

CREADIS3
Interreg Europe



CREADIS3: REPORT ON TERRITORIAL DIAGNOSIS. SLOVAK REPUBLIC



**Ministry of Culture of
the Slovak Republic**

June 2018

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1/ GENERAL INTRODUCTION

1.1. The project

Creadis3 - Smart Creative Districts is a European initiative in the field of Cultural and Creative Industries (CCI) that links six territories of the European Union: Regional Council of Central Finland, Emilia Romagna Region, Public Service of Wallonia, Ministry of Culture of the Slovak Republic, Region of Western Greece and Regional Government of the Basque Country. The Department of Language Policy and Culture of the Basque Government leads the project, which will be implemented between 2017 and 2021.

The Creadis3 project was born with the main objective of aligning territorial public policy agendas to support the development of more efficient cultural and Creative industries (later on “CCI”) policies in territories aiming to generate innovation and economic development around cultural policies. The main objective is declined in 6 sub-objectives:

- Foster multi-level administrative collaboration across the territory to enable better synergies between the different authorities in charge of CCI's /1a/.
- Articulate better culture and economic policies for effective CCI's innovation policies /1b/.
- Support international territorial attractiveness to increase investment in the creative potential of the region and retain talents/creative entrepreneurs /1c/.
- Improve cross collaborations within the local ecosystem of hubs, labs, clusters, incubators, universities, science parks etc. /2a/.
- Improve cross fertilisation across culture and technology sectors to trigger spill-over effects /2b/.
- Support the internationalisation of SMEs through capacity building and new business models of research and innovation infrastructure and capacities/2c/.

1.2. The partner and the project

The CREADIS3 project aspires to improve institutional governance and boost CCI's contribution to regional development. Each partner has a specific sub-objective, which for Ministry of Culture of the Slovak Republic is the 1a sub-objective focusing on Foster *multi-level administrative collaboration across the territory to enable better synergies between the different authorities in charge of CCI's*.

As a partner in the CREADIS3 project Ministry of Culture of the Slovak Republic is planning to develop tools that will support the improvement of implementing centralized support scheme of IROP – Priority Axis 3 through improved governance in order to foster administrative collaboration on a vertical axis: national (Ministry of Culture, Slovakia, Ministry of Economy, Slovakia, National Export Agency, Innovation agencies), regional (existing and future creative hubs, clusters, regional authority, Business Chambers) and local (city authority, local hubs) and foster cross collaborations across culture and technology sectors through existing and future creative hubs, technology parks, universities, etc. and support internationalization of creative SMEs. At the same time sharing experiences and learning new knowledge from the partners is a great opportunity to gather new know-how that will

be actively used during the processes of creating new policies and tool aimed at supporting the development of the CCIs and its ecosystem in the Slovak Republic.

As one of the main outputs of the project is a new action plan in which Ministry of Culture of the Slovak Republic will aim to improve the multilevel cooperation in the fields of CCIs and generate more tailored actions for effective support of the CCIs in Slovakia.

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June 2018

2/ REGIONAL CONTEXTS

2.1. Territory's general profile

Modern Slovakia was born as an independent nation-state in 1993, when it peacefully separated from the Czech Republic, splitting from the former Czechoslovakia by mutual agreement.

