

Research Note n°3 (2020)

«Sleeping Beauty» III, The Swiss Creative Economy: Some statistics- based reflections on the current debates in Switzerland

By Roman Page and Christoph Weckerle

This research note is part of a series of four notes published by the Zurich Centre for Creative Economies (ZCCE) on the economic consequences of the coronavirus for the cultural sector.

Introduction – (Christoph Weckerle)

Note 1 – The WPA, Roosevelt and Artist Relief in America 1936–1939 (Frédéric Martel)

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ABSTRACT | Since February 2020, the Covid-19 epidemic has affected entire sectors of the world economy. The creative economy is being hit hard, not only in economic terms but also in terms of its identity and organisation. Our four research notes aim: (1) to recall the history of the «relief» programmes set up in the past to aid the cultural sector, especially during the Great Depression of 1929; (2) to analyse the current situation of the cultural sectors, both as a whole and sector by sector; (3) to present the Swiss creative economy through some statistics-based reflections on the current debate in Switzerland; and finally (4), beyond the current debates: to consider alternative strategies for analysing the creative economy.

Introduction**Introduction**

The effects of Covid-19 on the cultural sector are only just beginning to be described, but they already appear to be dramatic. Almost all cultural institutions, including museums and galleries, concert halls or music clubs, bookstores or libraries are closed. Cultural demand has collapsed. The most important events have been cancelled, at least until autumn, and the lack of international flights even makes this recovery problematic. Smaller cultural enterprises and micro-entrepreneurs are sometimes no longer able to pay their rent and are threatened with eviction. There is even criticism that the protective measures for small and medium-sized enterprises are no longer adequate for the creative industries.

This break picture does not, however, reflect the reality of all sectors. Digital platforms, for example, those streaming content, are becoming increasingly popular in terms of subscriptions and consumption duration. As are some international agencies. Innovative organisations are repositioning themselves with new digital offerings. The situation seems confused, just as points of view and analyses are contradictory; usual concepts, such as public funding for culture or cultural industries, are becoming muddled.

As a centre for research and analysis, the Zurich Centre for Creative Economies (ZCCE) has been analysing cultural developments, contextualising current phenomena and identifying sustainable strategies for over ten years. It has done so always in conjunction with other disciplines, such as science, economics, social issues or politics. This work is presented in particular in form of «Research Notes,» which are published at irregular intervals, yet flexibly and swiftly.

These notes engage subjects and questions being researched at the ZCCE and which we wish to make accessible beyond the scientific community. These observations and analysis are «work in progress» and will be developed more fully in a scientific manner; we nevertheless consider them already relevant enough to feed into the ongoing debate.

For all these reasons, we have felt it essential to examine the consequences of the Covid-19 epidemic on the cultural sector in a series of three «Research notes»:

– This third note 3 provides an analysis of the cultural sector based on official statistics. We evaluate the latest available data and try to reveal the specifics of the creative economy which are too often overlooked in the current discussion. (Another note, forthcoming in late summer, will evaluate the newest data and register the first measurable effects of the Covid-19 crisis).

– Two notes have already been published. Note 1 approaches the current situation from a historical perspective and discusses the responses to comparable situations in the past and to what extent insights can be derived from them. Note 2 talks to affected cultural actors and organisations. The roughly 40 interviews that we conducted on different continents capture an extremely heterogeneous — and thus demanding — situation, which calls for urgent action.

– Note 4, to be published in June, will seek to relate the findings drawn from official statistics to practices and processes observed in the creative economy (zooming in). We also aim to develop alternative ways of discussing future strategies for the creative economy.

Hence, Research Notes 1–4 do not attempt to provide short-term advice to solve

Research Note III

The Swiss Creative
Economy

Some statistics-based
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the current problems, but strategic analysis and reflection on sustainable value creation constellations or funding scenarios. In doing so, we apply different perspectives — historical, sociological, statistical or entrepreneurial — in accordance with the research

principles of the ZCCE. We do this consistently from a national and an international perspective.

