Interreg
CENTRAL EUROPE
European Union
European Regional Development Fund
COCO4CCI

REGIONAL MAPPING GERMANY

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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: GERMANY

Name Surname reference person:

Magdalena Weinle (HdM)

References about existing mappings:

2018 Cultural and Creative Industries Monitoring Report

Organization delivering data:

ZEW (Centre for European Economic Research Mannheim)

MAIN QUANTITATIVE DATA COLLECTED

Economic value of the CCI Sector:

257,457 companies

€ 158,6 bln turnover

1,675,287 total number of workers

3,6% of total spending on innovation in Germany (€ 5.6 bln) 3.1% of GDP.

Breakdown by market segment:

music industry 4.62%

book market 5.62%

arts market 4.11%

film industry 6.19% broadcasting industry 5.89%

performing arts market 6.33%

design industry 19.40% architecture market 12.90%

press market 10.28% advertising market 9.28%

software and games industry 12.71%

other 2.67%.

The following graphics are from the Federal Ministry for Economic Affairs and Energy (PDF with more KPI/graphics can be found here:

https://www.bmwi.de/Redaktion/EN/Publikationen/Wirtschaft/monitoring-report-cultural-and-creative-industries-2018.pdf?__blob=publicationFile&v=3)

Overview of the Cultural and Creative Industries in 2017

254,700 companies

€102.4 billion gross value added

2.0% more gross value added (compared to 2016)

€158.6 billion turnover

€622,700 turnover per company

3.4% more core workers (compared to 2016)

4.3% more employees subject to the payment of social security contributions (compared to 2016)

1,157,683 core workers

5.1% start-up rate

517,604 people in marginal employment and marginal self-employment

3.6% of total spending on innovation in Germany

€136,980 sales per core worker

€88,460 gross value added per core worker

22.0% self-employed (proportion of core workers)

approx. 9,500 new start-ups

3.1% share of GDP

903,026 employees subject to the payment of social security contributions

€5.6 billion annual spending on innovation

1,675,287 total number of workers

Table 2.1: Key data on the cultural and creative industries in Germany 2009 – 2017*

Category	2009	2010	2011	2012	2013	2014	2015	2016	2017*	Change 2016/2017
No. of companies (in thousands)[1a]										
Cultural and creative industries (CCIs)	238.5	239.5	244.3	245.8	246.4	247.0	250.4	254.5	254.7	0.07%
Contribution of CCIs to overall economy	7.61%	7.57%	7.60%	7.56%	7.60%	7.62%	7.69%	7.79%	7.74%	
Turnover (in € billion)										
Cultural and creative industries (CCIs)	134.3	137.3	141.0	143.3	143.2	146.9	152.1	158.8	158.6	-0.15%
Contribution of CCIs to overall economy	2.74%	2.62%	2.48%	2.49%	2.48%	2.50%	2.54%	2.61%	2.56%	
Employment										
Core labour force (in thousands)[2a]										
Cultural and creative industries (CCIs)	953.1	952.5	976.8	1,011.7	1,037.3	1,056.0	1,084.9	1,120.1	1,157.7	3.36%
Contribution of CCIs to overall economy	3.10%	3.06%	3.07%	3.11%	3.16%	3.16%	3.19%	3.23%	3.27%	
Employees subject to the payment of social security contributions (in thousands)[3a]										
Cultural and creative industries (CCIs)	714.6	713.0	732.5	765.9	790.9	809.1	834.5	865.6	903.0	4.32%
Contribution of CCIs to overall economy	2.59%	2.55%	2.56%	2.62%	2.67%	2.68%	2.71%	2.75%	2.81%	
No. of self-employed persons (in thousands)[4a]										
Cultural and creative industries (CCIs)	238.5	239.5	244.3	245.8	246.4	247.0	250.4	254.5	254.7	0.07%
Contribution of CCIs to overall economy	7.61%	7.57%	7.60%	7.56%	7.60%	7.62%	7.69%	7.79%	7.74%	
No. of persons in marginal employment (in thousands)[5a]										
Cultural and creative industries (CCIs)	574.2	593.4	593.6	586.8	556.1	561.3	519.3	520.0	517.6	-0.45%
Contribution of CCIs to overall economy	6.80%	6.95%	6.80%	6.78%	6.38%	6.44%	4.38%	4.37%	4.35%	
No. of marginally self-employed persons (in thousands)[6a]										
Cultural and creative industries (CCIs)	197.1	214.0	224.8	221.9	203.3	211.1	211.2	209.5	207.6	-0.91%
Contribution of CCIs to overall economy	18.26%	19.57%	18.90%	20.84%	20.42%	22.17%	23.34%	23.93%	25.76%	
No. of marginally employed persons (in thousands)[7a]										
Cultural and creative industries (CCIs)	377.1	379.3	368.8	365.0	352.8	350.2	308.1	310.5	310.1	-0.14%
Contribution of CCIs to overall economy	5.12%	5.09%	4.89%	4.81%	4.57%	4.48%	4.00%	4.00%	3.97%	
Total employment (in thousands)[8a]										
Cultural and creative industries (CCIs)	1,527.3	1,545.9	1,570.4	1,598.6	1,593.4	1,617.3	1,604.2	1,640.0	1,675.3	2.15%
Contribution of CCIs to overall economy	3.90%	3.90%	3.87%	3.88%	3.83%	3.84%	3.50%	3.52%	3.54%	
Gross value added (in € billion)[9a]										
Cultural and creative industries (CCIs)	74.2	78.4	82.9	86.6	88.8	90.6	94.6	100.4	102.4	1.98%
CCIs' share of GDP	3.02%	3.04%	3.07%	3.14%	3.14%	3.08%	3.10%	3.18%	3.12%	
GDP Germany, nominal	2,460.3	2,580.1	2,703.1	2,758.3	2,826.2	2,938.6	3,048.9	3,159.8	3,277.3	3.72%
Additional key indicators of the cultural and creative industries										
Turnover per company (in € thousand)	563.3	573.3	577.1	583.1	581.1	594.8	607.2	624.1	622.7	-0.22%
Turnover per employee subject to the payment of social contributions (in € thousand)	188.0	192.6	192.5	187.1	181.0	181.6	182.2	183.5	175.6	-4.29%