Surface area: 49,034m²

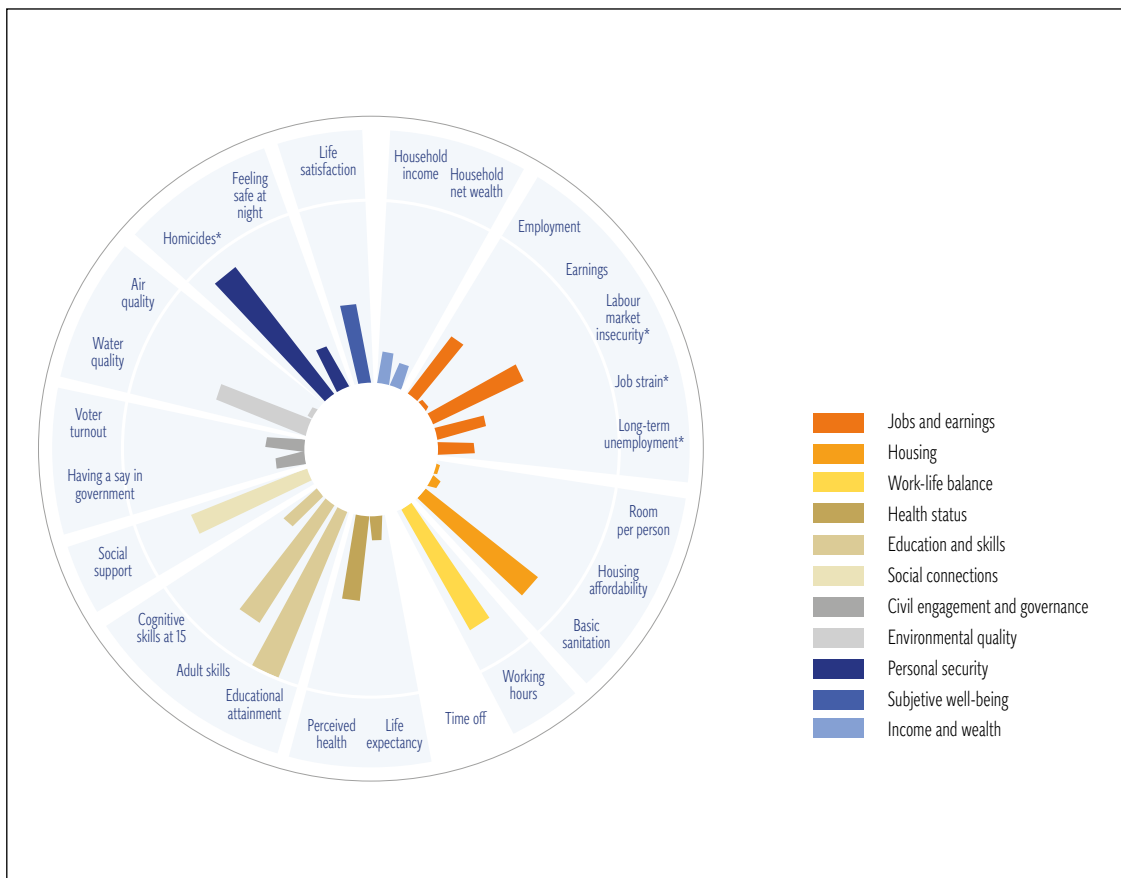
Population: 5,435,343 mil. (51,2% women; 48,8% men)

Population density: 111 per 1km²

Relative to other OECD countries, the average performance of the Slovak Republic across the different well-being dimensions is very mixed. Material conditions, environmental quality, and civic engagement and governance are all areas of comparative weakness. The average household net adjusted disposable income was about two-thirds of the OECD average level in 2015, while the long-term unemployment rate, at 5.5% in 2016, was almost triple the OECD average. Life expectancy at birth (77 years in 2015) is among the lowest in the OECD,

and only 66% of Slovaks perceive their health as “good” or “very good”, below the OECD average of 69%. However, the Slovak Republic has the second-highest level of educational attainment in the OECD: 92% of the adult working-age population have completed at least an upper secondary education, and adult skills are also above the OECD average. Regarding personal security, despite a low homicide rate, only 60% of Slovaks report feeling safe walking alone at night, compared to the OECD average of 69%.

The Slovak Republic’s average level of current well-being: Comparative strengths and weaknesses¹



According to the Country Report Slovakia² from 2017 Slovakia’s economic expansion continues at one of the fastest rates in the EU. Real GDP growth was expected to be around 3% in the end of 2017 and to increase to 3.6% in 2018.

1. <https://www.oecd.org/slovakia/Better-Life-Initiative-country-note-Slovak-Republic.pdf>
 2. https://ec.europa.eu/info/files/2017-european-semester-country-report-slovakia_sk

Detailed information about GDP from 2017

Gross Domestic Product (mil. EUR): **80,958**

Gross Domestic Product Index (%): **102,9**

Gross domestic product per capita (EUR): **14,910**

The labour market has witnessed a cyclical improvement. The unemployment rate fell to 9.7% in 2016, almost full two percentage points below the previous year, and is expected to decline further in 2017 and 2018 on the back of robust economic expansion.

While Slovakia's economy is highly integrated into global value chains, production is concentrated in only a few sectors and regions. The country's specialisation in automotive and electronics manufacturing accounts for a significant proportion of domestic output and is concentrated mainly in the western region. Small and medium sized enterprises can play a vital role in Slovakia's economic diversification, while innovation policy and resource efficiency continue to present challenges. Slovakia's relatively dynamic small and medium-sized enterprises sector is being granted greater policy attention.

