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CeRamICa project

**TRANSNATIONAL MARKET AND SITUATION ANALYSIS OF
THE CERAMICS AND SMALL CRAFTS SECTORS OF THE
EUROPEAN PARTNERSHIP**

2009 September

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Introduction

The traditional ceramics and small crafts manufacturers have had a high reputation in the world market for a long time, and are still famous of the high quality and added value of their production. However, their share has shown a decline during the last decades.

Although these are crucial issues for a number of regions in Europe, so far no European level integrated approach has been elaborated. In this respect, CeRamICa initiative could be considered as a first attempt to face the challenges by joint effort of the leading European regions/cities committed in developing their ceramics and small crafts sectors. Project partners will implement the CeRamICa project with the final aim to present a set of policy proposals and recommendations that can serve as a basis for development projects to be funded from mainstream European programmes. The current study was conducted as a first joint activity of the project, preparing ground for concrete actions in order to test and further elaborate on experiences and ideas revealed by the study itself.

The basic question the survey is addressing is whether the small crafts and handicrafts sectors – with a labour need higher than the average – are able to survive in a globalised world with changed market needs and extensive competition. Are there sufficient market opportunities the sectors can use and benefit from? What are the main criteria for the enhancement of these sectors? What are the views of the representatives of the sectors regarding their situation and what efforts do they wish to make in order to save their market position? What already existing best practices can be identified that already proved to be efficient tools for the improvement of competitiveness?

Apparently, the sector needs interventions and policy support for its sustainability. The partnership intends to provide with an integrated strategy and policy recommendations for the rejoining of the sectors into the market ensuring sustainable development.

1.1. The objectives of the project

The CeRamICa project is based on a transnational partnership consisting of city and regional authorities and development institutions situated in areas of deep-rooted cultural traditions on the field of ceramics and small crafts, belonging to various EU member states: Hungary, France, Romania, Italy, Slovenia, Spain, Greece, and Portugal. Being also a priority area for the European Union, the preservation of cultural heritage is of high value for the whole of the partnership. These traditions serve as a major asset in economic terms as well: they generate jobs, household income and stimulate local economic development.

The partner regions, endowed with a rich artistic heritage, are nevertheless facing severe problems: globalisation exacerbating competition and ageing population of craftsmen, both leading to a continuous decline of the sector.

The objective of the CeRamICa project is – on the basis of jointly developed local and regional development strategies – to formulate policy recommendations and elaborate instruments to support and boost the ceramics and small crafts sectors in the partners' regions, involving the relevant local, regional, and European stakeholders for exchange, input, and dissemination of project outputs and, through organised dissemination, offering operative models to all Europe.

These sets of recommendations will be drawn with the aim of preserving and revitalising this significant European cultural heritage; and thus, making this sector a competitive driving force of the local economies.

1.2. The aim of the current study

The current study is conducted in the framework of the starting activities of the project that are connected to a thorough analysis of the sector in the partners' regions, including interviews of all relevant stakeholders. The present study summarises and collects the results of the analyses, presenting the situation and problems of the sector, together with the already started initiations and local proposals for improvement.

The survey also serves as a means to identify best practices that led to tangible results. Its results will directly feed the core activities of the project: the intensified transfers of experiences and best practices that will be tested through a series of common activities carried out in the frame of benchmark visits, workshops, and study tours.

The exchange of experiences and ideas provides a primary basis for the core output of the project: policy recommendations for local, national, and EU level policies for the enhancement of the sectors.

1.3. The major steps of the elaboration of the comparative transnational study

- The project partners have elaborated their own local SWOT analyses presenting the current situation and future prospects of their ceramic and small crafts sectors, based on a common methodology. The preparation process of these studies started in early 2009, and has ended by May 2009.
- The studies of the project partners were based on a common methodology proposed by the Lead Partner (Cf. Annex 1.)
- The studies are based on desk research and field research and include the introduction of the given partner, a SWOT analysis, best practices, and directions for development or recommendations for local/national/European policies phrased by each partner.
- Based on the local studies and an in-depth investigation of the available information concerning the European market, the external experts of the Lead Partner have elaborated the comparative transnational survey. The structure of the study follows the common methodology, and it contains the following major chapters:
 1. An overall introduction of the ceramics and small crafts sectors in the European Union, regarding their current situation and prospects, based on the available literature and data,
 2. A short introduction of each partner,
 3. A comparative transnational SWOT table and analysis based on the regional analyses of the partners,
 4. A thematic list of best practices provided by the partnership,

5. A summary of directions for development and policy recommendations provided by the partners.

1.4. Methodological framework

As stated above, the current transnational study is the result of a two-level work:

1. preparation of local/regional studies
2. compilation of the transnational comparative study.

1.4.1. Methodology of the local/regional studies

Regarding methodology, the local/regional studies were prepared on the basis of the following approach:

Desk research

The study is based on the collection and evaluation of existing data, studies, and other written documents available that are relevant **at least for the last 3-5 years**, and, when possible, it has conducted a survey even deeper.

Main questions and issues discussed

- Representation of the sector in the development strategies of the city and/or the region
- Tendencies present in the ceramic and small crafts art and industry of the partner regions
- Local decision makers' awareness of the problems of the sector
- Representational organisations of the sector, and the way they provide tradesmen with help
- Organisations involved and conditions of the quality assurance of the handicraft products
- Professional education of local, regional, and national levels in the ceramic and small crafts sector
- Decisions of national level supporting the sector or SMEs in general

Statistics and databases

The sources, data and statistics available concerning the performance of the sector show high diversity. As the definition of the sector is difficult in itself, different regions and countries with different characteristics and main concerns use highly varying databases. Thus, these databases are not directly comparable, in concordance with the limitations for comparison:

- o The differences according to national characteristics, legal and financial structures, and traditions
- o Territorial differences (partners representing different levels of authorities, the scope of their surveys varying from small towns to whole regions)
- o The data collection is based on a secondary research of the own sources of the project partner regions, such as employment statistics and development strategies, as well as available documents providing information on the European situation.

This is not regarded as a disadvantage of the current study; however, during the analysis process as well as during the reading of the study, it is important to bear in mind the sporadic and diverse character of the sector we are considering.

Timeframe

The study analyses data available for at least the last 3-5 years regarding the ceramics and small crafts sectors of Europe.

Field research

In order to specify and refine the results of the Desk Research, the partners have conducted a Field Research consisting of personal interviews, consultations, thematic workshops, focus group discussions, and questionnaire surveys. The aspects of the study were given in advance.

Main issues and thematic areas studied

- production and employment structures of the sector
- micro- and macro level problems of the sector
- general operational conditions of the enterprises (administrational, financial and taxation environment)
- product structure
- enterprise structure (proportion of micro-enterprises and SMEs)
- composition of employees (size of enterprises, distribution of sexes, age structure, education, financial circumstances)
- local educational background of the sector
- markets of the sector (national/regional markets, export opportunities, contact with neighbouring countries)
- attitude towards quality assurance and official assessment
- tendencies of the last 3 years in the following fields: changes in revenues, marketing opportunities, and general operational conditions
- possible alternatives for the transmission of tradition
- expected steps and solutions from the professional and local policies
- preparation of a list of institutions and organisations capable of influencing the development of the sector, introduction of their reputation
- collection of best practices and good solutions discovered through the survey
- introduction of attitudes towards concrete city/regional level development plans
- local recommendations for local and national policies and decision makers

Methods of field research carried out

- Personal interviews
- On-the-spot visits (workshops, studios, factories, sales locations, cultural, educational and other institutions connected to ceramics and small crafts)
- Questionnaire studies
- Focus group discussions (based on Local Support Group meetings)

1.4.2. Methodology of the transnational comparative study

Major sources of information for the transnational comparative study are:

- I. European literature, international studies available related to the topic
- II. Local/regional studies developed by the project partners

- I. An overview on the status of the performance of the sectors was compiled based on a complex study of literature on the ceramics and small crafts sectors of the EU. The sector analysis at EU level is at a premature stage: there is very little relevant literature available, and we could find basically no documents dealing specifically with the small crafts and handicrafts sector. Thus, we regard the results of the project partners' analyses as major sources on the issue.

The studies and documents involved in the survey cover the following issues:

1. the competitiveness of the ceramics industry in Europe¹
2. craft and design marketing in Europe²
3. the future of manufacturing in Europe³
4. the principal challenges for the European glass and ceramics industries⁴
5. a sectoral overview of the European industry⁵
6. the role of creativity and innovation in Europe⁶

- II. All project partners have elaborated their own market surveys and SWOT analyses, the most important statements of which are presented in the current transnational study both individually and in a comparative SWOT analysis table. Apart from this, the European good practices provided by the partners are taken from the local/regional studies, and presented in a thematic grouping.

The insufficient amount of already available data also emphasises the role of the field research that was conducted thoroughly, based on personal interviews, in all of the partner regions.

We would like to emphasise that the current study concentrates on the issues of local importance from the point of view of the partners. Thus, the methodology does not require a complex demonstration of the ceramics and small crafts industries all around Europe, but, based on the partner level research, to provide with a basic understanding on the key issues influencing the tendencies of these sectors.

Where possible, the study discusses the ceramics sector separately from the small crafts sector. The reason for this is that the naming "ceramics sector" includes all kinds of ceramics together with industrial ceramics, which does not directly belong to the main focus of the study, however, is of significance for some of the partners.

¹ http://ec.europa.eu/enterprise/newsroom/cf/document.cfm?action=display&doc_id=4043&userservice_id=1 FWC Sector Competitiveness Studies - Competitiveness of the Ceramics Sector; Within the Framework Contract of Sectoral Competitiveness Studies – ENTR/06/054
Final report, 13 October 2008

² http://www.taito.fi/fileadmin/TaitoGroup/yrityspalvelut/yrityspalvelu_pdf tiedostot/kvraportti_en2008_taitettu_web.pdf Craft and Design Marketing in Europe, a survey conducted by the Finnish Crafts Organisation, Taito Group in 2007

³ http://ec.europa.eu/enterprise/enterprise_policy/industry/doc/future_manufacturing_europe_final_report.pdf - THE FUTURE OF MANUFACTURING IN EUROPE; (carried out within the Framework Service Contract B2/ENTR/05/091 – FC; 26th June 2007, final report)

⁴ http://ec.europa.eu/enterprise/non_metallic_mineral_products/2007/proceedings_070521.pdf
Conference: „From 2007 on: the principal challenges facing the European glass and ceramics industries“

⁵ http://ec.europa.eu/enterprise/enterprise_policy/industry/doc/sec_overview_update06.pdf

⁶ http://crell.jrc.it/creativitydebate/?page_id=96

2. Ceramics and small crafts sectors in the European Union

2.1. Introduction

This chapter focuses on the European ceramics and small crafts sectors, discussing key issues and main trends of these sectors, and introducing the major internal and external factors responsible for these trends. The statements are based on information gathered from the partners, and the available literature on the issue. The purpose of the chapter is to give an overall insight to the present situation and future opportunities of these sectors.

2.2. Overview

2.2.1. The relevance of the issue for European policies

Manufacturing has served as the basis of European export for a long time. However, the recent changes of the world market led to a basic restructuring of the European industries. Growing competition from non-EU countries with incomparably lower production costs and the changes in market demand due to demographic changes in Europe (ageing and increasing welfare) have led to a shift from manufacturing towards services, while manufacturing remains a major factor in European export. Thus, the formerly world leader European ceramics and small crafts sectors are now facing serious competition on the world market, together with a growing threat of extinction for various social and economic tendencies of the last 15-20 years.

In order to remain competitive, the manufacturing industries have to put more emphasis on innovation, the renewal of product portfolio with a shift towards products with higher value added, and marketing activities. As this is of major importance for the whole European Union, the Commission has named 2009 "the year of creativity and innovation". According to a recent study⁷ on European manufacturing industries, *"As part of its renewed Lisbon Strategy, the European Commission has launched a policy framework to strengthen EU manufacturing and to improve the framework conditions for the manufacturing industry by a number of horizontal and sectoral initiatives. This outline of work for industrial policy - which is to complement the work at Member State level and addresses the key challenges - needs to be extended through further analysis and policy action."*

⁷http://ec.europa.eu/enterprise/enterprise_policy/industry/doc/future_manufacturing_europe_final_report.pdf - THE FUTURE OF MANUFACTURING IN EUROPE; (carried out within the Framework Service Contract B2/ENTR/05/091 – FC; 26th June 2007, final report)

As Keith Sequeira claims⁸: *The role of design and creativity are also important elements for the development of a new Innovation Plan for Europe, requested by the European Council in connection with the future Lisbon strategy.* The ceramics and small crafts sectors are creative sectors with long traditions, the typical enterprises of which are SMEs. The survival of SMEs is also crucial for the European economies, and SMEs are especially endangered in a time of financial crisis. For their maintenance, governments have to revise policies and bring new measures in order to support this significant part of the economy. Consequently, the current directions of the EU economic policies are in concordance with the development of these sectors.

In this respect, the overall aims of the CeRamIca project are in line with the main trends for development defined by European Union policies: the implementation of the project by achieving the expected outcomes and results will contribute to the Lisbon Agenda by strengthening economic potentials of participating countries in these sectors bearing strategic importance for local communities and regions.

2.2.2. Major statements based on the literature survey

A recent study⁹, conducted on marketing of craft and design products and services in Europe, based on a field research involving relevant organisations and producers, identifies the major challenges and problems of marketing as follows:

Challenges in know-how and marketing

Respondents to the international survey were asked to assess the product and customer know-how of craft and design entrepreneurs. The strongest know-how was deemed to be in quality of products and services (71%) while the weakest know-how was in development of products and services (7%) and customer orientation and identifying customer groups (8%). Nordic respondents felt that entrepreneurs are fairly strong on quality of products and services while the most weaknesses can be found in customer orientation and identifying customer groups and the second most weaknesses in product development. Respondents to the Finnish entrepreneur survey felt that they were fairly strong on these issues but according to business advisors there is room for improvement particularly in customer orientation, product development and the ability to deliver the goods as agreed. The report says that the need to develop business operations in the branch is comprehensive and issues, which, at first glance, might seem to be problems in sales and marketing, are equally problems linked to products, product development and manufacturing processes.

The results of the international survey are slightly conflicting as product quality is seen as a know-how strength but, at the same time, it is felt that there is a need for product development and renewal of the product and service portfolio. Perhaps the respondents meant that the products are usually well-made and the standard of quality is held high but the products are not necessarily attractive and the selection is not renewed sufficiently fast. Product development could also be viewed in a new way and customers could be included in the process.

⁸ Keith Sequeira: DG Enterprise experience in measuring innovation. A presentation held at the conference **Creativity debate. Can creativity be measured?**, 28-29 May 2009, Brussels. The outline of the presentation is available at http://crell.jrc.it/creativitydebate/?page_id=96

⁹ http://www.taito.fi/fileadmin/TaitoGroup/yrityspalvelut/yrityspalvelu_pdf/tiedostot/kvraportti_en2008_taitetu_web.pdf Craft and Design Marketing in Europe, a survey conducted by the Finnish Crafts Organisation, Taito Group in 2007

Improving the marketing skills of the entrepreneurs is deemed very important. Nearly all questions related to the development of marketing elicited the response 'important or very important' from more than half of the respondents to the international survey. Identifying new markets and customer groups was considered the most important issue. Next came developing the image of the enterprise and identifying its strengths, commercialisation and productisation of the products, for instance for tourism needs, communication skills, product packaging and product information, pricing and utilising the web in marketing. Development targets were associated with the development of the company and its products and marketing and web skills. The Nordic results were similar. One of the conclusions drawn from the Finnish surveys was also that it is advisable from the point of view of developing marketing to invest in improving communication, in identifying customer groups and in customer orientation.

Respondents to the international survey were asked to name challenges in marketing. Changing markets and reaching new customer groups were felt to be particular challenges. Things were seen as problems rather than opportunities perhaps because small enterprises have limited resources to conduct market analyses and invest in marketing. Entrepreneurs need tailored information on the market situation. The need for renewed product and service selections was one of the messages gleaned from the surveys. This is also a challenge for development efforts. Customer orientation is part of the product development process. Understanding the lifestyles and needs of customers could be a starting point for product development.

According to the results of the local/regional studies, the major issues influencing the performance of the ceramics and small crafts sectors are highly similar to those discussed above. There are three major problematic areas defined:

1. The lack of development and marketing strategies and techniques at the enterprises mean a major obstacle for the needed improvement. Most of the respondents of the mentioned survey claimed to have difficulties in identifying new markets and target customer groups, as well as in drawing marketing plans.
2. The use of modern ICT tools is not typical of the representatives of the sectors, although that could ease the process of reaching new markets both by providing access to information on the changes of the market and customer needs and by giving an opportunity to appear on the Internet and become easily accessible.
3. The third major problem of the sector is the lack of cooperation. There are very few examples of cooperation even at local level (mostly because of the competition on the local markets). An increased cooperation would mean joint opportunities of appearance, joint forces in representation and rights protection, and work sharing in marketing and business activities. More intensive contacts of the enterprises could also easily lead to product development, as the experts would have an opportunity to exchange ideas and discuss strategies for the improvement of the quality and marketability of their products.

Summarising the above:

- the traditional ceramics and small crafts sectors that have long played an important role in European economies are facing increasing difficulties in surviving on the national and international markets.
- In the time of the present world financial crisis, saving these sectors from extinction gains an intensified importance.
- A tangible development of these sectors could be achieved through wider cooperation and innovation based on marketing and ICT development, with coordination support of relevant authorities.

2.3. Definition

As there is no such well-defined sector as the “ceramics and small crafts sector”, we regard it as necessary to define the range of activities this study discusses.

According to the NACE division (cf. Annex 2.), ceramic activities mentioned above fall into the category of No. 26, Manufacture of non-metallic mineral products, among which the present survey covers the following:

- 262 Manufacture of non-refractory ceramic goods other than for construction purposes; manufacture of refractory ceramic products
- 2621 Manufacture of ceramic household and ornamental articles
- 2622 Manufacture of ceramic sanitary fixtures
- 2623 Manufacture of ceramic insulators and insulation fittings
- 2624 Manufacture of other technical ceramic products
- 2625 Manufacture of other ceramic products
- 2626 Manufacture of refractory ceramic products
- 263 Manufacture of ceramic tiles and flags
- 2630 Manufacture of ceramic tiles and flags
- 2682 Manufacture of other non-metallic mineral products

The partnership is highly diverse regarding their activities: some of them focus on the ceramics industry while others on handicrafts and small crafts. These sets of activities can be detailed as follows:

There are two major sets that include all the activities covered by the present study:

1. ceramic industry
2. handicraft and small crafts industry

1. Activities covered by the ceramic industry (based on a survey¹⁰ on the competitiveness of the ceramics sector) include the following sub-sectors:

- Tableware and Ornamentalware
- Sanitaryware
- Technical Ceramics
- Vitreous Clay Pipes
- Expanded Clay Products

¹⁰http://ec.europa.eu/enterprise/newsroom/cf/document.cfm?action=display&doc_id=4043&userservice_id=1 FWC Sector Competitiveness Studies - Competitiveness of the Ceramics Sector; Within the Framework Contract of Sectoral Competitiveness Studies – ENTR/06/054
Final report, 13 October 2008; p 21.

- Refractory Products
 - Wall and Floor Tiles
 - Brick and Roof Tiles
2. Activities covered by the handicraft and small crafts industry include the manufacturing of various materials (e.g. wood, glass, ceramics, metal, textile, leather, etc.) conducted in small scale, usually related to the local culture and traditions, such as (in a non-exhaustive manner):
- pottery
 - embroidery
 - bone-lace
 - rope-making
 - pearl jewellery
 - leather craft
 - straw mat weaving
 - glass ornaments
 - wood-, bone-, and horn carving
 - horsehair jewellery
 - ornamental carving
 - wood statuary
 - enamel
 - icon painting
 - carpentry
 - etc.

Based on the above, the activities of the two sectors overlap in the case of pottery and ceramic handicrafts, usually included in the ceramic sub-sector Tableware and Ornamentalware.

The scope of the study includes traditional small crafts and handicraft ceramics, together with the ceramics industry and factory manufacturing settled on these traditions (utilitarian and ornamental ceramics). However, we do not include manufacturing of large scale, mass production, and ceramics with other purposes (for example, ceramic handles, complementary objects, roof tiles, sanitary ware, etc). Some exceptions are made in case of partners where these bare a special local significance.

2.1. Key factors influencing the performance of the ceramics and small crafts sectors

- **EU regulations**

The raising awareness of environmental issues in the European Union has led to strict regulations concerning energy efficiency, greenhouse gas emissions, and waste management. The regulations have a major impact on the ceramics sector, in which energy accounts for 10-30% of production costs. The sector is also involved in emission into air and water, thus having to follow the IPPC (Integrated Pollution Prevention and Control) directive.