Christoph Weckerle

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Research Note III

The Swiss Creative Economy Some statistics-based reflections on the current debates in Switzerland

This Research Note provides a statistical analysis of the creative economy. Drawing on the latest available Swiss Labour Force Survey (SLFS) by the Federal Statistical Office (FSO)¹, we conducted our own calculations to estimate the size and structure of the Swiss creative economy employment and its sub-sectors. Some of the tables and graphs below are published for the first time in Switzerland. The used dataset does not yet allow making any statements on the direct impact of Covid-19 on the creative economy. This will only be possible in late summer. What follows is therefore a picture of the pre-corona period. This basis will enable us to provide a comprehensive picture of the effects of the crisis in autumn.

We aim to provide a general overview of both the Swiss creative economy and its heterogeneous sub-sectors. This force field, between the whole and its parts, is one of the challenges in the current discussions in Switzerland: Whenever financial support or

bridging funds are concerned, people try to describe a homogeneous industry. At the same time, however, most sub-sectors are considered to be affected differently. The live sector is collapsing, while digital formats are growing. The demand for design services is coming to a standstill, while writers are continuing to write ... Thus, Research Note 3 offers a multifaceted view of the creative economy as a whole and of its various sub-sectors in particular. We do not focus on the measures taken for organisations and individuals in the public segment of the cultural sector — even if this is sometimes difficult since public and private are often confused.

¹ Since 1991, the Federal Statistical Office has conducted the SLFS on an annual basis on behalf the Federal Council. This telephone survey of individuals provides representative data on the socio-economic structure of Switzerland's permanent resident population

and on labour force participation. The SLFS is carried out on a representative sample based on around 120,000 annual interviews.

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III.1 Creative Economy, Switzerland, 2016-2018

This statistical analysis approaches the Swiss creative economy from the perspective of economic activities and occupations.² This approach rests on the assumption that creative occupations also exist outside the creative industries: «This methodology is based on the theoretical and empirical argument that the creative industries are ‘those industries that specialise in the employment of creative talent for commercial purposes’ — that is, have unusually high proportions of their workforce employed in creative occupations (‘creative intensity’).»³

Based on the classification for creative occupations and industries according to the UK’s DCMS and Nesta,⁴ we estimate the size of the Swiss creative economy employment and its three main components (specialist, non-specialist, and embedded employment) using the Swiss Labour Force Survey (SLFS).

Creative economy employment is given by the sum of creative industries employment and all creative jobs in other industries (embedded jobs). The creative economy thus consists of three types of employees:

Tab. 1: Creative Economy Employment, Switzerland, 2016–2018
Employed persons

	Specialist	Non-Specialist	Creative Industries	Embedded	Creative Occupations	Creative Economy
2016	124,000	134,000	258,000	239,000	364,000	498,000
2017	118,000	137,000	255,000	232,000	350,000	487,000
2018	130,000	142,000	273,000	245,000	375,000	517,000
Average 2016–2018	124,000	138,000	262,000	239,000	363,000	501,000
Share of creative economy in %	25	28	52	48	72	100
Share of total workforce in %	3	3	6	5	8	11

Source: FSO, SLFS; own calculations Zurich Centre for Creative Economies (ZCCE) at Zurich University of the Arts (ZHdK)

² See Page, Roman / Weckerle, Christoph, Creative Economy Switzerland, in Schiller, Janine (Hg.): Unternehmerische Strategien für eine «Positive Ökonomie», 3rd Creative Economies Report Switzerland, Zürich 2018

³ Bakhshi, Hasan / Hargreaves, Ian / Mateos-Garcia, Juan: A Manifesto for the Creative Economy. Nesta, London 2013.

⁴ The Dynamic Mapping methodology, originally applied by Nesta to classify the creative economy,

consists of three stages. First, a set of occupations is identified as creative. Second, the workforce intensity of these occupations is calculated for each industry. Third, based on the distribution of creative intensity across industries, a threshold intensity is identified, above which all industries are determined to be creative for measurement purposes, while those below the threshold are not. Finally, creative economy employment is estimated according to the Creative Trident approach.

1. Non-specialists (support): employed persons working in a creative industry, but who are not themselves employed in a creative occupation, for instance, a bookkeeper at a publishing company.

2. Specialists: persons working in creative occupations in creative industries, for instance, a dancer in an ensemble or a journalist writing for a daily newspaper.

3. Embedded: persons working in creative occupations outside the creative industries, for instance, a game designer working in financial services. (Tab 1)

Table 1 shows employment in the Swiss creative economy in the period 2016–2018 and the average for these three years. Between 2016 and 2018, about 501,000 people were employed on average in the Swiss creative economy. This represented 11 % of the total workforce. About one half (262,000) were employed in the creative industries, while the other half (239,000) pursued a creative occupation outside the creative industries («embedded») in the wider creative economy.

