



# Policy Recommendations to Creative Slovakia

## TO-BE report with recommendations

Analysis and recommendations to boost growth in Cultural Industries in Slovakia  
N° SRSS/SC2018/097

14 February 2020



Funded by the Structural Reform Support Programme of the European Union and implemented by KEA European Affairs in cooperation with the European Commission.

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# Terms and Abbreviations

AV	Audiovisual
CI	Cultural Industries
CCI	Cultural and Creative Industries
EC	European Commission
EEN	European Enterprises Network
EIF	European Investment Fund
ERDF	European Regional Development Fund
ESIF	European Structural and Investment Fund
EU	European Union
FI	Financial Instrument
GAFAN	Google, Amazon, Facebook, Apple, Netflix
GBP	Great Britain Pound
GVA	Gross Value Added
KPI	Key Performance Indicator
ICT	Information and Communication Technologies
IROP	Integrated Regional Operational Programme
MoC	Ministry of Culture
MoE	Ministry of Economy
MoF	Ministry of Finance
NACE	<i>Nomenclature statistique des Activités économiques dans la Communauté Européenne</i>
SARIO	Slovak Investment and Trade Development Agency
SBA	Slovak Business Agency
SIEA	Slovak Innovation and Energy Agency
SITC	Standard International Trade Classification

# Executive summary of this report

The strategic role of culture and Cultural Industries (CIs) is clearly spelled out in national strategic policy documents, including the Programme Declaration of the Government of the Slovak Republic 2016–2020 and the Vision and Strategy of the Slovak Republic by 2030. In 2015, the Government put forward a dedicated Strategy of CCIs Development for the period 2014-2020, an ambitious policy document to build Slovakia's creative ecosystem and increase the attractiveness of the country with a view to “increase the share of CCIs in the country GDP”. The Strategy is accompanied by an Action Plan for the period 2016-2017 for the implementation of 37 policy measures.

The study identified **three main opportunities** to build upon for the new strategic framework for CIs post 2020 currently being developed by the Ministry of Culture of the Slovak Republic (MoC):

- 1. A holistic approach to cultural investment:** the Strategy clearly shows the intention of the MoC to support the development of CIs holistically through the creation of a dynamic creative ecosystem to foster Slovak cultural production and cultural and creative entrepreneurship. The Strategy reveals a modern view of cultural policy by linking culture and CIs to different policy areas (entrepreneurship, market access, territorial development and attractiveness, education and skills development, internationalisation and export, innovation and ICT). The Strategy shows the strong vision by the MoC to associate its policy efforts in a multi-disciplinary dimension by pooling resources from other stakeholders (Ministries, national agencies and bodies, cultural institutions, local authorities).
- 2. A clever use of EU Funds to support investment in CI:** the Strategy allocated a considerable amount of EU Structural Funds (more than EUR 270 million) from the Integrated Regional Operational Programme (IROP) 2014-2020 Priority Axis 3 “Mobilising creative potential in the regions” to fund some measures (e.g. regional creative centres). The opportunity to increase cultural investment via EU Structural Fund was well apprehended by the MoC as it would in effect double its financial resources.<sup>1</sup>
- 3. A fast-growing economic sector:** the data analysis shows an impressive growth of the Slovak CIs sector between the period 2013-2017, fuelled by local talents. In the period 2013-2017, the audiovisual, media and multimedia macro-area (including film, video and tv; radio; music and video games) registered an impressive revenues growth (+49.6%) growing from EUR 346 million revenues in 2013 to EUR 518 million in 2017. The macro-area books and press also registered revenues growth, even if more modest (+4.6%). The video games sub-sector registered the most impressive growth between 2013 and 2017: +267% revenues, +92% profits and +1 469% employment. The Slovak music industry also registered +23% growth driven by digital distribution in 2017.<sup>2</sup>

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<sup>1</sup> The annual budget of the MoC was EUR 243,687,741 million in 2017. Source: Council of Europe, Compendium of Cultural Policies & Trends, Country Profile Slovakia, 2018

<sup>2</sup> Source: KEA European Affairs (2020) Cultural Industries in Slovakia. Report on the AS-IS situation

The research also identified **two main challenges** that need to be addressed by the future Strategy and Action Plan with a view to ensure the development of a competitive CIs sector:

**1. Capacity of the Ministry of Culture to design and manage an ambitious CIs agenda** which requires a sufficiently resourced MoC to be in a position to:

- Consult and engage with CI representatives (artists, entrepreneurs, trade associations). This requires the CIs to make the effort to work on a better collective representation.
- Manage Inter-ministerial or national public bodies consultation and coordination.
- Engage with self-governing regions and municipalities prepared to implement the Action Plan.
- Monitor impact of policy measures and market development.
- Raise awareness on the economic and social importance of CIs.

**2. Apprehension of the digital shift, creative skills and international market development in the Strategy and Action Plan.** The impact assessment found that the Strategy and the Action Plan require updating to enable Slovak CIs to make the most of market opportunities:

- Apprehend the entire value chain of CIs: future policy instruments need to better take into consideration marketing, distribution and audience management/development to apprehend new consumption patterns and business models. In addition, the traditional focus on the financing of production should adapt to new formats of storytelling associated with digital media (immersive technologies for immersive entertainment such as Virtual and Augmented Reality).
- Take into account CIs specificities and its innovation potential, tackling the lack of tailored financial instruments and low interest of financial intermediaries in this promising sector. Also, the potential of clustering and cross collaboration with other industry sectors looking to innovate requires promotion to the CIs.
- Put emphasis on creative learning, artistic education and cultural entrepreneurship to ensure availability of technical and creative skills as well as to build the next generation of citizens curious for local and culturally diverse content.

To address these challenges, our recommendations pursue **three main policy objectives** with a view to stimulate the establishment of a dynamic creative ecosystem to make the most of market opportunities and local based talent:

- 1. Address the capacity of the Ministry of Culture to develop and implement a CIs policy.**
- 2. Support the growth of CIs.**
- 3. Increase investment in CIs.**

On this basis, the study advances the following policy recommendations for each of the three identified overarching policy objectives:

<b>Address the capacity of the Ministry of Culture to develop and implement CIs policies</b>	
Proposition 1	<ul style="list-style-type: none"> <li>• <b>Organise a functional review of the Ministry of Culture</b> <ol style="list-style-type: none"> <li>1.1 Review organisation and reporting lines</li> <li>1.2 Reinforce financial and performance management</li> <li>1.3 Improve capacity to engage, collaborate and coordinate work with interested stakeholders</li> </ol> </li> </ul>

	<ul style="list-style-type: none"> <li>• Set up an Advisory Group to put artists, CIs entrepreneurs and associations in a better position to provide advice, share their experience and influence policy</li> <li>• Establish inter-ministerial agreements with other Ministries</li> <li>• Coordinate with national agencies (e.g. SBA, SIEA, SARIO), other public bodies and initiatives (e.g. Slovak Digital Coalition, Tourism Development Strategy)</li> <li>• Reinforce consultation and agreements with self-governing regions and municipalities (also in relation to the use of EU Structural Funds)</li> </ul>
Proposition 2	<ul style="list-style-type: none"> <li>• <b>Raise awareness on the importance of CIs at national and local level</b></li> </ul> <p>2.1 Organise a high-level annual event (forum) on Cultural and Creative Industries</p>
Proposition 3	<ul style="list-style-type: none"> <li>• <b>Improve data collection, analysis and dissemination of cultural statistics</b></li> </ul> <p>3.1 Propose to standardisation bodies, including EUROSTAT, to:</p> <ul style="list-style-type: none"> <li>• Amend NACE classification codes</li> <li>• Revise the current data collection scheme to better capture data on the self-employment and volunteering in the cultural sector</li> </ul> <p>3.2 Update the definition of Cultural and Creative Industry according to the latest revised Eurostat Cultural Industries definition</p> <p>3.3 Analyse cultural employment data in cooperation with Social Insurance services to get more reliable data</p> <p>3.4 Consider performing a representative research of 5000+ respondents from CIs to improve data collection</p> <p>3.5 Set up training schemes and capacity building sessions targeting national statistical office/public officers with a view to improving data collection and data analysis skills</p> <p>3.6 Improve accessibility and dissemination of cultural statistics</p> <ul style="list-style-type: none"> <li>• Introduce user-friendly dedicated sections on the MoC website</li> <li>• Release yearly (or biannual) newsletters or publications</li> </ul> <p>3.7 Develop a robust framework for monitoring and evaluating policy outcomes</p> <ul style="list-style-type: none"> <li>• Make use of the Satellite Account of Culture and Creative Industry to support data collection and analysis</li> <li>• Introduce indicators (KPIs) and target outputs and outcomes in the Action Plan</li> <li>• Liaise with non-cultural agencies (SBA, SIAE) to improve data collection on CIs.</li> </ul>
<b>Support the growth of CIs</b>	
Proposition 1	<ul style="list-style-type: none"> <li>• <b>Reinforce arts education and life-long learning for CIs</b></li> </ul> <p>1.1 Reinforce arts, culture and creativity in formal education at schools and universities</p> <ul style="list-style-type: none"> <li>• Promote specialised training for art teachers at schools and art universities</li> <li>• Develop a partnership with the Ministry of Education, Science, Research and Sport to: <ul style="list-style-type: none"> <li>▪ Review curricula to ensure that arts education is adapted to the evolution of popular/contemporary arts</li> <li>▪ Modernise curricula to improve digital media literacy in schools and arts universities</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>▪ Support programs for on-the-job training and exchanges between students and CI businesses;</li> <li>• Enable artistic intervention in schools as well as youngster's attendance at cultural events</li> <li>• Consider partnership with the video games industry to develop games for education</li> </ul> <p>1.2 Leverage the opportunity of future regional creative centres and creative hubs to develop links with universities with a view to deliver targeted training on creative skills and on business management for CIs professionals</p>
Proposition 2	<ul style="list-style-type: none"> <li>• <b>Review support mechanisms and regulations to support the growth of the CI</b></li> </ul> <p>2.1 Support market access and raise investment in local production by updating regulations</p> <ul style="list-style-type: none"> <li>• Implement quotas and investment obligations for broadcasters and on-demand service providers notably through the implementation of recent EU regulatory developments (Adoption of the Audiovisual Media Services Directive)</li> <li>• Amend the Copyright Law (2016) according to the recent EU regulatory development</li> <li>• Consider introducing a fixed book price to support local distribution</li> <li>• Consider introduction of a reduced VAT rate applicable to cultural products and services</li> </ul> <p>2.2 Review subsidy and grant mechanisms with a view to address digital opportunities and strengthen the entire value chain</p> <p><u>Grants managed by cultural agencies (AV Fund, Arts Council)</u></p> <ul style="list-style-type: none"> <li>• Better integrate emerging technologies, such as virtual reality and augmented reality in grant mechanisms</li> <li>• Support marketing campaigns and distributors/exhibitors to incentivise the availability of Slovak cultural products on the market</li> <li>• Consider financial support in the form of a specific tendering process to encourage cross-collaboration amongst CIs as well as with other traditional industrial sectors to promote non technological form of innovation</li> </ul> <p><u>Grants managed by other public agencies to stimulate cross-collaboration and innovation</u></p> <ul style="list-style-type: none"> <li>• Adapt existing innovation vouchers to stimulate SMEs, especially those from traditional sectors, to cooperate with CIs</li> <li>• Make use of R&amp;D funds (managed by the Slovak Research and Development Agency) and innovation funds (Innovation Fund and the Innovation and Technology Fund) to tailor support for cultural products and service sdevelopment</li> <li>• Consider the setup of a Creative Industry Fund funded by different Ministries to support programmes to enhance cross-collaboration amongst CIs and other sectors</li> <li>• Financially encourage the networking of regional clusters / hubs (including the future local creative centres) / incubators</li> </ul>
Proposition 3	<ul style="list-style-type: none"> <li>• <b>Improve measures to support internationalisation and export</b></li> </ul> <p>3.1 Better coordinate the strategy to support internationalisation</p> <ul style="list-style-type: none"> <li>• Establish a cooperation agreement with the Ministry of Foreign Affairs or the Ministry of Economy to leverage on diplomatic channels and promote CIs as part of trade missions</li> </ul>

	<ul style="list-style-type: none"> <li>Establish cooperation agreements with SBA (Slovak Business Agency) and SARIO (Slovak Investment and Trade Association) to consider how their services can be better targeted and delivered to Slovak CIs</li> <li>Set-up a Task Force composed by CIs representatives to help the MoC to focus its efforts on creating an effective programme of international activity</li> </ul> <p>3.2 Adapt public funding to support internationalisation in a more effective way:</p> <ul style="list-style-type: none"> <li>Review funding support provided by different cultural institutions (such as Arts Council, AV Fund, Music Fund, Literature Fund) to streamline support to CIs to participate in international fairs, awards, competitions, literary translation</li> <li>Support the set-up of bureau export for CIs to enlarge the level of distribution and promotion of Slovak content on foreign markets</li> <li>Support mobility of artists and entrepreneurs for market exploration, participation in training workshops and networking events abroad</li> <li>Ensure better success rate in Creative Europe and Eurimages programmes and encourage leadership in projects through support for project applications</li> </ul> <p>3.3 Pool resources with neighbouring countries (notably Viségrad countries) to invest in ambitious projects that support distribution and marketing of local co-production</p>
<b>Increase investment in the creative economy</b>	
Proposition 1	<ul style="list-style-type: none"> <li><b>Introduce new tax incentives</b></li> </ul> <p>1.1 Introduce tax incentives for other CIs sub-sectors (e.g. music, video games, books and press) to support not only production but also distribution of cultural content with a view to attract inward and local investment.</p> <p>1.2 Introduce fiscal incentives to encourage sponsorships and/or private donations in the cultural and creative sectors.</p>
Proposition 2	<ul style="list-style-type: none"> <li><b>Develop tailored financial instruments to encourage lending and equity investment</b></li> </ul> <p>2.1 Introduce a guarantee scheme to encourage financial intermediaries to lend to CIs (complemented by capacity building and awareness raising programs targeting financial intermediaries to improve expertise on CIs markets and businesses)</p> <p>2.2 Set up a public investment fund to provide loans and match-making fund to CIs entrepreneurs</p>

Table 1 – Overview of policy recommendations

# 1. Introduction

## 1.1 Background

Policymakers at local, national and European level are increasingly acknowledging the contribution of the cultural and creative industries (CCIs) to economic growth and sustainable territorial development.<sup>3</sup>

The Government of the Slovak Republic has recognised the strategic importance of CCIs as a driver for national development and the need to support the development of this growth industry. Since 2011, the Ministry of Culture (MoC) has adopted strategic policy documents in the field of CCIs, notably the Strategy of Cultural and Creative Industries (CCIs) Development<sup>4</sup>, complemented by the Action Plan for the realisation of the Strategy for the period 2016-2017. The Ministry of Culture of the Slovak Republic is preparing the new strategic framework for CCIs post 2020.

KEA European Affairs has been commissioned by the European Commission — DG REFORM to assist the MoC by providing strategic advice on policy measures to support the development of Cultural Industries (CIs) in Slovakia.<sup>5</sup> KEA performed a review of available statistical data, a process evaluation and impact assessment of the Strategy of CCIs Development and the related Action Plan and an analysis of the potential for the private sector to invest in CIs. The analysis resulted in three complementary reports which describe the current situation of the CIs sector in Slovakia:

- *Data Analysis Report* which provides quantitative data and analysis on the CIs sector based on recent available data for 2017 and key trend analysis for 2013-2017. Data focuses on revenues, expenditures, the structure of the sector and employment, audience data and cultural consumption, financial performance;
- *Report on Impact assessment and process evaluation of public policies* which provides a review of the Strategy of CCIs Development and the implementation of measures related to CIs in the Action Plan for the period 2016-2017;
- *Report on results from online survey, structured interviews and focus groups* on barriers to growth, development and innovation of the CIs sector with focus on access to finance and investment potential in CIs.