The sectors are also affected by health and safety regulations, especially tableware ceramics, where the surface of the products is likely to have contact with food.

- **Energy cost**

There has been a dramatic rise in energy prices inside the EU, which means a major threat for ceramics production, as energy is responsible for a high percent of production costs. Through the development of cleaner technologies, these costs can be slightly reduced.

- **Knowledge & innovation**

Enterprises engaged with ceramics and small crafts production generally use high level technologies, which means that no spectacular technological development can be expected in the close future. This is particularly true for the ceramics industry, while some European regions lack technological development in the field of small crafts.

In the case of small crafts, there is usually a high level of competencies and knowledge of the workers, however, the artisans are ageing and there is a lack of interest on behalf of the younger generations, which also explains the low spirit for innovation.

- **Human supplies**

Most of the project partners engaged in small crafts activities have pointed out the threat of the extinction of the crafts for the lack of human supplies. The crafts are generally not popular among the local youth, and there is a general decline in the education related to the traditional crafts activities. The high competencies and know-how of the workers are not passed on to the successors, and thus, the traditional succession chain of the crafts is disrupted.

On the other hand, human supplies are less problematic in the case of large scale ceramic producers, for those enterprises mostly employ non-qualified workforce in order to reduce labour costs. This solution leads to the lack of skilled labour force in the sector.

- **IPR & counterfeiting**

At the time of a new influx of low-cost and low quality products, the protection of intellectual property rights becomes a crucial issue for ceramic and small crafts manufacturing. Unfortunately, the protection of these rights has remained unsolved up to this day in most of the European Union countries, leaving space for counterfeiting and uncertainty among customers concerning the quality of products they wish to purchase.

- **Globalisation & trade barriers**

Globalisation has led to significant changes in sales distribution structures that caused an unbalanced situation in terms of import and export between EU and non-EU countries. The Union became open for import, letting in the low-cost products that compete with goods produced inside the EU, while strong trade barriers exist in the case of EU countries which make it difficult to sell on export. Among the major export destinations for ceramics and small crafts articles produced within the EU, the case of USA trade barriers is a good example for the situation described¹¹.

- **Structure of production**

A majority of the enterprises involved in ceramics and small crafts production are micro- or small businesses. This is especially true to the small crafts industry. The most important effects of the small sizes of the companies are the following:

- low financial capacities for investment in development and marketing
- difficulties in adopting new technologies
- dependency on labour and sales intermediaries
- difficulties in starting and operating the enterprises, created by the financial and legal background
- flexibility, and better protection from large scale economic crises.

- **Employment**

Especially the ceramic industry, where large scale production is still present, means an important opportunity for employment and job creation. However, due to the recent world financial crisis, the typical tendency of the enterprises can be characterised by layoffs and decrease of the workforce.

In the case of small crafts, the traditional activities are less and less attractive for the young generations, and thus, the number of employees of the sector gradually decreases, which trend is fastened by the closure of companies.

2.2. Summary

The ceramics and small crafts industries, traditionally having high reputation among the local population and the potential national and international customer groups are now facing serious challenges due to recent socio-economic changes including the decrease of market demand, a growing international competition, and the recent world financial crisis.

Ceramics industry is especially exposed to the dramatic rise of energy prices and the strict EU regulations concerning environment protection, health and safety.

On the other hand, small crafts are endangered by the decrease of interest for the products and the professions themselves, together with the changed requirements of a globalised world: the emergence of practical, inexpensive, products quickly available with the help of ICT tools.

¹¹http://ec.europa.eu/enterprise/non_metallic_mineral_products/2007/proceedings_070521.pdf

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European examples show that the best practices of tackling these problems include the development of production structure and design, completed by cooperation with suppliers and distributors, and together with intensive marketing and promotional activities (using ICT tools to reach customers), in order to become visible and save the arts and crafts from extinction. In the following chapters of the study, these general issues will be further elaborated and detailed, with the help of concrete examples originating in the experiences of the CeRamICa partnership.

3. The CeRamICa partnership

Introduction

The partnership of CeRamICa shows high diversity regarding geographical, demographic and economic situation, as well as ceramics and handicraft industries and activities conducted in the territories. The only obvious link and common characteristic of the partnership is their strong commitment in connection with handicrafts and ceramic activities. A majority of the partners focuses on handicrafts and small crafts, while the ceramic industry also plays an important role in the case of many partner regions.

This chapter provides with an introduction of the project partners one by one, in an order defined by the project documents. The aim of this chapter is to present the partners, including their geographical situation, economic profile, the past and present of their ceramic and handicraft industries, and their dream they wish to bring to reality by joining the CeRamICa project.

3.1. LP: The Municipality of Hódmezővásárhely, Hungary

As Lead Partner, the Municipality of Hódmezővásárhely initiated the project with the aim of the development of their traditional ceramics and small crafts sectors, based on already existing contacts and cooperation with some of the project partners.

Hódmezővásárhely lies in the South-East part of Hungary, in the South-Plain region. It is a micro-regional centre consisting of the city, farms, and 4 small townships setting up the agglomeration of the city. The natural characteristics of the area – flat ground, much sunshine, and good quality soil – make it suitable primarily for agricultural cultivation.

Hódmezővásárhely has long traditions both regarding the ceramics industry and the handicrafts sector. The history of the ceramics of Hódmezővásárhely started about 7000 years ago (the oldest archaeological finding is coming from around 5000 BC). The good quality material beneath the ground enabled pottery activities to thrive in the city and the surrounding territories.

The handicrafts and small crafts tradition of the city goes back to centuries. Pottery of Hódmezővásárhely has started in the 18th century, and the city was the biggest centre of pottery in Hungary in the 19th century.

Due to the occurrence of low-cost factory products, demand for pottery has decreased from the turn of the 20th century on. This has led to a gradual shift from utilitarian ceramics to ornamentalware. In 1912, the artisans of the city founded the Majolica Factory, creating the tradition of the art of industrial ceramics. In the 1950s, the traditional folk patterns, colours and motifs were reborn.

Nowadays, pottery is the most frequently practised among small crafts in the city. Besides the small workshops following mostly folk traditions, Hódmezővásárhely is a home for the arts of industrial and fine ceramics as well, thanks to the Hódmezővásárhely Ceramics Symposia held annually in the last 12 years.

The number of artisans has fallen dramatically recently, due to the flow of low-cost products from the Far-East and the lack of supplies of human resources. More and more small crafts become extinct by the ageing of the master craftsmen. In Hódmezővásárhely, there are some

artisans practising traditional small crafts – beyond pottery: for instance, smiths, carpenters, rope-makers, and wood carvers. Many of the artisans in the city practise art as a hobby, and there is a wide range of artefacts made by them (traditional folk music instruments, leather craft, special jewellery made of horsehair, pearl jewels, straw mats, embroideries, bone-lace, etc.). However, some of these artisans also participate in art competitions and displays. City celebrations and fairs provide opportunities of introduction for the artisans. For example the folk art show and fair organised in the frame of the Autumn Exhibition, the Animal Husbandry Days, or the programmes of the Country House of Árpád Street.

3.2. PP2: The Municipality of Vallauris, France

Vallauris is a town with long ceramics tradition of high reputation, referred to as “the world’s capital of pottery”, or “the city of 100 potters”. The talented craftsmanship of the city attracted great artists as well, among others Pablo Picasso and Mark Chagall, who also chose to live and work here. The presence of the world famous artists deprived the craftsmen of public attention, and market demand for their products became highly limited. Despite their creativity and artistic talent, the craftsmen of Vallauris lack an innovative spirit and a stable commercial infrastructure that would be essential for the survival of the art. The pottery activities of the city are hardly visible any more, which fact leads to the decline of tourism and the decrease of human supply.

The main pillar of the institutional background of ceramics in the city is the School of Ceramics and Fine Arts, the innovation of which can be crucial for the revival of ceramics. There are also various events focusing on ceramics held in the city: the most famous ones are The International Biennial of Contemporary Ceramics and the Exhibition of the A.V.E.C. Association. The works awarded at the Biennial are preserved in the Museum of Vallauris.

Vallauris visions the revitalisation of its ceramics sector through a sector development policy based on promotional and marketing activities. Individual actions of the craftsmen – updating product design, creating unique and well recognisable signs and labels – are as important as joint actions involving a conceptual image-building of the city, the creation of opportunities for young artists and craftsmen to learn, work, and appear on the market, and enhancing the visibility of the ceramic production of the city – organisation and better promotion of fairs and events.

Through these actions, the ceramic production of the city could regain its international significance, re-raising awareness of the name “Vallauris” once so renowned throughout the world.

3.3. PP3: The Municipality of Turda, Romania

Turda is situated in Cluj county – to be found in North-West-Romania, a county with one of the most powerful economies in the country. The ceramic tradition of the town dates back to the antique Roman period, when the 5th Roman Macedonian Legion was garrisoned here. Modern-time pottery has been an important part of the life of the town since the 17th century. From the 1920s on, ceramic factories have appeared in Turda. Ceramic and glass production of an industrial scale have meant the most dynamic branch of the industry of Turda from the 1930s on. The middle of the 20th century brought a strong industrialisation: various plants were established, and the city was restructured in favour of factory production. These changes led to

the gradual diminishing of traditional pottery. Nowadays, local pottery production is limited to a small amount of flower pots and terracotta stove tiles.

After the 1990s, economical and structural changes occurred in local industries that led to the fragmentation of some big companies in smaller or individual initiatives. Other new small businesses in ceramic sector appeared on the market.

The municipality has a developed industrial infrastructure – based on the proximity of raw material, and vocational education for ceramic workers. There are 32 active ceramic producer companies in Turda at present, most of which are SMEs. The 4 large ceramic enterprises are present in the European market with high reputation, having traditional relations with clients and suppliers. They are major employers of the area, supplied with qualified labour force. Due to the different types of the products these companies produce, there is no local competition between them. The production of the major companies seems stable and undisturbed even by the world financial crisis (which only led to a minor reduction of the number of employees among these enterprises).

The situation of SMEs is different, and the decreasing number of them draws attention to their problems. The small-scale industry is characterised by the uneven quality of local raw materials, the decreasing number of workers and young people interested in industrial production, a growing competition on the market from low-cost ceramic products coming primarily from China and the Far East, and the change in market demands (life style, tendency for natural, ecological products, etc.). These factors all add to the difficulty in succeeding on the market.

The small enterprises have difficulties in adapting production structures to market needs, innovation, and introducing new technologies. As this sector is highly labour-intensive, labour costs mean a major challenge for many SMEs. Consequently, most of the companies are using non-qualified personnel, which fact leads to the loss of relations with the vocational school. Vocational education is thus becoming less and less attractive for the younger generations. The small financial capacity of the enterprises stands as an obstacle for using the promotional opportunities on the national and international markets.

Most of the companies intend to solve these problems through the introduction of new technologies, the change to traditional and natural materials, and the participation in fairs and exhibitions for the increase of the visibility of the products, in order to reach more customers.

3.4. PP4: Abruzzo Region, Italy

Situated in the heart of Italy, Abruzzo is a region of mountains and hills, consisting of 4 provinces: L'Aquila, Chieti, Pescara, and Teramo. The territory is characterised by its special natural beauty – there are many national parks in the area, and a developed road infrastructure, based on the geographic position at the centre of the Adriatic Corridor – an integrated system of roads, highways, railways, ports, airports and inlands.

Abruzzo is a region with a strong manufacturing industry that has strengthened over time and become the engine of regional competitiveness. In its various components - the big external export industry, and the endogenous traditional industry of industrial districts, as well as what is emerging from the spin-off industry and technology - the manufacturing sector of Abruzzo is a result of contamination between cultures and experiences of which the region is rich.

There is a wide range of small crafts activities conducted in the region of Abruzzo: goldsmith art and stone sculpture, art of majolica, tombolo embroidery, carpets and tapestries, blankets, and embroidered linen.

The traditional economic structure of the region is based on the coexistence of agricultural and small crafts activities, the workers of the two fields providing each other with goods produced locally. The skills and know-how of the activities is passed on from one generation to another, making the craftsman the bearers of a tradition the artistic and technical level of which has given them a deserved reputation beyond regional boundaries.

The handicrafts of Abruzzo are living a dynamic revival. Certain territories of the region have been specialised to certain arts and crafts, thus creating centres for the different activities. The centre for ceramic production is Castelli, the traditions of which date back to the 15th century. A ceramics school was established as early as 1906, which has now reached international prestige under the name *Institute of Art for Ceramics*. For the revitalisation of the industry, artisans launched three initiatives: the *Ceramics Centre of Castelli* for promotion and marketing, the *Artisan Village*, giving place for all the big companies, and the *Crafts Fair*, a crucial marketing opportunity especially for small enterprises.

Abruzzo stands as an exception in the partnership of CeRamICa as it is the only region bearing an extensive legal background for ceramics and small crafts production. It is not surprising though, considering the significance of handicrafts in the whole region. However, the increasing competition from low-cost, low-quality products has reached this region as well, threatening the future of the handicrafts industry. Another major threat is stated by the crisis of the educational structure: the Institute of Art for Ceramics that has been a true driving force for the industry for a long time faces a predicament. The lack of skilled workforce and the high cost of training create a major obstacle for the development of the sector. The difficulty of succession is also caused by the loss of interest in handicraft production and the flow of the young generation to neighbouring areas, for better work opportunities.

The sector, consisting of small size enterprises, is unable to defend itself and ensure its own survival. Therefore, a cluster policy is recommended that would provide the sector with an appropriate legal and financial environment and strategic and operational strength for joint action.

3.5. PP5: The Municipality of Velika Polana, Slovenia

Velika Polana is situated in the Pomurje region, an interesting but lesser known area of Slovenia, being on the border of 3 other countries. The territory is rich in clay, which fact has served as a basis for the ceramic activities for long centuries. A special firing method has developed in the region, producing the so-called "black ceramics" that is the typical design of Pomurje.

The agricultural character of the region, however, means an obstacle for industrial production: the protection of the areas and the specialisation for agricultural cultivation prevents the local industry from further development and the use of the local resources. Thus, the ceramic craft is present mostly as a supplementary activity, not as a main occupation in the life of the region, remaining an important part of the small scale economy. The artisans are producing mostly utilitarian and ornamental ceramics, for a local market based on tourism. The traditional design of the products represents the region; however, the recent changes in market needs are difficult to follow for the artisans.

A systematic way of marketing and promotion would help the artisans in reaching a wider range of customers, using ideas such as open workshops for the attraction of tourists, and labelling for the increase of the visibility of the products. Pomurje wishes to become a region famous for its ceramics, which could be crucial for tourism development and economic restructuring as well.

The main challenges of the industry are created by the world financial crisis and the consequent decrease in market demand, together with the low-cost competition from countries outside Europe. In such circumstances, the problems of human succession become even harder to solve, and the attraction of skilled workforce is the primary concern of the developmental plan of the region. Through the above mentioned marketing activities, workers around the country (and Europe) could become aware of the high quality of ceramics production conducted in the region, and the access to skilled labour force would become easier.

Another important issue is the rise of energy prices and the strict environmental regulations of the EU. Pomurje region is devoted to environmental protection, thus, they intend to use the local natural geothermal energy sources in ceramic production, as to handle both issues at the same time.

Through the present project, Pomurje wishes to enhance its territory in terms of tourism and economic attraction, in order to boost its ceramic sector of high quality products and enable them to keep up with a more and more powerful competition.

3.6. PP6: La Hoya de Bunol-Chiva Region, Spain

La Hoya de Bunol-Chiva is an area of astonishing natural beauty to be found in the Valencia region, one of the most touristic areas of Spain. Small crafts have long been a colourful part of the economy of La Hoya. However, industrialisation and the economic changes of the last 20-30 years – due to EU membership since 1986, have brought a major shift from traditional craft activities to industrial production. Strictly speaking, “craftsmanship” as such does not exist in the region any more; however, craft activities are clearly recognisable and practised.

The quick change from traditional to industrial production shows the entrepreneurial, innovative spirit of the artisans, who have launched mostly family businesses in order to develop more effective production structures that are required by the changed market demand. The family character of the businesses serves as a good basis for the succession of the crafts: technology and know-how is passed on from generation to generation.

Two branches of small crafts are in a marginal position on the market, their survival not being ensured for the future: the typical embroidery of the region “bolillos” and ceramics. Both crafts are predominantly practised by women, in high quality and technology. However, there is no sufficient legal framework and economic and business environment that would provide new opportunities for the artisans. There is regional level legislation for the support of crafts; however, the terms “craft” and “artisan” are not well-defined, ambiguous, and this leads to difficulties in deciding about who can benefit from the legislation. There are also a few supporting actions taking place in Valencia region that are taken to enhance the small crafts sector:

- the *Crafts Centre*, established with the aim of promoting craftsmanship, providing the artisans with information, assistance, trainings, surveys, and coordination;

- the *Crafts Qualification Document* provided by the Crafts Centre, certifying that the owner of the document is recognised as craftsman or woman;
- the label *Craft from the Valencia Community*: the use of the label requires ownership of the Crafts Qualification Document;
- a system of various *grants* for individual craftsmen and guilds, associations.

The small crafts sector of the region has difficulties in reaching the market and adapting to market changes, as the majority of the artisans are ageing, following their own views and ideas, but having few opportunities to obtain information about market needs. The use of ICT tools is also not a well-known strategy for the accession of customers, and foreign languages often stand as barriers to international markets. The high quality and long traditions of the products have brought a good reputation for the small crafts in the country, and the innovative and creative design of especially the younger artisans still shows that there is capacity to be used for the enhancement of the sector. On the other hand, the lack of cooperation among the artisans means a serious drawback that has to be healed in order to promote the industry.

The natural and cultural value of the territory endow La Hoya with enormous opportunities for economic development based on the flourishing cultural tourism. Encouraged by the CeRamIca project, the artisans of the region have already joined in an association that aims at the promotion of the arts and crafts through bringing together the artisans and their ideas for strategic development – including design, technologies, appearance at fairs and exhibitions, training, visibility and branding, and marketing activities. The ethnographic value of the small crafts can be used to attract cultural tourism, and the combination of tourism with the use of ICT tools to reach new markets can expand the market for the small crafts of La Hoya to international level.

3.7. PP7: The Municipality of Millies, Greece

The Wider Area of the Municipality of Milies

From the early days of the newly established Greek state until today, the villages of the Pelion Mountain have been characterized by a continuous economic development. This development is achieved mainly due to the intense craft based (spinning and craftsmanship) and commercial activities of the local population. The treatment and the trade of wood, and the designing and production of copper, silver and golden artifacts, are only some of the activities that were considerably developed in the broaden area of Pelion.

However, due to the industrialisation of the production and the globalisation of the economy, many traditional professions have been abandoned. Large industries replaced the small traditional businesses, and nowadays only artisans and entrepreneurs of a strong will to operate in the profession are continuing small crafts activities.

Ceramic producers are predominantly family and small enterprises transporting raw materials from inside the country, selling their products either in their own retail shops, or through commercial shops also of family character, specialised in gifts and tourist goods.

The problems of the local traditional enterprises are focused around the following areas:

- Growth of sales and confrontation of a growing competition,
- Administrative - organisational modernisation,
- Technological modernisation,
- Institutional issues,
- Education - specialisation of staff,
- Sources of financing.

Furthermore, most of the local traditional enterprises are continuously facing pressures with regard to the supply of raw materials. The pressures concern the increasing cost as well as the decrease in the quality of materials.

The main challenges of this sector can be identified as: the lack of modernisation and improvement of production processes – due to the size and mentality of the enterprises; the lack of intellectual property right protection and the appearance of replicas that are not easily identifiable; and low-cost competition from countries with significantly lower labour costs, such as China and Turkey. This phenomenon threatens the smooth operation of the market and the viability of all legal and hard working enterprises.

Millies wishes to develop the position of the ceramics and small crafts sectors of the area by encouraging cooperation among the enterprises to enable them to protect their rights against the inflow of replicas and low-cost products, as well as providing them with appropriate legal structures for the support of entrepreneurship. Marketing activities should also be carried out with an emphasis on the high quality and traditional reputation of the products, with promotional strategies that serve as a basis for the development of international sales distribution.

3.8. PP8: The Municipality of Paggaio, Greece

The municipality of Paggaio, a town of approximately 4600 inhabitants is situated in the North-East of Greece, the North-West of Kavala region, at the foot of the Paggaio Mountain. Although the area bears astonishing natural beauty, and has a very advantageous geographical location – it is nearby the sea and important cross-border transport channels, it is not one of the most touristic areas of the country. The semi-mountainous, flat region is suitable for agricultural cultivation, which is the major occupation of the population up to the present day.