→

1a Taxable entrepreneurs with annual income of at least €17,500.

2a Core labour force consists of taxable entrepreneurs with an annual income of at least €17,500 and employees subject to social security contributions.

3a Employees subject to the payment of social security contributions in full and part time employment, but not people in marginal employment.

4a The number of self-employed people corresponds to the number of taxable entrepreneurs with an annual income of at least €17,500.

5a People in marginal employment and marginal self-employment.

6a Marginal self-employment includes freelancers and self-employed persons with less than €17,500 annual income based on the microcensus.

7a People in marginal employment (marginal low-paid and temporary employment) based on employment statistics from the Federal Employment Agency (deadline used in each case 30 June).

8a Total number of workers includes all self-employed and employed persons including people in marginal employment and marginal self-employment.

9a Gross value added based on reports of the national accounts, calculated on basis of breakdown of sales in VAT statistics.

Category	2009	2010	2011	2012	2013	2014	2015	2016	2017*	Change 2016/2017
Turnover per core worker (in € thousand)	140.9	144.2	144.3	141.7	138.0	139.1	140.2	141.8	137.0	-3.39%
Employees subject to the payment of social security contributions per company	3.00	2.98	3.00	3.12	3.21	3.28	3.33	3.40	3.55	4.25%
No. of core workers per company	4.00	3.98	4.00	4.12	4.21	4.28	4.33	4.40	4.55	3.29%
Gross value added per core worker (in € thousand)	77.8	82.3	84.9	85.6	85.6	85.8	87.2	89.7	88.5	-1.34%
Proportion of core workers who are self-employed	25.02%	25.15%	25.01%	24.30%	23.75%	23.39%	23.08%	22.72%	22.00%	

*Data for 2017 based partly on in-house estimates and preliminary official figures. Estimates partly based on development rates of previous years. Discrepancies from figures in previous reports due to revisions of data in the underlying statistics.

Source: Destatis, 2018a, b, c; Federal Employment Agency 2018; in-house calculations by ZEW.

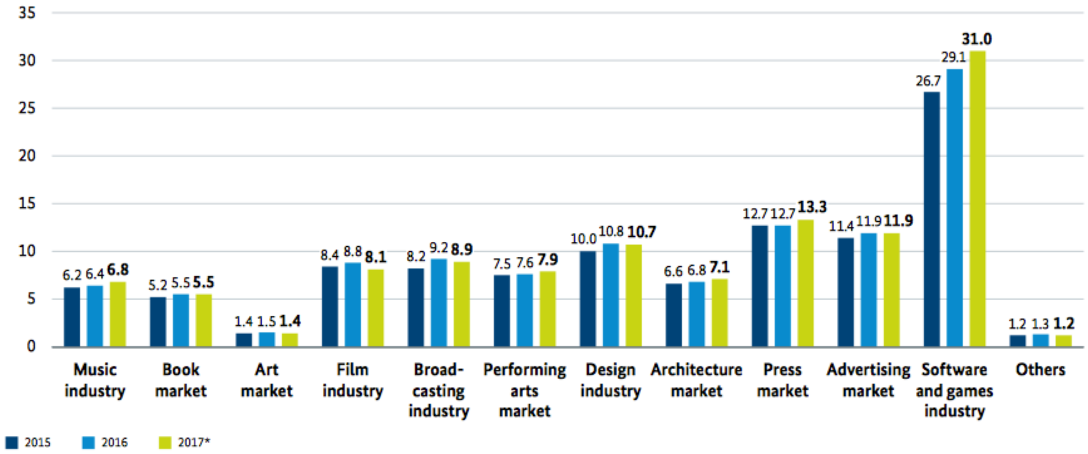
Table 2.2: Key economic data for the cultural and creative industries in 2017 by submarket

