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Craftsmanship in the Contemporary Business Environment. A S.W.O.T. Analysis of Pottery – Ceramics Sector in Greece

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Abstract— ***Today, traditional crafts are found either to meet the same daily needs in less developed economies, or - in developed economies - as an activity that should be preserved within the context of cultural heritage and something that carries unique value and authenticity Relevant research reveals structural weaknesses of the craft sector in general and ceramics, as well. Drawing on some central findings that can be extracted from primary research in the ceramics - pottery sector, in the context of the present research, we propose an analysis of the internal strengths and weaknesses, and the opportunities and threats (SWOT), in relation to the international context of the Greek handicraft sector of ceramics - pottery. Our findings show that the Greek Ceramics/Pottery sector faces constraints and diverse challenges either for endogenous reasons, or for reasons of the external environment.***

Keywords: ceramics, challenges, pottery handicraft entrepreneurship, strengths, weaknesses.

I. INTRODUCTION

Craftsmanship was born as a need to meet simultaneous daily functional needs (pottery, carpentry, glassmaking, metallurgy, weaving) and visual, aesthetic needs (woodworking, silversmithing, ornamentation) in pre-industrial societies. At the beginning of the 20th century, when increasing industrialization was historically, socially, and politically defining the Western world, the example of the Bauhaus school of fine and visual arts in Weimar, Germany, inspired by the Arts and Crafts movement in Britain, was born. The central aim of the school was to bring together all the arts around the building in an attempt to create a total artwork [1]. The innovation of this school lay in the coexistence and simultaneous training of the fine (painting, drawing, architecture, etc.) and applied arts (ceramics, bookbinding, glassmaking, printing, mural painting, weaving, carpentry, metalworking, theatre, photography) with the aim of creating integrated craftsmen so that "it will be possible for future generations to unite these skills in one and the same person".

Today, traditional crafts are found either to meet the same daily needs in less developed economies, or - in developed economies - as an activity that should be preserved within the context of cultural heritage and something that carries unique value and authenticity [2]. Since 2003, the UNESCO Convention for the Safeguarding of Intangible Cultural Heritage (ICH) has included traditional crafts in the five categories of intangible cultural heritage [3]. The inclusion of traditional handicrafts in the (IPC) is mainly related to the preservation of the knowledge and skills involved in the activity rather than the products per se. As with other forms of intangible cultural heritage, globalization poses significant challenges to the survival of traditional crafts. Mass production can often provide goods needed for everyday life at a lower cost, both in value and time, than hand production. Many craftspeople struggle to adapt to this competition.

II. LITERATURE REVIEW

The history of handicrafts in Greece follows the history from the early civilizations to modern times and evolves with the progress of techniques, the discovery of new materials and new methods of processing them. Along the way, Greek craftsmen have been highly valued for their skill and creativity. However, the handicraft activities of the past constitute the folk art and today they are distinguished from the activity of handicraft as we call it today. Modern handicraft is differentiated from folk art because it can use techniques and materials from different parts of Greece or abroad and the primary goal is the aesthetic satisfaction of human needs - not excluding a utilitarian value.

The importance and potential of handicrafts for Greek society and economy has now been recognized, for example in the National Recovery and Resilience Plan and the Annual Action Plan 2022 of the Ministry of Culture and Sports. Initiatives for the revival, evolution and development of Greek crafts, the strengthening of local communities through a sustainable and soft value-added development model that combines natural raw materials, traditional techniques, and modern design, and for the development of a new generation of craftspeople through their professional training, business support and international networking are of great importance.

Relevant research [4 - 8] reveals structural weaknesses of the craft sector in general and ceramics, as well as its heterogeneous composition, with diversification in traditional production and distribution methods accelerating the pace of digital transformation, triggering substantial debates on how craft interacts with society, the value it produces, and the directions it should take.