Key findings were discussed and validated through a stakeholder workshop organised by the Ministry of Culture in Bratislava on October 2, 2019. They are included in the consolidated report *Cultural Industries in Slovakia (Report on the AS-IS situation)* delivered in January 2020. The report is used as a basis for the policy recommendations developed in this

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<sup>3</sup> See for instance the European Parliament Report on A Coherent EU Policy for Cultural and Creative Industries (2016/2072(INI)); the New European Agenda for Culture 2019-2022 (COM(2018)267)

<sup>4</sup> The Strategy was adopted by Government Resolution No 32/2015 on January 21, 2015. Source: Strategy of Cultural and Creative Industries (CCIs) Development. The document is available here (in Slovak language only): <http://www.culture.gov.sk/posobnost-ministerstva/kreativny-priemysel-165.html>.

<sup>5</sup> In the current study, CIs indicates Cultural Industries (namely Books and Press, TV, Film and Video, Radio, Music and Video Games) while CCIs indicates Cultural and Creative Industries including the core arts field (Visual Arts, Performing Arts, Heritage), Cultural Industries and Creative Industries (Design, Architecture and Advertising) in line with the definition of CCIs in Slovakia. Source: Ministry of Culture of the Slovak Republic (2017) CREADIS3: Mapping 1: Competences.

document. This policy document has been drafted to take into account Vision and Strategy of Slovakia Development by 2030<sup>6</sup> and relevant EU policy and actions.

## 1.2 Objectives and scope

KEA has been requested to propose policy recommendations, amending the initial Action Plan, to improve:

1. policy strategy design, effectiveness and action implementation in support of CIs, including policy formulation and consultation processes;
2. The competitiveness of CIs notably to attract investment in the sector.

The policy recommendations are complemented with new Key Performance Indicators (KPIs) to monitor and assess the outputs and outcomes of policy measures as well as an indicative timeline for implementation.

The proposed policy recommendations are often illustrated with examples taken from other countries with similar challenges. They act as reference points for further research in case proposed policy recommendations were adopted.

The proposed recommendations should assist the MoC to:

- Formulate and implement a future Action Plan.
- Consider new rules or instruments to attract private investment in CIs.
- Make effective use of EU rules and funds.

The scope of the assignment is limited to Cultural Industries (namely *books and press, TV, film and video, radio, music and video games*) according to Slovak NACE code classification. For clarity, the list of NACE codes covered by the study is included in Annex I.

The proposed recommendations are aimed to complement, not substitute, or clarify already existing policy measures.

## 1.3 Approach and methodology

KEA applied a multi-method approach with a view to enrich and cross-validate the findings and co-create the policy recommendations with key stakeholders (list in Annex II) to enhance the uptake of the proposed measures. The main phases of the assignment are summarised below:

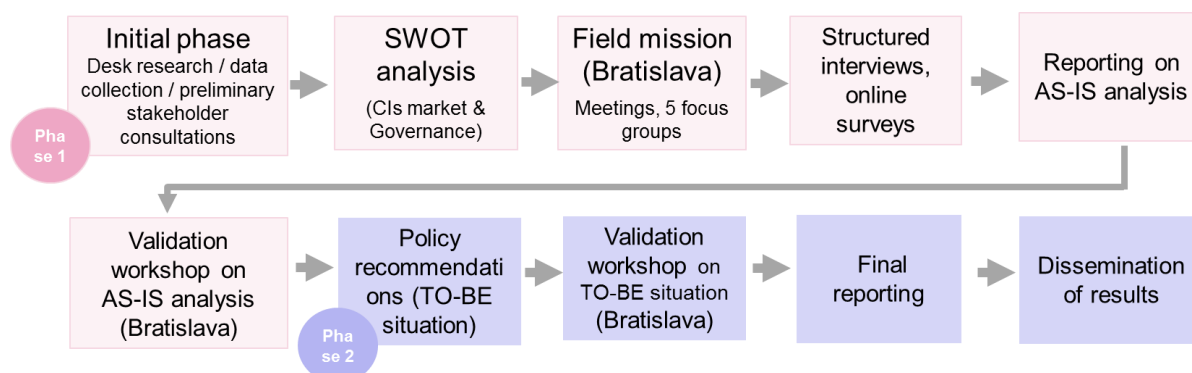


Figure 1 – Approach to the study (elaboration of service provider, 2019)

<sup>6</sup> Source: Vision and Strategy of Slovakia Development by 2030, available at <https://www.enviroportal.sk/sk/eia/detail/vizia-strategia-rozvoja-slovenska-do-roku-2030>

Data collection has been chiefly carried out through desk research. The collection of statistical data was based on the following main sources: the Register of Financial Statements (RFS)<sup>7</sup>, KULT 2017 (Cultural statistics provided by MoC), EUROSTAT, reports of CIs associations (notably in relation to audience data to complement KULT 2017). Preliminary desk research was also carried out to understand the market, governance, policy and regulatory framework related to CIs in Slovakia (notably the Strategy of CCIs Development and the related Action Plan). Desk research also included a comparative analysis with other European countries (notably Czech Republic, Hungary and Poland) to identify best practices that could be applied in the Slovak context. In addition, KEA has been looking into other EU countries which are addressing similar challenges, notably in the field of investment, to gather best practices.

Preliminary findings fed into two SWOT analyses at the beginning of the assignment (SWOT on CIs sector and SWOT on public policy and governance).

Initial findings have been enriched, tested and validated through stakeholder consultations in the form of meetings with public authorities and 5 thematic focus groups during a 1-week field mission in Bratislava (17-21 June 2019), structured interviews, an online survey to 76 CIs entrepreneurs and a stakeholder workshop (AS-IS workshop) organised by the Ministry of Culture in Bratislava on October 2, 2019 with 30 participants from the public and the private sectors. The list of participants is included in Annex III.

The policy recommendations included in the current report were discussed and validated through a second stakeholder workshop in Bratislava (TO-BE workshop) on October 29, 2019 with 30 participants from the public and the private sector. The list of participants is included in Annex IV.

The scope of the assignment does not permit an in-depth analysis on the content and impact of the various proposed measures. This would require specific research to consider technical feasibility. However, provided there is political will they can all be implemented.

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<sup>7</sup> The RFS is under the responsibility of the Ministry of Finance. Some data from the RFS is publicly available at: <https://finstat.sk/>

## 2. Policy Recommendations

This chapter summarises the key findings of the assignment which are a basis for the policy objectives and justify the set of proposed recommendations. This chapter also includes a proposition for new KPIs to monitor and assess the outputs and outcomes of policy measures. Finally, it proposes an indicative timeline for implementation.

### 2.1 Key findings

The policy analysis shows that the Slovak Government acknowledged the important contribution of culture and CIs to innovation and the socio-economic development of the country. The strategic role of culture and CIs is clearly spelled out in national strategic policy documents, including the Programme Declaration of the Government of the Slovak Republic 2016–2020<sup>8</sup> and the Vision and Strategy of the Slovak Republic by 2030. In 2015, the Government put forward a dedicated Strategy of CCIs Development, an ambitious policy document to build Slovakia's creative ecosystem and increase the attractiveness of the country with a view to "increase the share of CCIs in the country GDP". The Strategy is accompanied by an Action Plan for the period 2016-2017 for the implementation of 37 policy measures.

#### 2.1.1 The opportunities

##### 1. A holistic approach to cultural investment

The Strategy clearly shows the intention of the MoC to support the development of CIs holistically through the creation of a dynamic creative ecosystem to foster Slovak cultural production and cultural and creative entrepreneurship. The Strategy reveals a modern view of cultural policy by linking culture and CIs to different policy areas:

- entrepreneurship and support to CIs (mobilisation of opportunities for CI SMEs in relation to training and capacity building activities; access to finance; support to start-ups);
- business conditions and market access (IPR protection; awareness raising activities to stimulate demand of cultural products);
- territorial development and attractiveness (regional creative centres);
- education and skills development in primary and secondary schools (update course curricula; competitions to favour creativity and media literacy);
- internationalisation and export;
- innovation and ICT (support to clusters to promote networking between the creative, technological and business sectors in order to contribute to the country's innovation goal; cross-overs with other sectors).

As such, the Strategy shows understanding that cultural investment contributes to wider policy goals and the strong vision by the MoC to associate its policy efforts in a multi-disciplinary dimension by pooling resources from other stakeholders:

- Other Ministries, notably the Ministry of Economy and related agencies (the Slovak Business Agency and the Slovak Innovation and Energy Agency); the Ministry of

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<sup>8</sup> Source: <http://www.vlada.gov.sk/data/files/7179.pdf>

Education, Science, Research and Sport; the Ministry of Transport and the Ministry of Foreign and European Affairs;

- cultural institutions (notably the AV Fund and Arts Council which operate on the arm's length principle in respect to the MoC) and other national organisations (Intellectual Property Office);
- self-governing regions.

This visionary approach distinguishes Slovakia from neighbouring countries (Czech Republic, Poland, and Hungary) but also numerous other EU countries which have yet to develop a dedicated Strategy and Action Plan for CCIs.

## 2. A clever use of EU Funds to support investment in CI.

As a unique case in Europe, the Strategy allocated a considerable amount of EU Structural Funds (more than EUR 270 million) from the Integrated Regional Operational Programme (IROP) 2014-2020 Priority Axis 3 “Mobilising creative potential in the regions” to fund some measures (e.g. regional creative centres).<sup>9</sup> The opportunity to increase cultural investment via EU Structural Fund was well apprehended by the MoC as it would in effect double its financial resources.<sup>10</sup> This also suggests that the MoC embraced the strategic vision that cultural policy should best be decentralised and recognised that local authorities have a leading role to play in achieving policy goals, for instance following the example of Košice as European Capital of Culture in 2013. This vision is in line with the EU recommendations and the New Agenda for Culture 2019-2022, which emphasises the role of regions and municipalities “ideal partners for experimentation and exploration of new models for social and economic innovation thanks to greater local autonomy and their proximity to their inhabitants”.<sup>11</sup> However, it remains to be seen how and whether this EU funding resources from the IROP PA3 will be mobilised. The implementation of the decentralised scheme to support cultural and creative projects has not started yet as the final administrative processes of the call for proposals (contracting of successful applicants) are still ongoing.<sup>12</sup> The call for proposals to establish regional creative centers has been launched in July 2019 after some delays.<sup>13</sup> We understand that the applicants who submitted the proposals to establish creative centres are from 6 self-governing regions out of 8 (currently under evaluation).<sup>14</sup> We did not have the opportunity to consult local plans for the development of the centres. The policy recommendations will integrate this important development as local creative centres will be instrumental in implementing the future Strategy and Action Plan.

In this context it is important to highlight the positive role played by the AV Fund and the Arts Council to the development of the CIs. Their respective work is getting a consensus approval from stakeholders and beneficiaries.

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<sup>9</sup> Source: Integrated Regional Operational Programme (IROP) available at [www.mpsr.sk/download.php?fID=9759](http://www.mpsr.sk/download.php?fID=9759)

<sup>10</sup> The annual budget of the MoC was EUR 243,687,741 million in 2017. Source: Council of Europe, Compendium of Cultural Policies & Trends, Country Profile Slovakia, 2018

<sup>11</sup> European Commission (2018) New European Agenda for Culture (SWD(2018) 167)

<sup>12</sup> Source: Interviews with the Ministry of Culture (TO-BE workshop, October 2019) and CI stakeholders (field mission in Bratislava in June 2019)

<sup>13</sup> The published call is available here: <http://www.culture.gov.sk/podpora-projektov-dotacie/irop-po3-mobilizacia-kreativneho-potencialu-v-regionoch-vyzva-centralizovana-podpora-2fe.html>. According to the published call, the overall amount dedicated to the establishment of the creative centers is EUR 87,819,458 (of which EUR 14,818,790 for Bratislava region).

<sup>14</sup> Source: Ministry of Culture (January 2020)

### 3. A fast-growing economic sector

The data analysis shows an impressive growth of the Slovak CIs sector between the period 2013-2017, fuelled by local talents recognised internationally<sup>15</sup>, including video games developers.<sup>16</sup>

In the period 2013-2017, the audiovisual, media and multimedia macro-area (including film, video and TV; radio; music and video games) registered an impressive revenues growth (+49.6%) growing from EUR 346 million revenues in 2013 to EUR 518 million in 2017.<sup>17</sup> The macro-area books and press also registered revenues growth, even if more modest (+4.6%).<sup>18</sup> The video games sub-sector registered the most impressive growth between 2013 and 2017: +267% revenues, +92% profits and +1 469% employment.<sup>19</sup> The Slovak music industry also registered +23% growth driven by in digital distribution in 2017.<sup>20</sup> 2017 registered the highest number of cinema viewers since 2014.<sup>21</sup> Cinema admissions increased 18.1% in 2017 compared to 2016.<sup>22</sup>

Revenues from export are also growing fast in some sub-sectors, in particular book publishing (+19.4% in the period 2013-2017) and video games.

In relation to the structure of the sector and employment, between the period 2013-2017, the employment in the audiovisual, media and multimedia macro-area increased by 16% (while the employment in the books and press macro-area overall remained stable).

The analysis also shows a flourishing production of cultural content: in 2017, 8 220 new book titles were published (31% digitally published)<sup>23</sup>; 256 new audio-visual works were produced (of which 20 feature films)<sup>24</sup> and 55 new video games were released.<sup>25</sup>

These positive trends reveal CIs' dynamism and potential to benefit from the worldwide demand for original content driven by digital distribution platforms.<sup>26</sup> It is evident that Slovak CIs have to address the international market considering the size of the local home market as well as adapt to benefit from digital opportunities to reach out and to retain talents.

#### 2.1.2 The main challenges

There are two main challenges: the first one relates to the capacity of the MoC to manage an ambitious CIs agenda. The second is linked to the initial Strategy and Action Plan to sufficiently apprehend the digital shift and globalisation.

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<sup>15</sup> In 2019, a Slovak writer (Ivana Dobráková) has been awarded the EU Prize for Literature (EUPL)

<sup>16</sup> An example is the Slovak game development company Pixel Federation, which is considered one of the fastest-growing start-up companies in the Central and Eastern Europe. They currently employ over 200 people and focus on developing browser and app games. Source: <https://portal.pixelfederation.com/en/>

<sup>17</sup> Source: Data Analysis Report.

<sup>18</sup> Source: Data Analysis Report.

<sup>19</sup> Source: Data Analysis Report. This trend is in line with global market trends on video games: between 2011 and 2015, the global video games market has increased from USD 54.2 billion to 71.3 billion. It is predicted to grow to 90.1 billion in 2020. Source: Gaming industry and market report, Clairfield international

<sup>20</sup> Source: IFPI Slovakia Market Results 2017

<sup>21</sup> Source: Creative Europe Media Desk, Report on the Slovak audiovisual situation in 2017

<sup>22</sup> Source: *ibid.*

<sup>23</sup> Source: KULT report 2017

<sup>24</sup> Source: Creative Europe Media Desk Slovakia, Report on the Slovak audiovisual situation in 2017

<sup>25</sup> Source: Slovak Game Developer Association Report 2017

<sup>26</sup> Growth forecast for entertainment and media predict fast growth for Virtual reality (VR) and over-the-top videos (OTT). The total global Entertainment and Media (E&M) revenue will see a 4.4% CAGR (Compound Annual Growth Rate) rise over the five-year forecast period through 2022, reaching USD 2.4 trillion in that year, from USD 1.9 trillion in 2017. Source: EIF (2019) Market Analysis of the Cultural and Creative Sectors in Europe - A sector to invest in.