	Number of companies*	Turnover* (in € million)	Gross value creation* (€ million)	Core workers*	Employees subject to the payment of social security contributions	Marginal employees	Mini self-employed persons*
Cultural and creative industries (CCIs)	**254,657**	**158,578**	**102,409**	**1,157,683**	**903,026**	**310,051**	**319,622**
Overall economy	*3,289,461*	*6,190,332*	*2,954,696*	*35,454,434*	*32,164,973*	*7,806,047*	*3,120,875*
Ratio of CCIs to overall economy	*7.74%*	*2.56%*	*3.47%*	*3.27%*	*2.81%*	*3.97%*	*10.24%*
Breakdown by market segment, absolute and percentage							
1. Music industry	14,197 4.62%	8,858 5.00%	6,822 5.99%	51,667 4.01%	37,470 3.82%	14,675 3.93%	22,177 5.44%
2. Book market	17,254 5.62%	13,572 7.66%	5,451 4.79%	70,895 5.50%	53,641 5.46%	16,471 4.42%	28,540 7.00%
3. Art market	12,616 4.11%	2,151 1.21%	1,442 1.27%	17,997 1.40%	5,380 0.55%	3,882 1.04%	26,053 6.39%
4. Film industry	19,013 6.19%	9,523 5.37%	8,057 7.08%	60,989 4.73%	41,976 4.27%	22,955 6.15%	40,173 9.85%
5. Broadcasting industry	18,071 5.89%	10,484 5.91%	8,930 7.84%	42,930 3.33%	24,859 2.53%	1,766 0.47%	28,821 7.07%
6. Performing arts market	19,419 6.33%	4,851 2.74%	7,891 6.93%	43,679 3.39%	24,260 2.47%	19,476 5.22%	46,378 11.37%
7. Design industry	59,548 19.40%	19,428 10.96%	10,738 9.43%	150,118 11.65%	90,570 9.22%	60,779 16.29%	69,869 17.13%
8. Architecture market	39,605 12.90%	10,829 6.11%	7,050 6.19%	127,411 9.88%	87,806 8.94%	19,279 5.17%	27,260 6.68%
9. Press market	31,569 10.28%	29,855 16.84%	13,318 11.70%	146,762 11.39%	115,193 11.73%	81,751 21.91%	34,839 8.54%
10. Advertising market	28,490 9.28%	28,344 15.99%	11,931 10.48%	152,768 11.85%	124,278 12.66%	102,467 27.47%	27,657 6.78%
11. Software and games industry	39,016 12.71%	38,005 21.44%	31,010 27.23%	408,382 31.68%	369,366 37.61%	27,863 7.47%	44,425 10.89%
12. Other	8,183 2.67%	1,343 0.76%	1,228 1.08%	15,362 1.19%	7,179 0.73%	1,698 0.46%	11,701 2.87%
Cultural and creative industries (including double counts)	**306,980**	**177,244**	**113,867**	**1,288,958**	**981,978**	**373,063**	**407,893**

*Data based partly on estimates. Figures are percentages of the cultural and creative industries as a whole, including double counts. Values marked in green are 3 highest figures per indicator; values marked in red are the three lowest figures per indicator.

Source: Destatis, 2018a, b, c; Federal Employment Agency 2018; in-house calculations by ZEW.

Figure 2.2: Contribution of the CCI submarkets towards gross value added of CCIs 2015 – 2017* (in € billion)

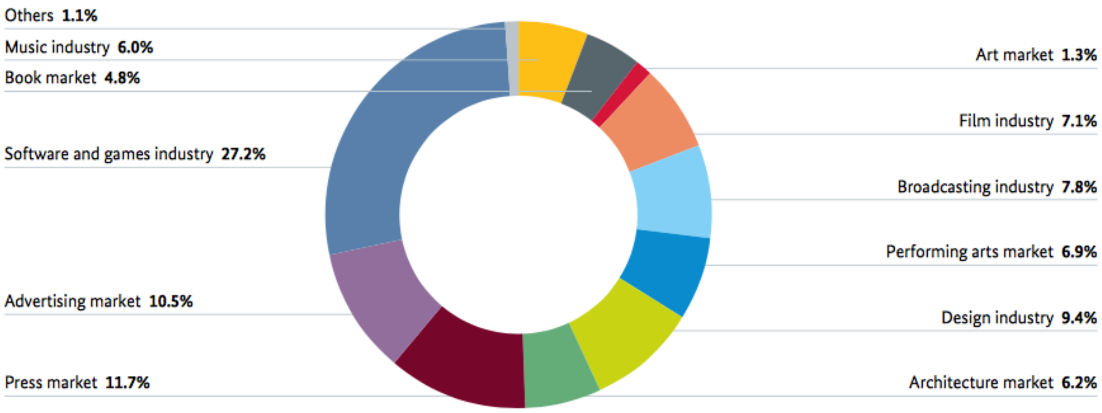


Aid to interpretation: In 2017, gross value added in the music industry amounted to €6.8 billion and to €10.7 billion in the design industry.

*Figures estimated.

Source: VAT statistics, Destatis, 2018b; national accounts, Destatis, 2018c; in-house calculations by ZEW.

Figure 2.3: Share of individual submarkets in total value creation in the cultural and creative industries in 2017* (in %)

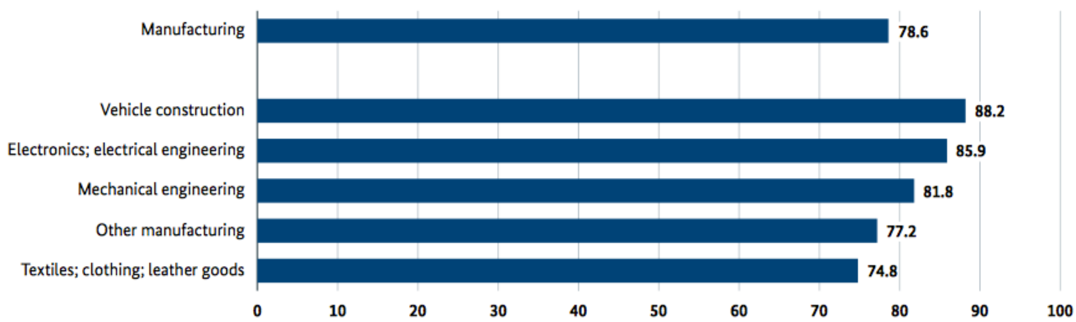


Aid to interpretation: The design industry submarket generated 9.4% of gross value creation in the CCIs in Germany in 2017.