If only those persons with a creative profession, i.e. creative occupation (363,000), are considered, around two thirds (239,000) earn their living outside the creative industries. These figures can also be displayed in a Creative Trident format, which presents industries as columns and occupations as rows.

This table also shows the relationship to the Swiss total economy. Creative economy employees, calculated as the sum of the three shaded fields, account for about one out of ten jobs in Switzerland.

The table shows that, according to an internationally established definition, the creative economy has reached a substantial size in Switzerland. It is therefore obvious that the various sub-sectors become apparent in a crisis like the present one. Strikingly, however, Switzerland's creative economy is barely closing rank and unifying its lobbying, not even during a crisis. Organisations

Tab. 2: Creative Trident, Switzerland, Average 2016–2018
Employed persons

	Creative Industries	Non-Creative Industries	All Industries
Creative Occupations	Specialists	Embedded	Creatively-occupied jobs
	124,000	239,000	363,000
Non-Creative Occupations	Non-Specialists	Non-Creative	Non creatively-occupied jobs
	138 000	4,138,000	4,275,000
All Occupations	Working in the Creative Industries	Working outside the Creative Industries	Workforce
	262,000	4,377,000	4,639,000

Source: FSO, SLFS; own calculations Zurich Centre for Creative Economies (ZCCE) at Zurich University of the Arts (ZHdK)

Tab. 3: Employment in the Creative Economy by Sub-sectors, Switzerland, Average 2016–2018
Employed persons

	Specialist	Specialist	Industries	Embedded	Occupations	Economy
IT, software and computer services	37,000	43,000	80,000	76,000	113,000	156,000
Advertising and marketing	10,000	11,000	21,000	71,000	81,000	92,000
Architecture	29,000	26,000	54,000	23,000	52,000	77,000
Design: product, graphic and fashion; crafts	10,000	8,000	18,000	44,000	54,000	63,000
Music, performing and visual arts	12,000	20,000	32,000	7,000	19,000	39,000
Publishing	8,000	11,000	19,000	9,000	17,000	28,000
Film, TV, video, radio and photography	14,000	8,000	22,000	4,000	18,000	26,000
Museums, galleries and libraries	5,000	10,000	15,000	4,000	9,000	19,000
Creative Economy	124,000	138,000	262,000	239,000	363,000	501,000

Source: FSO, SLFS; own calculations Zurich Centre for Creative Economies (ZCCE) at Zurich University of the Arts (ZHdK)

representing the different sub-sectors have various agendas and demands: adult education centres, game developers or a network of micro-professionals. Artists and designers do not consider themselves «creatives» or members of the creative economy.

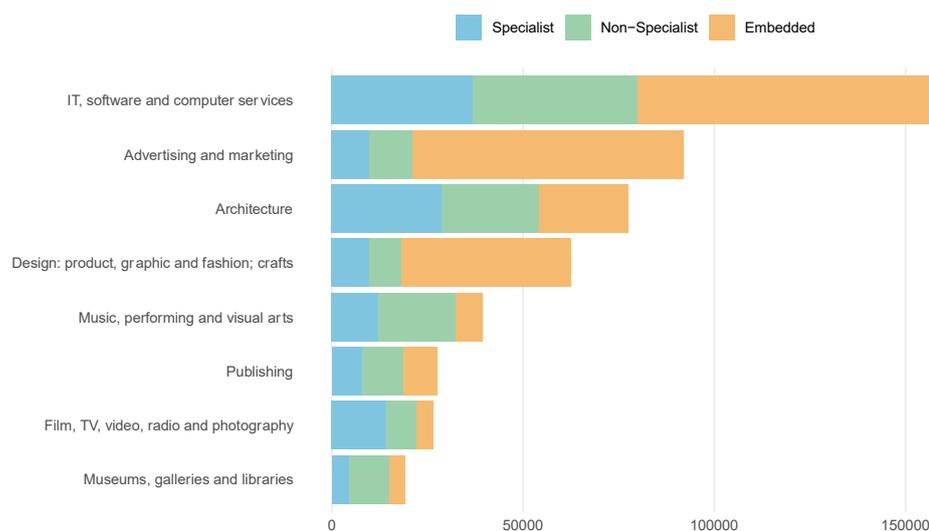
From this diversity arises a complex situation for funding bodies or political decision makers. Is the creative economy a system-relevant industry in which appropriate measures and strategies should be applied to overcome the economic downturn due to Covid-19? Or is it simply a communicative umbrella that subsume and interconnects very heterogeneous sub-sectors?

