

Analysis and definition of qualification needs in CCI area

Intellectual Output 1
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Summary analysis and editing:

Maria-Denitsa Georgieva, BIC INNOBRIDGE

Angela Ivanova, INI-Novation GmbH



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The following organizations contributed to the document: INNOBRIDGE (Bulgaria), INI-Novation GmbH (Germany), MEDF (North Macedonia), Budakov Films (Bulgaria), Alanam (France), Teleberry (Hungary)

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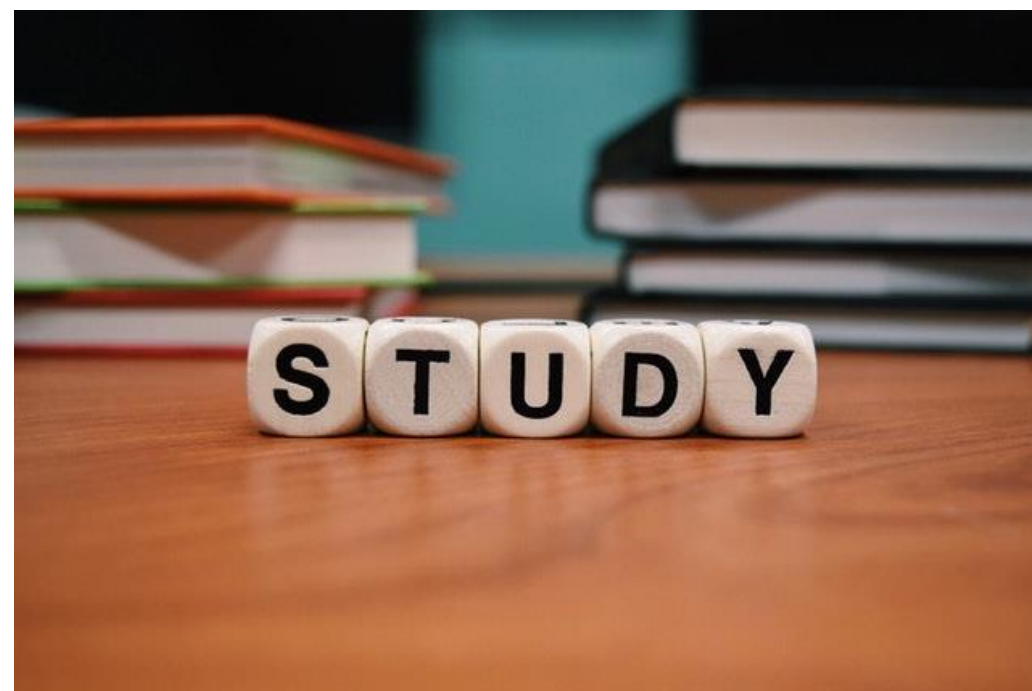
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Introduction



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Talent and creativity are important assets in the Cultural and Creative Industries (CCI). In the growing technological world we live in, creativity and creative thinking are becoming vital for many professions. The ability to cross ideas from various aspects in order to create something new is considered as a highly regarded skill.

However, a creative idea is just an idea without the proper knowledge how to develop, finance and execute it. The main obstacle for CCI entrepreneurs today is the lack of business skills to market their project to financial institutions and to mobilize financial opportunities.

CreatINNES Project

CreatINNES is a strategic partnership for innovation and business skills development in cultural and creative industries sector. It is an European project funded by the ERASMUS+ programme in the period 2018 – 2021 with project number 2018-1-DE02-KA202-005232.

The goal is to bring creative thinking and business competence together exploiting the mutually reinforcing impact of both to boost innovation and growth. CreatINNES provides support for CCI startups and freelancers via innovative training programs based on knowledge co-creation and cross-sectoral collaboration.

CreatINNES website www.creatinnes.eu provides more information about the project's goals and results.





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Partnership

We are six European organizations from five countries with an expertise in business development and creativity joined together and dedicated to provide training support for CCI startups and freelancers.

- INI-Novation GmbH (Germany)
- Business Innovation Center INNOBRIDGE (Bulgaria)
- BUDAKOV FILMS EOOD (Bulgaria)
- Macedonian Enterprise Development Foundation (North Macedonia)
- Teleberry Kft (Hungary)
- Alanam (France)



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The scope of the analysis work

Art has the power to transform humdrum things of our daily lives into inspiring concepts. Artists use creativity to get various messages across. To certain degree artists shape our perception of the enclosing reality and with their work encourage our imagination and perception of everything.

Nowadays, we talk about cultural and creatives industries and their role in our societies is increasing. This statement is especially true for Europe since the cultural economy of the continent is rooted in its history. Tourists from all over the world come to see the most notorious and well-known cultural heritage and other related to the various art places. Moreover, culture and art are more and more entangled with the emerging technologies to together create innovative solutions in many areas of the economy. Creative and Cultural Industries (CCI) are acknowledged as a source of innovation and a key for economic growth, increasing the competitiveness of the European economy, especially in specific sectors such as tourism, cultural heritage and design.

Along with all upcoming positives and opportunities for the creative people, various difficulties and issues occur. A hardship for the representatives of the CCI area in Europe is that the sector is fragmented by small businesses or individuals. They often face unique needs stemming from unique challenges including: the need for new models of cross-sectoral collaboration and "out-of-the-sector" thinking; the need for acquiring business skills and practical knowledge necessary for succeeding commercially, and access to finance for scaling up operations and production.

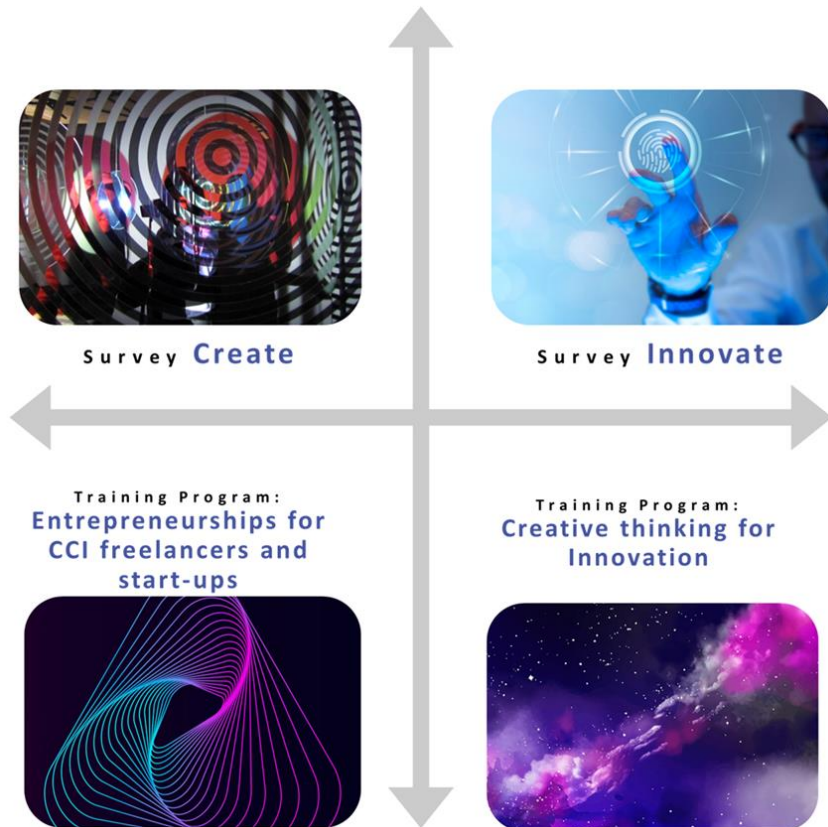
Therefore, before creating CreatINNES the training programs, our first step is to conduct our own survey targeting CCI startups, freelancers, and small innovative companies to gain more specific information about their training needs.