*Figures estimated. These calculations based on gross value added in the cultural and creative industries including double counts. Altogether, these figures add up to produce a total of 100%.

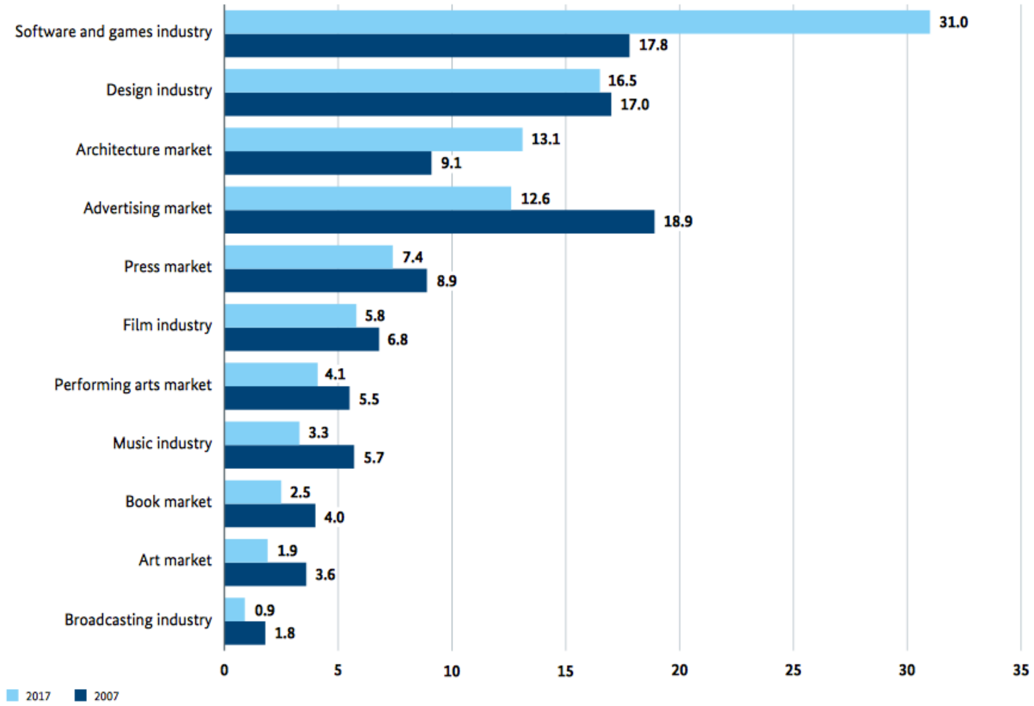
Source: VAT statistics, Destatis, 2018b; national accounts, Destatis, 2018c; in-house calculations by ZEW.

Figure 3.8: Companies that have bought cultural and creative services in the last three years (share of companies in %)



Source: ZEW Company Survey in Industry, 1st half 2018.

Figure 4.3: Start-ups in the cultural and creative industries in Germany broken down by submarket in 2007 and 2017 (in %)



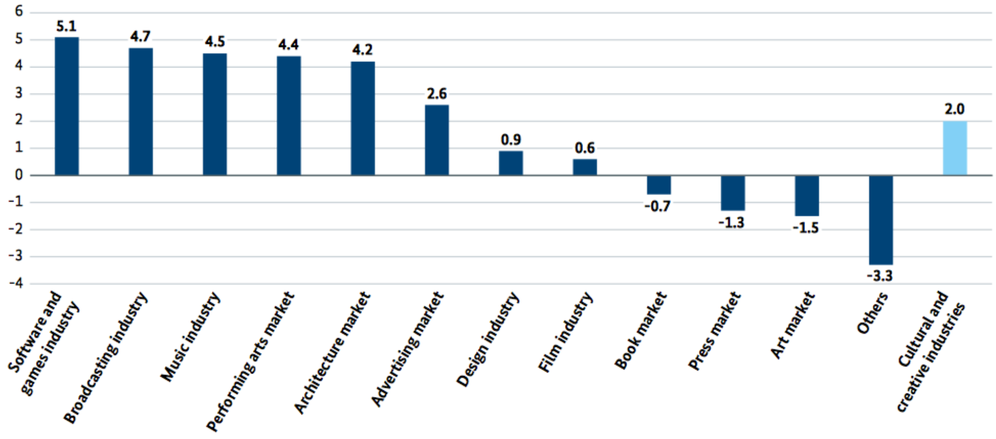
Aid to interpretation: The share of startups from the software and games industry within the cultural and creative industries rose from 17.8% in 2007 to 31.0% in 2017.

Note: Share of the respective submarket in the sum of cultural and creative industries with double counting. Difference to 100% corresponds to submarket "Other".

Source: Mannheim Enterprise Panel, ZEW, 2018.

Figure 6.1: Development of turnover in the cultural and creative industries compared with the overall economy (change in %)

Figure 6.2: Development of turnover in the various submarkets of the cultural and creative industries (average annual change 2012 – 2017* in %)



Aid to interpretation: Turnover in the music industry grew by 4.5% each year between 2012 and 2017.