How to deal with this challenge? On the international level, arguments have evolved in recent years. While initially mostly quantitative data were deployed (number of employees, share of GDP, etc.), qualitative examples are now increasingly used.

The focus is on the role of the creative economy in generating added value in the economy as a whole (see WIPO, 2017)⁵ or in developing new understandings of innovation (see Nesta). Storylines have been developed which extend beyond single industry groups.

⁵ World Intellectual Property Report 2017: Intangible capital in global value chains. Geneva : World Intellectual Property Organization (WIPO) 2017.

Fig. 1: Employment in the Creative Economy by Sub-sectors, Switzerland, Average 2016–2018
Employed persons



Source: FSO, SLFS; own calculations Zurich Centre for Creative Economies (ZCCE) at Zurich University of the Arts (ZHdK)

III.2 Analysis of the creative economy by sub-sector and by some further relevant criteria for discussing the effects of Covid-19

We are convinced that also in the case of Switzerland more detailed analysis of the different sub-sectors and a wider set of criteria are needed in order to generate more robust analysis. This is the goal of what follows.

III.2.1 Employment by Sub-sectors in the Swiss Creative Economy

The figures calculated for Switzerland's total creative economy can be shown for individual creative economy sub-sectors.

Employment is highest in the sub-sectors IT, software and computer services (156,000 employed persons), Advertising and marketing (92,000) and Architecture (77,000).

These three sub-sectors account for two thirds of all employed persons in the creative economy.

Figure 1 shows that the relation between «specialists» and «non-specialists» differs in the creative industries. While the proportion of «specialists» predominates in Film, TV, video, radio and photography or Architecture, the opposite is evident in Music, performing and visual arts, for example. A preliminary interpretation might be that productions in these fields are more staff-intensive and more diversified than the core services of the Architecture market.

The relation between the creative industries and «embedded» is similar. While the high value for Advertising and marketing or for Design: product, graphic and fashion;

Fig. 2: Employment in the Creative Economy by Major Region, Switzerland, Average 2016–2018

Employed persons, Share of total workforce in %



Source: FSO, SLFS; own calculations Zurich Centre for Creative Economies (ZCCE) at Zurich University of the Arts (ZHdK)

crafts indicates that these occupations are decentralised and can be found strongly outside the advertising resp. design industry, the comparatively low value for Film, TV, video, radio and photography, Music, performing and visual arts or Museums, galleries and libraries can be interpreted the other way round. However, these are merely preliminary interpretations, which need to be deepened in exchange with industry experts.

It is common knowledge that the employment structure in the creative economy is heterogeneous. There are larger sub-sectors like advertising or IT / software and smaller ones like museums and galleries. In Switzerland, however, we are less familiar with the fact that some segments have a very high proportion of «embedded» actors.

This could mean that the current discussion on the impact of Covid-19 on the creative economy is only one relevant aspect. A possible collapse of some sub-sectors of the creative economy could also have substantially impact other parts of the economy.