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Goal and methodological approach



- Our goal is to collect relevant information and to analyse the needs of CCI freelancers, startups, and innovative companies within the partners' countries. In return, we will be able to create two tailored made training programs covering their skill development needs.
- The analysis is the first step towards implementation of the two innovative training programmes:
Entrepreneurships for CCI freelancers and start-ups, and
Creative thinking for Innovation.
- Therefore, we conducted two surveys, each in Bulgaria, Germany, France, Hungary and Macedonia, based on the contribution of all CreatINNES partners.
- Both surveys are thematically divided - the first one is addressing the CCI freelancers and entrepreneurs; and the second one is targeting non-CCI innovative organizations.



Survey “CREATE”



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Methodology

- The Survey CREATE was conducted online in the five countries Bulgaria, France, Germany, Hungary, North Macedonia using the online platform Survey Monkey. It was finalized in January, 2019.
- Goal: To clarify a picture about the needs of business skills and knowledge among CCI stakeholders (freelancers and startups) per country, and to identify and analyze similarities and differences as specifics. The results should serve as a first step for development of the future Training program “Entrepreneurships for CCI freelancers and start-ups” targeting CCI stakeholders.
- Questionnaires were translated in five languages: Bulgarian, French, German, Hungarian, and Macedonian, and were **distributed to more than 620 respondents**. As a result, In total, **218 respondents participated** in the survey. The proportion between participating CCI freelancers and CCI startups per country is the following:

Bulgaria (73% CCI freelancers and 27% CCI start ups)	Hungary (75% CCI freelancers and 25% CCI start ups)
France (100% CCI freelancers and none CCI start ups)	North Macedonia (42% CCI freelancers and 58% CCI start ups)
Germany (50% CCI freelancers and 50% CCI start ups)	
- The questions included themes related to business and access to finance knowledge, entrepreneurship, innovation commercialisation, IPRs, and digital skills deficiencies.



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Analysis

The analysis is build in 4 parts:



Analysed results are presented per country



Identified differences and similarities



Recommendations for training

Conclusions



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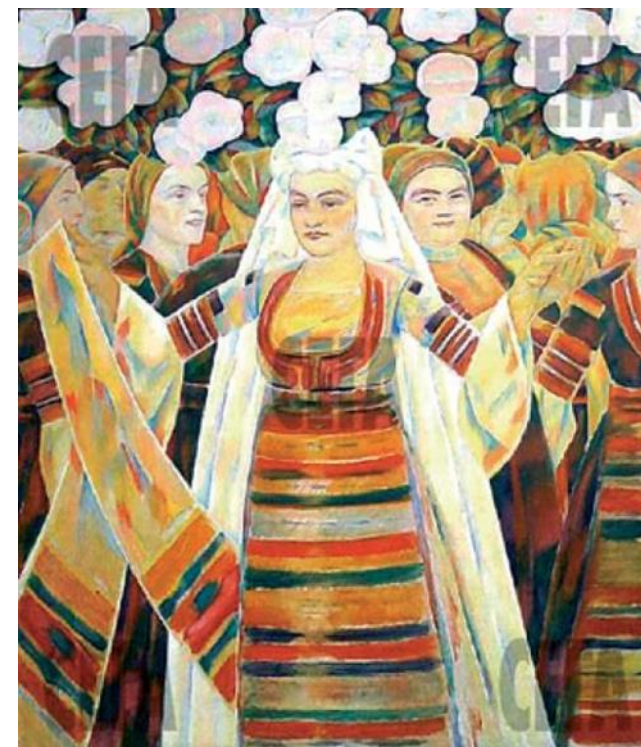


B u l g a r i a

Bulgaria is a country with massive creative potential. There are numerous traditional crafts often passed from generation to generation such as handicrafts, that survived over the years and impervious to “the winds of change”, resulting from the technological progress. Typical examples are the traditional carpets from two Bulgarian small towns Chiprovtsi and Kotlen that are still being handmade, hand embroidery of garbs. There are still existing various ancient traditions and customs such as *kukeri* tradition, *nestinari* and *Baba Marta*. They all are connected to the cultural heritage of the country.

Apart from its centuries-old crafts and traditions, Bulgaria is also known for its great creative potential in the field of design and animation. Recently a team of young and talented Bulgarians started working on what is going to be the first Bulgarian fantasy cartoon series “Golden Apple”, based on stories from the rich mythology and folklore.

This is one of the ways, in which Bulgaria intertwines modern and traditional. The rich folklore potential and the abundant cultural heritage provide many opportunities for Bulgarian artists and entrepreneurs to develop their ideas and draw inspiration.



“Harvest feast” by Vladimir Dimitrov –Maistora



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CCI in Bulgaria

The main activities in the CCI sector in Bulgaria are focused on handmade crafts, jewellery fashion, festivals, software and design industry.

About 4 % of all the enterprises in Bulgaria employ 2.8 % of the population working in CCI.

The capital Sofia is considered as a national centre of cultural and creative industries (CCI). Every tenth enterprise in the capital is a creative economy enterprise. Sofia gathers Bulgaria's leading performing arts troupes. Theatre is by far the most popular form of performing art in the city.

City of Plovdiv is an European Capital of Culture 2019.



Italy's Gigantic Walking Installation "The Floating Piers" created by the Bulgarian artist Christo. Photo: Christo



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Summary of the survey results in Bulgaria



- The respondents in Bulgaria consider the knowledge about **Business planning** and **Digital literacy** as very important for promoting their CCI products.
- They consider that they have to develop skills such as **Innovation**, **Critical thinking** and **Digital literacy** in order to enhance their activity.
- The biggest challenges for CCI freelancers and startups in Bulgaria are related to **Receiving support from local/governmental officials** and **Access to different funding**.
- CCI freelancers believe that it is important to receive **Professional help when looking for financing**. They need to be part of an **Entrepreneurial culture in the CCI industry** and to **have Knowledge about the tools needed for creating a brand** in order to be successful in Bulgaria.
- In Bulgaria, the responding freelancers in the CCI area used the following sources of funding: **Self-funding**, **Investors** and **Bank loans**.
- They use social media platforms such as **Facebook**, **LinkedIn** and **Instagram** in terms of their work in the CCI area.
- Participants in the survey from Bulgaria stated that they need help in the following areas of their CCI activity: **Marketing and promotion**, **Popularization of products**, **Marketing research**, **Developing of entrepreneurial way of thinking**, **Creating partnerships**, **Creative thinking** and **Participating in networking events**.



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France

There is not a single soul who have not heard of the famous French actor Louis de Funès or watched at least one comedy film where he is playing the leading character. Indeed movies like *The Wing or the Thigh*, *The Cabbage Soup* and *The Troops of St. Tropez* give us a glimpse of the French creative potential, which is vast and enormous. In addition to this they explore deep topics and complex topics and give the audience “food for thought”, leaving the public not only with a good one hour of laugh, but with topics to reflect on.

Along with the considerable cinematographic potential France is rich in works of literature. *The Three Musketeers*, *Les Misérables*, *Around the World in Eighty Days* and *The Little Prince* to name a few are outstanding, influential and timeless works that have shaped the way we see the world today.