*Data for 2017 based on estimates.

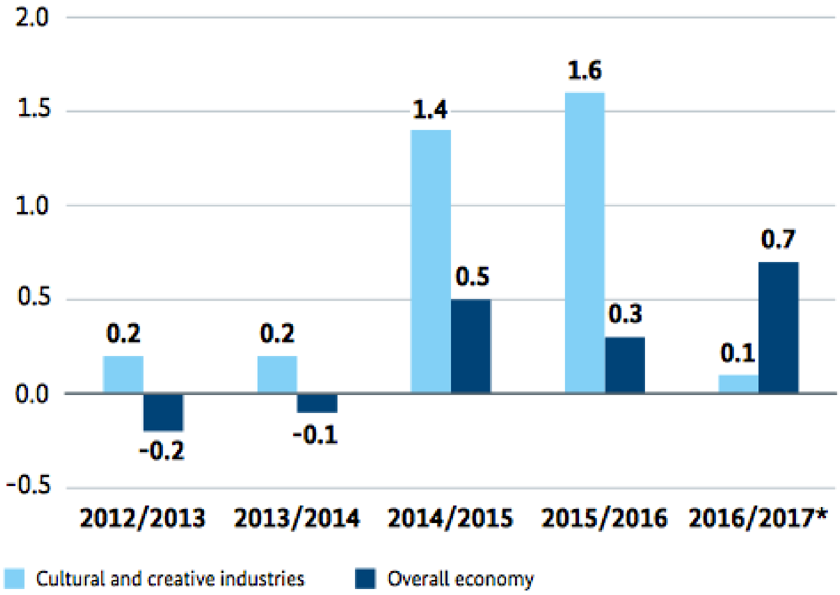
Source: VAT statistics, Destatis 2018b; in-house calculations by ZEW.

Aid to interpretation: Turnover in the music industry grew by 4.5% each year between 2012 and 2017.

*Data for 2017 based on estimates.

Source: VAT statistics, Destatis 2018b; in-house calculations by ZEW.

Figure 6.3: Development of number of companies in the cultural and creative industries compared to the overall economy (change in %)

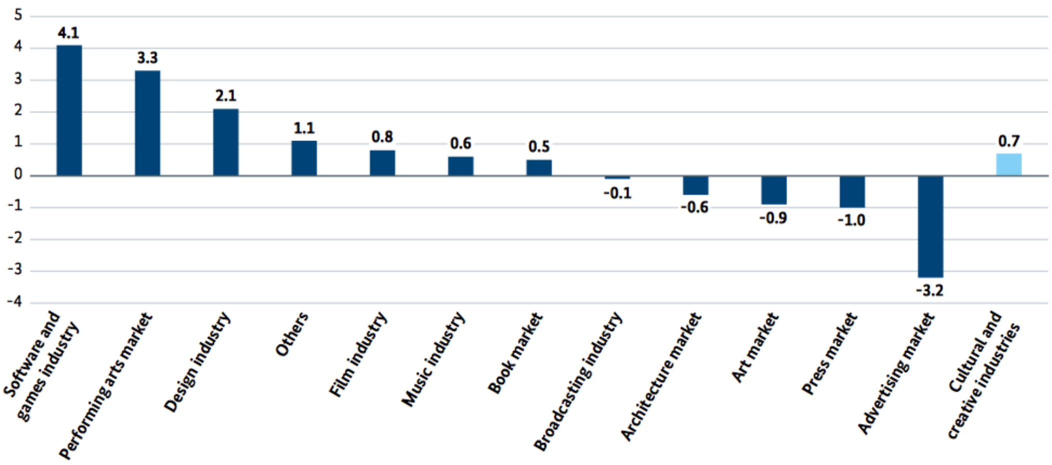


Aid to interpretation: Between 2012 and 2013 the number of companies in the overall economy fell by 0.2%; the figure for the CCI sector grew 0.2%.

*Data for 2017 based on estimates.

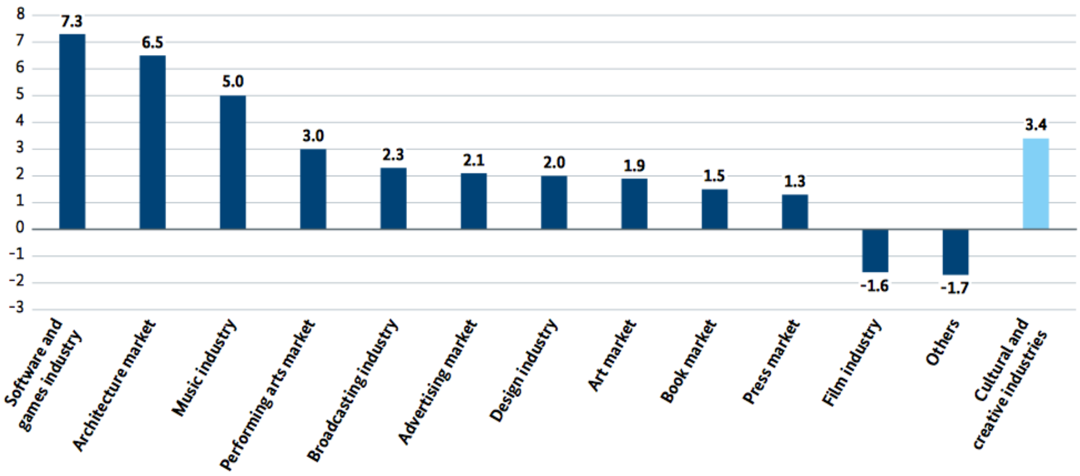
Source: VAT statistics, Destatis 2018b; in-house calculations by ZEW.