In spite of rising R&D intensity, Slovakia's science base is still ranked below that of most other Member States. Business R&D spending and cooperation between the public sector, research institutions and business are stagnating. Policy measures supporting research and innovation are not effective and reforms are proceeding slowly.

According to the Research and Innovation *Strategy for Smart Specialisation of the Slovak Republic*³ (RIS3) the share of knowledge-intensive services in GDP and export, compared to other countries, is very low and the use of innovative processes in the areas of creative industry and social sphere has started only recently. The RIS3 identify following prospective areas of specialization for Slovakia:

- Automation, Robotics and Digital Technology.
- Processing and increasing the value of light metals and their alloys.
- Production and processing of plastics.
- Creative industry.
- Increasing the value of domestic raw material base.

³ <https://rio.jrc.ec.europa.eu/en/library/strategy-smart-specialisation-slovak-republic-ris3>

The vision of this strategy will be accomplished through several strategic objectives. The area of CCIs is covered within the partial objective b (increase the share of creative industry in GDP creation) of the Strategic objective no. 3 - *Creating a dynamic, open and inclusive innovative society as one of the preconditions for an increase in the standard of living*. Slovak creative industry is here seen as the area, which has potential to increase its share in the GDP creation.

Indicators of economic development from 2017 according to “Slovenská republika v číslach” by Statistical Office of the Slovak Republic⁴:

Economic activity rate: **60,1 %**

Employment rate (15-64 years): **64,9%**

Total imports: **66,4 mld. EUR**

Total exports: **70,1 mld. EUR**

Foreign trade balance: **3,7 mld. EUR**

Development indicators from 2015⁵:

- Human Development Index value (HDI): 0.845 in 2015.
- (40 out of 188 countries and territories - below the average of 0.892 for countries in the very high human development group and below the average of 0.887 for countries in OECD).
- Inequality-adjusted Human Development Index value (IHDI): 0.793 in 2015.
- Gender Development Index value (GDI): 0.991 in 2015 (ranking it in Group 1).
- Gender Inequality Index value (GII): 0.179 in 2015 (ranking it 39 out of 159 countries).
- Multidimensional Poverty Index value (MPI): not calculated in 2015.

⁴ https://slovak.statistics.sk/slovenska-republika-v-cislach_2017/pdf
⁵ http://hdr.undp.org/sites/all/themes/hdr_theme/country-notes/SVK.pdf

2.2. Territory's CCI profile

According to the *Research and Innovation Strategy for Smart Specialisation of the Slovak Republic*⁶ (hereinafter RIS3) cultural and creative sectors are developing in Slovakia along with traditional sectors. The firms in creative sectors are considerably concentrated in space and create clusters. The Bratislava region is one of prominent EU regions from the point of view of concentration of employment in the creative sector since in this region approximately 5.01 % of the labour force work in these sectors, pointing out at significant specialisation. Moreover, 46 % of all firms in the creative sectors are seated in the Bratislava region, of that 91 % directly in Bratislava. Design and computer programming can be considered as the most prospective orientation of the creative industry in Slovakia.

Nowdays, there are no current official data specifically focused on economic indicators of CCIs. Even the existing Strategy on development creative industry in Slovak Republic is based on statistical data available at the time (2011) that doesn't reflect the structure and dynamics of the sector. As a result of this the government of Slovakia adopted a task to create a Satellite account for CCIs to improve statistical data in this sector. Ministry of Culture is in charge of this task and is preparing to launch the Culture and Creative Industry Satellite Account in 2020 and thus provide relevant statistics for future strategic documents for this sector. In 2018 will be first experimental data from the upcoming Satellite account available. Therefore, for the purposes of this report, we present data from the experimental Culture and Creative Industry Satellite Account from 2015⁷.

Number of companies in culture and creative industries

In 2015, the number of companies in CCI area was approximately **20,299 units**, of which 10,218 were legal entities and 10,081 individuals.

Number of employees in culture and creative industries

In 2015 the number of employees in culture and creative industries was 62,914 that represents full time jobs and different kinds of part time jobs and contracts in the main sectors of CCI as well (43,812 of the number mentioned above presents only full time jobs in the main sectors of CCI). As for the average employee per CCI company, it is approximately 2,4.