Last but not least France is known for *The Adventures of Asterix* series of French comics, that depict the adventures of a village of Gauls as they resist Roman occupation in 50 BC. The villagers do so by means of a magic potion, which for a short time gives the recipient superhuman strength.



The interior garden of Studio 28, a famous Parisian cinema.
Photo by Gilles Bizet © Dreamstime.com



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CCI in France

France is one of the three largest Europe's hubs for the creative industries together with Germany and the UK. In 2017, the employment in Cultural and Creative Industries is 3,5%.

According to Europe's Creative Hubs Update 2018, in the sector are working 178,000 companies employing around 478,000 people. France Créative reported 1.25 million people in 2013 directly engaged in the activities of creation, production and distribution of cultural and creative products across the territory.

In the Cultural and Creative Monitor Paris ranks 1st or 2nd at the Cultural Vibrancy and Creative Economy facets. Paris was one of the first cities to acquire the title of European Capital of Culture in 1989. Today the city is a creative hub for fashion design, architecture, performing arts, publishing and advertising.

Avignon hosts the Festival d'Avignon – one of the most important contemporary performing arts events globally.



Paris Fashion Week - street style. © Dreamstime.com

Summary of the survey results in France



- In France freelancers and entrepreneurs consider that the knowledge about **Networking and cooperation**, **Access to international markets** and **Branding and Intellectual Property** is very important for them to promote their CCI product.
- They consider that they have to develop skills such as **Innovation** and **Critical thinking** in order to enhance their activity.
- The biggest challenges for the respondents are **Financing their business**, **Access to different funding** and **Bureaucracy in the country**.
- CCI freelancer believe that it is important for them to receive **Professional help when looking for financing**, to have **Knowledge about raising awareness concerning a problem via their product** and to get access to **Tools and adequate help when starting a business** in order to be successful in France.
- In France freelancers in the CCI area used the following sources of funding: **Self-funding**, **Bank loans** and **Investors**.
- The use social media platforms such as **Facebook**, **Instagram** and **LinkedIn** in terms of their work in the CCI area
- Participants in the survey stated that they need help in the following areas of their CCI activity: **Marketing and distribution**, **Promotion**, **Finding partners**, **Business networking in order to promote or sell products/services** and **Receiving help from freelancers**.



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Germany

Germany is rich in creative and cultural potential that is manifested in the everyday life on German streets. Many traditional creativity festivals and events are organized all over the country that bring citizens, companies and artists together. One of the most famous one is the Carnival. It originates in a centuries-old religious tradition and is annually organized all over the country. During the Carnival period, work of many talented artists, designers, musicians and performers is combined to elaborate the complicated wooden masks, colorful costumes and humorous program for the celebration. They are usually based on the wealthy German mythology and folklore.

In addition to this, Germany has one of the largest theme parks in Europe. It is actually called Europa-Park and it is divided by sections. Each section is thematic and represents a country. The park combines beautifully the modern technology, creativity, culture, holidays and fun in one and it is the product of the hard work of many talented people.



Europa Park, Germany - Greek themed area
Photo: Preisler © Dreamstime.com



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CCI in Germany

Germany is one of the three largest European hubs for the creative industries together with France and the UK.

Germany have clearly defined and monitor their creative industries including 11 CCI submarkets: Music industry, Book market, Art market, Film industry, Broadcasting industry, Performing arts market, Design industry, Architecture market, Press market, Advertising market, Software and games industry.

Cultural and Creative Industries are of enormous economic significance in the country. In 2017, more than 250.000 businesses work in the CCI providing jobs to more than 1,6 million entrepreneurs and employees.

The startup activity in the CCI sector is strongly focused on four submarkets, which account for almost two thirds of all the new companies: Software and games industry, Design industry, Architecture market and Advertising market. Other submarkets with a relatively high share of CCI startups are the Press market and the Film industry.



“Balance” and “Luis And The Aliens” by the German twins Christoph and Wolfgang Lauenstein and their unique style combining classical puppet animation, claymation and computer animation. Information by <https://www.lauenstein.tv>



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Summary of the survey results in Germany



- In Germany, the respondents consider the knowledge about **Networking and cooperation**, **Financing their business** and **Powerful presentation and pitching skills** as very important in order to promote their CCI product. As important, they have pointed also **Branding and Intellectual property rights**.
- Freelancers consider that they have to develop skills such as **Innovation**, **Critical thinking**, **Self-management** and **Global citizenship** in order to enhance their activity.
- The biggest challenges that freelancer/start-up in Germany face are **Access to different funding** and **Financing their business**.
- CCI respondents believe that for them is important to have knowledge about **Technological advancement in the CCI area**, to get **Professional help when looking for financing**, and to be part of **Entrepreneurial culture in the CCI industry** in order to be successful.
- The main sources of funding for freelancers in Germany are **Self-funding** and **Crowdfunding**.
- The use social media platforms such as **Twitter**, **Facebook**, **LinkedIn** and **Instagram** in terms of their work in the CCI area.
- Most of the participants in the survey from Germany pointed out their needs in the areas **Funding opportunities**, **Innovation** and **Social media competences** to develop their CCI business activities.



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H u n g a r y

Hungary is one of those countries that are rightly proud of their huge creative and cultural potential, and yet regrettably far from fully exploiting and developing that precious resource, due to a dearth of knowledge about how creative projects can be turned into entrepreneurial projects that can be financed and that can beget products from ideas, and businesses from products.

A famous example of Hungarian's creativity is the Rubik's Cube. It is a 3-D combination puzzle invented in 1974 by Hungarian sculptor and professor of architecture Ernő Rubik. Another example can be seen in the work of a company called Prezi, which is a presentation software company founded in 2009 in Budapest.

In the year 2018 about 349 million euros spent on Hungarian film industry. About 84% of them are spend on film productions by foreign filmmakers. However in 2015 the Hungarian movie 'Son of Saul' won an Oscar.



Rubik's cube is an iconic toy for children of all ages. It was invented in 1974 by a Hungarian professor of architecture, Erno Rubik



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CCI in Hungary

Budapest is one of the top cultural and creative cities in Europe.

Alongside traditional cultural venues like the National Museum, the National Museum of Fine Arts, the National Dance Theatre and the Hungarian Heritage House, the city is also home to countless independent galleries, exhibition spaces, workshops and incubators. Budapest is also a UNESCO Creative City of Designs.

In 2014, the University of Szeged opened a New Media Culture Creative Lab with a view to equip students with new skills in the field of media, web development and design and thus boost the development of the city's creative economy.

In comparison in Hungary 3,3 % of the population is working in the CCI sector.



Street art in Budapest, Hungary. Photo by Matt Long



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Survey Results in Hungary



- The CCI respondents believe that the knowledge about **Networking and cooperation, Business plan** and **Presentation and communication skills** is very important for them to promote their CCI product.
- The freelancers consider that they have to develop skills such as **Communication, Problem solving skills, Self-management** and **Innovation** in order to enhance their activity.
- The biggest challenges for the Hungarian respondents are **Market insecurity, Bureaucracy in the country, Access to different funding** and **Financing their business**.
- CCI freelancers believe that it is important for them to get **Professional help when looking for financing**, to participate in **Networking opportunities and community building among entrepreneurs** and to experience **Entrepreneurial culture in the CCI industry** in order to be successful.
- The main sources of funding for freelancers in Hungary are **Self-funding, Bank loans** and **Investors**.
- They use social media platforms such as **Facebook, LinkedIn** and **Instagram** in terms of their work in the CCI area
- The respondents pointed out that they need help in the following areas of their CCI activity: **Funding opportunities, Marketing research, Grants and awards, Finding resources, Creating partnerships, Networking events in the CCI area** and **Promoting a product/service**.