Figure 6.4: Development in the number of companies in the various submarkets of the cultural and creative industries
(average annual change in % for 2012 – 2017*)



Aid to interpretation: The number of companies in the film industry grew by an average of 0.8% each year between 2012 and 2017.
*Data for 2017 based on estimates.
Source: VAT statistics, Destatis 2018b; in-house calculations by ZEW.

Figure 6.6: Development in gross value added in the various submarkets of the cultural and creative industries
(average annual change in % for 2012 – 2017*)



Aid to interpretation: Gross value added in the music industry grew by an average of 5.0% per annum between 2012 and 2017.
*Data for 2017 based on estimates.
Source: VAT statistics, Destatis, 2018b; national accounts, Destatis, 2018c; in-house calculations by ZEW.

CCI CLASSIFICATION AREA # 1

1st AREA Activities of preservation and enhancement of historical and artistic heritage (museums, libraries, archives, monuments)	
Sector	Indicators
Libraries and archives,	Number of companies: 55 , Turnover: 32 MEUR, Number of core workers: 1068
Operation of historical sites and buildings and similar visitor attractions	Number of companies: 82 , Turnover: 36 MEUR, Number of core workers: 203
Botanical and zoological gardens and nature reserves	Number of companies: 204 , Turnover: 317 MEUR, Number of core workers: 804

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.).	
Sector	Indicators
Performing arts market (sub-sectors are: Cultural education, theatre ensembles, own-account-performers and circus groups, own-account stage/motion picture/radio and TV artists, support activities to performing arts, organisation of theatre performances and concerts, private operation of opera houses/theatre and concert halls, variety shows and small theatres)	Number of companies: 19,419 , Turnover: 4,851 MEUR, Number of core workers: 43,679, Gross value added: 7,891 MEUR

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**
Music industry (sub-sectors are: Manufacture of musical instruments, retail sale of musical intruments, retail sale of music/video recordings, sound-recording studios, publishing of printed music, ballet companies, orchestras, bands and choirs, support activities to performing arts, own-account composers, organisation of theatre performances and concerts, operation of opera houses, theatre and concert halls.)	Number of companies: 14,197 , Turnover: 8,858 MEUR, Number of core workers: 51,667 , Gross value added: 6,822 MEUR
Book market (sub-sectors are: Binding and related services, retail sale of books, retail sale of second hand books, book publishing translation activities, own-account writers.)	Number of companies: 17,254, Turnover: 13,572 MEUR, Number of core workers: 70,895 , Gross value added: 5,451 MEUR
Film industry (sub-sectors are: Retail sale of music and video recordings, motion picture, video and TV programme production/postproduction/distribution, motion picture projection, renting of videotapes and disks, own-account stage/motion picture/radio and TV artists.)	Number of companies: 19,013, Turnover: 9,523 MEUR, Number of core workers: 60,989 , Gross value added: 8,057 MEUR
Broadcasting industry (sub-sectors are: Radio broadcasting, TV programming and broadcasting, own-account journalists and photographers.)	Number of companies: 18,071 , Turnover: 10,484 MEUR, Number of core workers: 42,930 , Gross value added: 8,930 MEUR
Software and games industry (sub-sectors are: Publishing of computer games, other software publishing, web-page design and programming, other software development, web portals.)	Number of companies: 39,016 , Turnover: 38,005 MEUR, Number of core workers: 408,382, Gross value added: 31,010 MEUR

Press market (sub-sectors are: Retail sale of newspapers and stationery, publishing of directories and mailing lists, publishing of newspapers, publishing of journals and periodicals, other publising activities, news agency activities, own-account journalists and press photographers.)	Number of companies: 31,569 , Turnover: 29,855 MEUR, Number of core workers: 146,762, Gross value added: 13,318 MEUR

CCI CLASSIFICATION AREA # 4

4th AREA **Creative industries related to the world of services (advertising, communication, architecture and design, crafts,)**	
Sector	Indicators
Art market (sub-sectors are: Retail sale of art/antiques, own account visual artists, museum activities.)	Number of companies: 12,616 , Turnover: 2,151 MEUR, Number of core workers: 17,997 , Gross value added: 1,442 MEUR
Design industry (sub-sectors are: Manufacture of jewellery and related articles, consulting architectural activities in interior design, advertising agencies (50% share), industrial product and fashion designers, graphics and communications designers, interior decorators, photographers.)	Number of companies: 59,548 , Turnover: 19,428 MEUR, Number of core workers: 150,118, Gross value added: 10,738 MEUR
Architecture market (sub-sectors are: consulting architectural activities in building contruction/interior design/town, city and regional	Number of companies: 39,605 , Turnover: 10,829 MEUR, Number of core workers: 127,411, Gross value added: 7,050 MEUR

planning/landscape archictecture, own-account restorers.)	
Advertising market (sub-sectors are: Advertising agencies, media representation.)	Number of companies: 28,490 , Turnover: 28,344 MEUR, Number of core workers: 152,768, Gross value added: 11,931 MEUR