Ceramic manufacturing is based on the clay resources of the area, and, just like in the case of practically the whole partnership, it has a tradition of some thousand years: in the Ancient Greek period, ceramic manufacturing was already flourishing in the region. The modern times brought another intensive period in the history of ceramics that lasted from the mid 19th century up to the 1930s, when the knowledge of the artisans was passed on in their families and small workshops. Changes in lifestyle and production structures have caused a serious decline in handicraft activities that led to the disappearance of the profession by the middle of the 20th century. Nowadays, pottery and ceramic activities are only practised as supplementary, pastime jobs, besides the main occupation of the workers. The municipality joined the CeRamICa partnership with the intention to revive its ceramic industry, regarding it as a major factor in the development of the local economy.

The majority of the population is still employed in the primary sector, in rural and technical, manual work, although the changes of the modern society increase the rate of industry and services. Compared to the average rate of active-age population in Europe, Paggaio can boast of a high proportion of young and active population, and a large number of educational institutions. However, the nearby developed towns with more and better job opportunities attract the skilled workforce, so the municipality has to tackle the lack of skilled workforce and low level of education.

Another obstacle to the improvement of the traditional handicraft industries is the negative attitude of the local public towards clay mining: a former period of unreasonable “gold mining” left an unsightly wound in the natural beauty of the Paggaio Mountain, thus creating a fear in the local population towards mining activities.

Paggaio wishes to enhance the area by developing its image in the eyes of the skilled workforce and tourists at the same time. Tourism development could be achieved by the environmental protection and promotion of the natural landscape together with the agricultural activities of Paggaio, while marketing activities making the traditional pottery of the town visible, promoting also the annual traditional events linked to ceramics could draw attention to the old profession of the town. Ceramic activities should also be taught in the educational institutions of Paggaio, thus ensuring human succession and bringing skilled labour force into the area. The excellent road infrastructure of the territory, creating a connection with an important international commercial corridor, could serve the creation of supply and sales chains for the industry, enabling the development of both small-scale and large-scale ceramic production. Such actions could revitalise the sector, bringing new perspectives for an integrated cultural and economic enhancement of the whole municipality.

3.9. PP9: The Municipality of Baia Mare, Romania

The municipality of Baia Mare is situated in the North-West region of Romania, in Maramureş County; it is relatively isolated, being far away from European transport corridors. The city with a population of approximately 140.000 used to be the capital of mining and metallurgy in Romania throughout the 20th century. During the last 15-18 years, radical changes of the world's economic structure have reshaped the city's economic profile: at present, the main branches of the economy are construction industry and services.

For the low level of road infrastructure, the closure of manufacturing units, and the consequent high rate of unemployment, the city was declared an under-privileged area by the state in 2003. This status made it necessary to make research and take actions for the development of the region, and thus, the city has been entitled a Pole for urban development.

Baia Mare has joined the partnership of CeRamICa based on its long traditions of ceramic production, and the presence of both industrial and small scale ceramic production in the city. Archaeological excavations conducted in the area have revealed that the inhabitants of the territory were involved in ceramic activities already in the Bronze Age. The history of non-ferrous minerals dates back to the Middle Ages, when the town was already famous of its natural resources. Obviously for this reason, the name the city received itself denotes "Large Mine".

Ceramic crafts have played a major role in the economy of the region already in the 18th century, and the trend continued until the 1920s-30s. Together with a significant technological development, the first half of the 20th century brought a serious decline of traditional craft activities. By the middle of the century, the craft started to disappear. The alteration of market demand – based on the emergence of a new interest group, the tourists – led to remarkable changes in production and sales structures. The tourists demanded ornamental ceramics different from the traditional utilitarian products, forcing the artisans to integrate modern design and combine it with the traditional forms and techniques. The so far primary sales channels, fairs and exhibitions gave way to individual shops and sales activities at the workshops. The activities of the craftsmen became more and more organised, leading to the foundation of the first factory of ceramic profile, Faimar. Fairs were uninterruptedly organised for the folk artists, becoming more and more occasions for contest and quality awarding.

At present, a relatively large number of craftsmen work in Baia Mare, who continue the family tradition of pottery. There are four factories with ceramic industrial activities, and many small enterprises, family associations, workshops, and individual artisans. The high level of the

educational infrastructure promises human succession: education related to the field of ceramics is provided in the city up to a preuniversity level. However, the migration of qualified workforce means a threat in this respect.

Raw material is available in the area, and European market locations are also not far away; however, the undeveloped character of transport and business infrastructure causes difficulties in accessing the Western-European markets. Therefore the Municipality sees a great opportunity in the CeRamIca project: Baia Mare can benefit from the transfer of knowledge and experiences in the fields of joint business, marketing and tourism development.

3.10.PP10: ADERE – The area of Peneda-Gerês National Park, Portugal

Founded in 1993, ADERE- Peneda Gerês is a private non-profit institution that develops its activity in the regions of the five municipalities covered by the Peneda Gerês National Park. ADERE has elaborated the SWOT analysis of the ceramics and small crafts sectors of Peneda Gerês.

Peneda Gerês National Park is situated in the North of Portugal, near the Spanish border. The beauty of nature is a major asset of the area, where traditional arts possess an intrinsic cultural value which constitutes their competitive advantage in relation to mass-produced goods created for mass-consumption. The municipalities which fall within the area of intervention of ADERE – Peneda Gerês, are Ponte da Barca, Arcos de Valdevez, Montalegre, Melgaço and Terras do Bouro.

In this area the exploration, usufruct and dynamics of the surrounding natural environment acquire a fundamental status. In fact, the very survival of these rural communities depends on this. It is this dependence which makes arts and crafts acquire, in these areas, an even stronger connection with the surrounding conditions and thereby have an enormous potential for the enhancement of the area.

Within the 5 municipalities, 65 artisans have been identified. The majority of artisans, within their area of experience, practise various activities, including textile arts and crafts (embroidery, weaving, lace, clothes, accessories, textile products for apartment decoration, etc), wood manufacturing of utensils and other items, straw cape craft, stonework, figurative ceramics, and metalwork. Small crafts activities are characterised by the predominance of textile manufacturing (47 of the 65 artisans being occupied in the craft), the second most widely practised craft being wood manufacturing, practised by only 9 artisans. The ageing of the artisans means a major threat for the survival of the arts and crafts.

National policies for incentives, promotion, protection and development of craft activities are relatively recent and so as yet there has been little reflection from their application. The lack of awareness of this process as well as the disinterest of some artisans who continue to prefer individualism to community spirit, has led to the situation where, in the 5 municipalities covered by the report, only 8 Craft Production Units have been identified as registered in the National Craft Register.

According to the developmental ideas of the local authorities, traditional arts can and should function as agents for community and territorial development. They generate employment, stimulate local commerce and serve as an element of tourist attraction (increasingly, tourists

seek natural environments and endogenous products, taking ever more interest in the background stories and the way of life of the local producer). ADERE wishes to use the opportunity of the present project in order to enhance the economy of Peneda Geres with the help of a jointly elaborated tourism development strategy.

3.11. PP11: The Municipality of Alcobaça, Portugal

The Municipality of Alcobaça is situated in Oeste sub-region, the ceramics-related activities and economic characteristics of which are described below, based on the concise SWOT analysis prepared by Project Partner Nr. 12, INTELI.

Alcobaça is assumed to have ceramic traditions from the 17th century on. Although this fact is not confirmed by historic evidence, there are some references that allow the assumption. The first pottery factory that existed in Alcobaça was founded in 1875. This factory supplied the local market and the whole commune, having seven employees in 1907. Product style and structure was renewed in the 1920s, the constant revision of which by two central ceramic artists led to the emergence of the Alcobaça style by the 1950s.

After the World War, the companies started exporting articles. A new period emerges impelled by communitarian funds in the 80s decade, when the commune of Alcobaça assumed itself has the main ceramic centre of the country. During the 20th century, ceramics have constituted one of the main sectors of the industry that influenced this region's economy the most, and simultaneously created a brand image in Portugal and in the World.

There is an observable tendency in the production nowadays – instead of what happened in the golden period of the artistic pottery when decorative painting was the main factor, these days the main concern is the image and design. To succeed today, we have to worry about the shape of each article that is quickly replaced by every new collection.

Nowadays, the Ceramic Household and Ornamental Articles Sector in the Commune of Alcobaça is composed of 53 entities, including raw materials suppliers, productive and distributor companies and artisans, registered in the Town Hall. In terms of employment in the sector, the Commune of Alcobaça represents almost 11% of the employment in the ceramic sector at national level.

The main destination countries of exportations made by companies from the Commune – in decreasing order of the number of companies that export for those countries are: France, USA, United Kingdom and Germany. Besides the countries above mentioned, Belgium and Greece are also important destinations of exportation.

Industrial and traditional ceramic activities are both to be found in the Commune. Industrial companies focus on producing for export, on the basis of a trained but ageing workforce. These companies conduct market research and promotional activities in order to stay successful on the international market. There is a spirit of innovation among most of the companies; however, branding is not a common practice.

The entrepreneurs producing ceramic household and ornamental articles consider that the major problems they have been facing are related, first of all, to the Energetic Invoice, followed by labour costs in comparison with other countries, and the Recruitment of Qualified Employment. On the other hand, they consider that the main opportunity they might have is connected to the creation of different products with design and recognized brand.

The representation of small enterprises in the ceramics industry of Alcobaga is much lower than that of companies with large scale production. The artisans leading the enterprises are practising the craft as a full time job, employing only a few persons to help the operation of the company. The workers generally have secondary education, usually completed by some kind of training in the field of ceramic production. The average age of the workers is 50, which shows the ageing of the sector as a major problem present at a European level. The production of small scale ceramic entities is mostly distributed on the national market.

The main problem that the crafts productive units from Alcobaga have been facing is the lack of orders. The artisans also confirm the lack of spaces for exhibition of crafts products and its techniques, as well as the lack of promotion.

The major advantage that the crafts productive units from Alcobaga consider to have is related to the production of differentiated products. It is also referred by an artisan that the tourists that visit the Monastery of Alcobaga are an opportunity to explore. CeRamICa project can help Alcobaga in identifying the best techniques for the involvement of international and national tourists, based on promotional and marketing activities.

3.12. PP12: INTELI – Oeste Region, Portugal

INTELI is an innovation centre in Portugal, focusing on intelligent and creative development models. The study they conducted is about the ceramics sector of Oeste region (NUTS III).

Oeste, situated on the West coast of the country, is a region with ceramic traditions of a long history, an industry that still plays a major role in the economy of 12 councils of the region. Most of the enterprises of the sector are producing ornamental and utilitarian ceramics, however, production of an industrial scale is also present in the region. The competencies and know-how of the workers is traditionally passed on from generation to generation. The general strength of the sector is in the advanced technologies used and the high added value of the products of some companies, with a clearly identifiable design.

Recent economic changes of the world have not avoided the ceramics sector of Oeste region: the sector is now facing difficulties due to an increased competition and the narrowing of the market because of the decreased purchasing power. The transformed lifestyle in Europe has also led to a decrease in demand for the high quality, vulnerable, and valuable ceramic products. Without an extensive strategic vision for development and cooperation in the sector, the industry cannot survive on the world market.

Portugal has neither incentive systems nor a specific regulatory structure for the ceramics sector. Its industrial policy is cross-sectoral rather than sectoral. There are measures and instruments aimed at industry and services in general, such as SMEs, clusters, competitiveness poles and regulation of a general nature applicable to companies.

Two operational programmes of the country are influencing the life of the ceramics sector: the Competitiveness Factors Thematic OP (creating incentive systems for R&TD, innovation, and qualification projects), and the Human Potential Thematic OP (organising trainings for companies using training-action methodology, and innovation and management trainings).

At a time of world financial and economic crisis, the ceramics industries have joined together to demand a specific and anti-crisis plan for the sector. The proposed measures are still general, however, crucial for an effective sector development. The proposals are as follows:

During layoff periods workers doing surplus labour should be provided with specific courses financed by the State, in order to raise the relatively low level of education of the workers and to motivate them by creating an opportunity for further training and better jobs.

SMEs of ceramics activities should be assigned access to the special SME Invest credit lines. The survival of SMEs is crucial not only for the ceramics industry, but also the economy of the whole region.

The existing touristic areas should be centres for an extension and increased intensity of sales and distribution of ceramic products.

INTELI wishes to provide the ceramic industry of Portugal with useful information on techniques and activities for the effective revival and enhancement of the sector. Through the above mentioned actions and through other actions specified after an intensive transfer of knowledge among the partnership of the CeRamICa project, a tourism and business based strategic sector development can take place.

4. COMPARATIVE SWOT ANALYSIS

4.1. Comparative SWOT table

According to the common methodology for the regional studies, each partner of the CeRamICa project has produced a SWOT analysis table for the analysis of the present situation and future prospects of ceramics/small crafts sector of their region.

This chapter summarises the SWOT analyses of the project partners, pointing out the common features and issues that bring together the partnership and serve as a basis for joint action in the framework of the project.

| STRENGTHS | WEAKNESSES |
|--|---|
| <ul style="list-style-type: none"> • Long traditions and high (national and international) reputation of the sector (good public opinion) • High quality, added value and variety of products • Human potentials: activeness, creativity and innovation, know-how and competencies of the artisans • Good geographical situation (proximity of raw materials, markets, touristic areas, education; geographical concentration of the sector) • Existing institutions for education, development, innovation • High level of infrastructure | <ul style="list-style-type: none"> • Lack of cooperation among the actors (division, conflict) • Lack of appropriate organisation, representation • Low capacities to use marketing channels • Lack of development / business / marketing strategies • Lack of entrepreneurial attitude, difficulty to adapt to market changes • Low financial capacities for investment / starting enterprises • Lack of human supplies, ageing sector • Lack of technological development/innovation, ICT • Inefficient production structure • Mostly family, micro- or small enterprises, the lack of medium and large businesses of strong financial capacity |
| OPPORTUNITIES | THREATS |
| <ul style="list-style-type: none"> • Development of (industrial and cultural heritage) tourism | <ul style="list-style-type: none"> • Low-cost and low-quality competition from non-EU countries |

| | |
|--|---|
| <ul style="list-style-type: none"> • Financing (EU, national, regional programmes, tenders, local institutions) • Cooperation (business), organisation, representation, cluster building • Improvement of product structure & design for the changed market needs • Growing interest for individual, ecological and hand-made products of high added value • Encouraging entrepreneurship by legal and financial support structures of regional/national policies • Development and extension of secondary and tertiary level education in the fields of ceramics and small crafts | <ul style="list-style-type: none"> • The products of the sector are less marketable (globalisation, changed customer needs and demand) • World financial crisis – decrease of purchasing power, decrease in market demand • Shrinkage in human supply, ageing, the lack of interest for the sector among the young generations • No significant increase (or decrease) in tourism and lack of interest for cultural activities • Sustenance of disadvantageous entrepreneurial environment (taxes, bureaucracy) • High production costs, uncertainty of energy prices and resources • EU policy on liberating import – unbalanced import-export conditions |
|--|---|

4.2. Analysis

The table above shows the present status and typical trends and characteristics of the ceramics and small crafts sectors on the basis of the SWOT analyses provided by the partnership. As there are 12 partners in the project, we regard items as typical, when at least 7 partners have included them in their analyses. The items are presented in a priority order according to the number of partners mentioning them in their SWOT analyses.

Based on the above, we can state the following about the ceramics and small crafts sectors of the European partnership:

Internal factors and characteristics:

- The sector has long traditions and generally high reputation.
- Artisans with high competencies create products of high quality and added value.

- Most of the manufacturers are located nearby raw material resources and markets. However, there are low capacities to use the existing marketing channels.
- The sector has generally good infrastructure (in terms of education, technology, transportation).
- The problems of the sector are caused by the incapability for cooperation and the lack of human and financial resources necessary for becoming more market driven by technological restructuring, modernisation, innovation.
- The lack of an innovative, entrepreneurial attitude, adds to the difficulties in adapting to the rapid market changes.
- Recently, the sector has not been generating revenue enough and has not been offering predictable perspective for young, talented, creative people and start-ups.

External factors shaping the future of the sector:

- The growing popularity of cultural heritage tourism, the growing interest for unique products of high quality, and the accessible European, national, and regional funds provide good opportunities for the positive development of the economic attractiveness and competitiveness of the sector.
- However, the competition from low-cost products flowing to the market from non-EU countries (primarily from China and Turkey) poses a serious challenge for the sector, together with the ageing of the artisans and the consequent lack of human supply.
- The current world financial crisis through the consequent decrease in purchasing power further hardens successful persistence on the market.
- The traditional products of the sector are less and less marketable due to the changed fashion and customer needs. Therefore, the transformation of product structure and design according to market demand would improve the competitive position of the sector.
- On the other hand, there is an emerging international market for unique high quality products, which is a significant opportunity.
- Remarkable improvement could be achieved through cooperation and cluster building, together with the use of modern ICT tools for the support of cooperation and to reach customers more efficiently.
- Similarly to artisanal sectors, the sector is highly dependent on labour. However, the traditional activities related to ceramics and small crafts are not attractive for the younger generations, and the serious fall in the number of human supply poses a major threat to the sector.
- Actions need to be taken to ensure the survival of these sectors. First, the local youth should be involved in the traditional activities from an early age on.
- Enhancing the attractiveness of the sector by marketing and promotional activities and image development of the products are also measures of strategic importance for the future of the sector.

There is one general characteristic of the ceramics and small crafts sectors, the interpretation of which – mentioning it among either strengths or weaknesses – differs from partner to partner. This factor is the following:

- A vast majority of the enterprises in the sector are SMEs, micro- or family enterprises.

Generally, we can say that this fact has both positive and negative effects on the sector.

Positive effects:

- Because of their size, the enterprises of the sector are more flexible and able to conduct quick operational changes.
- The sector is not exposed to huge pressure due to financial crises.

- Orientation on local markets lessens the dependency on international markets.

Negative effects:

- The enterprises usually lack financial capacities for investment in major technological transformation or marketing activities.
- There is a strong dependency on labour and trading intermediaries (as the size and the related financial capacities of the enterprises do not suffice for the operation of a commercial department).
- Management capacities (including strategic and financial management, change management) are often weak
- Privileges of economies of scale can hardly be gained by the small size businesses

The general statements are true to most of the partnership. However, the differences of the partnership regarding the ceramics and small crafts related activities carried out in their regions require a further breakdown of the results. Where possible, we made a distinction between the ceramics sector and the small crafts sector with the following results.

4.3. SWOT analysis of the ceramics industry

The most important factors influencing the **ceramics industry** are the following:

- generally has a high level of infrastructure and institutional background;
- produces high quality products with the use of advanced technologies;
- faces the lack of human supplies and qualified workforce;
- and lacks joint actions and concepts for marketing and sector development.

The future of the sector is dependent on the following threats:

- competition of low-cost products from non-EU countries;
- high production costs and the rise of energy prices;
- strict environmental regulations;
- shrinkage in human supplies and declining interest in the sector among the young generation;

and opportunities:

- the growing significance of cultural heritage tourism and growing demand for unique, hand-made, environment-friendly and high quality products;
- various funding opportunities (EU tenders, national and regional policies)
- the development of cleaner technologies.

The opportunities should be used by extensive marketing and promotional activities, as well as the elaboration of conceptual development strategies based on cooperation and cluster building.

4.4. SWOT analysis of the small crafts industry

The major factors influencing the **small crafts industry** are the following:

- manufacturing activities of long tradition and high reputation;
- high competencies of the workforce, however, more and more being over the active age;
- good geographical situation but lack of capacities to make use of marketing channels and the proximity of markets;
- lack of cooperation, and local competition in addition to the international one;
- the enterprises are mostly family and small businesses, lacking financial capacities for investment in developments and structural changes;
- lack of technological development and business infrastructure.

Regarding the future, the small crafts sector has to face the challenges listed below:

- growing competition from low-cost products coming from non-EU countries;
- changes in customer needs, which lessen marketability of the traditional products;
- loss of interest of the young generations in handicraft activities and the ageing of the sector, which threaten with the possibility of the extinction of the crafts;
- the sustenance of legal and financial burdens on starting and operating enterprises.

However, the following tendencies mean great potentials for the survival of small crafts in Europe:

- the growing significance of cultural heritage tourism and growing demand for unique, hand-made, environment-friendly and high quality products;
- funding opportunities provided by EU and national operative programmes.

5. BEST PRACTICES

The true driving force of the CeRamICa project lies in the commitment of the partnership to jointly develop ideas for political recommendations based on an intensive transfer of knowledge and experiences. With this purpose, the partners have collected the best practices to be found in their regions, presenting the basic ideas behind the successful endeavours of the enterprises.

This chapter lists all the best practices provided by the partnership. The best practices are organised thematically, in the following structure:

- 5.1. Events, fairs, exhibitions
- 5.2. Education
- 5.3. Tourism
- 5.4. Cooperation
- 5.5. R&D, Innovation, Technology
- 5.6. Marketing activities
- 5.7. Individual solutions

5.4. EVENTS (ANNUAL/BIENNIAL), FAIRS, EXHIBITIONS

5.4.1. CERAMICS SYMPOSIUM AND ARTISTS' COLONY

The Ceramics Symposium and Artists' Colony is an intensive workshop organised every year in Hódmezővásárhely, Hungary. The event brings together artists from Hungary and from abroad, working together for six weeks. Part of their work is exhibited in the local museum, later displayed in other ceramic exhibitions in the country as well.