## 1. Capacity of the Ministry of Culture

The ambitious agenda requires a sufficiently resourced Ministry in a position to:

- Consult and engage with CI representatives (artists, entrepreneurs, trade associations). This requires the CIs to make the effort to work on a better collective representation. The sector should be encouraged to speak with one voice to be able to influence policy making.
- Manage Inter-ministerial or national public bodies consultation and coordination.<sup>27</sup>
- Engage with self-governing regions and municipalities prepared to implement the Action Plan and make the most of funding opportunities.
- Monitor impact of policy measures and market development.
- To raise awareness on the economic and social importance of CIs.
- Develop good statistics on CIs.

## 2. A better apprehension of the digital shift, creative skills and international market development

The impact assessment found that the Strategy and the Action Plan require updating to enable Slovak CIs to make the most of market opportunities.

- A policy that apprehend the entire value chain of CIs<sup>28</sup>

Future policy instruments need to better take into considerations marketing, distribution and audience management/development to apprehend new consumption patterns and business models. It is about making the digital shift an opportunity for local CIs, raise their ability to compete internationally and to control their commercial destiny independently from other market players. Slovakia has to ensure the availability of outlets capable of ensuring the visibility of local produced content, notably bookstores, concert and theatrical venues, AV channels and theatres. There is no point funding production without the infrastructure to access markets and consumers. In addition, the traditional focus on the financing of production should adapt to new formats of storytelling associated with digital media (immersive technologies for immersive entertainment such as Virtual and Augmented Reality). This policy also requires addressing data gaps at statistical level to better capture the economic contribution of the CIs in the overall economy.

- A policy that takes into account CIs specificities and its innovation potential

Whilst it is right to include CIs in overall support policies for SMEs<sup>29</sup>, it is also important to consider the industry specifics to develop tailor made measures that reflect the size, structure and aims of such enterprises. It is to be considered that there is often poor awareness of general support policies for entrepreneurship that are accessible to cultural entrepreneurs

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<sup>27</sup> According to the results of our survey, 47% of cultural entrepreneurs are not satisfied with the interaction with the MoC.

<sup>28</sup> The value chain of CIs is composed of several core activities related to the creation, the production, the distribution and transmission of cultural goods and services which embody cultural, artistic or other creative expressions, as well as related functions such as education or management. Source: IDEA Consult, KEA and imec-SMIT-VUB (2017) Mapping Creative Value Chains - A study on the economy of culture in the digital age.

<sup>29</sup> For instance, supporting measures for SMEs under the responsibility of the Ministry of Economy / Slovak Business Agency or internationalisation and marketing opportunities through events organized during the Slovak Presidency of the EU (2016) or promotional activities in line with the Tourism Development Strategies 2020

besides grants and subsidies managed by the Arts Council and AV Fund.<sup>30</sup> Therefore more efforts should be provided to encourage and help CIs businesses to make use of support infrastructures for SMEs (such as the Creative Business Centres, the EEN services, the microloans promoted by SBA and clustering promotion schemes). The potential of clustering and cross collaboration with other industry sectors looking to innovate requires promotion to CIs with a view to implement this important policy vision that culture investment is supportive of innovation through cross fertilisation with science, technology and business. The support for digital transformation and ICT is one of the flagship initiatives of the Slovak Government (notably with the creation of the Digital Coalition in 2017<sup>31</sup>), this is the opportunity to create synergies between the IT and CIs sector, all contributors to the digital economy.

The specificity of the sector also militates for the development of tailor-made financial instruments to support investment in the sector. 75% of the respondents to the survey expressed dissatisfaction with the financial environment in Slovakia, thus preventing development and growth. Access to finance has been identified as the most pressing challenge. 90% of CIs entrepreneurs surveyed expressed interest in a specific financial instrument to make available loans or equity funding<sup>32</sup>.

Such specificity should also be taken into account in the development of support measure to encourage internationalisation and access to foreign markets.

- A policy that puts emphasis on creative learning, artistic education and cultural entrepreneurship.

To generate interest in the CIs, ensure availability of technical and creative skills as well as to build the next generation of citizens curious for local and culturally diverse content and stories education plays a crucial role. Policies, in association with the Ministry of Education, Science, Research and Sport, are required to modernise the school curricula and the teaching of the Arts. Arts education should include the development of media literacy. To remain attractive to investment and provide capacity it is important to nurture the training of technicians and creatives notably in AV industries and digital media. The development of the capacity of cultural entrepreneurs to manage finance, marketing or understand the value and management of intellectual property also requires more consideration.

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<sup>30</sup> Source: interviews and focus groups with CIs stakeholders

<sup>31</sup> Source: <https://ec.europa.eu/digital-single-market/en/news/digital-coalition-launched-slovakia>

<sup>32</sup> We understand that the Slovak Investment Holding is currently supporting the Ministry of Culture in designing a new Financial Investment scheme funded through ESIF (EUR 56 million from IROP Axes 3) to provide tailored Financial Instruments to CCIs. Furthermore the existing cash rebate scheme for AV production (film and TV) managed by the AV Fund to attract foreign investment increased from 20 to 33% as from January 1, 2022 according to the draft audiovisual law. This will contribute to reinforce the country's international attractiveness to foreign investment in the booming AV industry hungry for content to feed their international digital pipelines (Netflix, Amazon or Disney for instance).

## 2.2 Policy objectives

The overall aim of the proposed recommendations is to stimulate the establishment of a dynamic creative ecosystem to make the most of market opportunities and local based talent. They also consider best ways to build on EU initiatives adopted to support the growth of the CIs.

As a result, our recommendations pursue three main policy objectives:

1. Address the capacity of the Ministry of Culture to develop and implement a CIs policy.
2. Support the growth of CIs.
3. Increase investment in CIs.

The report proposes a set of policy measures to address the above-mentioned objectives. When relevant it highlights policy examples from other European countries facing similar challenges. These policy measures are justified by gaps identified in the research and consultation process as briefly described in the previous section and subject to a more in-depth analysis in the previous report.<sup>33</sup> They have been validated in a stakeholder consultation at the end of October 2019.

Notwithstanding the positive trends related to some cultural sub-sectors and products in recent years (e.g. video games), the increasing intertwining of CIs sub-sectors favoured by digitisation<sup>34</sup> and collaborative working methods generated by the emergence of creative hubs leads to promote policies that are not siloed but cross-sectorial.<sup>35</sup>

A roadmap for implementation is proposed at the end of the document (paragraph 2.4.2).

## 2.3 Policy recommendations

The following paragraphs present a set of policy recommendations for each of the three identified overarching policy objectives.

### 2.3.1 Policy recommendations to address the capacity of the Ministry of Culture to develop and implement CIs policies

There are three sets of policy recommendations:

1. Organise a functional review of the Ministry of Culture.
2. Raise awareness on the importance of CIs at national and local level.
3. Improve data collection, analysis and dissemination of cultural statistics.

Each set of policy recommendations is explained in detail below.

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<sup>33</sup> KEA European Affairs (2020) Cultural Industries in Slovakia. Report on the AS-IS situation

<sup>34</sup> Source: IDEA Consult, KEA and imec-SMIT-VUB (2017) Mapping Creative Value Chains - A study on the economy of culture in the digital age. A report prepared for the European Commission, DG Education and Culture

<sup>35</sup> As recent studies point out, some CIs sub-sectors can be considered as part of a wider “digital media” sector, which includes all activities linked to cinema, television, news and information, production, distribution and storage of content and video games. Source: KEA (2018) *Towards an integrated vision for the European Digital Media Sector*, research paper for the European Commission.

## 1. Organise a functional review of the Ministry of Culture

The functional review of the MoC aims to improve its overall effectiveness and performance (administrative, managerial, financial, technical capacity) looking at its structure, the competence, available financial and human resources as well as functions of the service in charge of CIs policy. An ambitious strategy requires a correctly resourced department with the authority to develop and carry out the national policy in collaboration with a large number of stakeholders and public services. The functional review aims to make the MoC more effective in putting into action the Strategy and Action Plan as improved organisation and structured dialogue will contribute to build trust between MoC and stakeholders, in particular with the CI sector. Transparency and accountability serve to mobilise interested parties to support the implementation of a modern policy vision developed by the MoC.

The functional review should consider the improvement of the following aspects:

- 1.1 Review organisation and reporting lines:** clarification of reporting lines of the services in charge of CIs (including the Department of Arts and Creativity under the Division of Art currently in charge of the CCIs agenda) towards the Ministry; assessment of whether departments or divisions need restructuring (considering the horizontal function of the Department of Arts and Creativity) and whether managerial responsibilities are balanced and sustainable; streamline functional responsibilities amongst departments; assessment of internal communication amongst departments (notably the Department of Arts and Creativity, the Institute for Cultural Policy in charge of data collection and interpretation and the Section responsible for the implementation of the IROP PA3<sup>36</sup>);
- 1.2 Reinforce financial and performance management:** clarification of budget lines of the Strategy and Action Plan including transparency and visibility of financial resources for the respective policy measure (to align the budget with policy priorities and check the feasibility of the proposed measures); reinforcement of competences of staff (technical and administrative) notably in relation to the financial management of the EU Structural Funds (understanding and implementation of EU procurement rules for timely use of resources); clarification of the use of EU Structural Funds for CIs (some potentially relevant measures for CIs are currently funded under the OPVal PA3 which is solely available for Architecture, Design and Advertising); use of KPIs and performance measurement systems (concrete proposals in this respect are made in paragraph 2.4.1);
- 1.3 Improve capacity to engage, collaborate and coordinate work with interested stakeholders** as prerequisite for policy formulation and implementation:
  - **Artists, CIs entrepreneurs and associations:** the MoC should set-up an Advisory Group composed of CI representatives to allow the sector to be in the position to provide advice, share its experience and influence policy.<sup>37</sup> Such Advisory Group could contribute to ad-hoc Task Forces to support the MoC on specific topics (such as the development of internationalisation strategies for CIs or establishing

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<sup>36</sup> Source: <http://www.culture.gov.sk/ministerstvo/organizacna-struktura-17.html>

<sup>37</sup> In France, in the context of the next CCI States-General (a gathering of representatives from all sectors of the cultural and creative industries to try to identify with them themes and projects of common interests e.g. digital transformation, promotion of employment, training and skills, development of research and innovation projects, conquest of new international markets), the government plans to set up a strategic sector committee (CSF) to establish, by the end of 2020, a sector contract for CCIs on the model of what exists in industrial sector. Source : <https://www.institut-metiersdart.org/agenda/consultation-en-ligne-pour-les-industries-culturelles-et-creatives-icc>

synergies with the Slovak Digital Coalition). The Advisory Group should support the collective representation of the sector.<sup>38</sup> The Stakeholder Platform (Forum) currently being developed by the MoC (as part of the Action Plan for CCIs in the framework of the Interreg Europe project CREADIS3)<sup>39</sup> can be useful in this respect (it might also be an opportunity to identify some key members to be part of the Advisory Group);

- **Other Ministries** (Ministry of Economy; Ministry of Finance; Ministry of Education, Science, Research and Sport; Ministry of Foreign Affairs; Ministry of Construction and Regional Development; Ministry of Agriculture as responsible for the IROP). The MoC should set up inter-ministerial agreements to break silos and effectively mainstream culture and CIs in other policy areas (notably economy and entrepreneurship, innovation, trade, tourism, foreign affairs, education, regional development).<sup>40</sup> Considering that numerous policy measures are under the responsibility of different Ministries and institutions, it is important to enable the MoC to coordinate and be consulted in the implementation. Allocation of responsibilities should be clarified and the MoC should be properly resourced to play a coordinating role notably in relation to the implementation of the strategy in the regions, in external relations or in support to economic development and innovation.
- **National agencies, other public bodies and initiatives:** the MoC should develop capacity to coordinate and monitor activities of agencies involved in the implementation of CIs policies, notably:
  - National agencies (e.g. Slovak Business Agency, Slovak Innovation and Energy Agency, Slovak Investment and Trade Development Agency) to raise awareness about non-sectorial opportunities for CIs;
  - The Slovak Digital Coalition (one of the flagship initiatives of the Slovak Government to support digital transformation and ICT launched by the Deputy Prime Minister Peter Pellegrini in September 2017) to stimulate cross-collaboration and innovation between CIs and other sectors.<sup>41</sup> The MoC is currently not a member of the Coalition and the cultural and creative sectors remains underrepresented;<sup>42</sup>

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<sup>38</sup> In UK, the Creative Industries Federation is the membership body which represents, champions and supports the UK's creative industries. The membership network comprises more than 10,000 individuals from creative organisations, businesses and educational institutions throughout the UK. Source: <https://www.creativeindustriesfederation.com/about>. In The Netherlands, the Creative Industry Federation represents the interests of the Dutch creative industry. The membership is open to individual businesses, umbrella organisations, trade and professional associations in the cultural and creative industry sector. Source: <http://dutchcreativeindustries.nl/>

<sup>39</sup> the Forum for CCIs should provide direct feedback to the MoC from relevant stakeholders, institutions to improve the design and efficacy of policy measures. More information on the CREADIS3 project is available at: <https://www.interregeurope.eu/creadis3/>

<sup>40</sup> In Czech Republic, In November 2019, the Minister of Culture and the Minister of Industry and Trade signed a Memorandum of Understanding for the design and implementation of the future strategy. Source: <https://www.mkcr.cz/>. In France, several Ministries other than the Ministry of Culture and Communication participate directly in public cultural development (e.g. Ministry of Education and Research, Ministry of Health, Youth and Sports, Ministry of Foreign Affairs, Ministry of Agriculture, Ministry of Tourism). The cooperation with the Ministry of Culture are based on many inter-ministerial agreement protocols that are frequently updated. Source: Council of Europe, Compendium of Cultural Policies & Trends, Country Profile France. Available at <https://www.culturalpolicies.net/database/search-by-country/country-profile/?id=13>

<sup>41</sup> Source : <https://ec.europa.eu/digital-single-market/en/news/digital-coalition-launched-slovakia>

<sup>42</sup> Out of the 67 members and 16 prospective members, there are few representatives of CIs including Future Media Production, sro; SmartBooks as; Radio and television Slovakia – RTVS. Source: <https://digitalnakoalicia.sk/>

- The Tourism Development Strategy to promote Slovak cultural content to inward tourists (e.g. events, festivals in rural areas).<sup>43</sup>
- **Self-governing regions and municipalities:** the MoC has considerable efforts to make to engage with regions and cities as they are essentials in the development and implementation of policies relevant to territories' attractiveness. National priorities need to be aligned with local needs. Local authorities need to understand the national policy objectives, the value of cultural investment and be considered as true partner to ensure coordinated implementation. The context of the implementation of the ESIF operational programmes highlight the importance of closer collaboration between the MoC and local authorities.<sup>44</sup>

## 2. Raise awareness on the importance of CIs

There is urgent need to increase awareness within the MoC, other Ministries, national public bodies, self-governing regions and municipalities as well as amongst the population on the strategic importance of CIs and the contribution of culture and CIs to the socio-economic development of the country.