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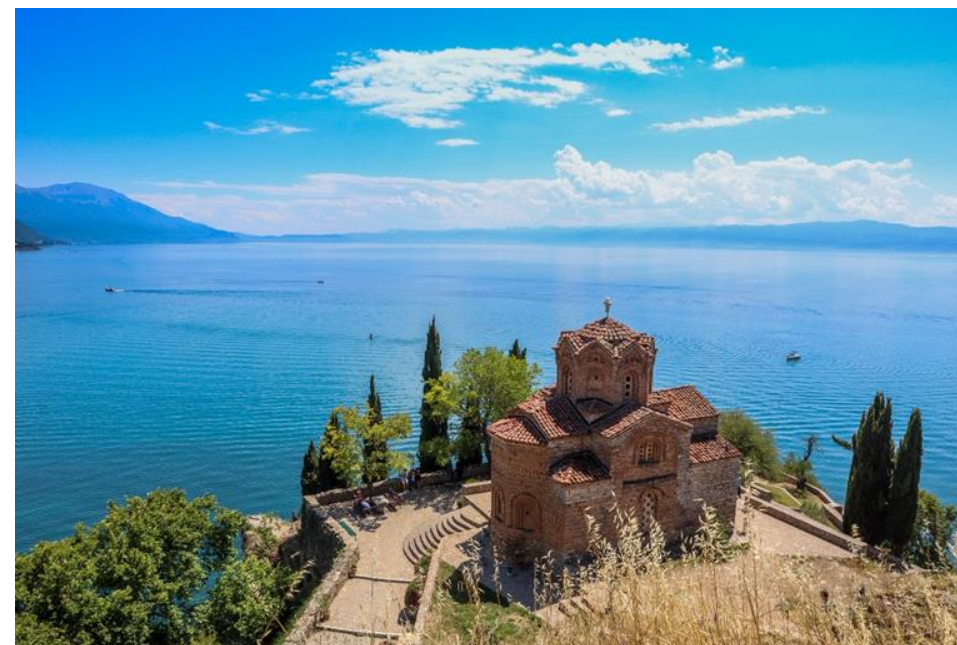


North Macedonia

The creative and cultural potential of North Macedonia has its roots from its extensive cultural heritage and traditions passed over from generation to generation. It is reflected in the rich folklore, well-preserved customs, flamboyant costumes, remarkable music and ancient religious temples and sacred monuments.

The traditional Galichnik wedding is unique in the world with its special blend of Macedonian tradition, music, folk costumes, dance and food all brought together in the breath-taking setting of the village of Galichnik. Vevchani Carnival is one of the festivals reflecting the well-preserved cultural heritage combining pagan and Christian customs. The city of Ohrid and its lake are accepted as Cultural and Natural World Heritage by UNESCO. History and culture have come together particularly in the Macedonian handicrafts such as Macedonian filigree, iconostasis, wood-crafts and clothing.

Manaki Brothers Film Festival is proudly one of the world's oldest film festivals and celebrates the work of cinematographers from around the globe. Established in 1979, this exciting event was inspired by Yanaki and Milton Manaki, the Macedonian brothers who pioneered 20th century film making in the Balkans with their documentaries and photographic art, some of which was made as early as 1904.



Ohrid, UNESCO World Heritage
Photo: Ljupco Dzambazovski © Pexels.com



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CCI in North Macedonia

According to the last conducted mapping the most prevalent creative industries In North Macedonia are the following: Advertising (13.9%), Publishing (12.6%), Art Craft (10.9%), Movies (9.6%), Fine Art (8.3%), Contemporary Art (7.8%), Architecture (7.4%) and Software (7%). Other CCI are involved but less prevalent.

The major Cultural and Creative Industry activities are concentrated in the capital city Skopje. There are several festivals that are attracting domestic and foreign creative talents. Skopje Kreativa is festival for development of Macedonia cultural industries through continuous creative cooperation and networking between the local creative/art community and the business sector. Skopje Design Week is a design oriented multidisciplinary platform that affirm the cultural and creative industries in the region and stimulate active role in creating better business, as well as social and political context for developing creative potential.

Creative talents can be found in the Movie industry. Most recent movie titles such as “Secret Ingredient” and “Honeyland” have attracted wide international audience and won prestigious movie awards. Most famous Macedonian movie is “Before the Rain” by Milcho Manchevski. Furthermore, the company Fx3x is an award winning Film and TV visual effects company that have worked on numerous blockbuster and Oscar winning movies.



“Vita Nuova” by Sinisha Kashawelski



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Survey Results in North Macedonia



- In North Macedonia, the respondents freelancers consider the knowledge about **Networking and cooperation** and **Digital literacy** to be very important for them in order to promote their CCI product.
- Freelancers consider that they have to develop skills such as **Communication, Innovation, Teamwork** and **Self-management** to enhance their activity.
- The biggest challenges pointed: **Bureaucracy in the country, Receiving support from local/governmental officials** and **Market insecurity**.
- CCI freelancers believe that it is important for them to have access to **Tools and adequate help when starting a business**, as well as to be part of to have **Knowledge about the tools needed for creating a brand** and **Knowledge about raising awareness concerning a problem via their product** in order to be successful.
- As main sources of funding for freelancers in North Macedonia are pointed **Self-funding, Bank loans, Government programs offering start-up capital** and **Investors**.
- They use social media platforms such as **Facebook, Instagram** and **LinkedIn** in terms of their work in the CCI area
- Participants in the survey from North Macedonia pointed out that they need help in the following areas of their CCI activity: **Financing, Marketing, Bureaucratic procedures, Business management, Government subsidies, Networking and Collaboration** and **Access to International Markets**.



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Identified current similarities and differences

The biggest challenges

- *Access to various funding sources and business financing* are pointed as the biggest challenges for CCI freelancers and startups in all countries except North Macedonia.
- In three countries France, Hungary and North Macedonia, the *national bureaucracy* is a challenge for the respondents.
- Respondents from the neighboring countries Bulgaria and North Macedonia have difficulties in *receiving support from local /governmental officials*.
- *Market insecurity* is a challenge for the respondents in Hungary and North Macedonia.

Main sources of funding

- *Self-funding, investors and bank loans* are the common sources of funding used by the respondents in almost all countries object of our research.
- However, the results from Germany are slightly different. Here, *self-funding* and *crowdfunding* are the most selected options by the respondents.
- Only the respondents in North Macedonia use *governmental programs offering startup capital* to finance their activities.

Social media

- Social media is used in all partners' countries as a communication channel.
- *Facebook, LinkedIn, Instagram* are pointed everywhere as preferred social media channels.
- Only the respondents from Germany have answered that *Twitter* is the most preferable communication channel, followed by the other three pointed above.

Identified similarities and differences concerning success factors

Knowledge considered as very important to be successful

- The knowledge related to *Networking and cooperation* is pointed by the most of the respondents as important for the success of their activities.
- There are variations between the different partners' countries in their opinion about the other types of knowledge influencing the business success.
 - In Germany and France - knowledge in *branding* and knowledge in *intellectual property rights*,
 - In Bulgaria and Hungary - knowledge in *business planning*,
 - In Bulgaria and Macedonia – knowledge in *digital literacy*,
 - In Germany and Hungary - *presentation and pitching skills*.
 - Only in France, the knowledge about how to *access international markets* is pointed important for the business success.
 - Only in Germany, the knowledge about *how to finance the business* is considered important for the business success.