Drawing on some central findings that can be extracted from primary research in the ceramics - pottery sector, in the context of the research project, we propose an analysis of the internal strengths and weaknesses, and the opportunities and threats (SWOT), in relation to the international context of the Greek handicraft sector of ceramics - pottery.

III. RESEARCH METHODOLOGY

For the purposes of the research, quantitative data collection was carried out, which captures the current picture in the Ceramics sector in Greece. The data were collected from a specific number of enterprises (50 in total) participating in this study of the pottery - ceramics sector in the pilot regions that were selected, namely:

- Thessaly
- Crete
- North Aegean
- Eastern Macedonia – Thrace
- Epirus
- Peloponnese
- Western Macedonia

Primary data was collected using a structured questionnaire for the ceramics sector, specifically adapted for interviews. The sector questionnaires were created by a Ceramics - Pottery Committee composed of academic scientists relevant to the fields of crafts, entrepreneurship, innovation, knowledge technology and business management, experienced with many years of experience in conducting large-scale qualitative research.

The project team, divided into individual working groups, contacted all the sampled companies. Communication was carried out in person, where possible, and in cases where physical presence was not possible, it was carried out by telephone.

The following procedure for quantitative data analysis was followed:

1) Creation of a special workbook in excel that deals with both the quantification of the survey and its qualitative analysis
2) Creating individual worksheets where each one responded to distinct sections of questions in the questionnaire used
3) Each workbook's questions were further grouped into categories of questions based on the survey questionnaire
4) Data entry into specific tables created using custom functions and formulas to extract the quantitative data
5) Presentation of Results and conduction of S.W.O.T. analysis.

IV. FINDINGS AND DISCUSSIONS

A. General Findings

The overall conclusions for all the regions under consideration that participated in the present study, regarding the existing situation, the business environment of the pottery - ceramics sector, the problems and the prospects it presents, will be able to form part of the building blocks required for the formulation of a specific strategy and for proposals for directly applicable measures tailored to the specificities and needs of businesses in the sector as part of the overall strategy for its reconstruction and business support.

Overall, we argue that as strengths and opportunities for the sector, were recorded, the mature business activity of the sector, which employs in many cases relatively young professionals and employees, with a good level of education, who seek creative expression through this activity. In general, the sector shows export activity, a differentiated value proposition, adaptation to modern ways of promotion, a positive attitude towards the adoption of open innovation models and many growth prospects in conjunction with the tourism product of each region, as well as significant potential for creativity and aesthetic adaptability to reality and contemporary lifestyles in the final products.

On the other hand, the weaknesses, which are also threats to several of them, focus on the intense competition from cheap imports of copies and fakes from third countries, the energy and geopolitical crises, the discontinuity in the value chain of the sector and especially with regard to the supply of raw materials, the small size and production capacity and the lack of spatial - cultural or other identity of the sector's products, the lack of clear and coherent business models for companies and the weak institutional representation – organization of the sector.

B. Common Characteristics of the Ceramics/Pottery Serctor

Among the common characteristics identified, we can mention that the whole sector is characterized by enterprises with most of these enterprises being individual.

Four (4) main categories of enterprises and professionals in the ceramics sector can be distinguished and dominate in all the Regions, namely:

1. Manufacturers of utilitarian and everyday objects with two (2) sub-categories:
   manufacturers focusing on mass production of utilitarian, decorative - souvenir ceramics aimed at tourists
   ceramists - potters who focus their sales on shops in the catering sector and tourist accommodation/hotels.
2. Manufacturers who focus on jars and pots.
3. Manufacturers with mass production using molds avoiding the wheel
4. Sculptors - artists of ceramic and pottery objects

The markets targeted by the sector are to a significant extent wholesale customers in Greece and abroad, which contributes significantly to the viability of the sector's businesses, extroversion, and the creation of economies of scale in production. It is the Greek market which remains the dominant destination for the companies in the survey. Of course, the international recognition of Crete, Mani, Argolida, Lesvos and Pelion as unique historical and cultural regions with an established brand on the international tourist map and a differentiated spatial identity is the factor that shapes the additional dynamics of the sector's extroversion in these regions in several important markets. However, here too, there is a lack of any form of certification or quality mark that defines the spatial and/or cultural identity or brand of pottery - ceramics products, with the exceptions of Mandamado on Lesvos and Thrapsanos on Crete, where this is achieved thanks to the distinctive pattern of the products of these areas.