CCI CLASSIFICATION AREA # 5

CCI Professions	N° or % of cultural and creative professionals in non core cultural
Industrial product and fashion designers	9924
Photographers	20097
Graphic designers	22167

STAKEHOLDERS

ORGANIZATION	KEY STAKEHOLDER	MAIN ACTIVITY/MISSION
Stuttgart Region Economic Development Corporation	Margit Wolf	The Stuttgart Region Economic Development Corporation (Wirtschaftsförderung Region Stuttgart GmbH or 'WRS') is the central contact for investors and companies in the City of Stuttgart and the five neighbouring counties. Its main task is to raise awareness of the qualities this high-potential business region has to offer, support companies setting up here and promote the development of the region with numerous projects and offerings.
MFG Baden-Württemberg	Stephanie Hock	The MFG Baden-Württemberg is an institution of the state of Baden-Württemberg and the Südwestrundfunk. In our business areas MFG Filmförderung and MFG Kreativ, we promote film culture and the film industry and support cultural and creative workers in the Southwest.
Stuttgart Media University	Prof. Dr. Nils Hoegsdal	Hochschule der Medien is a public university (sponsored by the state of Baden-Württemberg) which teaches media specialists.
Startup Code	Johannes Ellenberg	Fostering the digital transformation of medium-sized companies in Baden-Württemberg by applying start-up instruments.
Free dance and theater scene Stuttgart	Nora Auth	Empower and support the free dance and theater scene

Impro theater Stuttgart	Kerstin Kelm	Impro theater not only as a theater form but also as a "tool" for everyday life
Kulturinsel	Joachim Petzold	Room for creativity: a space for the exchange, development and presentation of cultural ideas, works and projects. On the cultural island the principle "culture meets industry" applies.
Abertausend	Marco Di Giacomo	Innovation agency which supports companies in their innovation process by developing user centered products & services

QUALITATIVE DATA COLLECTED

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

The primary output of cultural and creative activities is the development and implementation of new ideas and the design of products and services.

Cultural activities mostly claim to be non profit in some way. Entertainment or the creation of works of art are in focus.

Main criteria are commercial character and a creative core.

Many creative industries fail to develop scalable business models.

Think outside the box & fault tolerance in companies & result without censorship.

To create qualitative, but also low-threshold encounters. Important is the professionalism and authenticity. It should not be artificially produced.

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

We are using on our regional level the German Classification of the Federal Government, based on the classification by the EU, which defines 11 areas of the creative industries: music industry, book/publishing industry, art market, film industry, broadcasting industry, culture and

performing arts, photo/design, architecture, press market, advertising/events, as well as software/games industry. Yes, the one that was established by the ministers for economic affairs. The federal government uses the same, as well as most German CCI organizations. This is not necessarily relevant for me, for my institution. A clear distinction is made between creativity as a tool, e.g. in an innovation process, and creativity for its own sake as output
3 or more categories used for classifying creative driven industries Companies that have links to the creative industries, but are essentially more technologically oriented. On the basis of this definition, Porsche is also a creative driven business. Obviously, design as part of the creative economy plays a significant role in the automotive industry or auto entertainment. We know there are more creative driven economic companies but we do not have a special definition for them. The first thing that comes to mind to me is, moving away from the classic cultural-creative sector, the advertising industry, which creates creatives and uses similar wordings.
Most important/strategic and developed cultural areas in the region / nation In Baden-Württemberg, the main areas are Design, Architecture and Advertising. There is a report for Creative Industries that was published by the Ministry for Economic Affairs in 2018, it lists the main sectors. In addition to the classical culture, we have a good theatre/ballet landscape, the film industry with the film academy is probably one of the focal points of the Stuttgart region. Speaking for the creative industries as a strong economical factor, in the Stuttgart Region the focus is mainly on Industrial design, architecture, 3D communication. All of them are directly related to the dense regional high-tech industries, such as industrial machinery, automotive, etc. Sinography (exhibition design)

Definition of Cultural and Creative Industries:

“The cultural and creative industries comprise all cultural and creative enterprises that are mainly market-oriented and deal with the creation, production and/or dissemination through the media of cultural/creative goods and services.” (Conference of Economic

Affairs Ministers 2009, Definition used the Monitoring Report of the Federal Government of Germany)

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, mains partners, main investments,…)

The Culture and Creative Industry Initiative of the federal government (in German: Initiative Kultur- und Kreativwirtschaft der Bundesregierung).

The Media Initiative Region Stuttgart for example: It's a network for creative people from the Stuttgart region and already exists for more than 20 years. Around 250 creative and cultural workers (e.g. publishers, writers, architects, game designers, etc.) are actively involved. Together we aim to identify the specific needs of creative companies in order to derive new projects.

The Popbüro Region Stuttgart: It's a publicly funded institution for the promotion of popular music in the Stuttgart region. It aims to enhance the perception of the local music industry regionally, nationally and internationally and helps young musicians and bands to get a grip in the market.

The Film Commission Region Stuttgart: It's a central advisory body for all matters related to film production in the region. It offers individual advice and information and is the interface between film productions, filmmakers, motivators and public institutions to strengthen the Stuttgart region as a film location.

The Sandbox at Stuttgart Media University.

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

The Sandbox's goal is to accelerate start-ups in the Creative Industries by providing mentoring, seminars, a network plus co-working. The Sandbox is funded by the Ministry of Culture and Education Baden-Württemberg. The program itself is run by Stuttgart Media University.