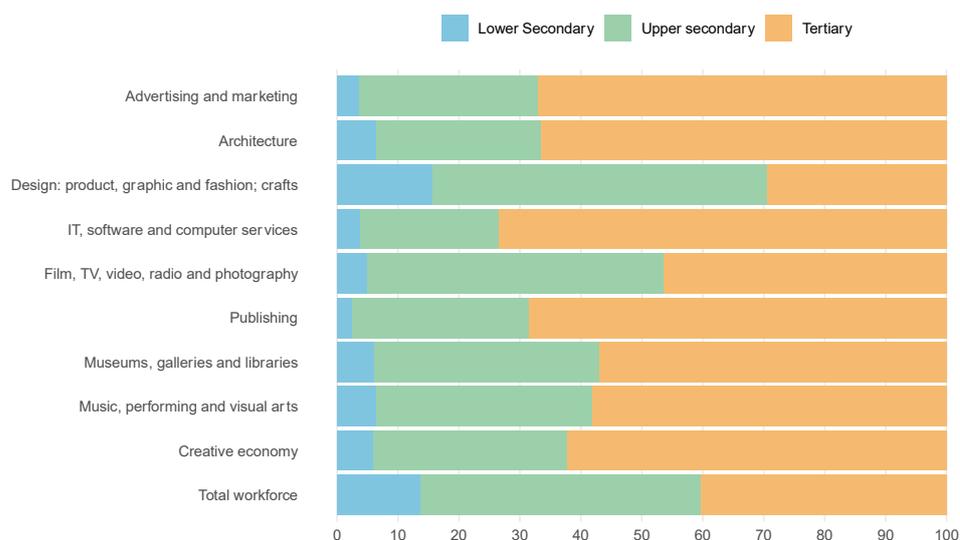
III.2.2 Employment by Major Region

With 130,000 employed persons in the creative economy, the Zurich region makes up a quarter (26 %) of the Swiss creative economy, followed by Espace Mittelland (97,000, 19 %), Lake Geneva region (83,000, 17 %), Northwestern Switzerland (66,000, 13 %), Eastern Switzerland (60,000, 12 %), Central Switzerland (49,000, 10 %) und Ticino (16,000, 3 %).

The creative economy's share of total workforce in the Zurich region (15 %) is higher than in Switzerland as a whole (11 %), while in the other major regions the share is lower than in Switzerland as a whole.

The region of Zurich might be particularly affected by a slump in the creative economy. As Switzerland's economic engine, a weakening of the creative economy in Zurich could affect the whole of Switzerland.

Fig. 3: Employment in the Creative Economy by Level of Education, Switzerland, Average 2016–2018, Employed persons, Shares in %



Source: FSO, SLFS; own calculations Zurich Centre for Creative Economies (ZCCE) at Zurich University of the Arts (ZHdK)

Thus, there is a need for analysis on the regional and on the national level when discussing future scenarios of the creative economy.

III.2.3 Employment by Level of Education

In the total creative economy, the share of employed persons with tertiary education (62 %) is clearly higher than in the total workforce (40 %). The sub-sectors IT, software and computer services (73 %), Publishing (68 %), Advertising and marketing (67%) and Architecture (66%) have the highest shares of persons with a completed education on tertiary level.

The sub-sector Design: product, graphic and fashion; crafts have the lowest share (30 %).

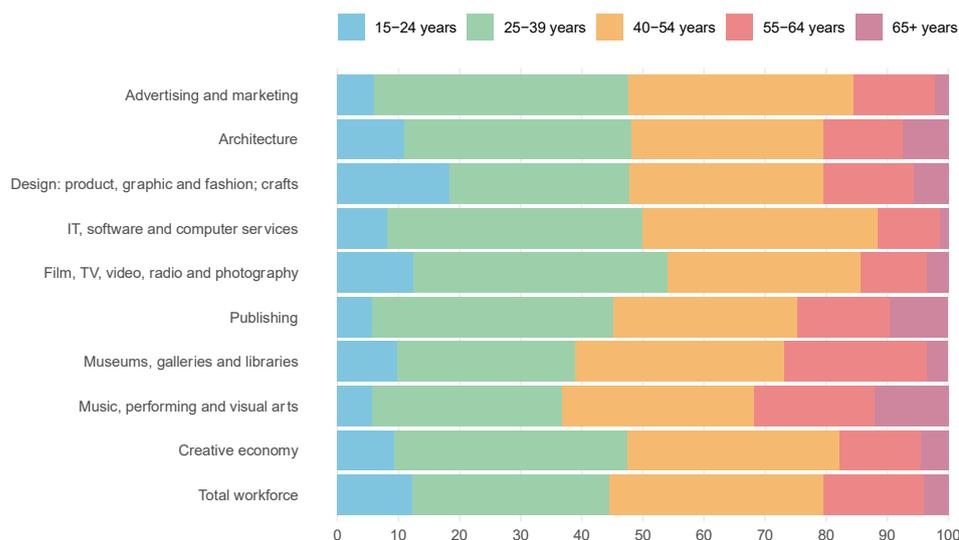
The creative economy shows a significant proportion of highly qualified people. Accordingly, a high intrinsic motivation can be assumed, which is also an important element for a successful start-up ecosystem.