Among the characteristic common points of the study as a conclusion are those of raw materials and energy costs. The issue of availability and finding - buying raw materials, especially clay, is of major importance, as almost all the professionals in the sector are supplied by large importers located in Athens and Thessaloniki. This has the consequence of increasing production costs and reducing competitiveness. The importance for the sector of the operation of the 'Clay Masa' plant within the framework of the Greek Clay Masa Centre (ELKEA) as a supplier of raw material at a low price for the Greek craftsmen of the sector is mentioned everywhere. Energy costs are the additional important factor affecting the competitiveness of the companies in the sector.

Despite the increased demand for the sector's products and the increased need for production capacity, companies do not yet seem to have managed to incorporate modern production technologies. Mass production is achieved by traditional means, which some of them have in large numbers. There is a positive attitude initially towards innovation, even if the concept of innovation is perhaps not fully understood by professionals in the pottery and ceramics sector, but essentially it remains at the level of a desire to introduce, adopt, or develop innovations, with a few exceptions from younger professionals in the sector, although this differentiation does not seem to be linked to spatial or regional characteristics.

Survey participants have the capacity to adopt combined sales strategies and shared distribution and sales networks that can form the basis for future business clustering as good practices for developing synergies.

Competition exists mainly from third countries through imports of cheap copies of ceramics, especially in decorative and utilitarian items. The question was raised by many professionals in the sector as to how to deal with this phenomenon, either through legislation or through the introduction of a mark of origin for pottery and ceramics products.

Finally, the need for skilled staff was also recorded as a common problem faced by businesses in the sector in all regions, with apprenticeships and on-the-job training for young craftsmen being the most appropriate way of passing on knowledge and acquiring specialized skills and abilities in the production of ceramic objects.

C. Differentiations Across Regions

However, there are some differences between the regions concerned, which do not appear from the quantitative analysis to be very significant, but which are the details that the overall regeneration strategy must consider to propose specific and applicable measures tailored to the needs and prospects of each region. Among the other variations we can mention as the most characteristic ones:

The Regions of Crete and North Aegean show the greatest dynamics among all the regions under consideration in the ceramics - pottery sector with a significant number of businesses and professionals active.

This is due to three main reasons:

a) The strong tourism sector in the regions and the establishment for many years of the brand of individual smaller regions and spatial units on the world tourist map, resulting in a high demand for the products of the sector by tourists and international markets
b) The great ceramic tradition that exists in areas such as Mandamados and Agiasos in Lesvos, Thrapsanos in Crete and elsewhere. The positive aspect is also that in these areas, even if informally, artists and professionals have, over the years, managed to link their designs and creations with specific characteristics that give them a distinct spatial identity, especially in terms of the decoration of specific products and
c) The existence and operation for many years of businesses in the sector and cooperative groups that have managed to establish characteristics and patterns of ceramic objects in Greek craftsmanship and internationally, which are recognized and in demand. Moreover, the close geographical proximity is considered to have helped these cooperative schemes to develop significantly over time.

There are regions where the sector is in a marginal state of survival (Western Macedonia - Epirus), regions where they balance between a positive and negative outlook for the sector (Eastern Macedonia and Thrace), those that have a positive outlook but do not seem to be able to exploit it easily (Thessaly - Peloponnese) and, as mentioned above, Crete with the North Aegean are in the best situation.

The reasons for this differentiation vary, from the remoteness of the regions, the historical nature of the regions, their tourist visibility and exploitation, the impact of recent catastrophic events (e.g. in Thessaly) that hit the country and others.