Connecting tradition with modernity

The Ceramics Symposia have been organised annually since 1992; the 12th Symposium will take place in 2009. Instead of encouraging the artists to continue the traditions of the ceramics craft, the aim of the symposium is to give them opportunity to create and experiment with deep concentration, in an inspiring environment, and to make use of the mass production technologies in arts and in their own creative art activities. The most exciting works are often unique, experimental pieces of art inspired by shapes designed for mass production.

A different topic each year

The symposia are organised around a different topic each year, giving room for diversity and change year after year. The topics are connected to the ancient and newer traditions of the city, or to opportunities of mass production technologies. (For example: 1999 – The bounds of material; 2000 – The idol; 2001 – The totem; 2002 – The way of the motif; and, the topic for 2009 is: The brick; for which topic a conference is held with the motto "A city building up from ceramics.")

Wide co-operation, lobbying, supporters

The symposium and creative artists' house is based on a wide co-operation of the artists, the profession, and the municipality, involving local decision-makers, economic and civil players. However, the cultural programme became an organic part of the national and international art life. This is the result of the continuous organisational work, creative ideas, and extensive lobby activities of an acknowledged ceramics artist throughout the 12 years of the symposia.

The symposium and artists' colony are organised and implemented by the following associations: The Company of Hungarian Ceramists, Wartha Vince Ceramic Arts Foundation, National Association of Hungarian Creative Artists, National Association of Fine- and Industrial Artists, and the Municipality of Hódmezővásárhely. The silicate industrial factories of the city (Porcelain Tableware Factory of the Great Plain Plc, Buron-Apta Refractory Works Ltd, Silicate Industrial Ltd, Clay Industry of Hódmezővásárhely Ltd, Villeroy & Boch Hungary Plc) provide the events with their modern infrastructure and financial contribution.

International participants, outstanding creative workshop

The artists' colony of Hódmezővásárhely accepts maximum 20 artists at the same time, for six weeks every autumn. Apart from Hungarians, artists from several countries have participated in the symposia – Hungarians from outside the borders, French, Egyptian, Turkish, Japanese, and Canadian artists. The local factories are providing with a real creative workshop, with 62 different technologies, different materials, firing opportunity, and a work opportunity without time limits.

City collection, exhibition, and website

138 artists participated in the 11 symposia held so far. The artists traditionally donate one of their works created in Hódmezővásárhely to the city, thus creating a continuously growing collection (around 500 pieces at present), the pieces of which are exhibited first in the local Tornyai János Museum, then in Budapest, and other periodic national exhibitions. Details about the symposium are available on the Hungarian-English language website called Artportal (www.artportal.hu). They have no separate web page.

Bridge-programme in international co-operation

2012 is going to be the Year of Majolica in Hódmezővásárhely. At the Twin City Meeting of Hódmezővásárhely held in May-June 2007 a row of frame contracts were made or confirmed by 16 twin cities (in connection with the exhibition of 2012 with the title *Ceramic art of Hódmezővásárhely – Vallauris*), one of which is the programme of the Symposium and Artists' Colony of Hódmezővásárhely. The connecting link, the bridge – giving the name for the programme – between the cities is ceramics. The implementation plans of the programme involve artists who have created at the Symposium and regard international co-operation and professional work connecting different territories as important. These artists come from – among others – Vallauris, Baia Mare, Rijeka, Beograd, Subotica, Arad, Istanbul, Ulm, and Hódmezővásárhely.

The main event is the exhibition in the city and the professional conference connected to it. Other events of the programme include visiting professional shows and displays, exhibitions, and other cities and artists' colonies (e.g. Siklós, Gödöllő, Kecskemét). The elaboration of the

final programme is still in progress. The Hungarian participants are the Public Association for National Creative Arts, the Association of Fine- and Industrial Artists, the Company of Hungarian Ceramists, the National Association of Hungarian Creative Artists, and the Wartha Vince Ceramic Arts Foundation.

5.4.2. THE BIENNIAL OF CONTEMPORARY CERAMICS

The Contemporary Ceramics Biennial is an event of international reputation, organised for the promotion of ceramic art. It has been included as a best practice for its outstandingly long tradition and international fame.

The event has been organised since 1966. Throughout the Biennial, various places are selected and prepared to show the ceramics in the town. The event has an international fame thanks to the participation of well-know ceramists from all around Europe. The good communication strategies have led to acknowledgment at local, national and international level.

The Biennial serves as a good road marking for the development of ceramic arts. It is held with the participation of various artists from France and other countries.

5.4.3. THE ARTISTIC ARTISAN EXPO IN GUARDIAGRELE

The Artisan Expo of Abruzzo region is known as the major event of appearance for the artisans of various small craft activities. The Expo includes contests for the artists with awards for the winners, and creates an opportunity for them to build contacts with their potential clients – the people of the streets.

An important moment for artistic craftsmanship in Abruzzo is the exhibition of artistic craftsmanship that is held every year from **August 1-20 in Guardiagrele** - centre of the province of Chieti, characterized by a strong vocation for crafts - by the Artistic Crafts Show Regional Committee. The exhibition reached its 39th edition in 2009. This is one of the "most beautiful showcases of artistic Abruzzo", which aims to know the specificity of interesting crafts developed and deserves the attention of those who make art and culture their passion, profession, intellectual work and practical activities.

The land of Abruzzo has artistic craft roots that come from far and are of great prestige in all their originality and dynamism, not only for the aesthetic-expressive and practical-concrete expressive success of the article, but especially for the pathos, the involvement, the passion, the attachment to their land, to their origins and roots characterizes the realization of the work of artists in the show: simple people, real, spontaneous, full of wisdom.

The activity of the Show Committee continues without stopping, since some years it has enlarged its horizon far beyond the summer edition of the historical exhibition, but operates in support of artistic and cultural promotion of the territory during the whole period of the year.

In 2009, the planning authority has strengthened its call for support and training of young talents.

- The contest "A jewel for the Mediterranean" took place, in which students of the

Art Institutes in Abruzzo have created a gem of jewellery for the XVI Mediterranean Games in Pescara in 2009. The winning jewel will be made by some of the best master goldsmiths of Abruzzo, which within a training plan currently underway at the Institutes of Arts, will teach students some of the secrets of the trade. The award winners will be young people in a conference with the theme "From conception to implementation: Determinate creative paths."

- "Craftsmen in the contemporary" is a project that will bring artisans meet the wide audience of large retailers where the hard work and creativity of the masters will be displayed outside their traditional shop.
- We have reached the XXXIX edition of the Festival which this year will see the 13th National Competition for Jewellery "by Nicola Guardiagrele" which will be dedicated to the realization of a gold bracelet this year.

The Museum Pass made with some of the most important museums of Artistic Craftsmanship in the region will bring the exhibition in Guardiagrele an integrated tourist circuit among some of the most important cultural villages, aiming to draw around the project at least 50,000 visitors more than the previous edition.

Since the *2009 edition of the exhibition* 3 sections will be established under which the activities will be placed:

- **section a** regarding Artistic Craftsmanship in Abruzzo as specified by the National Framework Law 443/85 and its amendments and additions;
- **section b** reserved to crafts in general usually including all the productive activities and services other than artistic crafts (under law 443/85 and its amendments and supplements)
- **section c** is reserved for people with hobbies and amateurs. Only for exposition and to express the values of artistic Abruzzo.

An area of importance will be given to Francesco Basile, goldsmith and clockmaker born in Ortona, in the province of Chieti, and emigrated in Veneto, where he set up a company specialized in fine watches, a limited-edition creations in gold and precious stones, some also of the value of Euro 100,000.00, inspired by the extraordinary and eternal charm of a unique city, Venice, around which he has established its headquarters for years.

A technical table will be set up between the Exhibition Committee, City of Guardiagrele and the Province to start the transformation of the Committee into a Foundation, as required by regional law.

The Committee Exhibition of Artistic Craftsmanship in Abruzzo, in its intensive program of promotion and enhancement of regional artistic craftsmanship, has pressed for a memorandum of understanding with the trade associations representing the sector, aimed at protecting, promoting, valorising at a regional, national and international level.

The Exhibition Committee has created awareness in the agreement that the artistic craftsmanship field is strategic within the region covering both economic importance, as it provides an opportunity for job creation and the promotion of the territory, which is an expression of a cultural value because it preserves and passes on specific values of local culture and a new value because it involves students and young people in innovative training. This was a first step towards the recognition of merit for the associations and artisans working in the area concerned in the production of quality.

The signers of the agreement are the bodies and organizations which, for various reasons, are responsible to maintain and promote an important economic sector in Italy and that plays also

a supporting role and dissemination of traditions and cultural values specific to the area. The associations, present with their offices throughout the region, play an invaluable and irreplaceable role for the services and projects implemented to assist small businesses.

5.4.4. THE ART AND CRAFT MARKET IN LJUBLJANA

The market is held every Saturday, from May to October. Artisans of various crafts activities produce, exhibit and sell their works. The market provides a good atmosphere with high quality and environment-friendly products, creating high standards for the designers.

Every Saturday the Slovenian capital attracts visitors with the colourful Art and Crafts Market on the banks of Ljubljanica River. At the Market, all kinds of artists and craftsmen make, exhibit and sell their works. Parts of the activities at the market are creative art workshops for young people.

The Art Market in Ljubljana offers a variety of unusual things, such as unique cloth bags and silk 'Grand Cru' bags, useful, imaginatively shaped wooden objects, jewellery made from silver plated wire and semi-precious stones using the bobbin lace-making technique, tree-friendly wooden toys, as well as objects made from white porcelain and ceramics in earth colours.

The market has been running for eight years, between 9am and 4pm on Saturdays from May to October, providing locals and foreigners alike a good excuse to take a stroll down Cankarjevo nabrežje, Čevljarški most (Shoemakers Bridge) and Hribarjevo nabrežje.

The market features the work of fifty to eighty non-mainstream painters, sculptors, ceramics artists and designers whose sense of aesthetics, beauty, uniqueness and simplicity awakens the senses. Visitors can also attend free creative workshops.

The creator and project leader of the Art Market, painter and designer David Matej Goljat, wanted to exhibit art in a way, which would also draw attention to the artists. The Arts and Crafts Market is not held in case of bad weather. (www.slovenia.si)

5.5. EDUCATION

5.5.1. ARTS, EDUCATIONAL AND RESEARCH CENTRE

The significance of this best practice of Hódmezővásárhely is in its way of bringing together various activities in one organisation: the centre provides facilities for the preservation of traditions, the ensuring of human supplies for the ceramics art, and the development of technologies through research activities.

Synergy of activities

Hódmezővásárhely is a place for ceramic activities of different levels and approaches. Apart from the activities of the small workshops following folk traditions, the industrial arts and fine arts branches of ceramics receive a growing attention. This is due to the 12-years activities of the ceramics symposium and artists' colony. The setting up of the educational and cultural centre of Hódmezővásárhely is a result of the activities of the main organiser and his colleagues. The municipality provided a 100-years-old school building for the ceramic arts foundation operating the centre. The renovation of the building is to be implemented from tender funds, in several stages.

Education, lectures, summer art camp

Our aim is to develop Hódmezővásárhely into a significant ceramics centre again, through practical ceramics work and the examination and introduction of the ceramics collection and documentation. The centre has already started to organise exhibitions and lectures in the topic without age limits. Studio workshops are organised every week, while lectures in more sectors are held every month.

The centre organises a summer arts camp of 2 weeks in July, 2009 for 30 persons. The age limit is 14 years. The course is held by acknowledged experts of ceramic arts, archaeology and art history, and art restoration. The programme includes ceramics, graphics, patterning, archaeology, restoration activities, lectures, picture shows, and discussions with the artists. The works made during the camp are exhibited in the end of the course, after which the participants can take them home.

The educational work of the centre receives a special emphasis in the areas of supply-breeding and perspective building: training has been organised for 5 years now, for the students of the philosophy-cultural history major of the Agricultural Faculty of the Szeged Science University. Those studying at the ceramic and plastic arts specialisation of the University can choose ceramic-plastic arts and/or traditional protection courses for credit points. 59 persons are involved in the training. There are plans for art restoration assistant training to be implemented jointly with the University. Long-term plans include (international) post-graduate training and the invitation of guest professors and artists from abroad.

5.5.2. MUNICIPAL SCHOOL OF FINE ARTS

This educational institution is exceptional in bringing together students of different age groups and levels of qualification, from childhood to people of a mature age. It also provides with workshop location for the students, as well as with degree qualification.

The Municipal School of Fine Arts is a rather rare case in France. So this is an example for many cities. Many persons come here to study the different techniques of ceramics (children, adults and artists). Now it has more than 400 students enrolled in ceramic production. Thus this school presents many strong points:

- a place of ceramic creation: many **lectures are proposed** e.g. pottery, decoration of ceramics, sculptures modelling, drawing, tournage, etc. ;
- a **section Young Creators** in order to develop a ceramics draft. Students must have a personal draft to be implemented. They are in a **direct situation to manage a workshop**. Then, the work is presented in the frame of an **exhibition of ceramics** in order to promote the students' work. Students must think who they are going to invite and how they are going to communicate. Each student has to apply in order to be presented. The number of stagiaires is limited to 5 for each sessions;
- a **complete offer** in term of level and diploma;
- a good **transmission of know-how**;
- an introduction to the applied arts open to school children from the town and the secondary school (2 teachers working within the framework of the City Policy, 30 classes, i.e. 500 students ; classes sets up in the secondary school as a Field of Excellence in Ceramics – a convention exists between the Pablo Picasso's Secondary School and the town);
- the **gratitude** by the professionals;
- a **qualitative communication** (school, exhibitions, scenography).

5.5.3. CENCAL – Professional Training Centre for the Ceramics Industry

This centre organises trainings primarily in utilitarian and ornamental ceramics, involving trainees in the whole production process, providing them with facilities to practise the art and opportunities to meet and listen to acknowledged researchers and artists of the field.

A training model for the industry

CENCAL – Professional Training Centre for the Ceramics Industry is an institution based in Caldas da Rainha that provides training and technical and educational support to the Portuguese ceramics sector.

The training courses, whether continuous training or initial training of young people or adult education and training, cover various areas, in particular the areas of ceramic techniques /technology; quality, hygiene and safety at the workplace; environment and energy; maintenance and production management.

At the centre there is a simulation of a small ceramics company so that trainees can have contact with the manufacturing reality. They witness the whole production process from moulding to firing and finally to painting. For those from far away, CENCAL can accommodate

about fifty boarders. The facilities have a bar, dining-hall, common room, library and study room, besides games fields and rooms for cultural activities.

The facilities and infrastructures also include two ceramic moulding studios, two ceramic painting/decoration studios, one creative ceramics studio, one ceramics laboratory, one production circuit for decorative and utilitarian ceramics and a wood studio.

One area to which CENCAL has paid particular attention is creative ceramics, periodically organising workshops, conferences and seminars and receiving artists, researchers, designers and experts from various countries to carry out projects in its facilities.

www.cencal.pt

5.5.4. Prof. LUMINITA MARINCAS

Luminita Marincas is a woman with special talents. She dedicated her whole life to teaching and the transmission of knowledge related to ceramic production. She has also elaborated curricula for the people engaged in the production process; these curricula are famous and widely used in the field of ceramics in Romania.

She graduated, in 1989, The Faculty of chemical technology, specialisation technology of the silicates and oxidic compound from the Polytechnic Institute Bucharest.

Since 1991, she has occupied a job in the educational system. This is how she discovered the pleasure and joy to work with the students, as well as the satisfactions that one can have at professional level. These aspects determined her to continue teaching.

Presently she is a full-time teacher, with 1st didactical degree I, at Technical College „Carmen Sylva” in Baia Mare. Here she teaches different technical subjects, such as: *The Technology of obtaining ceramic products, Chemical technology, Study of environmental quality, The Chemistry of silicate systems, Laboratory techniques, The management of quality* and others. By the activities done with the students she wants to infuse them with the desire to explore and discover the secrets of ceramic material, a material without which our everyday life cannot be imagined.

In the Project of institutional development of the occupational and technical educational system – a project financed by Phare, she elaborated 6 Auxiliaries curricula for the field of Materials for construction:

Level 1- qualification Worker in the ceramics industry:

- *Auxiliary curricula for the IX grade*
- *The calcinations of ceramic products – for the X grade*
- *The Gazing of ceramic products – for the X grade*

Level 2 – qualification Operator of fine ceramics.

- *The calcinations of fine ceramic products (XI grade), learning material for the transition from school to working place.*

Level 3 – qualification Technician in the industry of glass and ceramics.

- *The chemistry of silicate systems*
- *Methods of fabrication in the ceramic industry.*

The *Auxiliary curricula* is a rough guide that includes examples of good practices that should lead to capitalisation, both in teaching and in learning; a working material that has as purpose

the guidance of the teacher's activity and the stimulation of his creativity, including information that come as a support for the teacher.

The Auxiliary curricula also offers information of support and assistance for students, examples of learning activities, applications, working tasks proposed to the students, guidance concerning the way of doing the activities and the time period that should be given to each activity as well as guidance regarding the self-evaluation, the evaluation between colleagues and observing the others.

The learning activities presented in these auxiliaries have the purpose of attainment and development of some practical abilities and competences of the students. The methods used are active/interactive, methods that call on the students to do something material – to learn by doing. This way, students are more involved and have the opportunities to attain practical experience by practicing. These experiences may be enriched if the students work in team, by which they can mould the learning by interacting with their colleagues.

5.6. TOURISM

5.6.1. POTTERY IN ROMANIA: FROM TRADITION TO ECONOMIC ACTIVITY AND TOURISM ATTRACTION

Horezu is a small town that became famous for the special and well recognisable ceramics that the artisans of the town produce. The history of the development town is a good example of joint improvement of tourism and the economy.

In Romania, there are some active ceramic pottery centres, like Baia Mare – Maramureş, Corund, Odorheiul Secuiesc and Miercurea Ciuc – Harghita, Oboga – Olt, Şişeşti – Mehedinţi, Obârşia – Hunedoara, Bistrita, Marginea, Radauti -Suceava, Curtea de Argeş – Argeş, Vlădeşti - Arges, Obarasa – Hunedoara, Lungeşti, Măldăreşti, Slătioara and Horezu from Vâlcea. Some of them are urban ceramic centres.

There are three fairs of pottery, one of them being in Horezu, an economic model of success which has used and promoted the traditional values. The other fairs dedicated to ceramics are organized in big cities like Sibiu and Bucharest.

Every year, Horezu is the place for **The Faire of Romanian Pottery named "Cocoşul de Hurez"**. **Horezu is well known for its ceramists and attracts a lot of tourists for this reason.**

The town is a small one, about 7 thousands inhabitants and is known for Monastery Hurez, included in UNESCO heritage which is situated in its neighbourhood. The plates of Horezu have become a symbol of the town, and ceramics are used to decorate homes and also blocks of apartments. The identity of the inhabitants is profoundly marked by the pottery traditions, being a reason of pride.

Well known for its pottery, Horezu became a centre for pottery distribution from all over Romania. Economic revenues come also from production and trade with pottery. It has to be mentioned that the economic development of this craft has flourished in recent years. In '90 there were few craftsmen, Horezu being known as an old ceramic centre, visited mostly by collectors. Now, about 15 families of potters work here, continuing the tradition and importing also other models, adapting them to the changing demand.

The case of Horezu pottery centre is very valuable for other localities with heritage as model of using ceramics as an important attraction point for tourism development of the area.

5.6.2. ABRUZZO TOURISM PROMOTION

A website with touristic purposes

The site provides tourist information about the region of Abruzzo. The main topics covered are: how to get there, accommodation in the area of Abruzzo, traditions and folk festivals, arts and crafts in Abruzzo. <http://www.abruzzoturismo.it/>

5.6.3. BOJNEC CERAMICS

The Bojnec family became famous of their ceramic production. The basis of acknowledgement is in the conscious actions they made in order to promote the family traditions and call the attention of the public to the valuable and aesthetic pieces of art they produce.

Following Alojz Bojnec's legacy, Alojz Bojnec, Jr. began reorganizing all the phases in the ceramics manufacture. In addition to mould appliance, products were also manufactured by hand. The pottery also worked on decoration of certain products, which were then fired in a so-called tunnel kiln with an assembly line which rarely stopped working. Due to the increased interest in the products, a parallel production was established in Hungary. Nowadays the Bojnec Ceramics production is concentrated in a nearby Hungarian town. The company cooperated with prominent foreign partners such as Villeroy & Boch, Barilla, Scheurich, Colorobbia and Kerbek. The Bojnec Ceramics also cooperates with the Oskar Kogoj gallery in the production of highly elaborate pieces of ceramic art and has promoted its products at every large ceramics fair (Frankfurt, München, Milano...).