Support considered as very important to be successful

- *Professional help when looking for financing* is the most selected answer by the respondents in all five partners' countries
- There are variations between the different partners' countries in their opinion about the other types of knowledge influencing the business success. They are described below
 - In three countries - Bulgaria, Germany and Hungary – the support in *building entrepreneurial culture in the CCI* is important for success,
 - In France and Macedonia - the *adequate help when starting a business*,
 - In Bulgaria and Macedonia – support in *branding*.
 - Only in Germany, the support in the *technological advancement in the CCI* area is the most important factor for success.
 - Only in Hungary, the support in *networking and community building* is pointed as important.

Identified similarities and differences in the formulated needs



Identified need for skills

- Skills for *innovation* are the mostly pointed once in all partners' countries.
- *Critical thinking skills* and *self-management skills* are considered as needed also by most of the respondents.
- The *communication skills* are pointed as needed in North Macedonia and Hungary.

Identified need for training support

- Common need for training in all countries is related to *marketing - research, distribution and promotion*.
- Training in *how to create partnerships*, as well as *in networking and collaboration* is second most needed in four partners' countries.
- Training in *funding opportunities* and *business financing* is mainly requested in Germany, Hungary and Macedonia
- In Bulgaria and Macedonia the mostly needed trainings are *business management*, *how access to international markets*, and *developing of entrepreneurial way of thinking*.
- Other trainings needed: *Innovation*, *Social media competences* (Germany), *Creative thinking* (Bulgaria), *Collaboration with freelancers* (France), *Bureaucratic procedures* (Macedonia).



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Recommendations

Based on the findings of the survey, topics of the training modules (units) for the future Training program “Entrepreneurships for CCI freelancers and start-ups” are be defined.

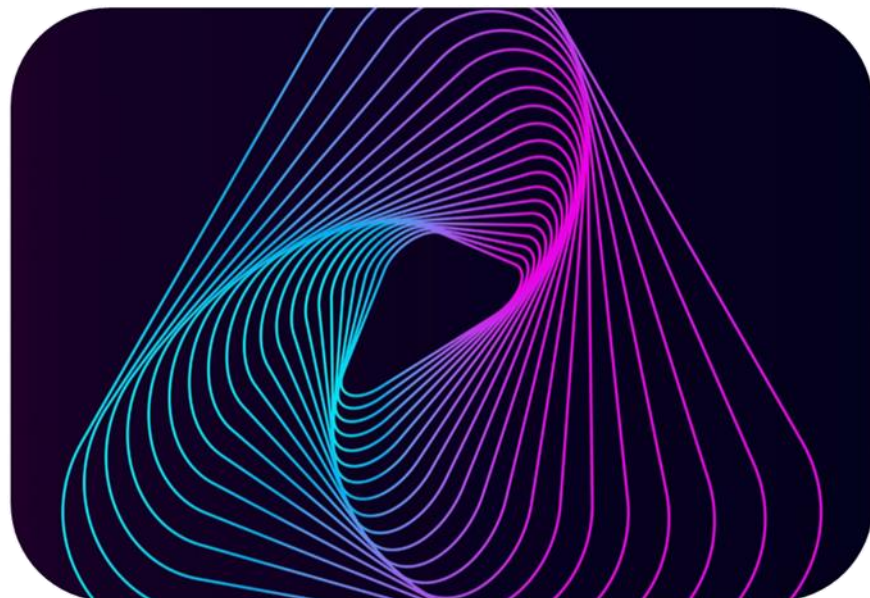
They contribute to the goal of the programme to develop skills and to provide knowledge to CCI freelancers and startups in various business topics.



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Training Program: Entrepreneurships for CCI freelancers and start-ups



Topics for the units:

- Modul 1. **Planning, organizing and managing** – visualizing the entrepreneurial journey
- Modul 2. **Business planning**
- Modul 3. **Marketing strategy and elements of the marketing mix**
- Modul 4. **Networking, building ecosystems and entering international markets**
- Modul 5. **How to finance your business growth**
- Modul 6. **How to create, protect and manage your IPR**
- Modul 7. **Go digital with social media**
- Modul 8. **Powerful presentation and pitching**



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Survey “INNOVATE”



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Introduction

“I never made one of my discoveries through the process of rational thinking”, with these words Albert Einstein sums up his work. Indeed progress, innovation or cutting edge ideas are powered by creative thinking. Today the most valuable qualities in the business area are considered to be innovational and entrepreneurial spirit, imagination and unconventional thinking. Together they create a unique potential, which many industries today use in order to develop and offer new products and services to the consumer-oriented market.

What many freelancers and business owners share nowadays is that they need help with boosting creativity levels amongst their employees. For many this is one of the main hardship in the non-CCI area. An effective way to overcome this obstacle is through life-long learning experiences. The second best solution is to replace the fear of being wrong with curiosity. Then ideas of better solutions, products, services, advertisements, etc. will start raining like cats and dogs.



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Methodology

- The Survey INNOVATE was conducted in the five countries Bulgaria, France, Germany, Hungary, North Macedonia. It was finalized in March, 2019.
- The goal was to receive an understanding of currently used skills and knowledge in creative thinking among innovative SMEs and audio-visual startups working in digital industries, as well as to identify their needs for training. The results serve as a first step for development of the future Training program “Creative thinking for Innovation” targeting non-CCI organizations and startups.
- Stakeholders from digital industries often work online “without borders”. Therefore, all project partners agreed to summarize the collected responses in one common analysis. Partners have used their own networks and ecosystems to conduct face-to-face interviews using personal meetings, phone, or Skype interviews, as well as emails for reaching respondents. Consequently, the survey is based on the contribution of each partner.
- The questionnaires contained 10 questions in English language.
- In total, **171 respondents**, representatives of the non-CCI area, were participating in the survey. There is a difference between the level of participation per country as following: Bulgaria 9 respondents, North Macedonia 60 respondents, France 63 respondents, Hungary 29 respondents, and Germany 10 respondents.

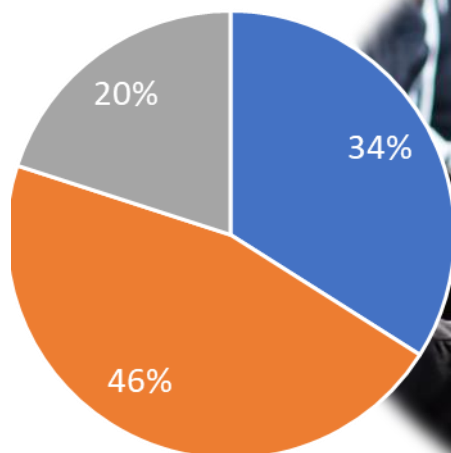


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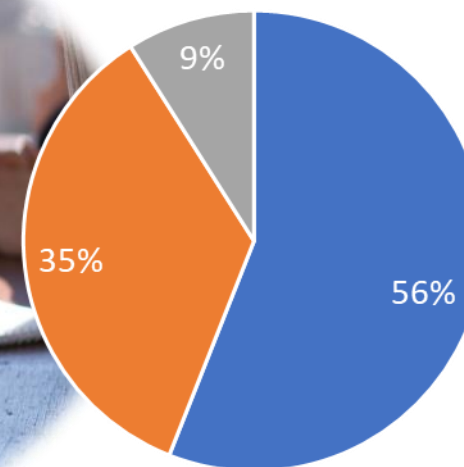
Who are our respondents?