It is suggested **to organise a high-level annual event (forum) on Cultural and Creative Industries** to raise awareness on the socio-economic importance of CIs. The event would be the opportunity to showcase successful local entrepreneurs in the media, enable interconnections between CIs and the political world, give the MoC a platform to address policy issues and inform stakeholders on priorities.<sup>45</sup>

In order to support demand for Slovak cultural content and raise awareness on excellence in the country it is important to incentivise public broadcasters, NGOs and commercial outlets to promote local talent.<sup>46</sup>

## 3. Improve data collection, analysis and dissemination of cultural statistics

The MoC should consider the following measures:

### 3.1 Propose to standardisation bodies, including EUROSTAT, to:

- Introduce or amend NACE classification codes (and related explanatory notes) in relation to CIs when a revision of the classification will take place to overcome the lack of recognition of relevant cultural economic activities, as emerged during the

<sup>43</sup> For example, Lithuania has a special working group on cultural tourism which unites all the stakeholders responsible for cultural tourism development. Source: UNWTO (2018) Tourism and Cultural Synergies. available at <https://www.e-unwto.org/doi/pdf/10.18111/9789284418978>

<sup>44</sup> In France, the Council of Territorial Authorities for Cultural Development (*Conseil des collectivités territoriales pour le développement culturel*, CCTDC) was set up in 1999, to formulate views and propositions on any question of territorial cultural development, within the framework of the partnerships between the Ministry of Culture and territorial authorities. Source: Council of Europe, Compendium of Cultural Policies & Trends, Country Profile France

<sup>45</sup> The International Forum Creative Ukraine is a platform for political and expert discussion on the development of state policy in the field of CCIs. Source: <http://creativeukraine.org.ua/> In Austria, the Creative Industries Forum is an open network for all intermediaries in the sector of the creative industries in Austria to favour regular exchange of experiences amongst professionals of regional and industry-specific institutions. Source: <https://www.kreativwirtschaft.at/en/creative-industries-policy/creative-industries-forum/>. B.creative is an international organization and event to promote creative entrepreneurship and networking worldwide. Source: [www.bcreativetracks.com](http://www.bcreativetracks.com)

<sup>46</sup> BookTrust, the UK's largest children's reading charity, launched its first 'Time to Read' campaign to encourage families to spend more time reading together, even when children are 'too old for a bedtime story'. Source: <https://www.daynurseries.co.uk/news/article.cfm/id/1578419/Time-to-Read-campaign-urges-parents-to-share-more-experiences>

data collection. For instance, a specific NACE code for video game development activities could be introduced (currently there is only a NACE code for publishing of video games) or a specific NACE code for collection of IP royalties. The lack of appropriate NACE codes is particularly problematic for some CI sub-sectors such as video games, as the majority of game developers report themselves as IT companies.<sup>47</sup> This results in an underestimation of the contribution of CIs to the economy;

- Revise the current data collection scheme by reviewing the sampling methods for national surveys to better capture:
  - coverage of data regarding self-employment and volunteering in the cultural sector, considering that these categories constitute a considerable part of CIs employment.<sup>48</sup> However, there is no common system to collect and analyse data about cultural volunteers in Europe;
  - the technological development and the emergence of new products or services, notably in the fast-evolving domain of audio-visual and digital production. For instance, the Standard International Trade Classification (SITC) provides data on trade in tangible goods only and does not cover services, licences, intellectual property rights or digital content such as music, films and video games available via streaming platforms.<sup>49</sup>

This recommendation is in line with the on-going important revision of NACE classification. The review process involves several stakeholders EUROSTAT, other European Commission services, EU Member States, European business and trade associations, central banks with a view to implement a fully revised NACE in the national accounts by 2024.<sup>50</sup>

**3.2 Update of the definition of Cultural and Creative Industry according to the latest revised Eurostat Cultural Industries definition.** Since 2012, EUROSTAT has been improving its definitions and the updated versions are part of the Guide to Eurostat Cultural Statistic (2018, page 13). The analysis of the Satellite Account of Culture and Creative Industry (recently set up to improve the collection and analysis of cultural statistics in Slovakia and due to be fully operational by 2020) carried out during the study shows that it does not include multiple NACE codes (1810, 1811, 1812, 1813, 1814, 1820, 3220) that are part of the recently revised Eurostat Cultural Industries definitions. It would be beneficial to align the definition of the Satellite Account with the recent development and European level to capture the full range of cultural activities.

**3.3 Analyse cultural employment data in cooperation with Social Insurance services to get more reliable data.** The data collection carried out during the study found that the data on employment provided by companies for the Register on Financial

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<sup>47</sup> For instance, according to the Register of Financial Statements, the Satellite Account of Culture and Creative Industry and EUROSTAT, the video game sector in Slovakia report revenues lower than EUR 500.000 (only 2 companies are reported as game publishers according to NACE code 5821) while the Slovak Game Developers Association reports revenues of about EUR 45 million in 2018.

<sup>48</sup> According to the data analysis report, the large majority of CIs companies in Slovakia is actually constituted by self-employed (61% of the total in 2017)

<sup>49</sup> Only some data on the online consumption/purchase of cultural content are available through surveys on information and communication technologies. Source: EUROSTAT

<sup>50</sup> The stakeholder consultation was done during the summer of 2019. A MS Access database with all comments and proposals has been created by EUROSTAT and can be accessible upon request. EUROSTAT proposals concern 'cultural' divisions 18, 58, 59, 60, 74, 90, 91 and class 85.2 (Cultural education). Other proposal relates to the distinction of cultural activities in division 84 ('Public administration') and 94 ('Membership organisations'). Source: consultation with European Commission, DG EAC

Statements is not always reliable.<sup>51</sup> A closer collaboration with the Social Insurance Service will enable to cross-check employment data and obtain more accurate estimation of cultural employment.

**3.4 Consider performing representative research of 5000+ respondents from CIs to improve data collection.** A large representative research on 5000+ respondents from CIs with targeted research questions (on revenues, employment, etc.) can provide different a point of view on creative industries and help to understand creative positions outside of creative sector. It can also provide better insights into activities of multidisciplinary companies and the cross-collaboration amongst CIs. Data collected from such representative research could be used to cross-check and complement data collected under NACE codes to have a more reliable picture of CIs at national level.

**3.5 Set up training schemes and capacity building sessions** (including the development of manuals and guidelines on how to collect and analyse data) targeting national statistical office/public officers with a view to improving data collection, data analysis skills as well as CIs association to improve sectorial data collection.

**3.6 Improve accessibility and dissemination of cultural statistics** in a user-friendly way to raise awareness about the contribution of CIs to the economy and support evidence-based policy making through:

- Elaboration of infographics / short analysis and presentation of key data in the dedicated section on the MoC website (e.g. section related to KULT statistics<sup>52</sup>) to make them more accessible to citizens<sup>53</sup>;
- Release yearly (or biannual) publications dedicated to CIs statistics (also per sub-sectors) including thematic tables on employment, business and consumption.<sup>54</sup>

**3.7 Develop a robust framework for monitoring and evaluating policy outcomes.** The MoC should develop such framework taking into consideration the following aspects:

- Make use of the Satellite Account of Culture and Creative Industry to support data collection and analysis related to the monitoring and assessment of the Strategy and the Action Plan. A specific working group composed by the MoC, INFOSTAT and the Statistical Office could be organised with this aim;
- Introduce indicators (KPIs) and target outputs and outcomes in the Action Plan to measure the medium and long-term impact of policy measures and allow for corrective measures. Suggestions in this respect are included in paragraph 2.4;
- Liaise with non-cultural agencies (SBA, SIAE) to improve data collection on CIs.<sup>55</sup>

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<sup>51</sup> For example, during the research we found examples of companies with low revenues (less than EUR 10.000 per year) reporting more than 2 000 employees, which is not be possible according to the minimal wage regulations in place in Slovakia.

<sup>52</sup> Source: <http://www.culture.gov.sk/vdoc/424/vysledky-kult-2017-324.html>

<sup>53</sup> Relevant examples are offered by the French Ministry of Culture and Communication which publishes short summaries with key data on CCI and sub-sectors (<https://www.culture.gouv.fr/Sites-thematiques/Etudes-et-statistiques/Publications/Collections-d-ouvrages/Chiffres-cles-statistiques-de-la-culture-et-de-la-communication-2012-2019/Chiffres-cles-2019>) or the Italian Ministry of Culture – MiBACT (an infographic is available at [https://www.beniculturali.it/mibac/export/MiBAC/sito-MiBAC/Menu-Utility/Immagine/index.html\\_1483285733.html](https://www.beniculturali.it/mibac/export/MiBAC/sito-MiBAC/Menu-Utility/Immagine/index.html_1483285733.html))

<sup>54</sup> An interesting example is offered by the Polish Culture Yearbook available here: <https://www.nck.pl/en/news/polish-culture-yearbook-2017>

<sup>55</sup> In Poland, the new Development Strategy 2030 will include guidelines for implementation dedicated to the different implementing bodies and KPI and output indicators to measure the results and impact over the 10-year period of implementation. Indicators relate to both social and economic impact and will be measures by the National Statistic Institution in cooperation with the MoC. The Strategy will also include specific data collection and analysis per CI sub-sector (music, video games, film...) with biannual publication of data (brochures) for the general

### 2.3.2 Policy recommendations to support the growth of CIs

The key findings of the impact assessment suggest that the Strategy and Action Plan should be updated to better support the competitiveness of the CIs industry taking into better consideration CIs specificities, market and technological trends as well as globalisation. The recommendations aim to address the following priority issues:

- Value the importance of creativity in education system (arts education) and life-long learning opportunities for talent to emerge (in coding, digital design, technical skills or creative storytelling) and become the next generation of entrepreneurs.
- Address the entire CIs value chain (not only production) for CIs to make the most of the digital shift.
- Improve clustering and cross-fertilisation between culture, science, business and technology to stimulate innovation and the establishment of creative ecosystems whether at national or regional levels.
- Increase internationalisation opportunities to look beyond the local market.

On international/EU cooperation, synergies should be sought in particular with the EU initiative STARTS (Science, Technology & the Arts<sup>56</sup>) or other cooperation opportunities under the forthcoming Horizon Europe programme, COSME<sup>57</sup>, Creative Europe, Interreg or other programmes. Of special interest in this context can also be cooperation opportunities under the EU Urban Agenda and Urban Innovative actions.

Three sets of measures are proposed to address the above-mentioned issues:

1. Reinforce arts education and life-long learning for CIs
2. Review support mechanisms and regulations to support the growth of the CI
3. Improve measures to support internationalisation and export.

Each set of policy recommendations is explained below.

#### 1. Reinforce arts education and life-long learning for CIs

##### 1.1 Reinforce arts, culture and creativity in formal education at schools and universities to reach and educate future talent as well as audiences, including:

- Promote specialised training for art teachers at schools and art universities to understand the potential of digital media and new technology, establish links with local creative hubs for CIs entrepreneurs. To ensure that learners benefit from integrating art and culture in creative learning processes, it is essential that teaching and training professionals understand art and learn how to work with it as an important teaching tool. There is a need for progressive continuing education programmes that enable teachers and trainers to learn how art and culture can be used in creative teaching and learning<sup>58</sup>;
- Develop a partnership with the Ministry of Education, Science, Research and Sport in order to:

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publicSource: Interview with Anna Ceynowa, Head of Strategies, Analyses and Creative Sectors Division, Department of Intellectual Property and Media, Ministry of Culture and National Heritage

<sup>56</sup> Source: <https://www.starts.eu/>

<sup>57</sup> Such as the Worth programme (<http://www.worthproject.eu/>)

<sup>58</sup> In Spain, arts education teachers must have a university degree, without prejudice to the participation of other qualified professionals in certain cases. Permanent training and evaluation is also required. For example, the Ministry of Education is now developing a special training programme in cultural mediation for teachers. Source: Kern P (2018) Cultural Policy Peer Review of Georgia. Prepared for the Council of Europe

- Review curricula to ensure that arts education is adapted to the evolution of popular/contemporary arts, for instance by taking into consideration new music genres (such as pop / rock music, electronic music), mass media culture, digital media studies also with a view to grow new audience for Slovak cultural content (music festivals, animation, serious gaming);
- Modernise curricula to improve digital media literacy in schools and arts universities (numeracy, coding, digital design in 2D/3D, creative storytelling fits for transmedia, virtual reality and augmented reality) to train the next generation of professionals in digital media (e.g. animators, game developers, technicians in special effects, audio and video specialists, graphic designers, advertising);
- Support programs for on-the-job training and exchanges between students and CI businesses and increase opportunities for young people to work in the cultural sector starting with volunteering or internships, also via EU programmes such as Erasmus, European Voluntary Programme, Erasmus for Young Entrepreneurs, i-Portunus artists' mobility and others.<sup>59</sup> This will also contribute to building bridges between education/skills and employment of young people and foster young people's active citizenship;
- Enable artistic intervention in schools as well as youngster's attendance at cultural events with a view to stimulate imagination, creativity and curiosity<sup>60</sup>;
- Consider partnership with the video games industry to develop games for education (serious gaming, edutainment). This will also contribute to improve the social recognition of video games as useful tools for education against the perceived negative influence video games might have on users (especially children and youngsters) in relation to violence and harmful content.

**1.2 Leverage the opportunity of future regional creative centres and creative hubs to develop links with universities with a view to deliver targeted training on creative skills and on business management for CIs professionals**, in line with the overall objective of the IROP PA3 "centralised scheme".<sup>61</sup> Such training should consider reinforcing business skills including budgeting, business plan preparation, marketing and branding, use of ICT equipment. The future creative centres act as co-working spaces to favour peer-learning and exchanges between CIs entrepreneurs and researchers.<sup>62</sup>

<sup>59</sup> See <https://www.i-portunus.eu/>

<sup>60</sup> In France, on September 17, 2018, Françoise Nyssen, Minister of Culture, and Jean-Michel Blanquer, Minister of National Education, presented a joint action plan to allow all children from 3 to 18 years old to benefit from arts education. Source: <https://www.education.gouv.fr/cid134086/a-l-ecole-des-arts-et-de-la-culture.html> Finland highly promotes the collaboration between schools, artists and arts institutions. Source: <https://www.lkca.nl/~media/downloads/bijeenkomsten/dutch-scandinavian%20exchange/ppt%20finland%20anu%20hietala.pdf>

<sup>61</sup> The regional creative centres should be used to host incubators, accelerators and business support schemes for CIs ("soft" activities such as professional consultancy, capacity building actions, ...). Source: Integrated Regional Operational Programme (IROP) available at [www.mpsr.sk/download.php?fid=9759](http://www.mpsr.sk/download.php?fid=9759)

<sup>62</sup> An interesting case is Creative Skillset, the UK-wide strategic skills body for the Creative Industries to support skills and training for people and businesses to ensure the UK Creative Industries maintain their world class position. Through co-investment, Creative Skillset manages a range of training funds raised from both industry and Government aimed at delivering solutions for skills development. Source: <https://www.screenskills.com/>

## 2. Review regulations and support mechanisms to support CIs' competitiveness and cross innovation

The policy measures are recommended to reinforce the capacity of entrepreneurs to grow across the value chain and develop in a globalised market and build on the initial Strategy and Action Plan.

### 2.1 Support market access and raise investment in local production by updating regulations

- **Implement quotas and investment obligations for broadcasters and on-demand service providers** notably through the implementation of recent EU regulatory developments (Adoption of the revision of the Audiovisual Media Services Directive<sup>63</sup>).

Legal rules concerning the environment in which AV service providers operate have been updated in order to create a level playing field. The amendments brought by Directive (EU) 2018/1808 of 14 November 2018 to the **Audiovisual Media Services Directive** 2010/13/EU (AVMSD) creates market access obligations to the benefit of European audiovisual content that are aimed to promote the availability of copyright content with EU origin. The revised AVMSD enhances the rules for promotion of European works by requiring TV, Pay TV and VOD services to allocate a share of at least 30% of European works in their catalogue and to ensure prominence (Article 13(1)). The Directive also recognises the ability for Member States to impose proportionate and non-discriminatory financial contributions obligations on a cross border basis on VOD and broadcasters targeting audiences in their territory (Art 13.2 and 13.3).