Bojnec pottery began operating in the 1950s when Alojz Bojnec took up the trade in his workshop, where at first mostly black earthenware was manufactured in old pile clay kilns called kopasta peč. Clay was dug up in the nearby hills and kept at home in dug up holes called zemljenjak. Initially, clay had been moulded and cut manually, later with a simple electrical grinder.

The shaping of earthenware took place on a wooden potter's wheel which the potter rotated with his feet. With the help of the entire family, the business progressed and its products were soon being sold across the whole of Slovenia. Especially the trading company Dom was highly inclined towards selling this kind of earthenware. At the beginning of the 1980s we started using an electric clay kiln which enabled more control of the glazing process. With time, some ceramics were also manufactured with a home made coil-built technique press which increased the sales and enabled serial manufacturing. Quality products, like chandeliers, candlesticks, soup tureens, baking moulds and plates are being used in numerous restaurants. An important role in our development was played by tourists who started visiting Bojnec pottery to see how earthenware is being shaped on a potter's wheel. Therefore, **Bojnec also started to focus on tourism** and the result of their efforts can be seen in the **open-air museum in Filovci**.

The open air museum in the village of Filovci is an important cultural and tourist establishment of the Pomurje region. It is unique for its first degree cultural monuments which are a part of region's cultural heritage. Since the indigenous cimprača houses (covered with straw and built of wood and mud) have nearly disappeared, the Bojnec family decided to transfer two such buildings to the emerging museum and thus helped preserve the representative examples of the vanishing Pannonian architecture. The renovated buildings were also typically arranged and furnished in accordance with the Pomurje tradition.

In addition to the potter's wheel method, we also employ the casting technique in manufacturing ceramics, in which a fluid mass is poured into plaster moulds. This enables us to manufacture elaborated earthenware. Some products are also being pressed out with special plaster moulds, fixed on the press itself. The raw material is not being excavated for the use of the pottery anymore, since the so-called secondary clay deposits do not meet the standards of the final product, hence the clay is being imported from abroad. To this end the purpose of the raw material differs regarding the manufacturing techniques as well as its use. The earthenware firing takes place in electric as well as in gas kilns, in certain cases even over 1000 °C, which increases the product's quality. In applying his technological knowledge and experience gained in the ceramic industry, in his own pottery, Alojz Bojnec, Jr. succeeded in enabling the development of such craft and thus its survival.

Today Bojnec manufactures a wide range of traditional products and household ceramics that are being used for cooking in electric ovens. Specially manufactured ceramics can also be applied in open fire cooking. The products are being sold in Merkur and Tuš stores in all bigger Slovene towns, and used in renowned restaurants such as Pod Rožnikom, Šestica, Slovenski hram, Ankora and in the Hotel Lev. (www.bojnec.com)

5.6.4. WORKSHOP AND MUSEUM – INTERNATIONAL CERAMICS CENTER OF VASILIOS ANETOPOULOS FAMILY

The Anetopoulos family has been known for ceramic activities for centuries. They promote their work through participation in fairs and exhibitions, as well as the establishment of a museum presenting the history and works of their ceramics production.

Stylios Anetopoulos, one of the great grandsons of Vasilios Anetopoulos, is responsible of the ceramics workshop since 1990, a workshop that started by his great grandfather at 1790 in the village of Apiranthos in the island of Naxos and later at 1881 in the building where the Ceramics Museum is located today. The enterprise is a personal entity with one employee (from the Anetopoulos family) and works in the ceramics production.

The enterprise had never had permanent or non-permanent staff. It was being managed and operated only by members of the family. During the last 3 years, the τζίρος and the profits of the enterprise remain relatively stable. The enterprise works within the national market, it does not have a permanent distribution network and its main competitors come from the local market. The enterprise does not use IT equipment and the only foreign language spoken is English.

Regarding promotion issues, the enterprise participates in fairs and conducts, from time to time, advertising leaflets. The owners state that they face problems of local staff with sufficient know-how in the field, and this is why they continue to participate in production themselves. The enterprise was funded by the LEADER+ Pelion and North Sporades Programme, and has been also issued a loan, without facing any pay-out problem. The owners argue that the most important issue for the improvement of the operation terms of their enterprise is marketing, in which they intend to invest significantly in the forthcoming years.

The innovation of their enterprise has to do mainly with the creation of the Museum – International Ceramics Center in the village of Ano Lechonia, being managed by Evangelos Anetopoulos and inaugurated in September 1999. It is a model λαογραφικό – of historical range museum that moves around the axis of the Greek traditional ceramics art. Evangelos Anetopoulos, for many years now, gathers data on ceramics and those that served and still serve it, and also gathers ceramics from all around Greece, starting from a huge collection of matrixes of neo-classical ceramics worked by his great grandfather Vasilis, around the year of 1900.

The Museum – International Center is supported by the Prefecture of Magnesia, the Art Organization of the Municipality of Artemida, the Chamber of Magnesia and the Pan-Hellenic Union of Ceramists. It is open to the public every day, it hosts education programmes and organizes ceramic fairs. Visits take place on a daily basis, under arrangement. Entrance is free.

The Museum is split into two basic areas, the external and the internal one, with two rooms. In the first room, a traditional workshop of 1881 is presented, ready to operate as in those times. In the second room, a presentation of the historical run of ceramics, as it was structured through place and time, takes place. The tools and materials of the ceramist of the old times, the matrixes and the produced ceramics help towards this direction.

In the external area, the workshop areas and the tools of the ceramist are spread genuinely. The "karouta" and the "axe" – i.e. big and small hole – for the straightening and the settling of the clay, the "toubeki" for the breaking of the flint that was used for the smearing of the ceramics, the handmill for the scrubbing of the clay, the small oven for the melting of the lead were necessary tools for the construction of ceramics. The forge with the wood for baking and the decoration finalize the procedure for the preparation and construction of ceramics. In parallel, in the open space, products are being presented, such as old drainage pumps and handmade bricks, the "simpagi" as told, of several workshops.

In the internal space, on the other side, the ceramic production of the 19th century of several workshops is being presented. Ceramic house dishes such as the "ladika" (tubes for the oil), goglets, jags, pans, plates, and vases with elaborate vivid ανάγλυφη decoration constitute its basic exhibits.

In 2001, the Museum – International Ceramics Center of the Anetopoulos Family organized the first fair entitled «Modern Greek Ceramists» and in 2002 the Museum organized the second fair. In the next steps, the Museum, in cooperation with the Prefecture of Magnesia, the Municipality of Volos, the organization Greek Αργιλόμαζα, the Municipality of Milies, the Municipality of Artemida, the Chamber of Magnesia, the DIKI, the PEKA and the EKPOL of Magnesia, institutionalized festivities of modern ceramics that include the Annual Symposium for Modern Ceramics of the Mediterranean Countries and the Annual International Ceramics Fair "Modern Ceramists". In the festivities, until today, there are participations of ceramists from France, Spain, Italy and Turkey. The new proposal of the Anetopoulos family is the development of a Global Civilization Center that will include Arts – Intuition – Ecology. The whole project, with a budget of 12.000.000 euro, will include 3.000 m² of covered space for the artistic and other needs of the Center (as it will include Art Workshops, Museum, Πινακοθήκη, Intuition Area, Congress Hall – Restaurant, etc.) and 2.000 m² in residential space. All these will be established in a total area of 70.000 m². The proposal is unique and refers to an international level. There are already negotiations taking place with Municipalities of the area, artists and entrepreneurs. Finally, the International Ceramics Center of the Anetopoulos family organizes this period an Association of Friends. Participation will have no fee and will aim at the moral support to its members.

5.6.5. CERAMIST DANIEL LES

Daniel Leş is an artist of great commitment to the art and traditions: he has established a guest house where he teaches traditional ceramics manufacturing to the tourists.

Daniel Leş has learnt to work ceramics together with his father, Ioan Leş. He has a real passion for the Dacian technique of elaborating the clay, but also for water and fire. 80% of his creation is represented by statuettes that render scenes from peasants' daily life, but also other various themes. He participated in many exhibitions, fairs in the country and abroad,

where he obtained many distinctions. For two years he has organised camps of initiation in the secrets of the pottery craft for children – among others from Baia Sprie town.

Out of the desire to valorise the traditional culture from Maramures, he created a touristic boarding house, where his guests can learn ceramics, eat traditional food and enjoy the cultural heritage from Maramureşului.

Considering his youth, his dynamism, but also by combining the three elements: creation, crafts and managerial abilities, Daniel Leş is an example of good practice.

5.6.6. MOLDE FAÏENCES

The company is characterised by an extremely great capacity for innovation and a capability to quickly adapt to market changes. The company also uses the great potentials of industrial tourism, organising factory visits for tourists interested in production mechanisms.

A sound company in a time of crisis

Molde, a company based in Caldas da Rainha, was founded in 1988. It produces utilitarian and decorative terracotta, faïence and sandstone items as well as innovative own-design tiles using new decoration techniques and materials. Products are positioned in the medium-high market segment.

The company currently has 81 employees and its strategy is based on differentiation, innovation, quality and design, especially in terms of raw materials and the creation of new product lines.

99% of its output is exported, mainly to the USA, the UK, France, Norway, Australia, Spain, Canada, Ireland, Denmark and Sweden. Molde is now recognised worldwide as the Portuguese company that produces terracotta and faïence products with high standards of quality and high technical complexity.

Manufacturing activity is currently combined with industrial tourism. There are organised visits to the factory to see work in progress and the various stages of a production process. At the end the visitors (seniors, foreign residents and students) can hand-paint a ceramic object. The manager considers this a good business opportunity, especially for the dissemination and recognition of the brand.

www.molde.com.pt

5.6.7. CERAMICS ROUTE

A ceramics thematic route connects ceramics centres of Oeste region, linking cultural tourism, local specialities, and ceramics, creating also a ground for cooperation for the ceramic producers.

Ceramics at the service of tourism



The Ceramic Routes project – “Ceramics Industry – Industrial, Scientific and Cultural Tourism”, linking the ceramics industry to tourism and regional and local culture, is aimed at creating a thematic route which can be a network of centres to attract new publics. It encompasses companies, museums, handicraft studios and workshops, schools, galleries, foundations and other locations associated with ceramics.

The initiative originated from the existence of a new tourist demand associated with co-production and the sharing of “experiences”, which may take the form of visits to ceramics companies and small units of craftspeople and artists: so-called industrial or economic discovery tourism. This means encouraging historic companies to set up their own museums, factory shops and demonstration studios, as well as organising events and exhibitions, etc.

The network is already linked to other tourist/cultural attractions, such as food, housing and residential, historical, environmental and sports tourism, which may result in a differentiated tourist product.

Launched in 2001 under the leadership of CENCAL, the project now has over 260 participants nationwide. However, according to one of the promoters, “It has come up against, in some cases, a certain distrust or reluctance to cooperate on the part of some members (...). We will have to wait for a few more generations until there will be an awareness of the economic and educational value of these initiatives” (José Luís Silva).

www.rotasdeceramica.pt

5.6.8. GARDEN OF THE ARTS

The Garden is a pleasant touristic place, incorporating learning facilities, sales opportunities and workshops for ceramics, connecting them with other tourist attractions.

A multidisciplinary cultural tourism project

The Garden of the Arts project being developed in Caldas da Rainha by the Braz Gil Studio is intended to combine, in the same space (a garden), learning infrastructures (design studio, painting school, etc), retail areas (shops selling ceramic products along with local and regional gourmet and other products), restoration areas, sensory and natural product (tea, herbs and other aromas) experimentation areas, workshops and exhibitions, etc. They are also planning to build residences for designers and artists who can live and work there temporarily.

This initiative intends to promote industrial and cultural tourism with a view of attracting new publics who will stay longer in the town and region than the usual conventional tourism stopovers.

This area has been classified as a public utility space by Caldas da Rainha Municipal Council.

5.7. COOPERATION

5.7.1. ITALIAN ASSOCIATION OF CITIES OF CERAMICS

The aim of the association is to bring together actors in the fields of ceramics, for the joint promotion and development of ceramic traditions of the country.

The Italian Association of Cities of Ceramics (A.I.C.C.) was established in 1999, based in Faenza, a non profit organization that has the aim of the creation of a national network of cities where a significant ceramic activity historically developed.

With this aim, the Association works for the development of ceramics, by promoting a pact of friendship between the centres of ancient ceramic tradition.

Objectives of primary importance to the Association are:

- The enhancement of traditional ceramics and the development of individual members, in order to promote uniform growth;
- The care and protection of documents relating to the ceramic tradition;
- Support to museums, exhibitions, research and, more generally, to all organized bodies, public or private, who are dedicated to the preservation, study and knowledge of traditional ceramics;
- Support for events which have the purpose of dissemination and knowledge of the ceramic tradition of communities part of the Association;
- Support exhibitions and events on contemporary ceramics;
- The development of art schools and professional centres where the art of production and restoration of ceramics in all its aspects is taught.

The following cities belong to the Association: Albisola Superiore, Albissola Marina, Ariano Irpino, Ascoli Piceno, Assemini, Bassano del Grappa, Burgio, Caltagirone, Castellamonte, **Castelli**, Cava de' Tirreni, Cerreto Sannita, Civita Castellana, Deruta, Este, Faenza, Grottaglie, Gualdo Tadino, Gubbio, Impruneta, Laterza, Lodi, Mondovì, Montelupo Fiorentino, Napoli, Nove, Oristano, Orvieto, Pesaro, San Lorenzello, Santo Stefano di Camastra, Sciacca, Sesto Fiorentino, Squillace, Urbania, Vietri sul Mare.

The initiatives implemented:

- the establishment of a dynamic Internet site for the networking of the associated cities with their own ceramic reality,
- the active participation in the National Exhibition opened in 2001 by the Ministry Industry for the promotion and advertising of the National Brand of artistic and traditional ceramics and initiatives implemented by the ACTA Project (2003-2004),
- the Memorandum of Understanding in 2003 with the National Craftsmanship Association,
- the Convention for the ANCI and the RES TIPICA Project,
- the publication of Ceramic City Guides Ed TCI 2001 and Ed ANCI 2005,
- the Convention on the Network of Museums of Ceramics in 2003,
- participation in exhibitions in Genova, Florence, Este, Montelupo Fiorentino, Palermo, Faenza, Brussels, Sciacca, Civita Castellana, Bastia Umbra, Oristano, Assemini, Lodi, Matera, Cutrofiano, Monza.

Relevant is the French-Italian Cooperation Agreement signed in 2005 by AICC and from the corresponding French Association of Ceramic Cities AfCC.

5.7.2. THE GROUP OF CERAMISTS OF THE VALLEY OF BUÑOL

“The effort to achieve a real voyage from the new to the antique”

The ceramist group is an initiation for the enhancement of the craft in the territory connecting the fields of production, education, tourism, and territorial development. The association delivers unique products for customers individually, and organizes ceramic fairs and trainings.

The group of ceramists of the Valley of Buñol was formed in 1999 from two consecutive courses realized in the region during the years 1998 and 1999. The group of ceramists was constituted originally by more than 8 persons, all of them women; nevertheless their number has fallen to only 4 by now.

The group is specializing in the production of artistic ceramics of small scale, and of great quality with designs based on the own culture of the territory.

It supports two big customer groups, first institutions (such as city councils) and other cultural associations

In case of institutions the whole production is realized by direct order and the design is exclusive and completely personalized, in case of particular clients; in some cases the group produces small series related to family events.

The strategy of communication is very simple: the people are attracted by the exhibitions realized by the group in the cultural fairs that are held every year in the territory, and are essential for the contact building between the ceramists and the public.

In the search of a definitive consolidation, the group has opened new lines of work related to the production: trainings are organized for adults as well as for primary and secondary school students, in the form of extra activities organized in cooperation with the schools.

Ceramics has never been a productive activity recognized in the territory (though it is a truly significant industrial activity in the whole region). Thus, both the courses and the initiative to create the group assume the introduction of a new artisan activity in the territory and have been supported by the intense personal work of the current partners. During these 10 years the group has been investigating and looking for special elements of our cultural landscape. This cultural and anthropologic research means adapting to ceramics, the materials, supports, forms, colors and idiosyncrasy of the territory, in the new symbiosis that they create by turning the craft into an own cultural symbol of the territory and secondly by adapting to the needs of particular clients.

5.7.3. FAIANÇAS BORDALO PINHEIRO & VISTA ALEGRE ATLANTIS

The merge of two major companies of high reputation has brought about a company of extensive activities – incorporating production, tradition, history, tourist centre, and sales opportunities.

Historic companies in an acquisition process

Two historic companies, Faianças Bordalo Pinheiro and Vista Alegre Atlantis, both quintessential Portuguese brands, have been bought by Visabeira for €4 million. The group maintains that these businesses can be made profitable by the second half of 2010. The Viseu Company owns businesses in the telecommunications, construction, property and tourism areas, and a unit from the utilitarian ceramics sector – Cerutil.

The Bordalo Pinheiro faience factory, in Caldas da Rainha, was founded in 1884 by the artist Bordalo Pinheiro. It is now renowned for the reproduction of typical items created by the master, such as Zé Povinho, the old tattler, cabbages, tiles and animals, greatly influenced by the naturalist movement.

Vista Alegre was established 185 years ago as a result of the dream of its founder, José Ferreira Pinto Basto. It now has one of the best and most automated porcelain factories in the world, and continues to produce and preserve porcelain made and worked by hand, in honour of its history and tradition. It has a museum, a chapel, a palatial mansion, shops and a visitors' centre. There is also a prestigious Collectors' Club limited to 2,500 members. May 2001 saw the merger of the VA Group with the Atlantis Group.

www.faborbalopinheiro.pt

www.vistaalegre.pt

5.7.4. AARO – ASSOCIATION OF OESTE REGION CRAFTSPEOPLE

The association organises events for the promotion of handicrafts, in cooperation with the designers and supporting organisations, such as municipalities and research and educational centres.

Ceramicist Ana Todo-Bom

AARO, founded in 1990, is an association of craftspeople aimed at promoting and disseminating the handicrafts of the Oeste region. It currently consists of 75 craftspeople, 10 of them ceramicists. Ana Todo-Bom is the President of the association and also a ceramicist.

The association has organised various events to promote handicrafts, in partnership with designers and with the support of a number of entities, in particular Óbidos Municipal Council and CENCAL.

According to Ana Todo-Bom, the Association's future will depend greatly on the collaboration established with municipalities, tourist offices and international and Portuguese training institutions (such as CENCAL and ESAD). It will also depend on its members' capacity for innovation, creativity and originality, combined with the capacity to preserve the identity of handicraft products.

Its workshop in Óbidos includes a shop and there is another point of sale in Caldas da Rainha, with five employees altogether.

www.aaro.pt

5.7.5. 3C'S COLLECTIVE

Cooperation in original contemporary ceramics

The 3C's – Creative Contemporary Ceramics Association – is composed of recognised ceramicists whose aim is to support and promote contemporary artistic ceramics. It champions ceramics with ethical, aesthetic, cultural and educational concerns.

The ceramicists who belong to the association are: Ana Lousada, Ana Maria Sobral, Alice Diniz, Aldosinda Pereira, Bolota Isabel Claro, Carlos Neto, Georgina Queiroz, Iolanda Esteves, Jean Dominique Ferrari, Joaquim Pimentão, José Machado Pires, Liliana Sousa, Mário Reis, Martin Santa Rita, Nadine Geniou, Nuno Miguel Faria Neto, Nikolay Amzov, Paulo Oscar, Ricardo Casimiro, Ricardo Cristovão Mendes Lopes, Sérgio Amaral and Vergílio Peixe.

The aim of the association is to collaborate with public cultural entities in organising events. It holds an annual Ceramics Fair in São Martinho do Porto, in collaboration with Alcobça Municipal Council and the José Bento da Silva Casa de Cultura (cultural centre) in São Martinho do Porto.

www.ceramica3cs.com

5.7.6. SUSTAINABLE HABITAT CLUSTER

The cluster includes various types of ceramic producers, with the aim of jointly seeking development opportunities coming from the changes of the market.

The Sustainable Habitat Cluster has been recognised by QREN-COMPETE (Factors of Competitiveness Operational Programme) as a regional cluster within the scope of the Collective Efficiency Strategies. It has been promoted by the CTCV (Ceramics and Glass Technological Centre), the ITeCons (Construction Sciences Technological Research and Development Institute) and the Platform for Sustainable Construction, which together represent about 220 habitat companies.

This cluster, cutting across the habitat area, includes construction companies, construction ceramics, utilitarian and decorative ceramics, cements, concrete products, mortars, metal products, plastics, woods and furniture, based on a central theme: sustainability.