Q9. Your age: (%)



■ 18-29 ■ 30-44 ■ 45+

Q10. Your gender: (%)



■ Male ■ Female ■ I prefer not to say

Summary of the results reflecting the current situation

Perception for creativity

- Creativity and creative processes are something individual. However, we tried to understand what creativity mean to non-CCI stakeholders (Q3).
- According to half of our respondents, creativity is expressed as *brainstorming process and communication of unique, compelling, and unexpected ideas* (55%), as well as *a powerful approach that allows the adoption of new innovations and ground-breaking technologies* (44%).
- One third of them relate creativity to *decreasing costs* (34%) and *workflow optimization* (32%).

Existing obstacles

- Non-CCI respondents are facing various obstacles when they search for creative solutions (Q5).
- Every third respondent mentioned as an obstacle the *limited access to practice-oriented knowledge that could boost innovations* (35 %), *having no prior experience with any design software and related platforms* (32%), and *lack of design talent or creative mindset* (32%).
- Other obstacles are *lack of knowledge about the tools needed for creating a visual brand identity* (27%), and *lack of knowledge about copyrights* (24%).

Experience with software and platforms

- 56% of our respondents stated that they *do have experience using design software such as Photoshop, Adobe Illustrator, CorelDraw and Adobe InDesign* (Q6). Such programs are hard to use by beginners and it takes some time for a person to master their handling.
- However, 63% of the respondents have *never created a custom-designed post for their company's social platforms*. This is due to the fact that usually companies have one person or a team who is responsible for handling social media platforms (Q7).

Summary of the results related to the training needs

Important knowledge to innovate

- At the beginning of our survey, the respondents were asked to select, as an individual choice, the topic of knowledge, which they think is important for them to obtain in order to improve the performance of their organization through creativity (Q1).
- Variety of answers were registered with domination of eight topics:
- *Visualization, Design thinking, Brainstorming, Concept development, Problem-solving, Design of presentations, Design of corporate identity and Digital literacy* are considered as closely related to creative thinking in the non-CCI sector.

Needed knowledge

- Knowledge in *Design thinking* (49%), *Visualization* (36%), *Concept development* (35%) and *Brainstorming* (33%) are topics of knowledge mostly pointed as needed by the non-CCI companies for improving their creativity. (Q8)
- Notably, *Design thinking* is the most selected option. It refers to the cognitive, strategic and practical processes, by which proposals for new products or services are developed by designers and/or design teams. Design thinking is strongly related to concept development and brainstorming. The three topics are linked to marketing and service providing to the customers, as well as building better team relationships.

Needed skills

- Soft skills such as *Brainstorming* (47%), *Problem-solving* (42%), *Design strategy* (37%), *Vision for corporate identity* (37%) and *Critical thinking* (37%) are mainly requested by the respondents. (Q2)
- All these skills are considered related to creativity as an important part for the development of innovative products and services.

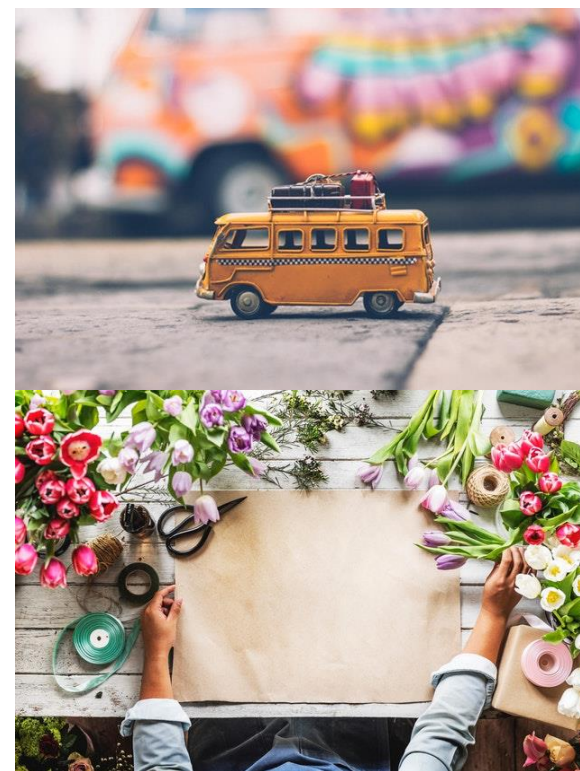
Summary of the results related to the benefits of creativity in business

Businesses sectors, which can benefit most from utilizing new creative solutions (Q4)

Research
(47%)

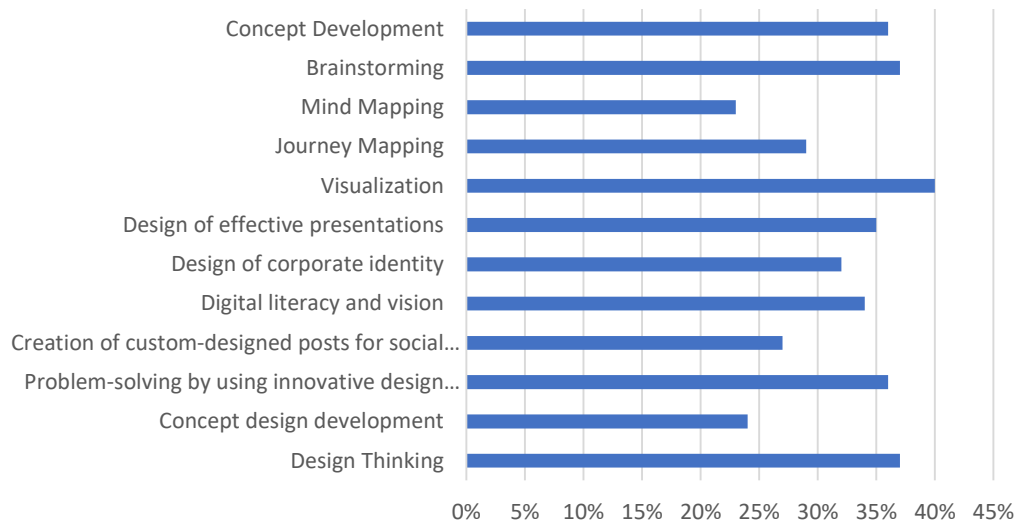
Marketing
(47%)

Product
development
(46%)



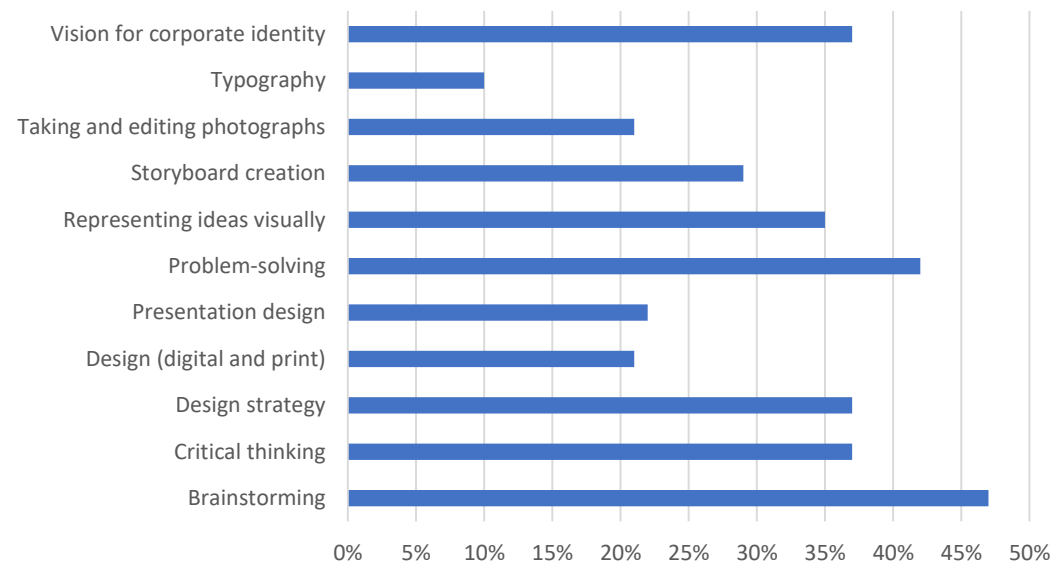
Individual results per question

Q1. Important type of knowledge for better business performance (%)



* The respondents have opportunity to selected more options.

