

REGIONAL MAPPING SLOVAKIA

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Index

1. Country and source information
2. Main quantitative data collected
 3. CCI Classification AREA # 1
 4. CCI Classification AREA # 2
 5. CCI Classification AREA # 3
 6. CCI Classification AREA # 4
7. Creative and Driven Classification
 8. Stakeholders
9. Qualitative data collected



COUNTRY AND SOURCE INFORMATION

Country/Region: SLOVAKIA

Name Surname reference person:

Jana Bielikova

References about existing mappings:

No mapping with actual data available

Name of Data Source:

Statistical Office of the SR; interviews with stakeholders

Organization delivering data:

Slovak Business Agency



MAIN QUANTITATIVE DATA COLLECTED

Economic value of the CCI Sector:

No information on the total value and contribution of CCI to GDP available

Share of CCI on GDP – approximately 6%¹, GDP in 2018:

N. of companies in core CCI Sector

Category SK NACE	Number of active economic entities
Advertising and marketing	10,357
Architecture	3,586
Design and fashion design	812
Film, TV, video, radio and photo	4,236
IT, software and computer services	9,306
Publishing activity	2,744
Music, stage and visual arts	2,082
TOTAL	33123

Comparisons with other economic sectors

Size category (number of employees)	Creative industry	Other sectors
0 employees	48.2%	53.1%
1 employee	27.3%	18.5%
2 employees	9.8%	9.3%
3-4 employees	6.3%	7.4%
5-9 employees	4.2%	5.9%
10-19 employees	2.2%	3.0%
20-24 employees	0.4%	0.6%
25-49 employees	0.9%	1.2%
50-99 employees	0.4%	0.6%
100-149 employees	0.1%	0.2%
150-199 employees	0.0%	0.1%
200-249 employees	0.0%	0.1%
250-499 employees	0.1%	0.1%
500-999 employees	0.0%	0.1%
1000-1999 employees	0.0%	0.0%

¹ Interview with a stakeholder – Nová Cvernovka



2000-2999 employees	0.0%	0.0%
3000-3999 employees	0.0%	0.0%
4000-4999 employees	0.0%	0.0%
5000-9999 employees	0.0%	0.0%
10000-19999 employees	0.0%	0.0%
TOTAL	100.0%	100.0%

Contributions by geographical areas

Region	Creative industry		Other sectors		The share of enterprises in the creative industry in the total number of business entities
	Number	Share	Number	Share	
Bratislava	13,048	39.4%	109,753	20.8%	10.6%
Trnava	2,797	8.4%	52,448	9.9%	5.1%
Trenčín	2,441	7.4%	50,656	9.6%	4.6%
Nitra	3,191	9.6%	64,598	12.2%	4.7%
Žilina	3,128	9.4%	73,499	13.9%	4.1%
Banská Bystrica	2,793	8.4%	53,108	10.1%	5.0%
Prešov	2,692	8.1%	69,512	13.2%	3.7%
Košice	3,033	9.2%	53,824	10.2%	5.3%
Total	33,123	100.0%	527,398	100.0%	5.9%

Professional categories involved

Category SK NACE	SK NACE code	Description
Advertising and marketing	70210	Public relations and communication activities
Advertising and marketing	73110	Advertising agencies
Advertising and marketing	73120	Media representation
Architecture	71110	Architectural activities
Design and fashion design	74100	Specialised design activities
Film, TV, video, radio and photo	59110	Motion picture, video and television programme production activities
Film, TV, video, radio and photo	59120	Motion picture, video and television programme post-production activities



Film, TV, video, radio and photo	59130	Motion picture, video and television programme distribution activities
Film, TV, video, radio and photo	59140	Motion picture projection activities
Film, TV, video, radio and photo	60100	Radio broadcasting
Film, TV, video, radio and photo	60200	Television programming
Film, TV, video, radio and photo	74200	Photographic activities
IT, software and computer services	62010	Computer programming activities
IT, software and computer services	62020	Computer consultancy activities
Publishing activity	58110	Book publishing
Publishing activity	58120	Publishing of directories and mailing lists
Publishing activity	58130	Publishing of newspapers
Publishing activity	58140	Publishing of journals and periodicals
Publishing activity	58210	Publishing of computer games
Publishing activity	58290	Other software publishing
Publishing activity	74300	Translation and interpretation activities
Music, stage and visual arts	59200	Sound recording and music publishing activities
Music, stage and visual arts	85520	Cultural education
Music, stage and visual arts	90010	Performing arts
Music, stage and visual arts	90020	Support activities to performing arts
Music, stage and visual arts	90030	Artistic creation
Music, stage and visual arts	90040	Operation of arts facilities



KPIs such as employment growth, youth employment, turnover growth, export growth, etc.