One of the aims of the cluster is to develop capacities to exploit the new opportunities arising from the evolution of the markets, such as in the case of new technologies associated to eco-efficiency and domotics (the "smart sustainable house" as a new need and new product).

The cluster's strategic programme envisages the creation of three competency centres in the area of construction materials, construction technologies and sustainability of the constructed environment. At the centre of the different R&D projects planned, it is worth noting the development of anti-bacterial surfaces and anti-stress flooring.

www.centrohabitat.net

5.8. R&D, Innovation, Technology

5.8.1. SC SENS ART SRL

The company founded recently is remarkable for its innovation spirit, combining traditional methods with advanced technologies in its production structure, thus adapting to market demand.

This company started the production in Turda in 2008 which functions as a working location in the former location of Potaissa Handcraft, using partly its traditional technology. The products are similar to those produced 10-15 years ago but are very well adapted to the market demand: flower pots from clay, ornamental bricks from clay and stove tiles.

The company has now about 11 employees, one of them retired, working on potter's wheel. The stove tiles are sold in the area to private persons and small companies.

The other products are sold in en gross system in Romania, the demand for those products is growing.

Conclusions:

- Products adapted to the market
- valorisation of traditional technologies
- experienced labour force coming from former ceramic local companies
- market oriented management
- good distribution channels
- promotion of ecological products.

5.8.2. RESEARCH ON THE PRODUCTIVE SYSTEM OF CERAMICS FROM CASTELLI

A research project conducted in Castelli, Italy, involving all the relevant actors of ceramic activities. The aim of the project was to jointly find solutions important for a strategic development of the sector.

This report is the result of a research project, the goal of which was to work with the artisans, small entrepreneurs of ceramics from Castelli, the city administration, other local and provincial institutions and social partners oriented to identify lines of action, local planning and strategies that will take place in the new Ceramic Centre in Castelli. The field research has been directed to reconstruct the strategies of actors, focusing on some major issues:

- an analysis of " business formula " which is based on the competitive advantage of different local producers, taking into account not only the market demand, but also the technologies used, the environmental conditions in which production takes place, the figure of employer and the professionalism of the workforce in firms where crafts plays a crucial role;
- an analysis of the production problems in Castelli in terms of systemic synergies between the various local producers and those that could be created by increasing the

- rate of cooperation, coordination and cohesion among the local players to improve the overall competitiveness and increase market share both internally and abroad.
- an analysis of issues related to the construction of the "long networks" to compete both on the domestic market and international market, including the creation and strengthening of coalitions and "ad hoc" alliances with other Italian ceramic producer districts;
 - an analysis of supply and demand of business services currently present on territory.

The intervention was structured around three main events:

- a survey of the needs of local actors - about 40 manufacturers of ceramic in Castelli members of the Chamber of Commerce - conducting "in depth" interviews. Interviews were aimed at entrepreneurs with the aim of highlighting the aspects of their business, to the chain of value, the system of relations which the production cycle is based on, the strengths and weaknesses, marketing strategies and applications for tertiary services and representation;
- analysis of the institutional context of reference through the implementation of targeted and conducted in depth interviews to the head of the Mountain Community, the Municipality, the Province, the Chamber of Commerce, the bank, the Institute of Art, class Associations of small business, and trade unions.

5.8.3. SOLAR TILES PROJECT

Ceramics at the service of sustainable construction

Based on a partnership of nine entities of Portugal, the project aims at a development of ceramic products for a combined technological-aesthetic advantage, taking into consideration issues such as environment protection, practicality, production costs, and the use of new materials.

The Solar Tiles project – "Development of Solar Photovoltaic Systems in Ceramic Coverings and Surfaces" is aimed at developing highly efficient functional prototypes of integrated photovoltaic ceramic products of high aesthetic quality for the surfaces of buildings (roof tiles and external façade surfaces) which incorporate (latest generation) fine photovoltaic films.

This is intended to contribute to a new type of architecture that includes eco-design and façades, and surfaces based on photovoltaic ceramic materials. New multi-purpose ceramic products combine aesthetic with technical energy-producing functions in order to promote sustainability in construction.

This R&D project is innovative internationally in that it provides an alternative solution for using renewable energies (solar energy), storing them, transforming them into electricity and promoting their architectural integration.

It is based on a partnership consisting of a consortium of nine Portuguese entities, headed by Revigrés, with an investment of €1.7 million and two-year duration, after which the products will be placed on the world market.

5.8.4. CTVC CERAMIC AND GLASS TECHNOLOGICAL CENTRE

Scientific and technological system at the service of companies

The institution was founded with the aim of supporting ceramics enterprises with information, technical support, research, and trainings in the fields related to their operation. The operation of the Centre is based on the collaboration of research and industry, as a profitable way of development.

CTCV – Ceramics and Glass Technological Centre, founded in 1987, is aimed at the technical support and technological promotion of national industries in the ceramics, glass and similar and complementary sectors.

Its main aims are:

- Technical, technological and scientific support for the ceramics and glass industries and complementary sectors;
- Promotion of the development and quality of products and industrial processes;
- Support for specialised training of industry technicians;
- Promotion, execution and encouragement of technological research and development work in materials and processes;
- Dissemination of technical and scientific information to companies.

It has three units: the Information Systems and Technologies Unit (new technologies applied to industrial information systems); the Product Design and Engineering Unit (product design, models and prototypes, inverse engineering, numerical simulation); and the Services Unit (trials, quality management, etc.).

In this way it undertakes numerous R&D projects in collaboration with industry (such as the Solar Tiles project) and provides services directly to companies. It is one of the entities that promote the Sustainable Habitat Cluster.

www.ctcv.pt

5.9. MARKETING ACTIVITIES

5.9.1. GLASS STUDIO

The glass studio in Hódmezővásárhely has become successful thanks to its extensive marketing activities: creating an own brand, the continuous renewal and promotion of product design, and the uniqueness and wide range of high quality products attracting lots of customers.

Competitive enterprise, wide range of products

The glass studio has been involved in decorative glass manufacturing since 1993. They apply unique technologies unknown to the city before. Their products vary from lamps, windows, glass roofs, painted stained glass through fused glass to their most successful main product, glass jewellery.

Unique products, continuous renewal

All of the products of the studio are unique and special, thanks to the emphasis the enterprise puts on planning and design. They think that this phase is the most significant in the quality of the product. The products have a high market position; there is high demand for them. Copying by other studios is prevented by continuous renewal: they introduce new products every half year.

Work distribution

The enterprise employs 6 persons. Efficient work distribution is assured by the separation of the management activities and the arts leadership.

Making an own brand

The most important factor in the success of the enterprise is the creation of its own brand and its protection. The brand created has a high reputation in the profession, assuring the customers of high quality. The studio has a major advantage in the design competition: the products (primarily glass jewellery) are sold in packages that add to the value of the products, thus increasing their prices. According to the studio's experiences, without appropriate design and packaging, the products are saleable only for much lower prices.

Synchronised marketing activities

The studio also puts emphasis on marketing activities: they have an own catalogue that further raises the price of the products with its attractive appearance. The prices of the products on the market are the multiple of production costs.

The studio is also outstanding for its professionally created, up-to-date website available in English and Hungarian languages, introducing the most significant products of the enterprise.

Market sales

It is a common practice of the master artisans to sell their products through consignment. This, however, means risk for the entrepreneurs. The studio requires a minimum of EUR 300 advance payment for its products. This makes the salesmen interested in selling the products, so they highlight them by placing them to more prominent places in the shop as compared to the products sold through consignment. The studio has an exclusive wholesale dealer, and they transport the products on order to post collection centres as well. Besides, the website of the studio contains an English language customer interface meeting 21st century standards.

International presence

The studio is continually present at fairs and exhibitions abroad, including exhibitions in Paris, London, Salzburg, and Munich, where the products are also put on sale. They apply for the participation in the exhibitions to ITD Hungary (Hungarian Investment and Commercial Agency), and so far the application has always been successful. So the registration fee, together with 80% of the exhibition fee is provided for them.

5.9.2. LABEL CITY APPLIED ARTS : VILLE ET METIERS D'ARTS

The label is presented as a best practice for providing visibility for the art of the city: the producers of high quality products in Vallauris receive the label in order to be able to prove origin, quality, and reputation that belong to this signal.

The label is a sign of gratitude of a quality production, providing a visibility for the enterprises that can be easily identified and distinguished from other partners of this network.

We also have a **label Vallauris** certifying that the potteries are made in this town. This label stamp on potteries is a guarantee of know-how, tradition and quality.

5.9.3. THE PROJECT ABRUZZO INTEREXPO

A website for promotion and contact building, providing artisans with an online exhibition space as well as with opportunities to find partners for cooperation and to easily access customers.

The international economy is experiencing a rapid transformation due to electronic commerce, both **business to business** (b2b) and in the area **business to consumer** (B2C). Telecommunications on Internet allow any company to be constantly visible in the whole world 24 hours a day, 7 days a week, 52 weeks a year.

Despite the high technological level reached in telematic transactions, few companies have the know-how and economic resources needed to activate their business network. In particular, small and medium-sized companies that have to reap the greatest benefits are the most disadvantaged.

Within this context, the Regional Board has adopted (LR 31.7.96, 60 - 41 - Virtual show on Quality artistic craftsmanship in Abruzzo on Internet, even with e-commerce, called "Abruzzo Interexpo ", DGR n. 475 of 26.06.2004) an initiative to help enterprises of Artistic

Craftsmanship in Abruzzo to promote permanently and completely free activities and products of the companies selected in a structure that would ensure maximum visibility and interactivity to the project.

Abruzzo Interexpo is a specialized site reserved for quality artistic craftsmanship in Abruzzo. With over one hundred exhibiting companies it is, in fact, a full and varied showcase of regional production. It offers the opportunity not only to admire local production, an evolution of a millennial art, refined and complex, but also and above all, to bring together realities operating in areas inaccessible and difficult to reach with public transport, with a refined and cultured audience, sure admirer of the patient work of our craftsmen. The website, in fact, allows carrying out orders and buying directly unique products. So unique, that some manufacturers have decided not to disclose the prices of their products, because their pieces are absolutely unique and therefore unrepeatable. It will not be difficult, however, to get in touch with them thanks to the site, a business tool unique and complex, technologically advanced and structurally well-defined in its essential parts.

The site is connected, with a permanent link, to the home page of the official site of the Abruzzo Region (<http://www.regione.abruzzo.it>), giving it a prominence and a broad dissemination of the cultural and socio-economic importance whole initiative. Among other things, the presence of the link on the page of the Abruzzo Region and the sponsorship of other major regional institutions can only reinforce, enhance and consolidate a technologically advanced project in compliance with the millennial culture of Abruzzo.

The project Interexpo Abruzzo is reserved for typical productions of the Abruzzo region with particular regard to the field. The permanent Exhibition of quality artistic craftsmanship offers the opportunity to small and medium businesses to create their own shop on Internet simultaneously providing a complete solution for selling online, from the creation of the catalogue and its maintenance (shopping-cart, cart expenditure) to getting in touch with clients and selling.

The project takes, and retains a cultural value in its permanent unique exhibition and as a showcase of local craft production is as a superb and unique means of disseminating of artistic traditions related to regional history and local custom.

The project **Abruzzo Interexpo** consists of a permanent virtual exhibition organized on the Internet. Each craft can have its own electronic stand (**website**) that can be reached by: a) selecting the type of goods or services, b) the name, c) the name of the site (web address) or d) the geographic location. With this aim, **specialized indexes** will be activated.

Each "virtual" stand, completely free for companies and artisans, has its own **network address**, the **catalogue of products or services offered**, **price list**, a **shopping cart for purchases**, an **email address** for orders and / or communications via e-mail, a **digital form** (form) to request detailed **statistics of access** and access to **restricted areas** (access b2b, large users, upgrade offers, reports, orders, etc).

The permanent connection 0-24h ensures maximum visibility to the shop, driven by links to frequently visited sites, privileged positions in search engines and promotional activities designed to promote the visit of new customers (promo on a newsgroup, expansion banner, link planning for webmasters, etc.)

The artisans give the webmaster of their stand the data on their activities, the product catalogue with pictures of themselves on the list and other useful information to better detect and locate their products. The material is processed and organized on electronic pages accessible through the Internet, to a potential audience of over two hundred million customers.

Among these, interested people can both buy the products directly, by sending an email, or request additional information and / or estimates.

Artisans receive **an email account** that allows them to follow directly from their place of work or contact a prospective customer: when they can not use a computer, orders and / or requests for information is sent via **fax** or direct **telephone call**.

The exhibition is updated online **in real time**: at any time artisans can make changes to their pages by sending (via e-mail, pages accessible from browsers, fax or regular mail) to the webmaster of the stand changes in prices, availability or products, placement of new products, special offers, etc.

The craftsmen are grouped in categories accessible from the home page (main page for access) and reachable with a few clicks. Log on to the site or type <http://www.abruzzointerexpo.com>

Categories in which artisans can activate a virtual "stand" in Abruzzo Interexpo are the following:

- CERAMISTS
- GOLDSMITHS
- COPPER PRODUCERS
- GLASS MAKERS
- EMBROIDERERS
- LEATHER ARTISANS
- FABRIC ARTISANS
- WOOD ARTISANS
- IRON ARTISANS
- BASKET WEAVERS
- PAPIER MACHE'
- MUSICAL INSTRUMENT ARTISANS
- STONE ARTISANS
- WAX ARTISANS
- TIN MAKERS

They are selected according to the "regionality" and quality of products or services offered up to a maximum of 200 operators in total. This will be assisted by specialized consultants on the field with a deep knowledge of the area to ensure the presence of the best and most representative professionals of the Region in the exhibition. Participation in the project is completely free to businesses and craftsmen selected.

5.9.4. ABRUZZO IS APPENNINES

The website is created in order to raise public awareness of the region and promote the multi-face area through presenting its main characteristics. The website includes a specific section for the small crafts of Abruzzo.

Abruzzo is Appennines was born with a simple goal: introducing a territory through the voices of its main characters. A choice that implies a clear idea of the community in which we live and work, where our identity, our vocations find recognition and citizenship, and sometimes even in the most stubborn cases, try to conduct project development, and test hypotheses for the future.

The website Abruzzo is Apennines is promoted and maintained by the Mountain Community of Peligna and includes a specific section on artistic crafts in Abruzzo.
<http://www.abruzzoeappennino.com/>

5.9.5. ITINERARIES OF ARTISAN SHOPS IN THE PROVINCE OF CHIETI

A guide presenting the area of Chieti, listing the artisans' shops to be found in the territory.

A publication, promoted by the Chamber of Commerce of Chieti, leaving the normal patterns that distinguish the guides on artistic craftsmanship to provide an insight into the territory of the province of Chieti, indicating some itineraries that include, in addition to artistic and environmental beauty, a list of artisan shops representing various sectors.

Your guide to the routes of artistic craftsmanship, therefore, tells the magic of places and the passion of men who inspire them through their work, being aware that you can only pass on the memory of these people bringing a visitor to this precious heritage.

<http://www.ch.camcom.it/show.jsp?page=59543>

5.9.6. THE PARK OF CERAMICS

The initiation was launched with the aim of the promotion of ceramics activities of the region, drawing public attention to the many sides and colourful history of this tradition.

The initiative was founded on the initiative of the Museum of the People of Abruzzo in 2005.

In addition to the city of Castelli, that can boast with the most successful production at an international level, it was discovered that several other towns that produced majolica drew significant profits from this activity. The masterpieces of Baroque and Renaissance majolica products from Castelli are exposed in the major museums in the world. Abruzzo has, in turn, a large number of museums displaying masterpieces of the masters of maiolica, and the museums are ideally combined in a major cultural theme park, the "Park of Ceramics".

The Park was an opportunity to raise awareness on the development of majolica in Abruzzo, but also providing a way to visit with different eyes some of the most beautiful places of Abruzzo, joining the cities of art with the scenery of the "green" region of Europe.

The Park has proposed routes that led to the discovery of historically fascinating towns, with a fine cultural tradition and new shops where you can buy products of high quality. One could benefit from these routes individually, creating his own path on the basis of information supplied, or in groups, through weekend packages offered by the organizer.

5.9.7. BRAZ GIL STUDIO

Emphasis on innovation through design and differentiation

Secrets of the success of a small enterprise: specialisation in high value added products and the proper identification of market niches, together with a promotion strategy based on cooperation with cultural entities.

The company, based in Caldas da Rainha, was founded in 1996. It is a family unit, currently with 18 employees. It specialises in non-mass production, particularly high-quality, value-added products with an individual design and identity and an emphasis on Portuguese culture and history.

It operates in demanding market niches, producing creative and artistic porcelain items (services, decoration, sculpture, lighting, etc) and exporting 39% of its output, mainly to the USA and France.

It works mainly on the basis of customer commissions and has items for sale at the National Palace of Queluz and the Thyssen Museum in Madrid, despite also having a shop at the manufacturing unit.

It works with various cultural entities such as IPPAR (Portuguese Architectural Heritage Institute), AICEP (Portuguese Investment, Trade and Tourism Institute) and the Portuguese Institute of Museums in manufacturing both original items and reproductions for museums and palaces, in collaboration with national and foreign designers.

It has recently invested in industrial tourism with a distinctive project called "Garden of the Arts".

www.brazgilstudio.com

5.10. INDIVIDUAL SOLUTIONS

5.10.1. POTTER'S HOUSE

The Potter's house in Hódmezővásárhely is an enterprise with diverse activities. Its main advantage is that it is able to incorporate all important aspects of product and business development, from technology to business cooperation, all this in a family enterprise.

Initiation of a family business

The master potter presently in his early 60s has learnt the profession from the great generation of Hódmezővásárhely, some of the representatives of which are still alive, close to 90 years of age. After being constrained to work in the Majolica Factory, the potter started his own family business in 1989, the year of the fall of the communist regime. Launching a new business needed significant own capital, operational permissions from authorities, suitable infrastructure, and creative ideas.

The wife of the master artisan had a significant role in the initiation of the business; however, she was working in a different sector, dealing with financial management and co-ordination at a big company in Budapest. She helped through her business approach and independency. Thus, the appropriate work shares of the family allowed everyone to do what they are good at: their activities – pottery and business – complete each other successfully.

Complexity: open workshop, exhibition room, museum, and shop in the same place

They renovated the workshop and made it suitable for accepting guests, together with a part of their family house (rooms, cellar, garden). The location works as an open workshop, art shop and exhibition room with fixed opening hours and entrance fees. There is a separate room for the authentic ceramics and embroidery of Hódmezővásárhely for the protection of the local traditions. Guests can give feedback in the Guestbook.

Quality assurance: jurying and exhibition

The products are juried and submitted for high-standard exhibitions, in order to assure quality by an external controlling process.

Diverse marketing activities

They have also created an own, independent image through marketing activities: they have named the workshop, developed an own website, and created colourful information flyers and name cards. Their name has become an acknowledged brand since then. With the high quality work of 20 years, the brand consequently endeavours to stay at high standards (for example, they do not sell at conventional markets, and do not sell mass products).

Wide range of products, unique style

Apart from the authentic ceramics of Hódmezővásárhely, the artisan has developed an own, typical glaze, thus creating a recognisable style.

He works with a wide range of products, including the authentic ceramics of the city, and modern, unique objects for apartment and garden equipment (e.g. ceramic garden fountain), and decorative objects for apartments.

Reliable quality and punctual transportation

The solution for market sales is also remarkable: the artisan made a contract with a commercial company of regional/national scope that runs furnishing shops in 6 cities, with a wide range of products. This requires absolute conforming to the conditions phrased by the contract: punctual transportation and reliable quality.

5.10.2. TILE STOVE WORKSHOP

The studio is specialised in tile stoves, operating the whole process from receiving orders through stove building to transportation and sales. The reliable quality of the products has led to high reputation among customers, who pass the name of the studio on, ensuring a widening range of potential customers.

Diverse professional knowledge

The master artisan now in his early 40s has received extensive education: after finishing secondary school, he studied pottery in the local Majolica Factory, then from one of the most renowned master potters. After this he worked in various European workshops, and finished a 2-years adult education of tile stove making, which is built on his former education, using unique, hand-made tiles and bricks for stoves.

Launching an own business with co-operation

The artisan, his father and brother were among the first ones to start an own enterprise in 1989. Later, more than 5 years ago, they started a family business of stove building, providing complex services on the market: the enterprise manages the process from sales management to the creation and building of the ordered stove. The former master potter extended the range of products with the inclusion of stove tiles of traditional folk techniques and motifs. He also builds special Hungarian traditional types of stoves and ovens, including outdoor furnaces. The company consists of two family businesses at present, with five persons: besides the two craftsmen, the master potter's wife and brother are also employed in the business. The workshop is behind the family house, in the same estate. This way the operation of the business is more cost-intensive.

The cast iron doors of the stoves are made by a company from Mosonmagyaróvár with a diverse catalogue of products. The fireclay material with high temperature resistance is transported from Kecskemét.