The directive in its Article 13.2 establishes a distinction between service providers under the jurisdiction of a Member States and service providers outside the jurisdiction but targeting its territory. It extends the ability of Member States to seek contributions from service providers to national cultural policy objectives. Criteria to determine if a service is targeting a specific audience in a Member State are suggested in recital 38 which refers to indicators such as advertising or other promotional activities aimed at customers in that territory, the main language of the services or the existence of content or commercial communications aimed specifically at the audience in the Member State of reception.

- **Amend the Copyright Law (2016) according to the recent EU regulatory development** with a view to ensure proper remuneration of local rightsholders on social media platforms. The Directive on Copyright in the Digital Single Market (EU) 2019/790<sup>64</sup> introduced specific rules for so-called "online content-sharing providers" which store and give access to a large amount of copyright works uploaded by their users. Where rightsholders do not grant a licence, online content-sharing service providers are liable for unauthorised content unless they make their best efforts to ensure that unauthorised content is not available on their service. The specific rules which must be complied with are set out in detail in Article 17(5), (7)-(9) of the Directive which focus on cooperation between online content-sharing service providers and rightsholders. The Directive also provides for the organisation of stakeholder dialogues to discuss best practices for the cooperation between providers and rightsholders. It is

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<sup>63</sup> Directive (EU) 2018/1808 of 14 November 2018

<sup>64</sup> Directive (EU) 2019/790 of 17 April 2019 on copyright and related rights in the Digital Single Market which will have to be transposed by Member States by 7 June 2021 ('the new Copyright Directive')

important that rightsholders in Slovakia be involved and informed on the implementation of such rules aimed at addressing the little monetary compensation to the exploitation of copyright protected works on social media platforms (notably YouTube). The law in Slovakia has to amend liability provisions governing activities of social media platforms.

- **Consider introducing a fixed book price to support local distribution** (local bookshops). Fixed book price is a form of resale price maintenance applied to books which allows publishers to determine the price of a book at which it is to be sold to the public. Fixed book price aims to facilitate non-price competition between retailers. It is a way to maintain a large network of booksellers on the basis that prices are not undercut by large distribution outlets whose book selling is ancillary to their commercial activities. This measure is in use in 13 European countries, including Austria, Belgium, France, Germany, Spain, Italy, the Netherlands, Norway, and Hungary.<sup>65</sup> In the same vein regulatory support could be granted to commercial and community radios that are making special efforts to showcase local productions.
- **Consider introduction of a reduced VAT rate applicable to cultural products and services** (e-books, cinema/music concert tickets, press and magazines...) as permitted by EU law to make them more affordable and support cultural consumption. At the moment, printed books are subject to VAT at a reduced rate (10%) instead of the standard rate (20%). On the other hand, several EU countries apply a reduced rate on other cultural products or services (such as newspapers, cinema/theatre tickets).<sup>66</sup> The field is subject to EU rules.

## 2.2 Review subsidy and grant mechanisms with a view to address digital opportunities and strengthen the entire value chain.

### Grants managed by cultural agencies (AV Fund, Arts Council)

- **Better integrate emerging technologies, such as virtual reality and augmented reality in grant mechanisms** to support creation and production fit for new forms of digital media and transmedia storytelling and immersive entertainment.<sup>67</sup> The Arts Council recently undertook some initiatives in this regard, notably the new scheme to support Digital Games Creation (gaming and non-gaming multimedia works) introduced in 2017 and 2018 (highly praised by the video game sector in Slovakia).<sup>68</sup> This should be reinforced and included in the new Strategy and Action Plan.<sup>69</sup>
- **Support marketing campaigns and distributors/exhibitors** to incentivise the availability of Slovak cultural products on the market, for instance to support distribution

<sup>65</sup> Usually, fixed book price can take the form of a law to oblige by all retailers or an agreement between publishers and booksellers. In France, Lang Law establishes a fixed price for books sold in France and limits price discounts on them in order to protect small, traditional booksellers from competition of big stores and chain retailers (such as Fnac). The law was extended to cover e-books in May 2011. Source : <http://www2.culture.gouv.fr/culture/dll/prix-livre/index.htm> In Germany, fixed prices on books have long been a tradition and were codified in law in 2002.

<sup>66</sup> For an overview of current VAT rates applied in the EU see [https://ec.europa.eu/taxation\\_customs/sites/taxation/files/resources/documents/taxation/vat/how\\_vat\\_works/rates/vat\\_rates\\_en.pdf](https://ec.europa.eu/taxation_customs/sites/taxation/files/resources/documents/taxation/vat/how_vat_works/rates/vat_rates_en.pdf)

<sup>67</sup> Source : KEA European Affairs (2018) Creative Europe: towards the next programme generation. Report prepared for the European Parliament, CULT Committee

<sup>68</sup> Source: <http://sgda.sk/slovak-arts-council-grants-to-support-digital-games-creation/>

<sup>69</sup> In UK, in 2018 the Government earmarked GBP 33 million (out of GBP 150 million to set up a Creative Industry Fund) specifically for virtual reality games, interactive art shows and augmented reality tourism, with a view increase Britain's share of global creative immersive content to GBP 30 billion by 2025. Source : <https://www.theculturediary.com/stories/funding-and-support-creative-industries-new-government-sector-deal>

and marketing notably for fast-growing sub-sectors such as video games (e.g. digital distribution through tablets, smartphone, PC, console) and digital distribution of books.

- **Consider financial support in the form of a specific tendering process to encourage cross-collaboration amongst CIs** (e.g. arts, design, AV, architecture) **as well as with other industrial sectors to promote non technological forms of innovation.** Partnerships between CIs and tech companies should be encouraged to enable CIs to better manage their customer base through artificial intelligence and big data (e.g. target audience, easing licensing processes) or to develop new services in healthcare, in tourism and digital media.<sup>70</sup> Future local creative centres should also be coordinated centrally to support projects on cross-collaboration.

#### Grants managed by other public agencies to stimulate cross-collaboration and innovation

- **Adapt existing innovation vouchers to stimulate SMEs, especially those from traditional sectors, to cooperate with CIs**, for instance to enable SMEs to use creative services in the framework of an innovation project. While innovation vouchers for SMEs already exist in Slovakia (provided by the Slovak Innovation and Energy Agency - SIEA, the funding agency of the Ministry of Economy), they are generic instruments not adapted to the needs of CIs.<sup>71</sup> In other European countries, tailored-made innovation vouchers have proven to be instrumental to stimulate cross-sectorial collaboration between CIs and other sectors.<sup>72</sup>
- **Make use of R&D funds** (managed by the Slovak Research and Development Agency) **and innovation funds** (Innovation Fund and the Innovation and Technology Fund) to tailor support for cultural product and service development (e.g. video games). In some EU Member States, innovation and/or technology funds actively support to CIs, notably video games.<sup>73</sup>
- **Consider the setup of a Creative Industry Fund funded by different Ministries** to support programmes to enhance cross-collaboration amongst CIs and other sectors (healthcare, environment, ICT).<sup>74</sup> This means that the Fund is operating within several policy contexts. Services offered by the Fund can include:
  - Targeted financial support (grants, subsidies);

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<sup>70</sup> In The Netherlands, the Creative Industries Fund NL contributes to the formulation of broadly supported creative-driven and design solutions for societal issues through its grants and programme. In 2016, it supported nine grant programmes to support collaborations amongst the fields of architecture, design, fashion, games and digital storytelling. Source: [https://stimuleringsfonds.nl/en/the\\_fund/organization/about\\_the\\_fund/](https://stimuleringsfonds.nl/en/the_fund/organization/about_the_fund/)

<sup>71</sup> Source: <http://www.siea.sk/inovacne-vouchre/>

<sup>72</sup> In Austria, the Creative Industries Voucher is issued in the form of a grant of up to EUR 5,000 and enables SMEs from all industries to use creative services in the framework of an innovation project. The objective is to stimulate innovation projects in SMEs, especially in those from traditional sectors, through cooperation with the creative industries.

<sup>73</sup> In Finland, TEKES (the Finnish funding Agency for Technology and Innovation) financed and managed by the Ministry of Employment and the Economy has invested EUR 30 million in the Finnish game industry, mainly through R&D projects between the period 2011-2014 greatly contributing to the development of the video games sector in Finland. Source: [http://www.neogames.fi/wp-content/uploads/2015/02/Neogames\\_report2015\\_full.pdf](http://www.neogames.fi/wp-content/uploads/2015/02/Neogames_report2015_full.pdf)

<sup>74</sup> In The Netherlands, the Creative Industries Fund NL (annual budget of about EUR 15 million) is co-funded by different Ministries. The greatest portion of the budget comes from the Ministry of Education, Culture and Science, complemented by a budget from the Ministry of Foreign Affairs for internationalization, and a budget from the Ministry of Infrastructure and the Environment for three stimulation programmes – Innovative Forms of Commissioning, Healthcare Environments and Education Environments – within the Action Agenda for Spatial Design. Source: [https://stimuleringsfonds.nl/en/the\\_fund/organization/about\\_the\\_fund/](https://stimuleringsfonds.nl/en/the_fund/organization/about_the_fund/)

- Information campaigns to bridging the communication gap between stakeholders from CIs and traditional businesses to raise awareness about the potential CIs can bring to innovation and value-chain development in traditional industries;
  - A platform to favour industry-to-industry dialogues and networking/match-making events;
  - Business coaching and advice for CIs whose staff favour the collaboration with traditional industries. This includes support on how to secure intellectual property from a cross-industry collaboration.
- **Financially encourage the networking of regional clusters / hubs (including the future local creative centres) / incubators** to support collaboration across the country and the development of joint projects with creative and innovation value. This can entail for instance specific grants to finance series of meetings/events to enable experience sharing and promotion of good practices or the establishment of joint calls for tenders aimed to supporting cross-regional collaboration.

### 3. Improve measures to support internationalization and export

The following policy measures are recommended to support internationalization and export in a globalized market and build on the initial Strategy and Action Plan.

#### 3.1 Better coordinate the strategy to support internationalisation through:

- **Establishing a cooperation agreement with the Ministry of Foreign Affairs and the Ministry of Economy** (which is responsible for international trade policy) to leverage on diplomatic channels and promote CIS as part of trade missions. Such cooperation can enhance opportunities to showcase Slovak culture abroad and build local support for the establishment of a strong Slovak presence in identified target markets to raise the profile of those Slovak businesses connected with it.<sup>75</sup> Notably, the Slovak Ministry of Foreign Affairs is member of the EUNIC network (European network of National Institutes for Culture) and could contribute to leverage on Slovak cultural institutes abroad;
- **Establishing cooperation agreements with SBA (Slovak Business Agency) and SARIO (Slovak Investment and Trade Association)** to consider how their services can be better targeted and delivered to Slovak CIs in terms of optimal information on business opportunities skills (marketing, branding, planning long-term internationalization strategies) and confidence to operate in overseas markets or with inward investors;
- **Establish a Task Force composed of CIs representatives** to help the MoC to focus its efforts on creating an effective programme of international activity for the benefit of the industry, as part of the Advisory Group discussed in paragraph 2.3.1.

#### 3.2 Adapt public funding to support internationalisation through:

- **The review of funding support provided by different cultural institutions** (such as Arts Council, AV Fund, Music Fund, Literature Fund) to **streamline support to CIs to participate in international fairs, awards, competitions**, literary translation to **showcase Slovak content abroad**, target third countries in demand of creative

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<sup>75</sup> The Czech Republic introduced a specific action in the National Cultural Policy 2015-2020 to foster cooperation with the Ministry of Foreign Affairs to boost the diplomatic network and support the presentation of Czech films abroad. Source: <https://www.mkcr.cz/cultural-policy-of-the-czech-republic-983.html?lang=en>

content (e.g. China).<sup>76</sup> For instance, grants for literary / artistic translations (including international mobility) are offered both by the Literature Fund and the Arts Council, thus it might be useful to assess these funding and rationalise them;

- **Financially supporting the set-up of bureau export for CIs** to enlarge the level of distribution and promotion of Slovak content on foreign markets.<sup>77</sup> For instance, LALA Music Export is a bottom-up initiative whose budget is almost entirely used for direct expenses rather than being redistributed to support skills development or marketing. A joint effort between the public and the public sector (involving the Ministry, music associations, publishers) could be useful to reinforce its efficiency;
- **Supporting mobility of artists and entrepreneurs** for market exploration, participation to training workshops and networking events abroad<sup>78</sup> also via European programmes (Erasmus+, i-Portunus, Erasmus for Young Entrepreneurs);
- **Ensuring better success rate in Creative Europe and Eurimages programmes and encouraging leadership in projects** through support for project applications.<sup>79</sup>

### 3.3 Pooling resources with neighbouring countries (notably Viségrad countries<sup>80</sup> as well as Interreg) to invest in ambitious projects that support distribution and marketing of local co-production.<sup>81</sup> The collaboration can be instrumental to:

- Create catalogues of content that feed into distribution pipelines;
- Fund international marketing campaigns;
- Mutualise technical, licensing and service costs to improve the offer to consumers and develop competitiveness in data management;
- Develop local subscription linear services.

## 2.3.3 Policy measures to increase investment in the creative economy

The key findings of the study show that<sup>82</sup>:

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<sup>76</sup> In Poland, the “The Don’t Panic! We’re from Poland” programme, initiated by the Adam Mickiewicz Institute in 2008, is a brand recognised around the world as a synonym for fresh, promising music from Poland. The programme comprehensively promotes contemporary Polish music abroad, through the participation of Polish artists and music-industry professionals in music events. Thus far it has presented more than 300 selected performers at more than 500 events in 21 countries. Source: <https://culture.pl/en/dont-panic-were-from-poland> In France, in addition to the National Book Center (which offers grants for the translation of French works into foreign languages by supporting translation costs), French authors are supported through the Publication Assistance Programs (PAPs) which provides assistance to publishers around the world for the translation and publication of French-language literary texts.

<sup>77</sup> Poland established the Music Export Poland (MExP) with the ambition of radically enlarge the level of distribution and promotion of Polish music, artists and recordings on foreign markets. The project is made possible thanks to the combined efforts of the Society of Authors ZAiKS which represents the creators, the ZPAV dealing on behalf of music publishers and a significant support coming from the Ministry for Culture and National Heritage. Source: [www.musicexportpoland.org](http://www.musicexportpoland.org)

<sup>78</sup> Source : KEA European Affairs, survey on the ‘International mobility of creative entrepreneurs’ (2018) <https://keanet.eu/cultural-creative-entrepreneurs-call-improved-mobility-market-exploration-development/>

<sup>79</sup> The Czech Republic introduced a specific action in the National Cultural Policy 2015-2020 to support CCIs to access the EU Creative Europe programme in terms of conception and preparation of new projects and new artistic cooperation. Source: <https://www.mkcr.cz/cultural-policy-of-the-czech-republic-983.html?lang=en>

<sup>80</sup> Slovakia is already cooperating with the Czech Republic, Hungary, Poland through the International Viségrad Fund which supports the development of common cultural, scientific research, and educational projects, exchanges and cross-border cooperation. Source: <https://www.visegradfund.org/>

<sup>81</sup> An interesting example is the strategy of five Nordic public service broadcasters (members of the European Broadcasting Union) to join forces for increased co-production and distribution of drama production to face the competition of international streaming services and the availability of strong American fiction. The ambition is to increase both the volume and the quality of Nordic drama, not the least through the broadcasters’ popular streaming services. Source: <https://www.ebu.ch/news/2017/10/nordic-ebu-members-pledge-enhanced-drama-collaboration>

<sup>82</sup> Source: KEA European Affairs (2020) Cultural Industries in Slovakia. Report on the AS-IS situation

- access to finance and lack of private investment are amongst the most pressing challenges for the growth of CIs;
- there is a clear lack of understanding on the potential of CIs amongst financial intermediaries;
- other European countries are better positioned to attract foreign investment notably in audiovisual, digital media and video games;
- the country has yet to make the best of the Creative Europe Guarantee Facility for the Cultural and Creative Sectors (CCS) set up to encourage investment in CIs SMEs.<sup>83</sup>

The survey to CIs entrepreneurs and stakeholder consultations stressed that Slovak financial intermediaries have a limited knowledge of the investment opportunities in the CIs. This militates for a campaign to raise awareness amongst the financial community to increase expertise in the CIs.