Structure of economic entities in CCI according to the turnover in 2017

Turnover Intervals (in Euro)	Number	Share
0 až 9 999	4,797	32.4%
10 000 až 24 999	2,274	15.3%
25 000 až 49 999	2,609	17.6%
50 000 až 99 999	1,779	12.0%
100 000 až 499 999	2,262	15.3%
500 000 až 1 999 999	755	5.1%
2 000 000 a viac	342	2.3%
Spolu	14,818	100.0%

Structure of business entities in CCI according to legal form

Legal form	Creative industry		Other sectors	
	Number	Share	Number	Share
Small trade licensees	14,832	44.8%	284,746	54.0%
Limited liability companies	17,090	51.6%	193,400	36.7%
Entrepreneurs - freelancers	381	1.2%	22,343	4.2%
Joint stock companies	283	0.9%	5,028	1.0%
Other legal forms	537	1.6%	21,881	4.1%
Total	33,123	100.0%	527,398	100.0%

Number of new economic entities in CCI in 2018

Category	SK NACE code	Description	Number of new entities in 2018	Share (%)
Advertising and marketing	70210	Public relations and communication activities	0	0.0%
Advertising and marketing	73110	Advertising agencies	1780	29.7%
Advertising and marketing	73120	Media representation	0	0.0%



Architecture	71110	Architectural activities	351	5.9%
Design and fashion design	74100	Specialised design activities	225	3.8%
Film, TV, video, radio and photo	59110	Motion picture, video and television programme production activities	2	0.0%
Film, TV, video, radio and photo	59120	Motion picture, video and television programme post-production activities	353	5.9%
Film, TV, video, radio and photo	59130	Motion picture, video and television programme distribution activities	4	0.1%
Film, TV, video, radio and photo	59140	Motion picture projection activities	0	0.0%
Film, TV, video, radio and photo	60100	Radio broadcasting	0	0.0%
Film, TV, video, radio and photo	60200	Television programming	1	0.0%
Film, TV, video, radio and photo	74200	Photographic activities	329	5.5%
IT, software and computer services	62010	Computer programming activities	431	7.2%
IT, software and computer services	62020	Computer consultancy activities	2005	33.5%
Publishing activity	58110	Book publishing	9	0.2%
Publishing activity	58120	Publishing of directories and mailing lists	0	0.0%
Publishing activity	58130	Publishing of newspapers	0	0.0%
Publishing activity	58140	Publishing of journals and periodicals	0	0.0%
Publishing activity	58210	Publishing of computer games	0	0.0%
Publishing activity	58290	Other software publishing	0	0.0%
Publishing activity	74300	Translation and interpretation activities	212	3.5%
Music, stage and visual arts	59200	Sound recording and music publishing activities	1	0.0%
Music, stage and visual arts	85520	Cultural education	36	0.6%
Music, stage and visual arts	90010	Performing arts	0	0.0%
Music, stage and visual arts	90020	Support activities to performing arts	138	2.3%



Music, stage and visual arts	90030	Artistic creation	9	0.2%
Music, stage and visual arts	90040	Operation of arts facilities	108	1.8%
TOTAL			5994	100.0%



CCI CLASSIFICATION AREA # 1

1st AREA

Activities of preservation and enhancement of historical and artistic heritage (museums, libraries, archives, monuments)

Sector	Indicators
N/A	

CCI CLASSIFICATION AREA # 2

2nd AREA

Non-reproducible activities of cultural goods and services, defined as Performing arts and visual arts, synthesized with everything that revolves around the shows live (theater, concerts, etc.).