Unique, guaranteed products of good quality

The prices are defined by the price of the unique, hand-made tiles, the price of the built-in door, and the stove building. The average price of a stove is around HUF 500,000 (EUR 1800). There are stove builders working with mass produced tiles, the price of which is approximately by 30% less than that of the hand-made tiles. The handicraft potter technology enables the production of 3 to 5 stoves per month. It is important to define the heating capacity to decide about the size of the stove. The cleaning of the stoves is possible without breaking or dismantling them, and they propose to do it every 8 years. Stoves made this way "live eternally", serving generations without the need to rebuild them. The master takes guarantee for them and also executes their cleaning.

Multi-face marketing activities

In order to achieve a wider acknowledgement and better sales opportunities, the works of the master are submitted to national exhibitions and expos. He has a colourful flyer and product catalogue (with a wide range of colours, patterns, sizes, and shapes). He also shows product samples at the exhibitions that can be examined in detail by the visitors, and the master answers questions about the articles. He has also made megaposters in the beginning, but that turned out to be inefficient. All this means extra expenses, but marketing is inevitable for sales management. Besides marketing, the most important is reliability, guarantee, and a persistent good quality. The best marketing of the enterprise is the proposal of satisfied customers transmitting the name of the company.

National and international markets

Because of the decrease of customer power, the number of orders in the region has fallen recently. Under these circumstances it is especially advantageous that the master produces for the national market, occasionally managing sales even abroad. Transportation costs are higher in proportion with the distance, and the transport takes more working hours as well, but the customer takes responsibility for the extra costs.

A significant proportion of the customers are hunters, as the producer himself as well, who like to place a tile stove in their hunter-houses. They usually prefer green glaze and acorn motif. As hunting is an expensive hobby, these customers have sufficient financial capacities.

The enterprise makes no complaint about the number of orders: their whole capacity is covered by orders for the whole year. They can only transport goods for a new order in 3-5 months.

Emphasis on alternative heating solutions

The renewed fashion of the tile stoves is a positive tendency. The objective reason for this is the uncertainty of the future of national gas supplies: people are eager to find alternative heating solutions in order to "prepare for the worst". Moreover, they are producing so-called water stoves, which are connectable to central heating by a special technological solution, and thus the heat produced by the stove is able to warm up the water running in the heating system.

Products preserving and revitalising traditions

Another popular product of the enterprise is the decorative brick, which is placed on the façade of the houses, and the special wedge bricks that are produced for vaults. The enterprise conducted research on local history collecting the most exclusive motifs from old houses of Hódmezővásárhely. Through the reproduction of the motifs collected, they are revitalising this nice, old tradition of the city.

5.10.3. GALAROSA

“Quality is not enough: To adapt or to be eliminated”

Galarosa studio has reached its position as high quality textile manufacturer by a continuous examination of fashion trends and market needs, and specialising in high quality products for celebrations and official occasions. The use of ICT tools has boosted the opportunities of the factory that has reached a leading position in product design.

Galarosa is the textile factory of Rosa Magraner, one of the best dress-designers of the province. The studio is located in the municipality of Cheste.

Rosa Magraner is a dress-designer of the third generation with more than 15 years of experience in textile manufacturing. Rose makes fashion of high quality, especially in terms of design: she prepares dresses for fiancée, high couture, celebrations and in general dresses for family events.

The textile manufacturing factory sells its products on individual orders, and its highest quality is based on two fundamental elements:

1. - The customized deal with the clients, which creates a basis for the loyalty of the customer and the expansion of the fame of the quality production from mouth to mouth of the clients.
2. - The continuous investigation of new landlords, tendencies fashionable, colors and weaves.

In that continuous and exhaustive investigation a major role is assigned to the use of new technologies. Rose, in spite of being a middle-aged woman, has adapted quickly to the evolution of the ICT and by its use (looking for landlords of new dresses, tendencies, being in contact with other seamstresses and using the ICT to maintain contact with clients) she has not only stayed in the market but she has become the vanguard of design.

As she says: “My aims are to be kept on the market and if it is possible to grow, but it only will be possible if I announce myself in Internet, so I am preparing my own web page www.galarosa.es.”

5.10.4. ART WORKSHOP POPOTECH

The workshop is based on the work of two artists, Jemma and Garry, designing both individually and together. The workshop includes outdoor and indoor exhibition spaces, making the site more exciting and attractive for visitors.

The Art Workshop "PoPoTeCH" was founded by Jemma and Garry in 1999, a year when they started to work with πηλό, wood, silver, bronze, iron and other metals, creating handmade and authentic ceramic objects and gifts, metal constructions and establishments, pieces of art and everyday tools. Jemma (from Ireland) and Garry (from Holland) settled down permanently in the mountain of Pelion in 1989.

All the creations of the Art Workshop PoPoTeCH (from big constructions to smaller objects) are 100% handmade and are being characterized by uniqueness in inspiration, authenticity, construction and design.

Jemma works with ceramics. All of her products are handmade, and most of them are made on wheel. They are being mainly processed with red πηλό, which then is baked in gas forge. Moreover, for the non-table objects, also non-toxic glass products are being used.

The products are: 1) Dishes for raki, tsipouro, ouzo, wine, tea and coffee, 2) several ceramic objects, such as oil lamps, ashtrays, balls, vases, plates, wall clocks, mirrors, candle frames, etc, 3) human and animal figures, fruits, 4) figures of the traditional Greek "Shadow Theatre", 5) wall decorations with subjects from the mountain Pelion.

Jemma also works with the construction of handmade jewelry. Each separate piece has a simple and obviously handmade character. The jewelry is designed by both Jemma and Garry, and this is why every single piece has a balance within its simplicity. For the construction they mainly use silver 925, but also some pieces are being produced by copper.

The iron constructions, by Garry, include all different metal pieces of art and other objects, including the procedure of metal processing and the constructions themselves. Each single piece is powerful. Garry uses, with imagination and humour, old irons from a local ναυάγιο and recycled metals, which in some cases he uses in parallel with unprocessed wood. The hit of the σφυρί and the fire give birth to his projects. Garry does his whole work always in good mood. His projects are between sculpture and constructions and can be grouped in 4 categories: 1) big constructions – establishments, 2) ships, 3) αφηρημένα sculptures and 4) knives.

The area of the Art Workshop PoPoTeCH consists of:

1. The building, where workshops are located,
2. The external yard, where big constructions are exhibited,
3. The internal exhibition of ceramics, metals and jewelry.

5.10.5. CERAMICA BLEDEA

Bledea family has been known for their traditional ceramic activities for decades. They are appearing in exhibitions and fairs, and submitting their products also for quality assurance and health and safety tests. The fairs have brought prizes for the family, raising the reputation and popularity of their products.

The Bledea family has practised ceramics for several decades now. Doina Bledea is one of the potter craftsman Sitar's five children, a potter known in the second half of the 20th century, in and around Baia Mare. Since she was little, she has worked at the potter's wheel and painted, guided by her mother. She was known as: Doina Sitar "the girl with golden hands". Her

husband Zaharie Bledea worked in the Laboratory for Unconventional Technologies at the Institute of Mining Research trained as chemist. In 1990, he leaved the Institute and started to work in his father-in-law's pottery shop, together with his wife's brother, Liviu Petru Sitar. Then, the Bledea family built their personal shop on Eminescu Street no.114, where they built 2 kilns. Since 1995 they have moved the shop to Mărășești Street no.11, where it is also to be found today. They endowed technologically, built their own kiln on gas, and involved the two children - Adrian and Adriana - in realizing the production. Since 2003, in order to protect their own creations, they have been registered at OSIM with 5 Invention Patents, another 2 being in course of registration. Each Patent contains 15 models with specific realisation techniques: colouring, skids etc.

In Bledea family there are three generations of potters/ceramists:

1. Doina and Zaharia Bledea
2. Their children:
 - Adrian Bledea and wife Simona
 - Adriana and her husband Dan Matei Bledea
3. Nephews Andrei (10 years old) and Alexandru (8 years old).

The Bledea family's slogan is "quantity, quality, and discipline".

The products created by the Bledea family are analysed at "Laris" Laboratory in Baia Mare, and since 1996, their plumbum content has not exceeded the admitted limit, being many times even under the limit.

They participate in many Exhibitions and Fairs in the country and abroad, a fact that makes the products to have a large distribution on national and international level. In the spring of 2009, the Bledea family has obtained the Great Prize at the first Potters' Fair, organised at the Village Museum "Dimitrie Gusti" in Bucharest.

So that the activity can be seen they created in 1992 the Family association "Doina Bledea", in 2005 the Commercial Society Ceramica Bledea "Z" (that is no longer active). In 2005 they founded and opened the shop "Nobil Art", to present and sell the products created in the family.

The future of "Bledea" ceramics might be the opening of a micro-enterprise, for which they have the necessary field, but do not have the necessary funds. 25-30 persons could work here, and the following institutions could come to existence:

- a centre for reanimation of the ceramics of Baia Mare, Târgu Lăpuș, Saschiz, Vama - Oaş etc., in scientific and gainful conditions, with a larger number of employees;
- a centre of creation;
- a laboratory for technological tests;
- a centre of occupational training, for the creation of workshops, of initiation, of creation, camps, contests etc.

For all these there are sufficient human resources.

5.10.6. PLASTIC ARTISTS JUDIT AND GHEORGHE CRĂCIUN

The Crăciun couple have participated in numerous exhibitions, even in own, individual displays. They have become known for their teaching activities carried out in secondary education. Their educational method is based on the introduction of the widest possible range of technologies to students, making them active in the art.

Some of their students have become acknowledged professional ceramists themselves.

They graduated in 1971 from The Institute of Plastic Arts „Ion Andreescu” in Cluj-Napoca, Ceramics Section, under the guidance of Professor Mircea Spătaru. They have been members of the Plastic Artists’ Union, Branch from Baia Mare since 1990 and 1973 respectively.

JUDIT CRĂCIUN has organised many personal exhibitions, starting with 1996 and 2000 at the Art Galleries in Baia Mare; 1999 at the Art Museum in Zalău; 2001 at Piazza Gallery in Nyíregyháza, Hungary; 2004 at International Ceramic Studio in Kecskemét, Hungary.

GHEORGHE CRĂCIUN, PAU, member since 1973, has organised many personal exhibitions: in 1968 the Opart exhibition at Matei Corvin House, Cluj; 1993 the exhibition called Family Memory, in the Art Museum of Baia Mare; in 2001 at Piazza Gallery from Nyíregyháza – Hungary; in 2004 at International Ceramic Studio, Kecskemét – Hungary. Between 1990 and 1993 he was president of the Plastic Artists’ Union, Baia Mare Branch.

They participated, together, in many county exhibitions and in groups between 1971 and 2002 in Baia Mare:

- 1973, 1986, and 1989 at Triennium and Quadrennial of Decorative Arts, Dalles Hall, Bucharest;
- 1976 at Plastic Experiment, Baia Mare Art Museum;
- 1977 at the exhibition of Artists from Baia Mare, Ivano Frankovsk, USSR;
- 1979 at the exhibition of Artists from Baia Mare, Oradea Art Museum;
- 1980, 2001, and 2002 at the exhibition of Artists from Baia Mare, Art Galleries of Satu Mare;
- 1983-1985, 1989, 2001, and 2002 at the Ceramic Symposium „Faimar” in Baia Mare;
- 1989 at the retrospective exhibition of the Artistic Centre Baia Mare, Dalles Hall Bucharest;
- 1990 at Artexpo, Bucharest;
- 1992 at the exhibition of Artists from Baia Mare, in Budapest and Nyíregyháza, Hungary.

Other collective exhibitions: each year, between 1992 and 2009, at Oradea, Baia Mare, Satu Mare, Bucharest, Arad (Romania); Szolnok, Győr, Nyíregyháza, Kecskemét, Szentendre, Hejce, Kőtelek, Nagykörű, Gyula, Vaja, Budapest (Hungary); Malines (Belgium); Cairo (Egypt); Venice (Italy); Sofia (Bulgaria).

Together, complementing each other, they developed a fruitful pedagogical activity (of andragogy) in the field of visual arts and of ceramics creation and technology.

Between 1973 and 2009 they taught at the Arts High School of Baia Mare, but also in the gymnasium, offering qualified personnel for the ceramics industry of Baia Mare, especially „Faimar”. They have also guided many students towards the profession of ceramic artists, having become, presently, contemporary artists with and individual record.

Benefiting from a positive relation with the local industry, students were able to obtain a permanent technological level, the raw material being offered by sponsors, so they could make their own creations in definitive materials: burnt and glazed clay, glazed refractory bricks, faience founded or moulded manually, either by traditional techniques, or with techniques taken from artistic symposiums. 80% of the works were created in faience, covering the entire range of techniques: projection, moulding the originals by turning at the vertical lathe, but also by moulding manually, covering this way the technological range.



They taught the subject according to the national school curricula, in the elaboration of which they have had direct participation since 1994.

Of great popularity has been the painting under-glaze and painting over-glaze, generating special sections in producing the faience by the graduates who have not taken up an artistic career.

Between 1991 and 2009, participants in the Olympics of „Water-clay“ and the specialisation ceramics brought 25 different prizes to the school.

5.10.7. CERAMIST ARTIST VALENTIN GANȚA

Valentin Ganta is a person not only talented but also able to adapt to changes and try new ideas. His ceramic works have been prize winners for a long time. He has founded a Laboratory in the factory, preparing it for the newest technologies as well as for visitors to observe the technological processes and the exhibitions of the products. He has also worked as visual arts teacher, and he is recently involved in artistic photography.

Ganța Valentin graduated from the **Institute of Plastic Arts Nicolae Grigorescu** in Bucharest, Ceramic Section, in 1978, with the maximum average at the Examination for the Diploma. According to the legal framework of that time, he got a governmental repartition at the **“Faimar” Ceramic Enterprise** in Baia Mare. He chose this factory and this town because it was the newest created factory of ceramic profile in Romania, with possibilities of professional achievements and with an innovating production potential.

Between the years 1978 and 1996, he realized over 3000 ceramics models - household ceramics and ceramics for decoration - compatible with the factory’s technological possibilities and elaborated with respect for ethics and creativity. He was unanimously known as the best technologist in the Creation compartment, his products combining perfectly the proportionality and minimum consumption of raw material as well as the elimination from the phase of știclu of the later phases of retouching, finishing, etc. In this context he honoured the orders for export, for the best technological adaptation of the products contracted to the factory’s production possibilities. His **exceptional work capacity** can be exemplified with the fact that in 1989, the works created by him and found in the technological flux – some of them up to now - represented 32% of the Faimar’s production’s value. At the same time with this work obligation, he attended the **Creation Symposiums** organized by “Faimar”, at the editions from 1983, 1984, 1985, 1989, acquiring each time the First Prize. The art objects created for these occasions participated in the national editions of the **Triennial of Decorative Arts in Bucharest**, being afterwards acquired by The Romanian Museum of Modern Art României and the Museum of Collections.

As extra work tasks, he organized and put in function **The Serigraphy Laboratory**, endowing it and preparing it in a technological way – including human personnel that was instructed by him, in courses formulated and held besides the working hours. Therewith, he led a team of 30 of persons with medium art education, a team which realised the factory’s internal publicity – exhibition panels, documentation room, the permanent exhibition, the participations to annual fairs of consumer goods. He made the publicity pictures of the products for the enterprise’s presentation albums, posters, folders, as well as many other actions with internal or external publicity character.

Because, especially after 1989, a creator's task was limited to copying products imposed by the external orders - many times these did not offer the possibility to use his talent and imagination in practice, the possibilities of cultivating his own creativity disappearing almost entirely, Gața Valentin chose to give up his activity as a ceramist, and became a **teacher of visual arts**. At present he is a teacher at the Sports High School and at The Telecommunication High School in Baia Mare and a museographer at the Mineralogy Museum of Baia Mare.

At the same time, his passion and competency in the field of art and advertising photography has been exploited in different fields, from advertising graphics to digital art - creating various posters, folders, pliante, art catalogues, and fashion photography, participations in national and international exhibitions. For example, in 1990, he won the national **photography contest** organized by Arta Magazine and the Union of Plastic Artists from România, only the abolishment of the magazine preventing him from occupying the aimed job.

The date 1990 is also important for the selection of his ceramics works at the International Contest of Art Ceramics from Faenza - Italy, as the only selected representative of Romania (16 participants from the country, over 2400 from the entire world). Besides the aesthetic qualities of the series of art objects nominated for this occasion, the presence of the artist proved in the contest and exhibition a peculiar creativity, resourceful, by the usage of some unconventional materials in the ceramics field, these acquiring artistic valences, new and astonishing.

As the art critic Mihail Pamfil said, "*Valentin Gața arch of creation encloses in himself everything that is older, as a proven human occupation, and everything that is new: at one end ceramics, and digital art (especially photography, considered in its primary sense of „writing with light”), at the other end. (...) Valentin Gața compresses at this distance (duration) in approximate simultaneity of a creation that refuses to separate the arts on the ground of their novelty degree*".

As in Baia Mare the possibilities of creation in the ceramics fields have diminished, almost disappeared, Gața Valentin's qualities as a creator remain unexploited for the moment, and we consider that the project CeramICa represents an opportunity to develop this creative potential.

5.10.8. CERAMIST STEFAN KÖSZEGHI

Stefan Köszeghi has specialised in the creation of toys and diminutive ceramics, always bringing his special style and humour into the works. Although the highest reputation in the profession is connected with different branches, he has stayed at making toys, creating for the children. His works are nevertheless appreciated by art collectors.

Ștefan Köszeghi has learnt the craft of pottery together with ceramist Bogossy from Baia Mare and has followed the courses at the Art High School in town. The artist is specialised in diminutive ceramics, which renders the forms of traditional ceramics, but also toys, producing utilitarian products. He confesses that although the old potters made toys, besides utilitarian ceramics, the majority of his products are the **diminutive ceramics and toys**, which he updates according to the contemporary demands.

Because he has a happy character, the artist always creates newer and newer forms of toys, which are nice and appreciated by children, but also by the art collectors. His creations are known at a national level, but especially internationally.

He participated in many **exhibitions** in Baia Mare, but also in the country: Sibiu, Horezu, Iași, Bucharest, Cluj etc., as well as abroad: Hungary, France, Germany, Portugal, Italy etc.

The workshop is situated in Valea Borcutului neighbourhood, close to the Citadel and the Pocol Castle.

Young people from Valea Borcutului have been involved in the ceramist's workshop for several years.

For more than 10 years he has led the playing and **ceramic creation camps** taberele in Baia Mare organised at the Hungarian House, where many children learn the secrets of clay.

His value in terms of creativity, together with his concern to pass on the craft, recommends him as a resource for the „CeRamiCa” Project.

5.10.9. CERAMIST VIOREL OPRIS

Knowledge on different fields brings success: Viorel Opris can tell how experience in technology, management, and marketing complete each other.

He graduated from the Polytechnic Institute Timișoara, Faculty of Industrial Chemistry, section Ceramics. From 1971 he worked as chief of section at the Porcelain Factory in Alba Iulia. From February 1979 he worked at "Faimar" Baia Mare as chief of production, Chief engineer and Director. In 1992 he created, together with other associates, the society with private capital called "Vitron". From 2003 till 2008, he was the manager of Commercial Society "Kervog SRL", that, starting from this year, is in conservation. He is presently active as a physical authorised person.

He has a large experience in the technological field, as well as in management and marketing. He can be considered an important resource person.

5.10.10. CERAMIST CORNEL SITAR

An old family tradition revived through participation in fairs and exhibitions, regaining fame and reputation

His father was one of the best known potters from the middle of the 20th century. Cornel Sitar learned the craft working together with his brothers in his father's workshop. He was employed in several ceramic enterprises (Ceramar, Vitron). He is a follower of the pottery tradition from Baia Mare, but he is also one of the craftsmen that contributed to the **reanimation of the old Saschiz ceramics**. He participated in many fairs, exhibitions, and symposia in the country and abroad. His works are found in many museum collections and private ones, but also in restaurants and private clubs.

Present at almost all fairs and exhibitions organized in the country, Cornel Sitar is appreciated for all that he does in this craft's field, but especially for the way in which he keeps the ceramic tradition of Maramureș county (Univ. Prof. dr. Ion H. Ciubotaru).

His occupations:

- Between 1977 and 1978: Chief Ceramic Section, I.P.I.C.C.F. Baia Mare
- 1978 – Chief Ceramic Section I.F.S. "Faimar", Baia Mare
- Between 1981–1992 President at "Avântul" Cooperation Baia Sprie (activity in the ceramics field)
- Between 1992 and 1994, Vice President at SC VITRON SRL Baia Mare (activity in the ceramics field)
- From 1994 and presently Administrator at SC KERAMIS Prod Com SRL Baia Mare (with object of activity the production and sell of traditional and hand-made ceramic products).