3 or more goals expected in the project realization.

The focus is on validating "creative" business ideas.

The problem is that people have terrific ideas, but we need to see how the great idea can make money. And that's where Sandbox and our training programs step in. The Sandbox is not just an offer for the Hochschule der Medien, it is an offer for the whole state

3 or more goals reached So far, more than 30 teams have taken part in this program, most of them made it to market.
3 or more definition of their collaboration (positive/negative) n/A
3 or more cultural or creative processes identified in Advanced Manufacturing Industries Creative industries and high-end manufacturing increasingly meet when it comes to differentiating products and creating user experiences. All AVM companies also have to deal with creative issues, such as marketing, advertising, brand development, product design, architecture, exhibition design or communication. It is crucial for their business development to get or to keep them in touch with professional creatives and their approaches and creative ideas. Use of creative methods (such as Design Thinking or Scrum)
3 or more CCI programs/project which cooperate with Advanced Manufacturing Industries (briefly described) or motivation to not cooperate. More via the StartUp scene: Then suddenly someone from Daimler meets someone from Bosch, who looks for startup activities and then maybe hears something. WRS, for example, runs industry teams for all regional industries, therefore, the cooperation between the (AVM) teams also leads to cooperation projects with their respective (creative) target groups. Also, we are always trying to create event formats or cross-over projects to include all target groups.

Best practices

1. Sandbox: To take a standardized set of tools to validate a business idea, starting with Problem solution fit. The whole range of support and qualifications offered at the Sandbox are tailored to the specific needs of start-up teams and young enterprises from the creative industries. The support is divided into the areas of qualifications, market access and networking. In seminars and coaching, the participants receive intensive support in the development of their business model and the implementation of the project. In terms of content, the focus is on providing basic knowledge (for example on project management, financing and marketing).
2. The "European Design Days" and the "Directory of Creative Service Providers in the Stuttgart Region". The European Design Days are an initiative of the European regional network ERRIN. The main task of the ERRIN Group Design & Creativity is to promote and establish design as an important and valuable instrument for promoting innovation. In order to make the added value of design accessible to a wider audience, the EU Design Days were launched in 2012. Examples from different regions were used to illustrate the possibilities and ways in which design processes and methods can be successfully implemented. The event is an important meeting place for designers, SMEs, policy makers, representatives from universities and the European institutions. The Stuttgart Creative Region is firmly involved in the planning of the Design Days via the Brussels office of the Stuttgart Region and regularly provides speakers and panelists from the region. In this way, the creative region is presented on a European platform and at the same time receives valuable suggestions from creative professionals from other regions.
3. The directory of creative service providers in the Stuttgart region is published every two years, the last edition with almost 100 entries and a circulation of 10,000 copies in September 2018. It is sent directly to more than 4,000 marketing managers and decision-makers in the region and is continuously adapted to WRS events. In the ten categories Architecture and Communication in Space, Design, Film and TV, Photo and Illustration, Art and Culture, Music and Audio, PR and Event, Software and Games as well as Publishing and Advertising, new and established creative companies present themselves. The directory supports entrepreneurs in finding a creative service provider as close as possible to them.
4. Kultur- und Kreativpiloten (https://kultur-kreativpiloten.de/about) Cultural and creative pilots Germany is an award that has been awarded since 2010 in the name of the cultural and creative industries initiative of the Federal Government to 32 companies from the cultural and creative

industries. By the end of 2018, 288 companies had been awarded "Cultural and Creative Pilots". The award winners receive an award from the Federal Government and participate in a program geared to exchange and networking. In personal discussions with mentors they reflect their entrepreneurial perspectives. In workshops, the participants meet experts.
5. Platform 12 An experimental space, serving researchers as a creative playing field, a place for reflection, a setting where people can work untrammelled by corporate structures. As an essential feature, Platform 12 contains a permanent collaboration with Akademie Schloss Solitude, in the framework of which artists of various disciplines engage with the company as indirect observers and initiators, to exchange ideas with researchers and work on their own and joint artistic projects. The fellowship is meant to encourage artists and researchers to explore new ideas and to shape future-oriented concepts together. The main focus is not necessarily the production of a specific artistic work, but the encounter and process of dialog in itself. “I firmly believe that Bosch needs to build a new ecosystem for the future. To me that also means that we can’t do this on our own. We need friends, we need allies to work on these systems with us, to bring along facets of their own that we cannot contribute ourselves.” (Birgit Thoben, Senior Innovation Manager at Robert Bosch GmbH)

Challenges

Problems occur when people see themselves as artists and are resistant to advice
Many creatives aren’t attracted by business affairs. They have other triggers, not money/a business model. However, often it needs business skills/a business mindset to make an idea bigger
The main challenge is the recognition of CCI as a relevant economic factor and the importance of professional creative services.

Opportunities

From a global perspective, an innovation ecosystem must be as diverse as possible. Art, creativity and culture are very important players in the complete ecosystem in my opinion.
It would be good if the support for CCI would not only consist of qualification but also more of financing.
Project business vs. ongoing projects: it would be optimal to have the two strings in order to not depend on constantly acquiring new projects.
The greatest opportunity in the Stuttgart Region is to have the CCI recognized as an equally important industry e.g. as the automotive sector, and have creatives being involved in all steps of the value chain. This would also be the ideal goal.