In Region of Northern Aegean, several collective efforts have been undertaken to promote and highlight the sector through the organization of an international exhibition - festival for many years. On the contrary, in Thessaly it is observed that this is only done on the initiative of a specific artist located in the region of Kalambaka. In the other regions no specific initiatives of this kind were found.

In contrast to other regions, Eastern Macedonia and Thrace shows little export activity. Ceramics/pottery makers in the Region seem to consistently prefer the domestic market rather than exports. Also, in contrast to the general picture, East Macedonia and Thrace makes (albeit isolated) use of 3D printers and CAM/CAD computer programs.

In the Peloponnese Region, one enterprise stated that it has a specific quality label related to its products, which is not found in any other Region. Of course, this company is an SA, belongs to the medium-sized enterprises and is essentially a large industrial unit, where almost all its production is exported and which specializes in the production of a specific type of product, in particular jars and pots. Unlike in other regions, its main foreign customers appear to be private individuals rather than retailers, wholesalers or restaurants and hotels. Finally, the participants seem to have a very specific perception of competition. The main belief is that competition comes from other potters/pottery makers around Greece, and secondly from producers from foreign countries that have very low costs (e.g. China).

D. Swot Analysis

In this paper, the presented strengths and weaknesses are the horizontal ones, i.e. at national level. Therefore, according to the results of the quantitative study, major strengths at national level appear to be:

S1: All businesses

S2: Young aged professionals

S3: Satisfactory level of education

S4: Several years of operation and establishment in the industry

S5: Variety in the products produced

S6: Combined B2C and B2B sales

S7: Existence of exports to a significant extent

S8: Product themes with the ability to adapt to modern trends and desires - needs of customers.

S9: Satisfactory level of business equipment

S10: Positive attitude to the introduction/adoption/development of innovations

S11: Selection of partners on the basis of individual criteria for each company

S12: Constant experimentation and adoption of innovations frequently

S13: Adaptation to modern ways of promotion - promotion - access to distribution - sales channels. E-sales and e-stores, use of social media.

S14: Balanced pricing strategy on products

S15: Differentiated value proposition

S16: The shift of the tourist accommodation - catering sectors to handmade decorative and utilitarian objects

S17: Handmade is fashionable

S18: Pottery - ceramics is a creative sector for young people of various levels of education and specializations and is being used as a professional alternative.

S19: Significant potential for creativity and aesthetic adaptability to reality and modern lifestyles

S20: Prospects for the application of open innovation models

S21: Existence of stable partnerships based on trust

S22: Plenty of financial tools and instruments

On the other hand, the most significant weaknesses, according to the findings are the following:

W1: Lack of corporate forms with sufficient capital -Low turnover

W2: Family businesses without a specific succession plan

W3: Low degree of product differentiation between businesses

W4: Low production capacity

W5: No clear business model for each individual company

W6: Lack of certification of products/processes

W7: Lack of certification for spatial/cultural identity of products

W8: Unorganized way of accessing international markets

W9: Limited space - small workshops

W10: Own suppliers with high bargaining power

W11: Import of raw material (clay - soil)

W12: High costs - reduced competitiveness due to raw materials and energy costs

W13: Low local market dynamics and its participation in the sales mix

W14: Inability to use thematic exhibitions and events as promotion channels

W15: Empirical pricing

W16: Lack of quality label

W17: Reluctance to enter partnerships concerning the production process

W18: Absence of organized information activities

W19: Low level of funding

W20: Non-reimbursable role of sectoral bodies

W21: Very small size of enterprises

W22: Weaknesses in individual knowledge of professionals and employees in the sector

W23: International geopolitical and economic developments

W24: Tourist interest only in certain regions

W25: Legislation concerning licensing in urban areas (degree of nuisance)

W26: Lack of a vertically integrated value chain especially in terms of raw material production.