We propose two sets of policy recommendations to address the issue of investment:

1. Introduce tax incentives to encourage investment in CIs and the digital economy
2. Develop a tailored financial instrument to encourage lending and equity investment.

Each set of policy recommendations is explained below.

## 1. Introduce tax incentives

There is a wide range of public policy incentives to stimulate private investment.<sup>84</sup>

Slovakia currently has in place a 33% cash rebate on expenses spent on film or TV production in the country (feature film, documentary, animation, TV series or a commercial).<sup>85</sup> The scheme is managed by the AV Fund. However, the cash rebate is solely dedicated to AV production, in line with the mission of the AV Fund. In addition, there are no fiscal incentives to stimulate private donations or sponsorships in the cultural sector.

Hence, the following policy measures are proposed<sup>86</sup>:

- 1.1 Introduce tax incentives for other CIs sub-sectors (e.g. music, video games, books and press) to support not only production but also distribution of cultural content** with a view to attract inward and local investment.
- 1.2 Introduce fiscal incentives to encourage sponsorships and/or private donations** in the cultural and creative sector.

The choice of the most appropriate schemes should take into consideration different factors, including the targeted beneficiaries (e.g. size of the company) and the current income tax of businesses in Slovakia. This will require a feasibility study to select the most suitable instruments in cooperation with the Ministry of Finance and the Slovak Investment Holding which is currently designing tailored instruments for CCIs funded through ESIF (budget EUR 56 million).

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<sup>83</sup> Until now, 13 financial intermediaries in 10 EU countries have signed agreements with the European Investment Fund, including Czech Republic, Hungary and Poland. Source: <https://ec.europa.eu/digital-single-market/en/financial-guarantee-facility-culture-creative>

<sup>84</sup> Source: Institute for International Relations, Encouraging Private Investment in the Cultural Sector, 2011 for the European Parliament; IDEA Consult et al, Survey on access to finance for cultural and creative sectors, 2013

<sup>85</sup> Source: <https://www.filmcommission.sk/cash-rebate/>

<sup>86</sup> The proposed measures have been presented and discussed to representatives of the Ministry of Finance and the Slovak Investment Holding during the assignment, notably during the field visit in Bratislava (21 June 2019) and the TO-BE workshop (29 October 2019)

The schemes are described below with exemplary cases from other EU countries.

*a. Tax incentives to stimulate investment*

Tax incentives are recognised as effective public support schemes to stimulate private investment (both by foreign and local investors) into different stages of the CIs value chain (notably production, post-production or distribution) by decreasing the tax charge of the investor.

There are 2 main types of tax incentives commonly used in Europe: tax shelters (tax deductions) and tax credits (rebates).<sup>87</sup>

- *Tax shelters* are any methods of reducing taxable income resulting in a reduction of the tax payments. Tax shelters designed to attract investment from individuals or firms who are permitted to deduct investments made in qualifying production costs from their taxable revenues, while still being able to realise profits from a project (although these would be subject to tax when received)
- *Tax credits* are driven by the production spend against the producer's tax liabilities in the way that the incentive will directly reduce the amount of tax due, after a corporate annual return is filled in. This model can be further distinguished in tax rebate according to the procedure for claiming the tax credit (rebate).

Tax incentives are considered a viable complementary source of finance in the CIs industry. The access to tax incentives (or other forms of private investment) relies on business skills, diligence, on developing business relations between the different involved sectors and understanding the various specificities of each sector. Also, these instruments offer an incentive to promising local creators to remain in the country and not set up elsewhere, taking advantage of more lenient tax regimes targeting the sector's best talent to relocate.

Tax incentives have become increasingly popular across the EU: recently, a large number of European countries (amongst others, Belgium, France, Estonia, Hungary, Italy, Lithuania, The Netherlands) have implemented tax incentives notably to stimulate audiovisual production (feature films, animations, TV series, documentaries, etc).<sup>88</sup>

Tax incentives have also been extended to support other CIs sectors such as video games, music or books and press as well as other segments of the value chain (not only production but also post-production, distribution and marketing).<sup>89</sup> This reflects the broader trend in

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<sup>87</sup> Source: Olsberg SPI (2014) Impact Analysis of Fiscal Incentive Schemes Supporting Film and Audiovisual Production in Europe. Report produced for the European Audiovisual Observatory

<sup>88</sup> In Belgium, the Tax Shelter for AV production is open to Belgian productions as well as international co-production. The net advantage for the producer is 42% of the qualifying audiovisual spend in Belgium. Source: <https://www.belgiumfilm.be/film-financing/tax-shelter> In France, the *Crédit impôt cinéma* offers automatic direct support which normally equals to 30% of the total eligible expenditure (capped at EUR 30 mln per project). Source: [https://www.cnc.fr/professionnels/aides-et-financements/cinema/production/credit-dimpot-cinema\\_132769](https://www.cnc.fr/professionnels/aides-et-financements/cinema/production/credit-dimpot-cinema_132769) In Hungary, the Motion Picture Act and Corporate Tax Act (the Hungarian financial support system) allows foreign movie production companies that shoots a movie in Hungary (even only on video or audio post-production) to get 25% of the cost back from the Hungarian government indirectly. Source <https://filminginhungary.com/255-tax-rebate> Italy introduced six new tax credits to support AV production and distribution in 2016 (Law 202/2016).

<sup>89</sup> Italy has in place a tax credit for music (the scheme covers up to 30% of the eligible costs incurred for creation, production, digitalization and promotion of music or AV recordings for a maximum of EUR 200 000 per year per company) and a tax credit for bookstores (retail sale of new and second-hand books) for an amount not exceeding EUR 10 000 per year (Law 205/2017). Source: <http://www.beniculturali.it/> Belgium, the Tax Shelter mechanism has been extended to the "performing arts" (including music) since 2017. In France, a tax rebate for video games covers 30% of production expenses, for up to EUR 6 million per company. In Poland, the Ministry of Culture prepared legislation providing tax incentives for video games companies making Polish content starting from January 2019. Source: Interview with Anna Ceynowa, Head of Strategies, Analyses and Creative Sectors Division, Department

Europe towards encouraging investment in the CIs sector, as a holistic measure to support the industry, develop the local economy and promote international attractiveness.

Some countries like Belgium, France, Hungary, Italy, Lithuania, the UK are specialists in attracting foreign investment thanks to these schemes.<sup>90</sup> For instance, KEA study (2018) on the evaluation of the fiscal incentive scheme for film production in Lithuania<sup>91</sup> shows that the tax scheme has helped channelling an additional EUR 24.4 million of foreign investment in the country and helped generating an estimated EUR 43.5 million in expenditure in the country between 2014-2017.<sup>92</sup>

It is important to point out that the introduction of tax incentives is also beneficial for the government. For example, in France EUR 12.8 has been invested in the sector for every EUR 1 of incentive provided. The UK shows that for every GBP 1 of tax relief there is an additional GBP 12 of GVA created.<sup>93</sup> UN's creative tax incentives are amongst the most competitive in the world: the instruments have since 2007 attracted over GBP 11 billion of investment in British screen industries.<sup>94</sup>

No EU country can spare its own incentives if it wishes to attract production and stimulate investment in CIs.

#### *b. Tax incentives to stimulate sponsorships and donations*

It should be noted that tax incentives can also be applied to sponsorships and donations as another way of encouraging investment of external private capital in the wider cultural and creative industries:

- *Sponsorship* is becoming a strategic measure for increasing investment in CIs. Sponsorship of cultural institutions, organisations or events can be treated the same as other expenses for advertising (i.e. it is fully deductible) with the condition to be linked to business activities that are sources of taxable income.<sup>95</sup>

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of Intellectual Property and Media, Ministry of Culture and National Heritage. in the UK, the incentives initially introduced for AV have been expanded to new sectors such as video games.

<sup>90</sup> Source: European Commission (2016) Innovative instruments to facilitate access to finance for the cultural and creative sectors (CCS): good practice report

<sup>91</sup> The Lithuanian tax scheme came into effect in January 2014 for a five-year period. It was approved by the European Commission in 2012, as part of State Aid review. The scheme was designed as a policy measure to boost local and foreign film production in Lithuania and to attract inward investment through a private investment scheme. The support is provided as a donation (which does not exceed 20% of the production budget) by an undertaking entity and is backed by a tax relief on profits. Source: KEA (2018) Evaluation of the fiscal incentive scheme for film production in Lithuania.

<sup>92</sup> The study also shows that a significant increase in the production activity reflected in the annual turnover of the Lithuanian production companies, evolving from EUR 10.3 million to EUR 14 million in 2016 (an increase of 36%). Since the implementation of the tax scheme, Lithuania's film industry has shown ability to increase its market share and meet consumers' demand for local stories (21.47% in national market share in 2017).

<sup>93</sup> Source: Olsberg SPI (2014) Impact Analysis of Fiscal Incentive Schemes Supporting Film and Audiovisual Production in Europe. Report produced for the European Audiovisual Observatory. According to the study, almost all of the incentive structures analysed "provide a greater return to the government in tax revenues than they cost to operate, whilst also providing standard trickle-down benefits to the broader economy, also including in areas such as tourism and exports" (page 3).

<sup>94</sup> Source: UK Government, Creative Industries Sector Deal. Available at: [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/695097/creative-industries-sector-deal-print.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/695097/creative-industries-sector-deal-print.pdf)

<sup>95</sup> In France, the "Aillagon Law" passed in 2003 is part of a broader reform aimed at developing sponsorship and patronage (donation). The Law grants fiscal benefit to companies to encourage corporate sponsorship by introducing a 60% tax reduction on corporate tax. In Bulgaria, to encourage private sponsorship, a tax deduction is provided to resident and non-resident natural persons and legal entities. The deduction amounts to up to 10% of the taxable income of the donor for the purpose of conservation and restoration of historical and cultural

- *Donation* is a gift in cash or kind made by companies (or other legal subjects) or individuals to cultural organisations or individual artists. A taxation policy measure to encourage corporate donations is mostly implemented via a *tax deduction* on the donation (*tax shelter*), i.e. the taxable income of the donor is being reduced with the value of the donation. This is a well-established measure in countries of Anglo-Saxon cultural policy tradition<sup>96</sup>, however, more and more countries are starting to encourage donations in the cultural sectors via tax incentives for both individuals and businesses (Italy<sup>97</sup>, France<sup>98</sup>). The beneficiaries of individual or corporate donations are mostly non-profit organisations in the core arts field (such as visual arts, performing arts, heritage), thus these measures should be coupled with the ones illustrated above targeting CIs.

Whereas sponsorship is part of a commercial strategy which includes quantifiable returns, no financial return is expected when making donations.

Several EU Member States such as Austria, Bulgaria, Denmark, France, Ireland, Italy, Malta, Portugal or the UK, have introduced tax incentives (in particular *tax deductions*) for sponsorship actions and/or donations (corporate or individual donations). Some measures have been very successful in raising funds (both from individuals and companies) to culture while increasing the fiscal revenues at the same time. For example, thanks to the Aillagon Law in France the number of companies giving corporate donations rose from 6 500 in 2005 to 68 930 in 2017. The tax expenditure has almost multiplied by ten, going from EUR 90 million in 2004 to EUR 930 million in 2016.<sup>99</sup>

Another type of measure to boost individual donations and raise funds for CIs is the National Lottery mechanism introduced by several countries (Belgium, France or UK for instance). In UK, the British Film Institute uses National Lottery funds to develop and support original UK filmmakers and films, and to increase the audiences who can enjoy them.<sup>100</sup> As from November 2015, the British Film Institute (and, prior to 1 April 2011, the UK Film Council) received GBP 236 million.<sup>101</sup> In France, the innovative « Loto du Patrimoine » (Lottery for heritage) regularly offers a prize of EUR 13 million and part of the profits goes to save cultural heritage sites in danger of falling into ruins. The Lottery was launched in 2018 and raised EUR 20 million.<sup>102</sup>

## 2. Develop dedicated financial instruments for CIs

To date, there are no financial instruments specifically designed to target CIs businesses besides the cash rebate for AV production previously described. While CIs companies can access to generic financial products (e.g. micro-loans offered by the SBA, loan guarantees provided by the Slovak Investment Holding, loans offered by commercial banks), stakeholder

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monuments. In the Netherlands, investments in arts and cultural projects that generate profits up to EUR 54 000 are exempted from charges on capital returns

<sup>96</sup> Institute for International Relations, *Encouraging Private Investment in the Cultural Sector*, 2011 for the European Parliament.

<sup>97</sup> In Italy, the Art bonus tax credit was introduced in 2016 (Law 208/2015) to support donations in the cultural sector. The tax credit covers donations to support culture and entertainment, for up to 65% of the donations made. Between 2016 and November 2018, thanks to the Arts Bonus tax incentive EUR 300 million have been donated, mostly from come from private citizens (59% of the total).

<sup>98</sup> In France, the Aillagon Law introduced a 66% reduction in income tax capped at 20% of taxable income for individuals.

<sup>99</sup> Cours de compte (2018) Le soutien public au mécénat des entreprises (in French only)

<sup>100</sup> Source: <https://www.national-lottery.co.uk/life-changing/project-bfi-film-festival>

<sup>101</sup> Source: <https://researchbriefings.parliament.uk/ResearchBriefing/Summary/LLN-2015-0049>

<sup>102</sup> Source: <https://loto-du-patrimoine.fr/>

consultations underlined that CIs businesses are rarely aware of these opportunities. Furthermore, the study found that there is a clear lack of understanding on the potential of CIs amongst financial intermediaries.

Hence, it is recommended to:

**2.1 Introduce a guarantee scheme to encourage financial intermediaries to lend to CIs.** The state guarantee incentivises financial intermediaries to extend loans to CIs companies (to be selected according to NACE codes) by mitigating and/or protecting risks (notably commercial default risk).

**2.2 Set up a public investment fund** to allow for the offer of a wide array of tailored financial instruments to CIs such as:

- repayable financing (loans) with free or favourable interest rates
- venture capital (equity) or matching funds to support investment in CIs, from start-ups and capital-intensive sectors such as AV and video games companies.

Such Fund can also be set up at regional level, for instance to support business angels with matching funds.<sup>103</sup> The local creative centres could be activated to promote such measure to CIs and promote networking/awareness raising events to bring together CI businesses, investors and public authorities.

The Fund will complement and not replaces other existing financial mechanisms (e.g. the cash rebate) and public subsidies. This will effectively complement public support to projects with investment in the growth of CIs businesses and stimulate the leverage of private investment capital. The MoC can assess the possibility to expand the scope of the Slovak Arts Council to become such a Fund.<sup>104</sup>

The financial instruments described above to stimulate private investment in CIs are widely used in other countries in Europe, as exemplified in the following paragraphs.