In 1995, he became a **member of the "Academy of Traditional Arts"** in Romania. Starting from 1977 he has participated at the **most prestigious national fairs and exhibitions** in the field of ceramics: Sibiu, Iași, Rădăuți, Horezu, Craiova, Cluj-Napoca, Bucharest etc.

Between 2000 and 2009 he participated at the international fairs and exhibitions obtaining great prizes:

Klagenfurt - Austria;

The International ceramics Festival Annaberg (Germany) –IIIrd Prize;

2006 – Christmas Fair at Strasbourg;

2007 – Exhibition "Water and clay" organized at the Romanian Cultural Institute from Venice during the manifestations of the Venice Carnival;

2008 - "The Exhibition of Romanian popular art" at the Royal Cultural Centre from Jordan;

2008 - Representing Romania Euro 2008 Fair in Berna, Switzerland;

2009 – Representing Romania at the Fair from Lyon, France.

5.10.11. OFICINA DO JOE (JOE'S OFFICE)

A successful combination of innovation and environment protection adapted to the taste of customers

Horst Stricker was born in Germany in 1960, where he attended a vocational school for mechanics. For ten years he worked in industry in the production of machinery, thereby developing a true vocation for working with metal.

In 1997, Horst and Gitte Ernst, his partner, moved to Portugal, to the village of Outeiro, integrated in the Peneda Gerês National Park. Here began a new phase with the creation of the "Joe's Office", which develops an intense work, creating **decorative and utilitarian pieces with an innovative design.**

In addition to iron, Horst Sticker is working with materials such as brass, copper and, with excellent results, stainless steel plate, the stainless vulgar. However, it is not only because of the raw materials that their work is presented uniquely multifaceted. The way of old **iron-recycling** and the production of **highly innovative pieces** among others as elegant as astute in its functionality, give the production a distinctive sign that is parallel only in their professionalism.

5.10.12. ARTE DA TERRA (EARTH ART)

Personal ways of working on ceramics: the advantage of unique and recognisable products, using modern technologies and diverse materials

Earth Art is the name of a special workshop. Located in Paradela do Rio, a village in the county of Montalegre, where two artists, José Teixeira and Maria Carvalho, chose to live and work.

José Teixeira, started in the 1960s in the secrets of a street jewellery, much appreciated. But then he switched to the macramé, a technique of working with textile yarn which is a tissue of much higher prices. He used a silver wire to make macramé. But soon, he returned to work with metals. Later, José Teixeira tried to work with other materials as well, such as leather or clay, and also tried to work with the loom.

Now, he works on ceramica handicraft. His work reflects a view of an ironic and sensitive time in the world. Working on **ceramics in a very personal way**, his production has characteristics that are easy to identify and became unique.

Maria awakened to the love of handicrafts in London, working with mentally disabled people.

Maria's pieces convey strong emotions but quietly, talking to us, especially the miracle of life and love. Using **diverse and unusual materials** - recycled pulp of mud, old iron, stone, furze, and earth, their hands create works of art full of respect, tenderness and passion for life.

5.10.13. CENTRO DE ARTESANATO DE MELGAÇO (HANDICRAFT CENTRE OF MELGAÇO)

The Handicraft Centre has been founded with the aim to preserve the traditional handicrafts of the region, by creating working location for the practising artisans as well as providing them with sales location and a place for joint appearance.

Handicraft Centre of Melgaço is near the village of Melgaço. It is an atelier of handicrafts in a rural area in a rustic house, playing an important role in not only the marketing but also in the development of the local craft.

The weaving of linen, weaving in wool (blankets and carpets) are some of the articles that are part of the history of the county.

The embroidery on clothes, towels, blankets are beautiful and diverse, some sober, others more smug. These pieces are made on old linen and the drawing figures are popular or traditional, with the same tone or more colourful.

They are maintaining the traditional crafts of the region, but also giving some innovation that suite the present days.

This handicraft center has also made the regional dolls, with the famous costumes typical of this county. The traditional female figures of the mountain village of Castro Laboreiro, symbolizing, in their black robes, the grief, the nostalgia, the respect shown by those who left: husbands, boyfriends and children. This typical dress is used up to the present day.

Another typical suit is the "Black Agnes", legendary and historical figure of Melgaço that gave its name to the toponymy of the old town and who bravely took the stronghold of Melgaço to the Castilian, struggling body to body with a traitor to the Portuguese homeland.

5.10.14. SOCIEDADE DE CERAMICA ANTIGA DE COIMBRA

Former factory to be converted and extended by facilities for visitors and artisans at the same time: an integrated strategy for bringing together all the relevant actors for the development of the area and its ceramic industry.

The heirs of the legendary Sociedade de Cerâmica Antiga de Coimbra (Old Ceramics Company of Coimbra) plan to implement an innovative revitalisation project in the former faience factory.

There will be a **living museum of ceramics, café, ideas studio and a shop**. It will be open to the public via a tourism and cultural programme based on the history and memory of the site. According to one of the promoters, "the intention is to create a living museum, with people working, where visitors can come in, have a drink and leave with an object purchased in the shop (...). Another aim is to **combine craftspeople and designers**, with their different areas of knowledge". The latter can be achieved by holding design and painting workshops and arts events.

The restructuring of the factory is also intended to regenerate the Terreiro da Erva, a square in the historical centre of Coimbra, thereby helping in the **urban revitalisation** of the area and attracting tourists and visitors.

6. Policy recommendations and directions for development

6.4. Introduction

The core output of the CeRamICa project will be a set of policy recommendations compiled by the partners, based on the exchange of experience and ideas throughout project implementation. Partners have already been requested to put forward their ideas in the form of preliminary proposals for action for local, national and European policies. These proposals are included in the local/regional studies elaborated by project partners.

This chapter summarises the preliminary policy recommendations and developmental ideas in a thematic structure. The aim of the summary is to give an insight into the partnership's the existing ideas out of which more elaborated recommendations will be generated.

6.5. Policy and developmental recommendations

Concrete recommendations have been grouped according to their themes and professional fields. The recommendations focus mostly on regional and national level policies and actions, addressing the relevant authority level.

The developmental ideas are organised in sub-themes within the major themes, for the purpose of structuring the information in comprehensible units. As the themes confirm and complete one another, their order does not signal any priority order. Nevertheless, economic development is a crucial issue, which is completed by technological development, innovation, tourism, and indirectly but organically supported by PR-marketing. Education is also of high importance, as it assures the supply and quality of the labour market.

6.5.1. Economy

- Easing legal and financial burdens:
 - lower rental fees for local events
 - legal and financial support schemes for the development of SMEs, micro- and family enterprises and businesses
 - smoothing of stringent regulations (location establishment, environmental and labour safety regulations) causing difficulties for starting SMEs
 - more efficient protection of intellectual property rights in order to prevent the copying of juried products or the jurying of the copies
 - provision of juried products with tax allowances
 - job creation and economic vitalisation
 - decrease in building and industrial taxes

- creation of state aids schemes to make more advantageous bank loan opportunities
- adoption by public bodies such as local authorities of public procurement rules and mechanisms for innovative products, thereby creating positive discrimination for enterprises involved in ceramics and small crafts activities and sales
- Creating a level playing field for competitors:
 - induction of competing countries to adopt ETS
 - promotion of construction products standards
 - promotion of pollution standards (IPPC)
 - extension of REACH, substances classification to third countries (not only imports to EU)
 - promotion, support and defence of the commerce of national products
- Enhancing economic cooperation:
 - marketing:
 - joint commercial strategies with producers indirectly connected to the sector (e.g. alternative use of ceramics in packaging for honey, sweets, alcoholic drinks, marmalade, etc.)
 - exploration of market niches with the control of distribution and supply circuits
 - shift in production structure – adaptation to market needs by creating new trade marks, brands, “accredited products”
 - scanning and utilisation of tender opportunities: complementary support for access of information and partners with the financial support of the Structural Funds
 - organisation of fairs and exhibitions at local, regional, national and international levels to create an opportunity to build professional and economic relations
 - promotion of rebuilding image
 - incubation:
 - employment of a development expert for local coordination in order to boost clusterisation and other adequate forms of cooperation
 - setting up of a business incubator that provides artisans with an opportunity to join the market with smaller financial investments and with trainings on marketing and management activities
 - strengthening horizontal and vertical cooperation among local actors and stakeholders
 - employment of young designers in factories
 - employment of young designers as instructors in various educational facilities
 - promotion of joint action among local producers and reduction of competition at local level to achieve finances of scale

- cooperation in the widest possible range, including raw material suppliers, designers, producers, commercial connections, local representation of the sector, educational institutions
- creation of a ceramics and/or small crafts cluster
- launching of international mobility programmes for artists and designers

6.5.2. Research, technology & innovation

- Developing technologies:
 - constant development of cleaner technologies
 - introduction of alternative energy sources
 - reduction of total energy use in production processes, management systems, transportation and services
 - optimisation of products in terms of health and safety (eco-products)
 - promotion of the use of ICT technologies by giving financial support for the implementation of ICT tools
- Providing direct R&D resources towards cleaner technologies and even more efficient production processes
- Exploiting existing environmental management systems
- Supporting research to identify the best available technologies
- Adopting economic and technological intelligence strategies to anticipate changes in technologies, markets and products, especially shifts in consumer preferences
- Fostering innovation in products, processes and corporate organisation

6.5.3. Knowledge & education

- Enlarging cooperation between generations, institutions and sectors:
 - establishment of a professional association for the exchange of ideas and experiences
 - dissemination of good practices of the region among the artisans
 - creation of benchmarks for artisans to discuss techniques and practices
 - setting up of master-student contacts in an institutional way by creating a common scholarship tender
 - cooperation between vocational schools and elementary schools specialised in general and special arts
 - development of a new educational profile to vocational schools in cooperation with ceramic artists

- professional cooperation with higher educational institutions
- Enhancing the level and quality of education and training:
 - targeted training programmes for low-skilled workers
 - trainings for specialisation of workers
 - provision of locations for practice at all levels of education
 - investment in new education and training programmes or RTD programmes attracting designers or engineers to the sector
 - hiring of acknowledged and talented designers in secondary and tertiary education
 - launching of Bachelor and Master training programmes connected to ceramics and exploitation of programme accreditation
 - launching of international postgraduate education, invitation of guest lecturers from abroad
- Involving local children at an early age:
 - introduction of ceramics and small crafts activities in kindergartens
 - organisation of non-profit summer camps
- Organising trainings, workshops and seminars in the following fields
 - design applied to the crafts
 - new technologies
 - business management and marketing

6.5.4. Tourism

- Utilising the expansion of cultural heritage tourism:
 - revitalisation and continuation of traditions – connection of ceramics and small crafts with other typical tourist attractions of the region
 - creation of arts thematic routes connecting the typical locations of crafts with sales locations
 - establishment of open workshops where tourists can observe and try the making of the art, and buy products
 - exploitation of cultural activities in the region and promotion of traditional production procedures, design and activities
- Creating common sales locations:
 - common pottery house, exhibition and creative house
 - common handicraft shop for the local small craftsmen in order to disburden customer reaching
 - establishment of a common incubator house for small craftsmen with sales opportunities

- Timing:
 - connection of the dates of fairs with the tourist season in order to reach more customers
 - revision and transformation of the opening hours and schedules of shops and enterprises
- Developing product and services quality:
 - enhancement of attractiveness and functionality of the workshops, improvement of operational conditions
 - promotion of social responsibility of the companies, and making it transparent to customers, suppliers, shareholders and the general public
 - incorporation of new areas of activities in factories in line with the “educational factory” model: (i) establishment of shops, studios and galleries, (ii) building cooperation with schools and learning centres, (iii) organisation of workshops and exhibitions
- Organising design competitions financed by the local authority in order to define products to represent the area as a touristic attraction
- Establishing a distribution network based on a strong collaboration between NGOs with tourist activities, tourism agencies and companies
- Promoting industrial tourism projects, in association with cultural and scientific tourism, making entrepreneurs and other stakeholders aware of the advantages of this type of activity
- Promoting domestic and international tourism, thus increasing demand for handicraft products

6.5.5. PR & marketing

- Enhancing visibility
 - concentration of local small craftsmen by a common brand in order to highlight the uniqueness of the products of the region
 - strong positioning in high-quality products with fashionable design
 - image development of the sector – enhancement of attractiveness in the eyes of the skilled labour force by investment in technology programmes and the development of cleaner products
 - creation of awards for craftsmen connected to local fairs and events (various aspects could be awarded: product design and quality, innovative character of the artisan, etc)
- Promotional publications
 - creation and operation of a common website with a separate menu item for the illustrated introduction of the representatives of the sector in national and foreign languages



- preparation of a high quality introductory publication about the artisans (in at least two languages) in large numbers, for cultural locations and shops as well as other sites visited by tourists
- preparation of short movies for local media about small crafts with the purpose of raising their reputation, to be broadcast by the national television or other channels
- dissemination of best practices through various media channels – TV, radio, booklets, local newspapers, etc – to reach potential skilled workforce and customers

ANNEX 1

CeRamICa Proposal for the joint methodology of the SWOT and market analyses to be carried out by each partner

Task:

Carry out a situation and market analysis of partner areas' / regions' ceramic and small craft sectors using SWOT analysis. The survey's objective is to get a comprehensive picture of the sector including data on the demand and offer sides of the market, the current and expected difficulties and the ongoing initiatives in order to identify the regional strengths and weaknesses.

The survey addresses the following questions:

- What are the characteristic features of the sector: What are the local/regional factors promoting or preventing the development (skilled labour, existing traditions, intellectual capital, sector related know-how, existing education systems, number of enterprises or businesses or the lack of the above: low level of young enterprises and entrepreneurs, ageing craftsmen, unpredictable market trends, lack of market information and strategies)?
- What kind of local/regional sector related policies are available: Are there any national level measures, policy initiatives promoting the ceramics/craft sector itself or the SMEs in general? Are the current and future problems well-known and acknowledged by the local politicians responsible for the development of the cities involved? Are there any "civil" or quasi -civil organisations or professional associations that are able to influence local/regional policies and act as a lobby force for the sector?
- Can we identify "good practises", proven successful solutions which could further contribute to the development of the ceramics sector or which, with more funding, could produce more and tangible results, models that could be used as best practises not only for the partner regions but for other European countries (education models, information and marketing systems for better market promotion, local/regional self-organisations, professional co-operations, cluster operations, local/regional initiatives to support the renewal and the technology development of the sector, concrete funding schemes, etc.)?

How can the market survey serve the implementation of the project?

According to the application, the following steps will be carried out:

- 1) Carrying out market surveys on partner country level by using commonly accepted methodology
- 2) Organising partner level workshops to present and discuss the outputs of the market survey with the local/regional stakeholders representing all key local players that could be relevant for the sector: enterprises and entrepreneurs operating in the sector, institutions of education, service providers, art organisations, professional associations, NGOs, etc. The purpose of the workshop is to inform the relevant stakeholders, to listen to their opinion and to commit them to the objectives and planned activities of the project.
- 3) Compiling the local/regional studies into one single comprehensive study to obtain an international comparative market study: identifying partners' common problems, market developments, proposed interventions, strategies and also those successful or not successful practises, practical solutions, policy initiatives that partners identified while carrying out the market survey. As a conclusion, the study will make policy recommendations based on the partners' outputs.

Methods, methodological approaches:

We recommend using the combination of two different methods:

- 1) Desk research: structured collection and processing of existing data, relevant studies and written materials (covering at least a period of 3-5 years)
- 2) Field research: conducting primary surveys in order to make the information gathered by desk research more focused and nuanced (individual and group consultations, thematic workshops, focus-group discussions).

For preparing the analysis (market study), we recommend summarising information and knowledge gathered and processed by the desk and field research phases in a structured way.

Main issues and questions to be addressed by the desk research:

- Analysis of the production and labour structure of the ceramics/craft sector: product and company structure (proportion of micro-, small- and medium-sized enterprises, their geographical features), structure of labour (age, gender structure, income levels, etc.).
- Educational background of ceramic/craft sector (secondary schools, vocational training, higher education and other adult training facilities, their service portfolio and accessibility).
- Overview of national/regional and local development policies related to the sector.
- Overview of the ceramic/craft industry's markets: development trends of local/regional market, if there are export activities providing an overview of market opportunities, listing those problems and difficulties which

prevent a better export performance (competition, old fashion product portfolio, lack of market-oriented selling strategies, etc.).

- Identification and listing of institutions and organisations having direct impact on the development of the sector.
- Collection and listing of good practises to be identified during the survey

The key thematic areas and actors of the field research:

Thematic area:

- In depth and nuanced analysis of the sector's problems
- The general business environment of the sector: administrative rules, legal environment, financial and tax conditions
- Collecting opinions and thoughts of the sector related opinion leaders regarding the general situation and the future development trends of the sector
- Mapping of previous, ongoing and expected measures, policies, concrete solutions of those policy and decisions-making bodies that have a direct influence on the sector

Actors to be involved:

- Representatives of the sector: individual craftsmen, SMEs and big enterprises, art ateliers, small businesses of manufactures.
- Education organisations providing regular or specific trainings for the sector or if there are no such organisations available, it is recommendable to involve (to interview) the representatives of secondary schools and vocational training institutions to clarify whether they would be open to launch such kinds of new programmes
- Organisations responsible for marketing and sales activities for the sector: wholesale and export organisations, sales co-operatives, chambers of commerce
- Representatives of regional/local development policy making bodies

Recommended interview techniques:

- Individual deep interviews (approx. 1,5-2 hours): half-structured interviews, e.g. the interview is based on a few groups of questions prepared by the interviewer but leaving a lot of freedom to the interviewed to explain his/her points, covering side issues not directly attached to the main stream but providing valuable information to the subject as a whole
- Thematic workshops (app. 2.5-3 hours): participants are representatives of relevant homogeneous professional groups (education providers or sales organisations or various groups of local enterprises, etc.). It is a highly focused discussion moderated by a professional expert where participants may generate a wide and lively discussion by fertilising each others' thoughts.
- Focus group meeting (2,5-3 hours): a moderated discussion among people representing different segments of the project, the objective is to

confront various aspects relevant for the project in order to enrich the general understanding of the situation

The partner level market study based on the desk and field researches' outputs has to be compiled according to the following structure:

- 1) Methodological background: it explains the methods used for the preparation of the study including information on the period analysed (i.e. 3-5 years) and on the interviewed actors and target groups
- 2) Situation analysis: using dynamic methods of analysis, e.g. comparing data of certain periods of time
 - Overview on the production/product structure including information on the technological background
 - Labour structure of the ceramic/craft sector
 - Overview of the market trends
 - Characteristic features of co-operation and clusterisation within the sector
 - Overview of the business environment (financial, tax, legal and administrative rules and regulations)
 - Past, ongoing and expected measures of local and regional policy and decision-making bodies
- 3) Listing and explaining problems that are the most relevant as far as the future opportunities of the sector are concerned, together with the presentation of possible solutions
 - Detailed presentation of the identified and proposed "best practises"
 - Further steps, policy recommendations contributing to the development of the sector

ANNEX 2

The NACE codes relevant for the transnational comparative study (activities covered by the study are indicated in blue).

26 MANUFACTURE OF OTHER NON-METALLIC MINERAL PRODUCTS

261 Manufacture of glass and glass products

2611 Manufacture of flat glass

2612 Shaping and processing of flat glass

2613 Manufacture of hollow glass

2614 Manufacture of glass fibres

2615 Manufacture and processing of other glass including technical glassware

262 Manufacture of non-refractory ceramic goods other than for construction purposes; manufacture of refractory ceramic products

2621 Manufacture of ceramic household and ornamental articles

2622 Manufacture of ceramic sanitary fixtures

2623 Manufacture of ceramic insulators and insulation fittings

2624 Manufacture of other technical ceramic products

2625 Manufacture of other ceramic products

2626 Manufacture of refractory ceramic products

263 Manufacture of ceramic tiles and flags

2630 Manufacture of ceramic tiles and flags

264 Manufacture of bricks, tiles and construction products, in baked clay

2640 Manufacture of bricks, tiles and construction products, in baked clay

265 Manufacture of cement, lime and plaster

2651 Manufacture of cement

- 2652 Manufacture of lime
- 2653 Manufacture of plaster
- 266 Manufacture of articles of concrete, plaster and cement
- 2661 Manufacture of concrete products for construction purposes
- 2662 Manufacture of plaster products for construction purposes
- 2663 Manufacture of ready-mixed concrete
- 2664 Manufacture of mortars
- 2665 Manufacture of fibre cement
- 2666 Manufacture of other articles of concrete, plaster and cement
- 267 Cutting, shaping and finishing of stone
- 2670 Cutting, shaping and finishing of stone
- 268 Manufacture of other non-metallic mineral products
- 2681 Production of abrasive products
- 2682 Manufacture of other non-metallic mineral products**