Although some differences are evident between the sub-sectors (e.g. design and publishing), the high level of education seems to be a stable indicator for the creative economy.

III.2.4 Employment by Age Class

In the total creative economy, the share of employed persons aged 25–39 (38 %) is higher and the share of employed persons aged 55 and more (18 %) is lower than in the total workforce (32 % and 21%). The sub-sectors Advertising and marketing (42 %), IT, software and computer services (42 %),

Fig. 4: Employment in the Creative Economy by Age Class, Switzerland, Average 2016–2018
Employed persons, Shares, in %



Source: FSO, SLFS; own calculations Zurich Centre for Creative Economies (ZCCE) at Zurich University of the Arts (ZHdK)

as well as Film, TV, video, radio and photography (42 %), have the highest share of persons aged 25–39.

The sub-sectors Music, performing and visual arts (32 %), Museums, galleries and libraries (26 %) and Publishing (25 %) have the highest share of persons aged 55 and more.

The proportion of persons aged 25–39 in the creative economy is higher compared to the total workforce in almost all sub-sectors. This indicates a rather young economy, one that is sometimes most probably linked to an internationally connected start-up scene. Both elements are highly relevant for Switzerland as an innovation location.

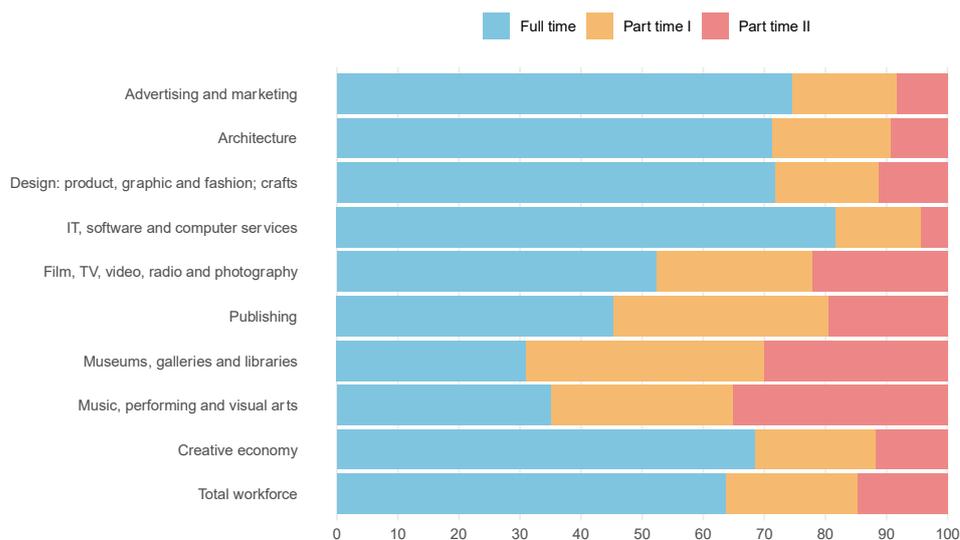
III.2.5 Employment by Work-time Percentage

In the total creative economy, the share of full-time workers among those employed (68 %) is slightly higher than in the total workforce (64 %) and the share of part-time workers among those employed (32 %) is slightly lower than in the total workforce (36 %). The sub-sectors IT, software and computer services (82 %), Advertising and marketing (75 %), Design: product, graphic and fashion; crafts (72 %) and Architecture (71 %) have the highest shares of full-time workers.

The sub-sectors Museums, galleries and libraries (69 %), Music, performing and visual arts (65 %) and Publishing (54 %) have the highest share of part-time workers.

Fig. 5: Employment in the Creative Economy by Work-time Percent, Switzerland, Average 2016–2018

Employed persons, Shares in %



Source: FSO, SLFS; own calculations Zurich Centre for Creative Economies (ZCCE) at Zurich University of the Arts (ZHdK)

Comparing full-time and part-time workers changes the customary picture of the creative economy in Switzerland. While funding bodies often talk about a high density of part-time workers, the creative economy in Switzerland is also about stable and long-term structures. This is the case both for most sub-sectors and for the creative economy as a whole. Nevertheless, there are significant differences, e.g. between music and architecture.