Film, TV, video, radio and photo Music, stage and visual arts	Number of active economic entities: 4,236 2,082
Film, TV, video, radio and photo Music, stage and visual arts	Share of economic entities: 12,7 % 6,2 %



CCI CLASSIFICATION AREA # 3

3rd AREA

Activities related to the production of cultural goods and services according to a logic industrial repeatability, defined as cultural industries (cinema, radio - TV; video games and software; automation, publishing and printing; music);

Sector	Indicators
IT, software and computer services	Number of active economic entities: 9306
Publishing activity	2744
	Share of economic entities: 28,1 %
	8,2 %

CCI CLASSIFICATION AREA # 4

4th AREA

Creative industries related to the world of services (advertising, communication, architecture and design, crafts,)

Sector	Indicators
Advertising and marketing	Number of active economic entities:
Architecture	10357
Design and fashion design	3586
	Share of economic entities: 31,2 %
	10,8 %
	2,4 %



CCI CLASSIFICATION AREA # 5

CCI Professions	N° or % of cultural and creative professionals in non core cultural
N/A	

STAKEHOLDERS

ORGANIZATION	KEY STAKEHOLDER	MAIN ACTIVITY/MISSION
SBA	Creative Industry forum (CIF)	It represents the interests of the creative industry in Slovakia. Communication platform to popularize and support the creative industry
SBA	Association “Nova cvernovka”	The main goal of the association is to maintain and extend the existing ecosystem of artists, creators, innovators and developers, which originated in the former Cvernovka, in a new place and under one roof, thus creating a sustainable Creative, Cultural and Social Center of Exclusive Importance in Bratislava.
SBA	Creative point	Fablab operated by Sba, providing access to technology (3d printing, lacer, cnc cutter) and advice on prototyping (creating 3D or 2D models



		- from their digital form to the final tangible prototype)
SBA	Academy of performing arts (APA)	The largest artistic educational institution in the Slovak Republic. At present, the VSMU consists of three faculties: Music and Dance Faculty, Theatre Faculty and Film and Television Faculty.
SBA	Slovak game developers association (SDGA)	Civic association established in 2015. Main activities: communication w/ institutions promotion international presentation support business development community and communication information about funding organising events education annual game developer census
SBA	Fashion revolution	



QUALITATIVE DATA COLLECTED

3 or more key concepts or sentences defining cultural and creative industry sector:

- CCI is a set of activities carried out by artistically sentient people (artists, designers, painters, jewellers but also laymen) who contribute to the development of culture and creative activities.
- The grouping of individuals but also of the collectives who create together (can be occasional / project). The aim of the collaboration is to start a project (not creating for creation but because it makes sense). It is based on culture, history, location, something organic, it cannot be defined
- CCI bring the added value in the form of intellectual property, the result of the creative process is a project
- Creative and cultural economic activities in game development consist of games as final product which as multimedia belong to creative and cultural industries. They are a collaborative medium which is being created by teams of specially focused profession of various technological and artistic skills that individually by themselves are part of cultural and creative economies. For example concept art, 3d modelling, animation, scriptwriting, storytelling, sound design, music composition etc.

3 or more categories used for classifying cultural and creative economic activities

- “true art” - music, performing arts
- “Creative industries” - film, games, marketing, architecture, fashion
- “creative driven” - printing,

3 or more categories used for classifying creative driven industries

- Creative driven economic activities are activities that require creative skills and artistic inputs to be made. Integral part of creative driven industries is to have a product that is mainly created by your own means that also carries some sort of artistic, creative or design value.
- We don't use specific definitions and consider digital games development to be part of both.



Most important/strategic and developed cultural areas in the region / nation

- Film - there is plenty of state support available and enough high education
- Event organising - a lot of professionally organised events with good variety and attendance, many of them supported by Slovak Arts Council
- Advertising - culmination of various creative skills ranging from graphics design, copywriting and programming. There are a lot of first class advertising agencies that are very professional in the field of regular and digital marketing.
- IT - software, game development, apps,
- crafts,
- folklore

Main programmes or projects developed in the CCI sector at a regional national level:

Most important national or regional CCI support policies mentioned (project name, main activities, main partners, main investments,...)