⁶ <https://rio.jrc.ec.europa.eu/en/library/strategy-smart-specialisation-slovak-republic-ris3>

⁷ INFOSTAT - Inštitút informatiky a štatistiky (2017), Satelitný účet kultúry a kreatívneho priemyslu v SR rok 2015 (experimental version), Bratislava

Employment in culture and creative industries

Employment in the sectors of CCI represents about **8.08% of total employment in the economy.**

Growth and Share of GDP of the culture and creative industries

The GDP of the culture and creative industries represented around **1.32% of the GDP** of the economy in 2015.

The added value of the culture and creative industries

The added value of the cultural and creative industries in 2015 amounted to **4,591,284 EUR.** The proportion of **the added value of CCI in the added value of the economy** was about **6.5%.**

Culture and creative industries' production in the Slovak Economy

Production of cultural and creative industries in 2015 was about 9,622,432 EUR. The proportion on **the production of economy** was about **5.3%.**

3/ CCI-S SECTOR ANALYSIS: EVOLUTION AND CURRENT SITUATION

3.1. Evolution

The most important facts and significant elements for the regional/state CCI industry and policy over the past 20 years: different plans, legislation, another key milestone, etc.

DATE	FACTS & FIGURES
1991	Slovak Design Centre It is as contributory organization of Ministry Of Culture of the Slovak Republic.
01/06/1992	Slovak Chamber of Architects It was established by the Act of the Slovak National Council no. 138/1992 Coll. (on authorized architects and authorized construction engineers). Its activity is financed from its own resources without state subsidies. He is a member of the ACE Architectural Council of Europe and part of the network of competent authorities in the ENACA architecture.
01/09/1994	The Chamber of Restorers It was established by the Law of the National Council of the Slovak Republic No. 200/1994 Coll, which has the task to gather physical persons executing the profession “restorer” in the area of the Slovak Republic.
04/12/2003	Copyright Act Act No. 618/2003 Coll. on copyright and rights related to copyright.
01/01/2009	Audiovisual Fund according to Act No. 516/2008 Coll. A new public institution was created to promote and develop audiovisual culture and industry. The fund has replaced the grant program of the Ministry of Culture and will significantly increase the possibilities and sources of support.
01/01/2013	European Capital of Culture Košice 2013 As part of the European City of Culture 2013, the Interface 2013 project was implemented, which aimed at transforming Kosice as a strong industrial center into a post-industrial city with creative potential, university background and new cultural infrastructure. The creators brought the concept of a creative economy to Košice, creating space for creative industries and creative tourism.
28/10/2014	Operational Programme Research&Innovation Investments in micro and SMEs in cultural and creative sector (sectors: advertisement and marketing architecture, design, fashion design and ICT).
18/12/2014	Integrated Regional Operation Program Investments in the cultural and creative sector (sectors: film, TV, video, radio and photography, visual arts, multimedial industry and animated production, publishing and book market, music and scenic art, craft industry of traditional, folk and urban culture, market with culture).
01/05/2014	National Business Centre (implemented by Slovak Business Agency) The strategic goal of the national project was to create an interface among the private/business sector, research and development (hereinafter “R&D”) sector and academia. The component of its Acceleration Program is Creative Point, which provides access to new technologies.
01/01/2015	Slovak Arts Council It is a self-governing public institution guaranteeing support of art activities, culture and creative industry, which was established according to Act No. 284/2014 Coll. The Council replaced the substantial part of the former grant system of the Ministry of Culture of the Slovak Republic and is independent of central bodies of state administration. Its main mission is the support of “live” arts and culture with a special focus on diversity. The Council provides grants especially for creation, production, distribution and presentation of works of art; support of international cooperation; educational programmes in the fields of art, culture and creative industry; grants for individuals who contribute to development of arts and culture in creative way or by research.
2015	Bratislava Regional Grant Scheme for Culture Promotion
01/01/20016	New Copyright Act (Act no. 185/2015 Coll.) The New Copyright Act is a modern and flexible legal regulation that provides authors and other rights holders with a more effective exercise of their rights in the framework of European and international law.
2017	The Fund for the Promotion of the Culture of National Minorities It is established by Act No. 138/2017 Coll. The Fund is an independent public institution whose mission is to promote and stimulate the culture of national minorities in the field of cultural and scientific activities of national minorities, in particular by creating support mechanisms for the creation and dissemination of cultural and scientific values.