III.2.6 Employment by Contract Form

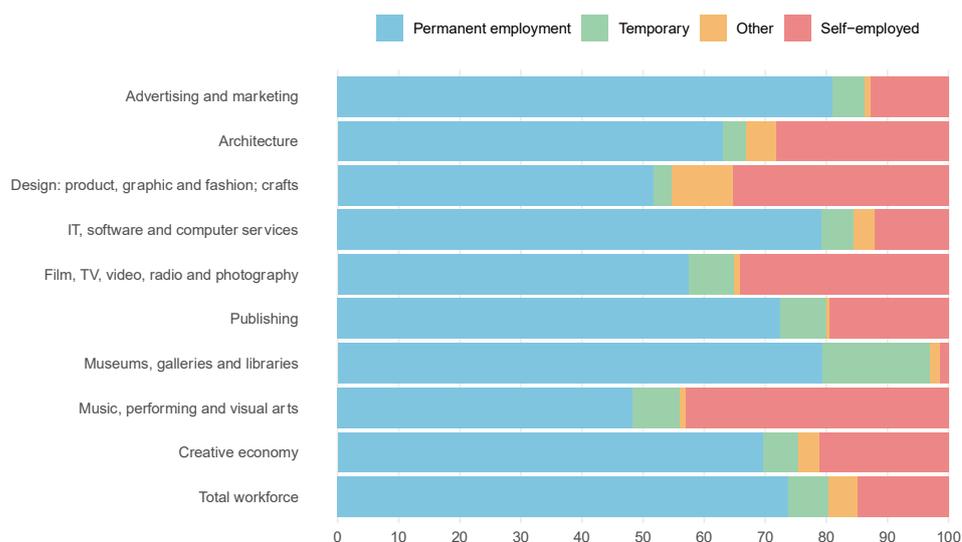
In the total creative economy, the share of permanently employed persons (70 %) is slightly lower and the share of self-employed persons (21 %) slightly higher than in the total workforce (74 % and 15 %). The sub-

sectors Advertising and marketing (81%), as well as IT, software and computer services (79%), have the highest share of permanently employed persons and the lowest share of self-employed ones (13 % and 12 %). The sub-sectors Music, performing and visual arts (48 %) and Design: product, graphic and fashion; crafts (52 %) have the lowest share of permanently employed persons (%) and the highest share of self-employed ones (43 % and 35 %).

Figure 6 points out a variety of information missing in the ongoing discussions on the creative economy in Switzerland:

Fully in line with international trends, there is a clear tendency to set up companies in the creative economy. (Moreover, official statistics are unable to capture less traditional forms such as informal networks or collectives. The proportion can therefore be

Fig. 6: Employment in the Creative Economy by Contract Form, Switzerland, Average 2016–2018
Employed persons, Shares in %



Source: FSO, SLFS; own calculations Zurich Centre for Creative Economies (ZCCE) at Zurich University of the Arts (ZHdK)

assumed to be even higher.) The differences between the sub-sectors are considerable and reflect the various legal and institutional frameworks, e.g. between museums and the visual arts. Permanent employment is almost the same in the creative economy as in the total workforce. The same is true for the share of temporary workers.

Once more, the overall picture is that of a dynamic industry on the one hand, but also of a robust and stable one on the other.

III.3 General Conclusions

Our analysis describes the creative economy as a relevant and robust set of creative sub-sectors within the Swiss economy. This finding aligns with what the creative economy reports published by the ZCCE (and its predecessors) have been claiming

for over 10 years.⁶ Further, we find that these creative sub-sectors sometimes differ, in some cases to a great extent. And third, the present analysis underlines that a wider set of criteria is required to better understand the needs and the contributions of the creative economy and its sub-sectors.

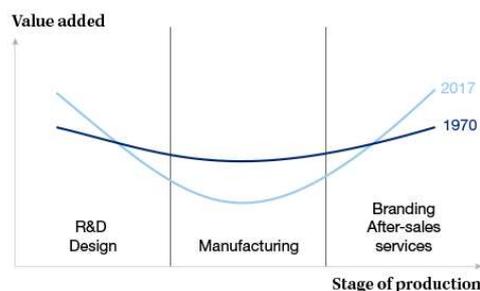
We are convinced that combining statistical analysis based on official data (zooming out) with analysing creative economy practices and processes (zooming in) will contribute to drawing an even more fine-grained picture. Which common features allow speaking of the creative economy as a set of creative sub-sectors (creative occupations and industries) relevant for Switzerland as a whole and for its business and innovation system in particular?