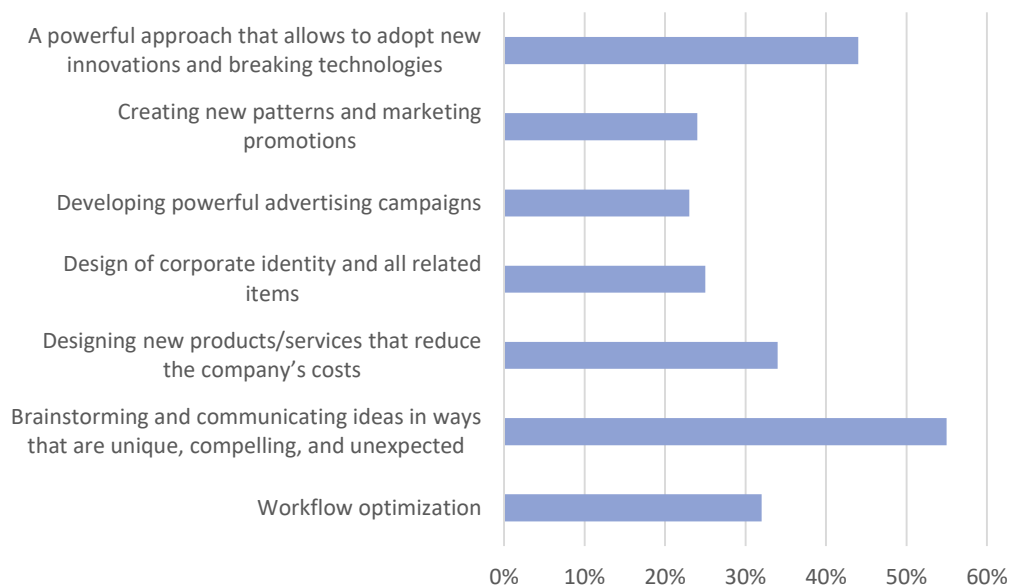
Q2. Needed soft skills (%)



* The respondents have opportunity to selected more options.

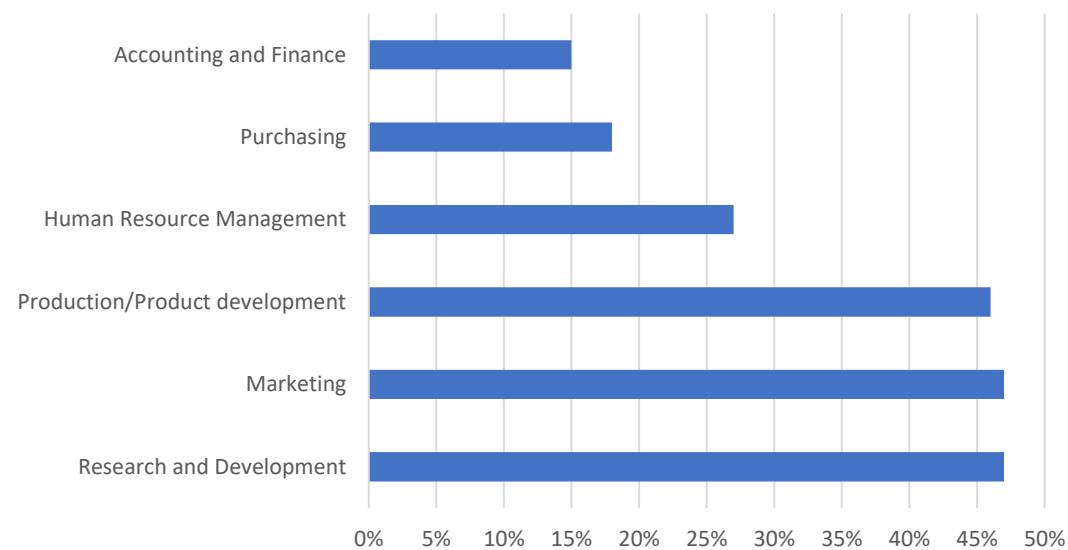
Individual results per question

Q3. What does creativity means for you? (%)



** The respondents have opportunity to selected more options.*

Q4. The adoption of new creative solutions and design skills impact the following business areas mostly (%)