*a. Guarantee schemes to encourage financial intermediaries to lend to CIs*

Guarantees can mobilise and leverage debt financing by mitigating and/or protecting risks, notably commercial default risk in the case of CIs. Through a public guarantee, governments or other public executive bodies agree to bear a certain amount of risk, typically by assuming a borrower's debt obligation in the case of a default.

In the EU, public loan guarantee schemes for CIs have become increasingly popular in recent years.

At European level, in 2016 the Creative Europe Guarantee Facility for CCS entered into force seeking to incentivise banks and other financial intermediaries across Europe to extend loans to SMEs within the cultural and creative sectors through a free-of-charge guarantee instrument of an overall value of EUR 121 million (extended to EUR 181 million in 2017). The guarantee takes the shape of a portfolio of eligible debt financing, meant to cover eventual losses incurred by financial intermediaries if a CIs business falls into default on loan repayments (i.e. it covers 70% of outstanding final loss after recovery procedures are terminated). However, a cap on losses is set by the European Investment Fund at a maximum level of

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<sup>103</sup> Matching funds require that an investment has to be matched by a certain amount proportional to the value of the investment from a third party, such as the state or local community.

<sup>104</sup> The Statute of the Slovak Arts Council mentions that "its main mission is to create conditions for sustainable development of artistic creation, artistic activities, culture and creative industry, for creation of artistic works and its presentations by providing financial sources following its aim to support creative activities, culture and creative industry".

25%. The Guarantee Facility is expected to generate more than EUR 1 billion in loans for thousands of cultural and creative SMEs.<sup>105</sup>

The experience of the Creative Europe Guarantee Facility has proved to be effective in stimulating financial intermediaries and investors to invest in CIs by sharing their risks. In Italy for instance, the agreement signed between the EIF and the Italian public bank “Cassa Depositi e Prestiti (CDP)” to leverage on the Italian Guarantee Fund for SMEs aims at generating EUR 300 million in new financing for around 3 500 SMEs in the cultural and creative sectors in Italy. Several financial intermediaries have shown interest in CIs and have signed an agreement with the EIF in the past 2 years (13 financial intermediaries from 10 EU countries have signed an agreement so far and others are currently under discussion with the EIF<sup>106</sup>).

At national level, there are several examples of public loan guarantees set up at national levels in several EU Member States:

- In France, the Financing Institute for Cultural Industries and Cinema (IFCIC) is a Fund established in 1983 on the French ministries of Culture and Economy's initiative.<sup>107</sup> In 2016, the total volume of loans granted or guaranteed by IFCIC amounted to EUR 1 billion for the benefit of nearly 1 000 cultural and creative companies. It offers two sets of financial instruments:
  - Loans to cultural and creative companies and financial/banking expertise; the loans usually finance development investments (post-seed financing) and expenditures on intangible investments; IFCIC loans are unsecured (no guarantee, security, mortgage or insurance is required). It also offers medium-term loans in particular to music businesses for structural development through the ‘Fonds d’Avance aux Industries Musicales’ (the loans cover up to 70% of the costs for a maximum of EUR 800 000)
  - Loan guarantees to banks, co-financing ability and expertise in assessing the specific risks of CCI companies and projects; the IFCIC guarantees take the form of a participation in risk in which IFCIC shares the final capital risk of the credit transaction with the bank. All maturities (from short to long-term) are eligible. The guarantee rate usually varies between 50% and 70% of the credit's amount.
- In Spain, the CREA SGR is a pan-European financing institution aimed at supporting the audiovisual industry through financing and development of its projects. The activity of the CREA SGR is to provide guarantees to its participating members when obtaining financial resources from the lending institutions to which they apply, thus enabling them to have access to the financial market in addition to improving cost and payment return period conditions over what could be achieved without such guarantees.<sup>108</sup>

The guarantee scheme can be coupled with **capacity building and awareness raising programs** for financial intermediaries to better understand the business models and specificities of operators of the CIs sector (value chains, B2B relationships, credit risks assessment). The participation of Slovak banks to the Creative Europe Guarantee Facility for CCS could be beneficial in this regard. Financial intermediaries under the Creative Europe Guarantee Facility for CCS can benefit from free of charge capacity building services aiming

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<sup>105</sup> Source : <https://ec.europa.eu/digital-single-market/en/financial-guarantee-facility-culture-creative>

<sup>106</sup> [https://www.eif.org/what\\_we\\_do/guarantees/cultural\\_creative\\_sectors/guarantee\\_facility/ccs\\_signatures.pdf](https://www.eif.org/what_we_do/guarantees/cultural_creative_sectors/guarantee_facility/ccs_signatures.pdf)

<sup>107</sup> Today, 49% of IFCIC's capital is held by the French government and the group Bpifrance and 51% by private shareholders, including most of the commercial banks and lending institutions established in France. Source : <http://www.ifcic.eu/>

<sup>108</sup> Source: [https://www.egeda-us.com/Egeda\\_AudiovisualSGR.asp](https://www.egeda-us.com/Egeda_AudiovisualSGR.asp)

to tackle the lack of experience when it comes to financing CClIs. Furthermore, the program supports the organization of awareness-raising events between financial intermediaries and representatives of CIs entrepreneurs to make a bridge between the financial institutions and the CClIs' operators.<sup>109</sup>

*b. Public investment funds*

Public investment funds have been effectively established in several EU countries to support the growth of CIs by supporting the development of CIs businesses besides public subsidies and grants. The following are exemplary cases:

- In Belgium, St'art investment fund (EUR 17 million provided by the Wallonia Region, the Wallonia-Brussels Federation and the Regional Investment Company of the Brussels Region) supports CI SMEs including non-for-profit organisations. The fund provides financing in the form of loans and investments and contributes to the creation of companies and the development of existing structures in order, for example, to undertake new projects, create new products and win new markets.<sup>110</sup>
- In UK, in the context of developing a new industrial strategy<sup>111</sup>, the government committed to support the development of UK's CIs to put them in the position to be at the forefront of emerging technologies in the years ahead. Within the Creative Industries Sector Deal<sup>112</sup>, the government committed to implement the following measures:
  - a Cultural Development Fund (GBP 20 million over two years) administered by the Arts Council England to support investments in CIs in areas of the country that can demonstrate a solid plan for using such investment to support economic growth and support local communities. The bids should demonstrate commitment which includes match funding in areas such as capital investment, physical space, new cultural and creative programmes, events and activities to leverage private investment in CIs.<sup>113</sup>
  - A regional angel co-investment fund: this instrument aims to complement existing equity schemes offered by the British Business Bank to provide matching fund to syndicates of angel investors. This scheme can create an opportunity for the CIs industry to provide support to investors to secure the matching fund.
  - Support Creative England which addresses the financing gap for CIs businesses (video games, TV, film and digital media industries) by offering investment, loans but also growth mentoring and networking opportunities between national investor networks and regional CIs businesses.<sup>114</sup> Between 2014 and 2018, Creative England has invested more than GBP 23 million in loan and equity investment to

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<sup>109</sup> Source: [https://www.eif.org/what\\_we\\_do/guarantees/cultural\\_creative\\_sectors\\_guarantee\\_facility/eif-ccs-bruxelles-20190322.pdf](https://www.eif.org/what_we_do/guarantees/cultural_creative_sectors_guarantee_facility/eif-ccs-bruxelles-20190322.pdf)

<sup>110</sup> Source: <http://www.start-invest.be/st-art?lang=en>

<sup>111</sup> Source: UK Government, Industrial Strategy White Paper. Available at: [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/664563/industrial-strategy-white-paper-web-ready-version.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/664563/industrial-strategy-white-paper-web-ready-version.pdf)

<sup>112</sup> Source: UK Government, Creative Industries Sector Deal. Available at: [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/695097/creative-industries-sector-deal-print.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/695097/creative-industries-sector-deal-print.pdf)

<sup>113</sup> Source: <https://www.artscouncil.org.uk/funding-finder/cultural-development-fund>

<sup>114</sup> Source: <https://www.creativeengland.co.uk/who-we-are/>

SMEs and leveraged GBP 49 million private investment. The step-up finance (from GBP 10 000 to GBP 250 000) is offered alongside business support.

## 2.4 Proposition for new KPIs and roadmap

### 2.4.1 Proposition for new KPIs

The use of KPIs is an essential management tool to support the monitoring and measurement of policy measures.<sup>115</sup> While the Action Plan for the implementation of the Strategy for CCI Development for the period 2016-2017 presented KPIs for a number of tasks (14 out of 37), these are mostly intended as “fulfilment” indicators in terms of number of activities provided (e.g. number of lecturers, number of trainings) without any quantitative targets. The Action Plan lacks impact indicators in relation to outputs (direct consequences of the action, such as number of meetings held with target beneficiaries, number of grants allocated, number of people trained, etc.) and impact/outcome (overall long-term effects of the measure such as the impact on the economy; the increase of private investment in CIs, etc.) in relation to each policy measure.

Indicators are key for decision-makers to design a policy or support measure, to decide on the allocation of the resources (inputs) needed to produce the deliverables (outputs), as well as to foresee the results in the medium and long term (outcomes and impacts). The establishment and implementation of a monitoring system with clear impact indicators (social and economic) is increasingly regarded as a fundamental component of evidence-based policy making to make informed policy and budget decisions, mitigate risk by identifying underperforming programs, and strengthen accountability by providing citizens with clear information on the effectiveness of services and by tracking progress on important measures.<sup>116</sup>

The study proposes a series of KPIs to help the MoC to monitor and assesses the impact of the policy measures advanced in paragraph 2.3.

The proposed indicators are classified as follows:

- **Key overall performance indicators:** we propose 5 ‘key performance’ indicators to assess the overall impact of the policy establishing a creative ecosystem in the national economy;
- **Indicators for governance:** these indicators have been specifically designed to measure the performance of governance in designing and implementing CIs policies, in relation to policy objective 1;
- **Indicators for policy measures** (excluding ‘governance’) in relation to arts education and long-life learning, growth of CIs, cross-innovation, internationalisation and financing/investment to monitor and evaluate the performance of the measure in a more complete way.

The indicators (list based on most common indicators and not exhaustive) are presented in Figure 2 below:

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<sup>115</sup> Source: KEA (2011) Towards a “Benchmarking raster”: A selection of indicators to measure policies for culture and creative industries. Prepared for CREA.RE project

<sup>116</sup> KEA (2015) Feasibility study on data collection and analysis in the cultural and creative sectors in the EU. Study prepared for the European Commission, DG EAC

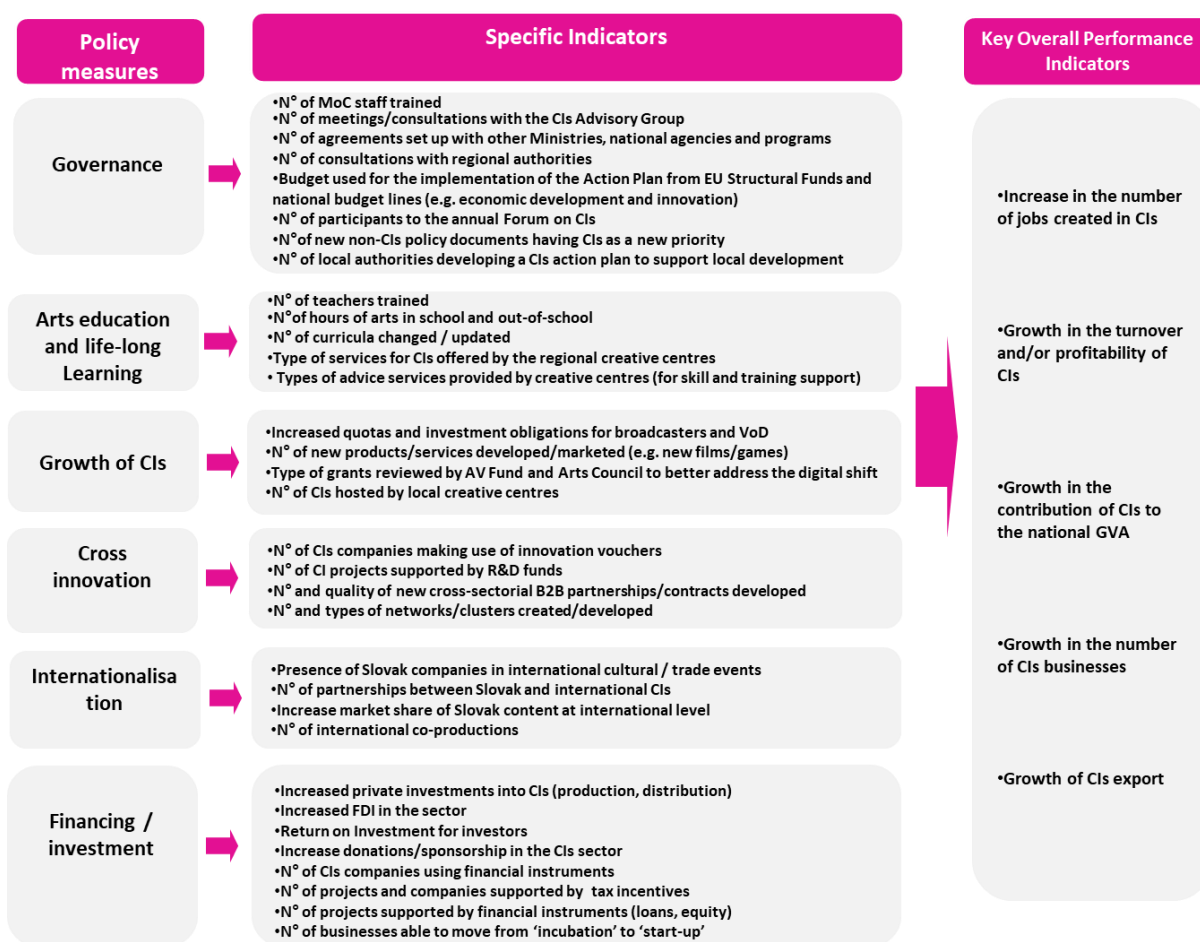


Figure 2 – Indicators per policy measures

For a more refined assessment, we also propose a classification of the indicators provided in the list, as follows: input, output, and outcome/ impact indicators.

- **Input indicators** refer to the resources put into a project or support measure. They include the procedures and systems established to ensure the smooth running of the project (management plans, etc.), articulation with policy objectives.
- **Output indicators** give information on the direct consequences of the action, such as number of meetings held with target beneficiaries (e.g. creative SMEs), number of grants allocated, number of people trained (e.g. for business skills), etc.
- **Impact/Outcome indicators** relate to the effects support measures. In particular, impact indicators refer to the overall long-term effects of the measure including secondary effects (e.g. the impact on local cultural and creative dynamics and contribution to city or region policy objectives; the impact on the economy; the increase of private investment in creative industries; etc.) while outcome indicators measure the short-term effects on direct beneficiaries.