- Slovak Arts Council - however focusing mainly on cultural sector
- Slovak Audiovisual Fund - audiovisual industry
- support provided by the Ministry of Culture via the Operational programmes: call supporting establishing creative centres and demand for creative activities
- support provided by the Ministry of Economy via the Operational programme through 2 agencies (SIEA - a national project aiming at the development of CCI, focusing on CCI sectors Architecture, Design and Advertising) and (SBA - providing complex support to existing and potential entrepreneurs and operating a Creative point - a fab-lab)
- City of Bratislava
- Foundations (Nadácia Orange, ESET Nadácia,
- Slovak Design Centre

Most important programs/project promoted by the institutions in CCI Sector, describe briefly:

CIF - N/A

Nová Cvernovka:



- Annual event - Open Studio Day
- offer creative developers a discounted rent, it's not a cheap rent, but it's under commercial rent.
- Creative mothers program - paying fees for kindergarten for a period of 6 months (18-200 euros per month), for 4 hours (grant provided by Philip Morris via Pontis)
- establishing a Children playground

SBA /Creative Point

- open space for artists to create ideas and prototypes, organizing workshops, discussions, where they connect artists with artists or artists with laymen, have a license for programs - 5 thousand euros (have a PC),

APA

- Project Creator - supporting designers, who were working on new projects from the idea phase to production of prototypes. The prototypes were presented at various exhibition (also international) in order to facilitate cooperation between young designers and manufacturing companies
- a project at the Uni where they do 4-5 educational events a year on topics such as fundraising, self-presentation, marketing, but business skills have not yet given them.

SDGA

- Lots of activities ranging from organising monthly meetups, international event, support for presentation abroad, publishing a brochure, yearly census, business development etc.

Fashion Revolution

- activities aimed at raising awareness, education and transparency in the fashion industry focusing on sustainability, acting also as Contact point

3 or more goals expected in the project realization.

CIF

- to raise interest in the creative industry, in political circles, with consumers, in the related economic sectors, but also to create a dialogue between individual sectors of the creative industry, thereby strengthening its position.



Nová Cvernovka

- to be a cultural attractor in the district, providing space for CCI (to acquire more buildings, specific equipment for various CCI sectors, provide education and information)

CreativePoint

- Raising technology awareness, industrial use and making technology available to the general public if they do not have the money to do it. Get technologies to schools - high and universities

APA

- Continue w/existing activities.
- Business skills development - hopefully in the future

SDGA

- Recognition of the industry by public institutions
- Ensure adequate education
- Meetups - platform for information exchange and community building
- Events - international information exchange, bizdev, promotion
- Brochure and census - promotion and research

Fashion Revolution

- raise awareness and initiate broad discussion on sustainability in the fashion industry
- educate
- organize events e.g. FR WEEK or Installations of rags - graphics, banners will be delivered and folded at conferences

3 or more goals reached

CIF- NA

Nova Cvernovka

- creating a new space for artists and CCI (reconstruction of a school building - since 2016)

SBA/Creative Point

- fab-lab developed
- established cooperation w/ universities
- several workshops and seminars for CCI organized

APA:

- project Creator put together 30 names of young designers in project the aim of which was to prototype to produce. They took them to fairs - 2 of them succeeded: BIRD CHAIR - a chair that mimics the wings of birds. They bought the design from him and there the cooperation ended

British Airways bought cutlery and furniture design in airlines, then designer lived in England and worked for BA

SDGA

- Events - international information exchange - connecting the community - Game Days,
 - production of a Brochure and census - promotion and research
- Bizdev - connecting developers with institutions and clients / other professionals
- representing the interests of the community, e.g. specific calls prepared for the game developers under the Slovak Arts Council

Fashion Revolution

- In the beginning there was no attention to textiles, because plastics were solved, now the topic of textile waste is coming to the forefront as well.

3 or more definition of their collaboration (positive/negative)

CIF:

- communication w/ State administration authorities - primarily ministries and their institutions, participation in preparation of strategic documents, support programme documents, preparation of new legislation, etc.
- cooperation at the professional level works, so far the problem was that the topic had no political priority, respectively the bearer of the creative industry development strategy.