W27: High energy costs - energy crisis

W28: Gaps in the industry's supply chain with high transport costs

W29: Inward-looking business culture

W30: Cautiousness in highlighting weaknesses - shortcomings of each company

W31: High cost of innovation

W32: Reluctance and resistance to change of customers and staff

W33: Inability to link to specific local - cultural characteristics and to create a brand

W34: Imports of cheap copies and imitations from third countries - unfair competition

W35: Low capacity to raise/leverage significant investment and other capital

E. Challenges For Ceramics/Pottery Sector

Today, Greek Ceramics/Pottery sector is in a transitional phase. This finding confirms relevant literature. According to recent studies the Greek crafts industry is under strong international pressure (massive imports from third countries, cost of raw materials, etc.) and is facing rapid changes in consumer preferences [8-10]. On the other hand, in the general context of increasing interest in handicraft and especially pottery products as mentioned above, but also of the high level of tourism, favorable conditions for the development of Greek ceramics and pottery are created, if the appropriate measures are transformed to implemented policies.

The Greek Ceramics/Pottery sector faces constraints either for endogenous reasons, or for reasons of the external environment. The main challenges are:

Economic challenges: The debt crisis and repeated periods of recession have affected the purchasing power of consumers and reduced domestic demand. Demand for handicrafts, as buyers turned to cheaper mass-produced goods. Economic instability also led to limited access to the financing, making it difficult for artisans to invest in business contemporary equipment or expand their markets.

Limited access to markets: Greek ceramics/pottery sector often face restrictions in accessing international markets. The lack of international visibility, the limited export networks and unfamiliarity with procedures and regulations export procedures and regulations hinder their ability to access global markets. In addition, competition from low-cost, mass-produced imports is extremely difficult to overcome. This is a critical challenge for craftsmen in the sector, particularly in price-sensitive markets.

Changes in consumer preferences: Consumer preferences have evolved in line with widening social inequalities. On the one hand, a huge mass of consumers who can respond (fast fashion) and on the other hand, smaller and more in particular communities that possess the cultural capital to recognize and choose pottery goods of higher quality and uniqueness. Educating consumers about the value and quality of ceramics/pottery products quality becomes crucial to overcome this limitation.

Transfer of skills and knowledge: The decline of traditional ceramics in rural areas due to urbanization and migration has led to large losses of skills and knowledge. Younger generations often choose different career paths, resulting in a scarcity of skilled artisans. Transmission of traditional techniques and know-how from the oldest craftsmen to the younger generation becomes crucial for the continuity of the sector in Greece.

Limited institutional support: The lack of institutional support for the sector is a major obstacle. Insufficient funding for training programs, limited access to resources and lack of coordination between government agencies. can hinder the development of the Greek ceramics/pottery sector. The very small size of enterprises (generally family-run), even though it offers flexibility and adaptability, it also creates problems due to the existence of the need to cover parallel tasks (production, design, business management, distribution, marketing, etc.), responding to new institutional conditions.

Increased production costs: Production often involves higher costs due to factors such as skilled labor, high quality materials and time-intensive processes. This can make it difficult for craftsmen to compete with mass-produced products which are often cheaper. Balancing the need for fair pricing with market demands and cost constraints becomes a major challenge, especially today when energy and imported raw material costs are at very high levels.

Protection of intellectual property: The protection of intellectual property rights and the prevention of unauthorized reproduction or imitation of traditional designs is an important and topical issue for producers. Ensuring legal safeguards such as trademarks and copyrights, is becoming essential to protect the uniqueness and cultural heritage associated with Greek ceramics/pottery.

The study and policy proposals for this sector examine various dimensions of the ceramics - pottery sector in Greece through these two aspects: their contribution to social and economic development. These two dimensions are obviously not independent. To fully unfold the dynamics of the sector in the contemporary business environment, they must be robust, and the participation of society as a whole and in all parts of the country must be possible and encouraged. At the same time, only by establishing synergies with the whole range of actors that shape social and economic life, will the contribution of culture to the shaping of values and economic development become apparent.

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