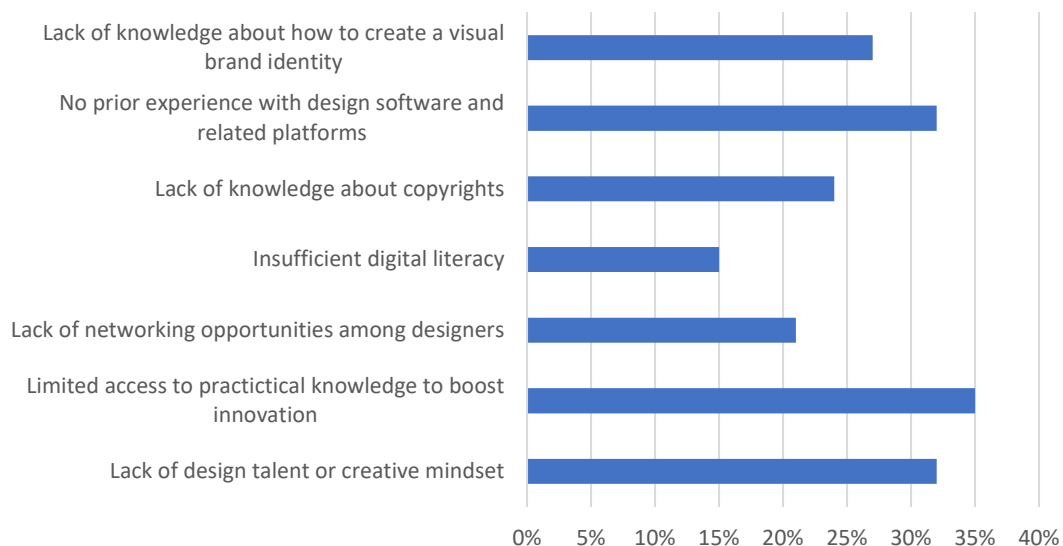


** The respondents have opportunity to selected more options.*



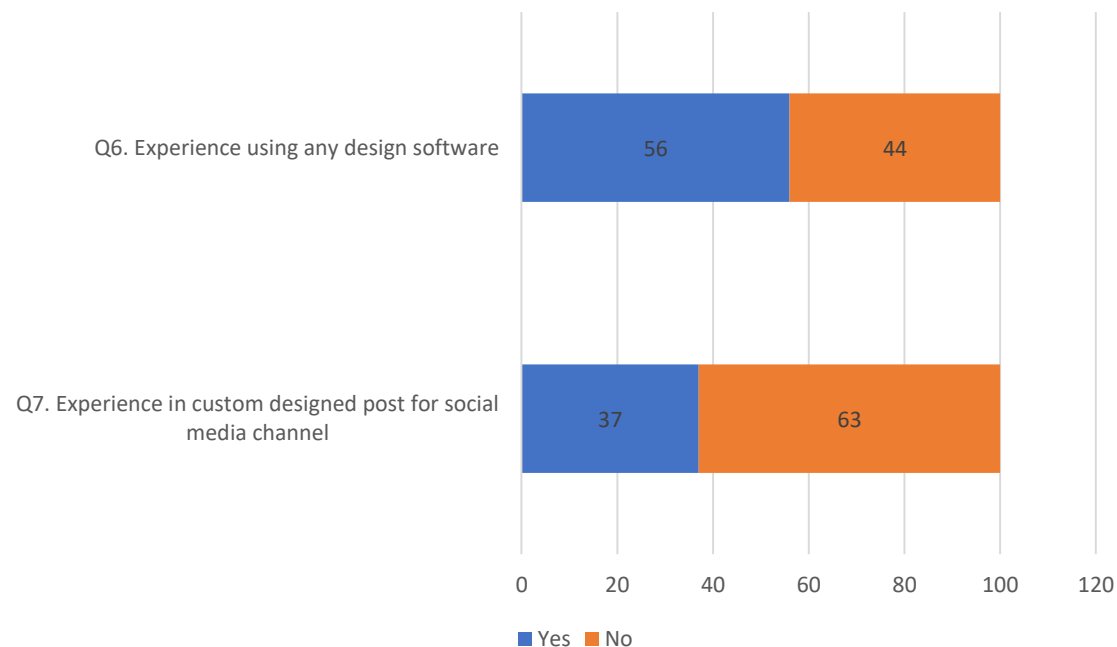
Individual results per question

Q5. What kind of main obstacle do you face when you search for creative solutions? (%)



** The respondents have opportunity to selected more options.*

Q6 & Q7. Experience identified (%)

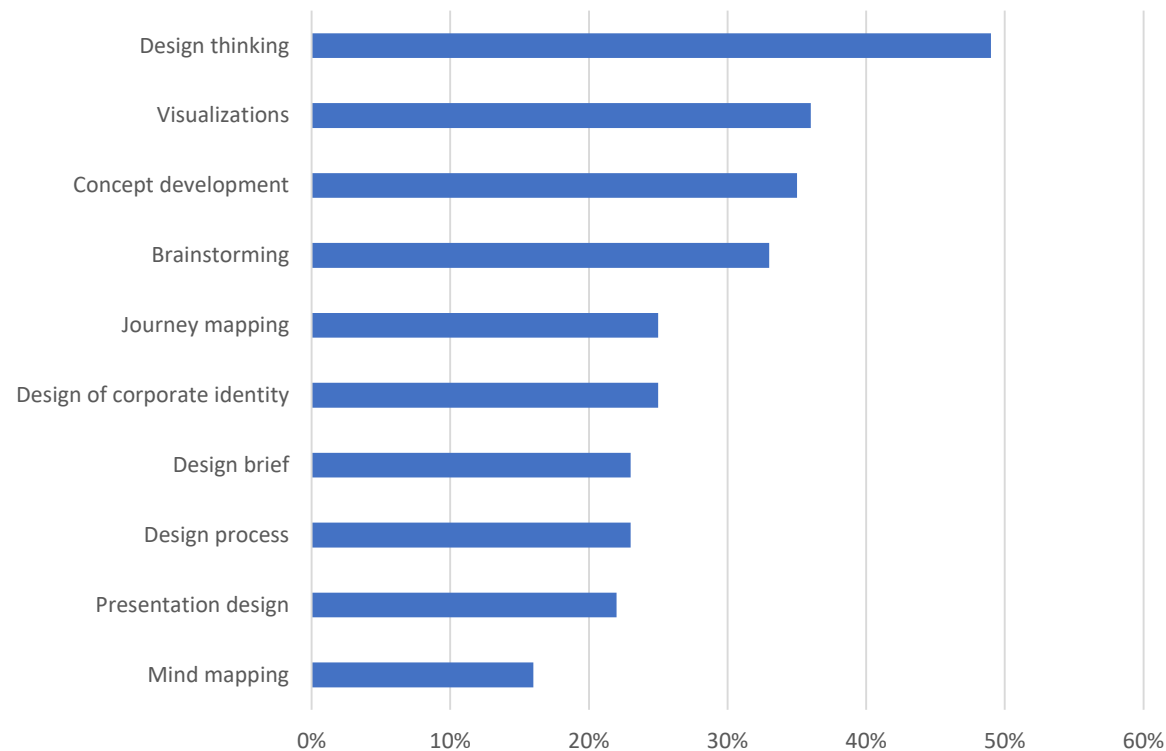




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Individual results per question

Q8. Knowledge needed to unleash creativity (%)



** The respondents have opportunity to selected more options.*



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Recommendations

Based on our findings in the survey, recommendations for the future training modules (units) in the Training programme “Creative thinking for Innovation” are made.

The goal of the programme is to develop skills and to provide knowledge about creativity in business.

Through a series of lectures and exercises the non-CCI stakeholders will develop understanding and skills in creativity. This learning programme will help entrepreneurs who are not affiliated with the CCI to understand the role of creativity and innovation in their own work through challenging participants to move outside of their comfort zone.



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Training Program: Creative thinking for Innovation



Topics for the units:

- Modul 1. **What is Design thinking?**
- Modul 2. **Design Brief**
- Modul 3. **Visualization**
- Modul 4. **Visual Branding**
- Modul 5. **Brainstorming**
- Modul 6. **Problem solving and critical thinking**
- Modul 7. **How to create attractive social media content?**
- Modul 8. **Concept development**



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B i b l i o g r a p h y

EC Cultural and Creative Cities Monitor

<https://composite-indicators.jrc.ec.europa.eu/cultural-creative-cities-monitor/>

2018 Cultural and Creative Industries Monitoring Report, Authors: Prof. Irene Bertschek, ZEW Mannheim, Dr Jörg Ohnemus, ZEW Mannheim, Dr Daniel Erdsiek, ZEW Mannheim, Dr Christian Rammer, ZEW Mannheim, Publisher: Federal Ministry for Economic Affairs and Energy (BMWi)

Europe's Creative Hubs Update 2018, Produced by Dr Alice Enders, Chris Hayes, Joseph Evans, Rob Jenkin and Douglas McCabe, Copyright © 2018 Bertelsmann and Enders Analysis

Mapping of creative industries in North Macedonia (Мапирање на креативните индустрии во Македонија), Authors: Antoanela Petkovska and others, Skopje, British Council in North Macedonia, 2010

Economic Contribution of the Cultural and Creative Industries in Sofia: The Educational, Cultural and Political Spillover Effects, Authors: Assoc. prof. Bilyana Tomova PhD, Diana Andreeva PhD,, Observatory of Cultural Economics



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Contact information



With regard to the survey and its results:

Maria-Denitsa Georgieva / Milen Dobrev

BIC INNOBRIGDE, Bulgaria

Phone: +359 82 825875

Email: info@rcci.bg

Website: www.innobrigde.org

With regard to CreatINNES project:

Angela Ivanova / Wolfgang Kniejski

INI-Novation GmbH, Germany

Phone: +49 6151 787 3315

Email: info@ini-novation.com

Website: www.ini-novation.com

 www.creatinnes.eu  www.facebook.com/creatinnes  [#creatinnes](https://twitter.com/creatinnes)



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