SBA / Creative Point

- Priority is given to cooperation with universities, in particular the Slovak University of Technology, Faculty of Architecture - organizing tailor-made workshops.



- FAB LAB Slovakia (Comenius University Science Park) - mutual cooperation in order to provide a complex support to the clients
- building the community - organizing workshops w/ and for artists, IoT experts

Fashion Revolution

- FR Slovakia has a partner of FR Global, giving them guidelines textile collection company, designers and slow fashion brands, students participate voluntarily in FR week, SK Tex, printer Svornost' ...
- FR WEEK - annual event organized to commemorate the anniversary of the fall of plaza in Bangladesh - workshops, lectures, city eco day focused on textiles, high school students project lectured and coached, students' projects presented
- Installation of rags - at conferences, banners delivered and folded at conferences (need a textile supplier)

3 or more cultural or creative processes identified in Advanced Manufacturing Industries

- AVM are affected by the way of thinking, abstract thinking, creativity has so little tangible - creative people can offer thinking outside the box - necessary for innovation
- As with many other fields there can always be connections. Specialized types of production require special technologies and IT solutions. 3d printing, ai, big data, high performance computing, sustainability
- hollistic approach - thinking in a wider context
- technology development 3D printing - was originally created only as a printing of plastics, then began to adapt, not only plastic, but for example, clay. It's more customized, who are not only from the car but also the designers
- Technology penetration between people and their adaptation to other sectors - They started to think more about architects, etc. Technology gets more to people, scenarios... it helps digitization

3 or more CCI programs/project which cooperate with Advanced Manufacturing Industries (briefly described) or motivation to not cooperate.

- none - in my view, it is precisely the consequence of the absence of a continuous strategy for the development of the theater industry where such activities should be among the development tools
- Transport design - collaboration between VW and the Academy of Performing Arts



Best practices

1.

AUDIOVISION is an industry THAT almost disappeared in Slovakia.

- In Slovak conditions it is not possible for this sector to operate without state support.
- Policy setting (2004) AND establishment of the Audiovisual Fund facilitated access to capital. This enables a growing number of filmmakers to realize their projects.
- Natural effect is the development of crafts and industries, as well as creative activities, from writing scripts to camera, costumes, and technicians.
- By effects are benefits for the locations in which the filmmaking process takes place. It is a stabilized sector with the possibilities of improving the system and expanding positive expanding positive impact - e.g. building related infrastructure
- There are several interest associations in the audiovisual sector that create pressure on the dialogue with public institutions and a critical mass of people.
- For example, the creation of the Fund itself was only a result of the transparency and trust that had been established in the sector.

2.

Maker Fair

- started as support for national creators in the US
- festival of artists, architects, developing it up to now
- for the first time it will be held in Slovakia (15. November 2019 will be in Bratislava, Stará Tržnica)
- an event where CCI meet according to the size of the city. There will be a mini maker fair in BA (80 representatives from the Czech Republic, Austria and Hungary). It is very interactive - workshops, lectures, let the visitor take away the experience. The goal is to connect communities. Interactive event, in every stand the client can try the creation. Also work with IoT (can be used, in the mirror screen and shows news, weather, weather station, humidity meter), there will be laser, scanner, robotics, IoT, VR, heavily focused on technology
- popularizing and networking the community
- Various artists, handymen, Creative Point will attract students - motivation to innovate, work in these sectors

3.

- Development of technological workplaces that would be equipped - "SPECIALIZED LABORATORIES" to be available to start-up entrepreneurs that cannot afford buying the technologies, equipment. Nova cvernovka would provide CCI access to the space at a discounted rent.



- there are private FAB LABs (3D SCANNER) but more professional labs are missing,
- it should be provided by ACADEMIA, PRIVATE SECTOR, PUBLIC ADMINISTRATION

4.

- games - functional support from public sources, important for starting CCI
- informal education (e.g. BUTTERFLY EFFECT provided by private companies) supplies formal education
- clusters / associations - communication with the institutions - have the association / industry leader representing the interests of the industry are very helping, can initiate the communication
- cross-border cooperation - V4 FUND, INTERREG - information exchange, advanced form of cooperation;
- grant support schemes
- bottom-up initiatives - CVERNOVKA, STATION Z. - self-mobilization of the community

5.