In recent years, innovation research (WIPO, 2017) has provided one possible argument for the relevance of the creative

⁶ See: www.zhdk.ch/zcce

economy. It has shown that in the value-added chain, the importance of research and design services at the beginning of the chain, and of branding, storytelling and community management at its end, is constantly increasing compared to production. Accordingly, value creation in the 21st century depends largely on the core competencies of the creative economy. The reasons are obvious. On the one hand, it is necessary to react to social shifts and to meet the high demand for distinction among an urban and educated middle class through products and services able to meet that need. On the other hand, the era of an economy of scale has been replaced by an economy of speed. New products and services need to be developed at the highest possible speed (Reckwitz⁷).

Production in the 21st century – a growing smile



Source: World Intellectual Property Report 2017

We will need to closely examine whether the global effects of Covid-19 will shift the

relevance of manufacturing / production back to the stage of the last century or whether the «growing smile» will grow even larger.

On the other hand, ZCCE research shows that creative economy actors and organisations are characterised by certain attitudes and competencies which the different creative sectors seem to have in common. Attitudes and competencies are both highly relevant for the Swiss innovation system⁸:

According to ZCCE analyses, the creative economy stands for «radical claims about which future models could be possible, both as an innovative opening-up of perspectives and as a critical debate on the present and thus also on the world as it is.» Creative economy actors and organisations are specialists in thinking about how the world could be rather than about how it is.

The creative economy is able «not only to formulate radical claims in an abstract manner and to translate these into speculative designs, but also to carry such claims into practice so that they can be concretely tested and made tangible.» Hence, the creative economy has always been an interesting place for new business models or new value-creation constellations.

The creative economy is able to build «platforms on which designs and their materialisations can be controversially negotiated from different perspectives and with the help of heterogeneous evaluation criteria.»⁹ Strong links exist between the creative

⁷ Andreas Reckwitz, *Das Ende der Illusionen Politik, Ökonomie und Kultur in der Spätmoderne*, Suhrkamp Verlag, Berlin 2019

⁸ See also: *L'apport des sciences humaines et sociales à l'innovation en Suisse Étude dans le cadre du rapport « Recherche et innovation en Suisse 2020 » Partie C, étude 2* Hugues Jeannerat, Olivier Crevoisier, Gaël Brulé, Christian Suter Institut de Sociologie

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⁹ Grand, Simon / Weckerle, Christoph, *What's next? Die Zukunft der Kultur- und Kreativwirtschaft wird von ihren Akteuren entworfen*, in, Hedinger, J. / Meyer, T., (Hrsg.): *What's next? Kunst nach der Krise*, Ein Reader, Kadmos

economy and higher education, e.g. studios at arts universities or labs at technical universities. But other cultural institutions, e.g. museums, are also curating these debates and developing alternative solutions. And, of course, the creative economy consists of creative sub-sectors which, beyond claiming, speculating or discussing such (business) alternatives, are also developing, testing and implementing them — be it in a traditional and local context or in a global and digital one; be it in small and very specialized companies or in vast global networks.

In Research Note 4, Simon Grand and Christoph Weckerle will reflect on strategies which take up the core competencies of the creative economy described above and which can be seen as alternatives to the approaches prevailing in the current discussion.

Roman Page, Simon Weckerle

This third research note is part of a series of four notes published by the Zurich Centre for Creative Economies (ZCCE) on the economic consequences of the coronavirus.

SUGGESTED FURTHER READING:

Note 1 – The WPA, Roosevelt and Artist Relief in America 1936–1939 (Frédéric Martel)

Note 2 – The Great Cultural Depression (Frédéric Martel)

Note 4 – Beyond the current debates: Alternative strategies for analysing the creative economy (Simon Grand, Christoph Weckerle)

ZURICH CENTRE FOR CREATIVE ECONOMIES (ZCCE)

The Zurich Centre for Creative Economies (ZCCE) is an international research centre of excellence dedicated to studying and analysing the creative economies and to transferring this knowledge into higher education and practice. Our fields of expertise are: Cultural Policies, Digitalisation, Smart Cities, Art and Design Careers, Criticism & Theory and Entrepreneurial strategies.

We work closely with our international partners, researchers, academics and startappers.

The Zurich Centre for Creative Economies (ZCCE) is part of Zurich University of the Arts (ZHdK).

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