Figure 3 classifies the indicators listed in Figure 2 into the three categories, taking into consideration the type of policy measures for output and impact indicators as follows:

- Governance/policy
- Arts education and life-long learning
- Cls growth
- Cross-innovation
- Internationalisation and export
- Financing/investment



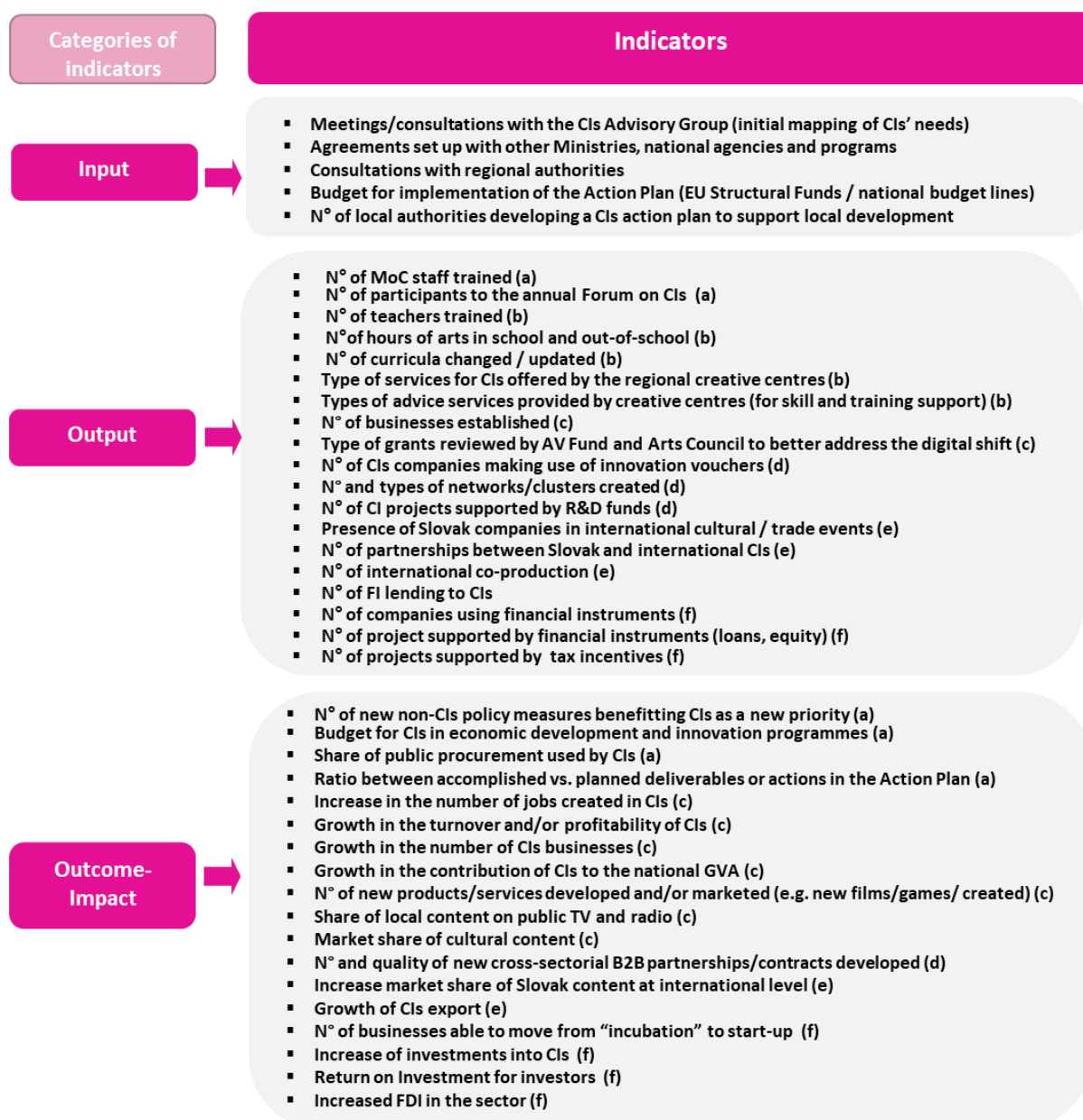


Figure 3 – Proposal for new input, output and impact indicators per type of policy measure

## 2.4.2 Proposition for a Roadmap for implementation of policy recommendations

To complement the policy recommendations described in paragraph 2.3, we propose a roadmap for the implementation of the policy measures including responsible body and indicative timeline.

The roadmap is illustrated in Table 2 below:

Action	Responsible	Indicative timeline
1. Finalise the Strategy and related Draft Action Plan including draft guidelines for local creative centers	MoC	Short term 3 to 6 months

2.	Submit the draft Action Plan for consultation to stakeholders including local authorities for endorsement	MoC	Short term 3 to 6 months
3.	Inter-ministerial meetings and working groups to gather views on the Action Plan and seek support for implementation notably on the issue of financing, internationalisation and cross innovation	MoC in cooperation with other Ministries, agencies, local authorities and CIs	Short term 3 to 6 months
4.	Set up an Advisory Group composed of CIs representatives	MoC in cooperation with CIs	Short term 3 to 6 months
5.	Organise functional review of the MoC to advise on structure to implement CIs Strategy and Action Plan	MoC	Short term 3 to 6 months
6.	Organise a working group to review the Satellite Account of Culture and Creative Industry and to set up KPIs with the MoC, INFOSTAT and the Statistical Office.	MoC and Infostat	Short term 3 to 6 months
7.	Review AV Fund, Arts Council and other national agencies funding priorities according to the new Action Plan	MoC in cooperation with AV Fund and Arts Council	Short/medium term 6 to 12 months
8.	Organise a Cultural Forum to present Action Plan and raise awareness on potential of CIs and associate policy makers (Slovak Parliament, Government, local authorities)	MoC	Short/medium term 6 to 12 months
9.	Implement results of MoC functional review	MoC	Medium term 12 to 24 months
10.	Review with Ministry of Education of cooperation opportunities on art education and creative skills.	MoC	Medium term 12 to 24 months
11.	Review with Ministry of Foreign Affairs and Ministry of Economy cooperation opportunities	MoC	Medium term 12 to 24 months
12.	Establish working methods with other ministries and agencies in charge of implementing Action Plan notably on financing and internationalisation to stimulate cross collaboration and implement KPIs with their support	MoC in cooperation with other Ministries and agencies	Medium term 12 to 24 months
13.	Set up the new financial instruments in collaboration with Ministry of Finance and relevant agencies	MoC in cooperation with MoF	Medium term 12 to 24 months
14.	Meetings with heads of local creative hubs to engineer coordination and monitor development.	MoC	Medium term 12 to 24 months

Table 2 – Roadmap for implementation of policy recommendations

## Annex I - Scope of the study according to NACE code classification of CIs

Area	NACE code	Name of economic activity
<b>Books and Press</b>	5811	Book publishing
	4761	Retail sale of books in specialized stores
	7430	Translation and interpretation activities
	5813	Publishing of newspapers
	5814	Publishing of journals and periodicals
	6391	News agency activities
	4762	Retail sale of newspapers and stationery in specialized stores
<b>Audiovisual, media and multimedia</b>	5911	Motion picture, video and television programme production activities
	5912	Motion picture, video and television programme postproduction activities
	5913	Motion picture, video and television programme distribution activities
	5914	Motion Picture projection activities
	6020	Television programming and broadcasting activities
	7722	Renting of video tapes and disks
	5920	Sound recording and music publishing activities
	4763	Retail sale of music and video recordings in specialised stores
	6010	Radio broadcasting
	5821	Publishing of computer games

## Annex II – List of stakeholders consulted during the study

### Participants to focus groups (Bratislava, 18-20 June 2019)

Name	Organisation and position	Type of organisation
<b>Focus Group Book and Press -Tuesday, 18.6.2019 (9.30 AM – 11.30 AM)</b>		
Jana Vozárová	LITA Authors Association	Association
Gabriela Belopotocká	IKAR	Book Publisher
<b>Focus Group Music and Radio -Tuesday, 18.6.2019 (14.00 AM – 16.30 AM)</b>		
Michal Berezňák	Sharpe	Festival
Alexander Červenka	LALA Slovak Music Export	Export
Jaro Slávik	StarHouse Media	Producer
Tomáš Miks	SOZA	Collective Society
<b>Focus Group Film, Video and TV - Wednesday, 19.6.2019 (9.30 AM – 11.30 AM)</b>		
Ladislav Dedík	Studio 727	Rental, Postproduction
Patrik Pašš	Trigon Production	Full Stack production
Juraj Krasnohorský	Assoc. of Animated Film Producers	Association
<b>Focus Group Video Games - Wednesday, 19.6.2019 (14.00 AM – 16.00 AM)</b>		
Marián Ferko	Bohemia Interactive SGDA	Game studio/Association
Filip Fischer	Charged Monkey	Game Studio
<b>Focus Group with Investors - Thursday, 20.6.2019 (9.30 AM – 11.30 AM)</b>		
Zuzana Zaťovič	StartLab	Crowdfunding platforms
Viktor Mikulášek	Launcher	Crowdfunding platforms

### Participants to meetings with public authorities (Bratislava, 18-20 June 2019)

Name	Organisation and position
<b>Monday, 17.6.2019 (14.00 AM – 16.00 AM)</b>	
Igor Valentovič	Music centre
Matúš Jakabčíč	Music fund
Miroslav Ulman	Slovak Film Institute, Creative Europe Media Desk
Miroslava Vallová	Literature centre
Zuzana Bielíková	Film Commission

**Friday, 21.6.2019 (09.30 AM – 11.30 AM)**

Maria Simoncicova	Ministry of Culture
Daria Hamajova	Ministry of Culture
Zuzana Borošova	Ministry of Culture
Marcel Čas	Ministry of Culture
Sandra Salamonová	Office of the Deputy Prime Minister of the Slovak Republic
Martin Sebok	Slovak Investment Holding
Ján Bruncko	Slovak Investment Holding
Martin Spiritz	Ministry of Finance

**Interviews with public institutions**

Organisation	Name	Title/position
Slovak Arts Council	Jozef Kovalčík	Director
Slovak Business Agency	Marian Letovanec	Director of the National and International Programmes
Ministry of Finance	Martin Polonyi	Director of Financial Instruments and International Institutions Unit
Regional representatives	Rastislav Trnka	Head of the Self-Governing region Košice

**Interviews with other stakeholders**

Name	Company	CI sector
Anton Zajac	ESET	Investor
Boris Meluš	Nová Cvernovka – co-founder	Creative hub
Braňo Čavoj	Nová Cvernovka – co-founder	Creative hub
Daniel Marek	Systemios	Investors
Dáša Karpelová	IAB The Slovak Republic – Assoc. Digital Media	Association
Denisa Zlatá	Former Director of the Department of Culture and Creativity, MoC	CCI Policy Expert
Eva Pauliaková	Slovak Print and Digital Media Association	Association
František Malík	BRaK	Book Festival
Lucia Gertli	Film Europe	Film Distribution
Lukáš Fila	N Press	Press

Marian Urban	SAPA / Slovak Audiovisual Producers Association	Association
Maroš Brojo	Fest Anča/APAF	Association
Martin Lipták	Čierne diery	Book Publishing
Michal Kaščák	Festival Pohoda	Festival
Michal Meško	Martinus	Book
Peter Nagy	Founder of Games farm	Games producer
Petra Nemecková	SITA	Press
Sasha Michailidis	Acquisition manager HBO Europe	Foreign international investors
Šymon Kliman	Nová Cvernovka – co-founder	Creative hub
Viliam Csino	Nová Cvernovka – co-founder	Creative hub
Zora Jaurová	Creative Industry Forum	CCI Policy Expert
Zuzana Mistríková	Pubres, s.r.o.	Press
Zuzana Zaťovič	StartLab	Crowdfunding

## Annex IV – List of participants to the AS-IS workshop

Bratislava, October 2, 2019

Sector	Name	Organisation
Book and Press	Eva Pauliaková	Association of Press Publishers
Book and Press	Martin Gajdoš	Association of publishers and Bookstores ZVKS
Book and Press	Matúš Mládek	Tatran
Book and Press	Jana Vozárová	LITA
Book and Press	Silvia Stasselová	Univerzitná knižnica Bratislava
Music	Tomáš Mikš	SOZA
Music	Martin Noga	World Music Festival
Radio	Robert Pospiš	Real Music House
Music	Jozef Mikulášik	TRUESELF Records
Film, Video and TV	Alžbeta Calpaš Mordinová	TV JOJ
Film, Video and TV	Matúš Leviczky	TV JOJ
Film, Video and TV	Lucia Tandlich	TV Markiza
Film, Video and TV	Michal Hradický	Council for Broadcasting and Retransmission
Film, Video and TV	Jakub Viktorín	Visegrád Film Forum
Film, Video and TV	Ivana Sujová	Fest Anča
Video Games	Marián Ferko	Bohemia Interactive SGDA
Video Games	Ivan Trančík	Cellense
Video Games	Pavol Buday	REBOOT / Digital Adventure LLC/ SGDA
Video Games	Peter Nagy	Games Farm
Video Games	Maroš Brojo	Slovak Game Developers Association, Game Days Trnava
Video Games	Imrich Orosz	Grindstone
CI Focus Group	Martina Slezáková	Všeobecná Úverová Banka ("VÚB") Foundation
Public institutions	Igor Valentovič	Music Centre
Public institutions	Jana Bieliková	Slovak Business Agency
Public institutions	Martin Spiritza	Ministry of Finance
Public institutions	Martina Čeretková	Ministry of Culture
Public institutions	Miriam Horváthová	Ministry of Culture

Public institutions	Elena Gyurcsová	Ministry of Culture
Municipalities / self-government regions	Katarína Formánková	Bratislavský samosprávny kraj - BSK
Other	Šymon Kliman	New Cvernovka, Bratislava,
Other	Michela Foresti	European Commission
Other	Elisabetta Airaghi	KEA European Affairs
Other	Philippe Kern	KEA European Affairs
Other	Vladimír Kmeť	One Click Systems
Other	Mária Šimončičová	Ministry of Culture
Other	Dária Hamajová	Ministry of Culture



## Annex IV – List of participants to the TO-BE workshop

Bratislava, October 29, 2019

Sector	Name	Organisation
Books and Press	Eva Pauliaková	Association of Press Publishers
Books and Press	Matúš Mládek	Tatran
Books and Press	Lukáš Fila	N Press
Books and Press	Marianna Zimová	LITA
Music	Tomáš Mikš	SOZA
Music	Robert Pospiš	Real Music House
Music	Ján Sudzina	Hevhetia
Music	Jaro Slávik	StarHouse Media
Film, Video and TV	Alžbeta Calpaš Mordinová	TV JOJ
Film, Video and TV	Lucia Gertli	Film Europe
Film, Video and TV	Michal Hradický	Council for Broadcasting and Retransmission
Film, Video and TV	Ivana Sujová	Fest Anča
Video Games	Marián Ferko	Bohemia Interactive SGDA
Video Games	Maroš Brojo	Slovak Game Developers Association, Game Days Trnava
Video Games	Filip Fischer	Charged Monkey
Video Games	Mátyás Csernák	Grand Beats Production s.r.o.
Public institutions	Matúš Jakabčíč	Music Fund
Public institutions	Martin Spiritza	Ministry of Finance
Public institutions	Martin Šebök	Slovak Investment Holding
Public institutions	Ján Bruncko	Slovak Investment Holding
Public institutions	Zuzana Duchová	Creative Europe
Public institutions	Jozef Švolík	Ministry of Culture
Public institutions	Martina Čeretková	Ministry of Culture
Municipalities / self-governement regions	Katarína Formánková	Bratislavský samosprávny kraj - BSK
Other	Šymon Kliman	New Cvernovka, Bratislava,
Other	Miroslav Balog	SAV
Other	Elisabetta Airaghi	KEA European Affairs
Other	Philippe Kern	KEA European Affairs
Other	Vladimír Kmeť	One Click Systems
Other	Mária Šimončíčová	Ministry of Culture
Other	Dária Hamajová	Ministry of Culture
Other	Martina Čeretková	Ministry of Culture

## Annex V - Bibliography

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