FASHION REVOLUTION / NEW TRENDS IN FASHION INDUSTRY AS A DRIVER OF CHANGE

- sustainability (e.g. upcycling) is starting to be a trend, it teaches people / designers to change their practices. Excess of textile and textile waste have already begun to be perceived.
- in Slovakia, this aspect has been seen as a value and necessity for a long time, however so far only in small (it started w/ the arrival of Sashe - an online platform for hand-made products producers, gathering mini brands.
- growing number of hand-making businesses has been launched.
- FASHION REVOLUTION has been working in education via connecting the individuals, businesses, raising awareness.

Challenges

<ul style="list-style-type: none"> - lack of a strategy reflecting the real needs of individual CCI sectors. The offer does not meet the needs of the demand side.
<ul style="list-style-type: none"> - Administrative barriers - in order to be eligible, clients of Creative Point have to undergo a complicated registration process, provide even very sensitive data (the possibilities of digitalization have not been used) companies in difficulty are not eligible - even though they need it most - lack of willingness and courage in many cases, and a certain indolence to start a business in CCI
<ul style="list-style-type: none"> - challenges: inappropriate measurable indicators - e.g. number of jobs created. - despite the fact that there have been surveys carried out, the support programmes do not meet the real needs of cci - ineffective flow of information between the target group, policy makers and support providers - Missing Cross-sectoral Communication - the agenda of CCI falls into the competencies of several ministries (economy, education, culture, foreign affairs) - raising awareness - show good examples, education focusing on cci - financial support - structural funds / tax exemptions or tax reductions for CCI - Slovak Arts Council is a great tool, however support is provided only to "culture"
<ul style="list-style-type: none"> - missing business skills, marketing, self-presentation, etc. - - missing education - e.g. IPR, ability to write a CV, different mindset - focused on creating art pieces, not doing business. - connection between CCI and business is not perceived - grant schemes do not meet the CCI needs - e.g. the measurable indicators are new jobs. However, CCI do not work with the aim to get employed. They need more flexibility - oftentimes they work on several projects in parallel. - - support programmes / grant schemes aim to support creative production, however CCI do not need support to be creative, they need space, equipment, etc. grants are not provided for rental or technical equipment (for example animators need software and equipment for 30000 €). - Lack of support for the CCI technical facilities: It is to create a physical / technical background. - missing sponsorship law - missing tax reductions



- CCI can act as a vector for innovation, however innovation is seen only in relation to industry
- excessive bureaucracy
- lack of flexibility
- formal education not meeting the needs of the industry and labour market
- way of using structural funds
- biggest challenge - existing support system - based on grants - the system is complicated, programmes are run by several institutions, no single contact point exists
- CCI wants to focus on their work, not identifying grant programmes and writing projects.

Opportunities

- the objective is to get the data and know the real state of CCI so that the real needs could be identified and support tools could be designed.
- ensure efficient implementation of the tools.
- getting technologies and making them available in smaller towns - e.g. in cooperation with the private sector
- connecting to schools - so that students have access to the technologies.
- get education related to and promoting CCI to schools, so that young people and children could get in touch and learn about CCI
- promote technical thinking and creative activities from the preschool education (e.g. preschools teaching kids to build a robot)
- cross-sectoral cooperation - creating “cells” where synergies between academy, public administration, CCI, etc. could emerge
- getting to larger markets
- change the paradigm of thinking at all levels (outside)
- conceptual thinking: there is no dialogue between the ministries of culture and economy or education.
- e.g. when the project creator was asking for support to get the designers to international exhibitions they were sent to the ministry of economy, as this kind of support is in its competence. from this ministry they were sent back to ministry of culture, as art does not fall into the competences of moe



- | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none">- set the support conditions for cci so that they would be able to start a sustainable business (not only money for start but also for physical space, equipment ...) but also economic measures (tax rate) |
| <ul style="list-style-type: none">- continuous improvement of everything- cooperation with the community- to have an intermediary between various institutions and support providers and CCI - a person / institution able to understand both sides- ideal future state - identify a sustainable business model, creating a strong organizational team, acting also as a contact point |