3.2. Current situation

The Slovak republic is subdivided into 8 regions, each of which is named after its principal city. Their self-governing bodies are referred to as Self-governing (or autonomous) regions. For their part, regional capital cities (municipalities) also play a key role in the development of public policies for the CCIs. Following administrative levels can be identified in Slovakia:

State administration

- National level

Self - administration

- Regional level (8 regions)
- Local level (municipalities)
- All institutions established under the Act. No. 83/1990 on Citizens Civil Law Associations which are connected by a particular social interest (different types of associations).

Description of regional/state strategy and public policies that impact the CCI sector in Slovakia

POLICY NAME AT NATIONAL LEVEL	SECTORS TARGETED	MAIN FEATURES	ON-GOING STRATEGY
<p>WITH KNOWLEDGE TO PROSPERITY -</p> <p>STRATEGY FOR RESEARCH AND INNOVATION FOR INTELLIGENT SPECIALIZATION OF THE SLOVAK REPUBLIC</p>	CCIs	The strategy is an ex-conditionality for implementation European Structural and Investment Funds in 2014-2020, defines the creative industry as one of the prospective sectors.	√
<p>CREATIVE INDUSTRY DEVELOPMENT STRATEGY IN THE SLOVAK REPUBLIC</p>	CCIs	<p>The strategy defines four priority areas:</p> <p>P1: An Effective System for Developing Creative Industry</p> <p>P2: Quality Human Resources</p> <p>P3: Increasing the absorption capacity of the market</p> <p>P4: Supporting financing instruments</p>	√
<p>ACTION PLAN FOR THE IMPLEMENTATION OF THE CREATIVE INDUSTRY DEVELOPMENT STRATEGY IN THE SLOVAK REPUBLIC</p>	CCIs	<p>The Action plan defines specific actions and measures within the four priority areas of Creative Industry Development Strategy:</p> <p>Priority 1</p> <p>Measure 1.1.: Physical Infrastructure Development</p> <p>Priority 2</p> <p>Measure 2.1: Creativity and creativity education</p> <p>Measure 2.2: Further training in creative activities</p> <p>Measure 2.3: Promote the growth of the quality of human capital through mobility and transfer of knowledge</p> <p>Priority 3</p> <p>Action 3.1: Raising awareness of the creative industry</p> <p>Measure 3.2: Support for the export and internationalization of goods and services in the creative industry</p> <p>Action 3.3: Creating conditions conducive to business</p> <p>Measure 3.4: Cluster support</p> <p>Action 3.5: Protection and use of intellectual property</p> <p>Priority 4</p> <p>Measure 4.1: Subsidies</p> <p>Measure 4.2: Access to capital</p>	<p>X</p> <p>(implementing period was 2015 – 2017)</p>

<p>RESEARCH AND INNOVATION STRATEGY FOR SMART SPECIALISATION OF THE SLOVAK REPUBLIC</p>	<p>Partially CCIs</p>	<p>The RIS3 document is the national R&I strategy for 2014-2020. It sets goals and policy measures are aimed at research, innovation and education.</p> <p>Goal 1 tackles challenge of the dual economy and aims at increasing embeddedness of key industries in Slovakia.</p> <p>Goal 2 relates to support to economic growth via results of excellent science.</p> <p>Goal 3 aims at creating dynamic, open and inclusive innovative society as a condition for improving quality of life contains three policy measures on grand societal challenges.</p> <p>Goal 4 aims at improving quality of human resources for innovative Slovakia' contains policy measures aimed at improving system of vocational education and supporting excellent higher education.</p>	<p>√</p>
<p>POLICY NAME AT REGIONAL LEVEL</p>	<p>SECTORS TARGETED</p>	<p>MAIN FEATURES</p>	<p>ON-GOING STRATEGY</p>
<p>REGIONAL INNOVATION STRATEGY OF THE KOŠICE SELF-GOVERNING REGION FOR 2013 - 2020</p>	<p>Partially CCIs</p>	<p>The document is a key development document for the region in the field of business, innovation and research and development for the period 2015-2020.</p>	<p>√</p>
<p>PROGRAM OF ECONOMIC AND SOCIAL DEVELOPMENT OF THE KOŠICE SELF-GOVERNING REGION</p>	<p>Partially CCIs/ culture</p>	<p>The Program of Economic and Social Development together with the Territorial Plan are the key documents for the self-governing region. It is usually processed for a period of 7 years.</p>	<p>√</p>
<p>RICS OF THE KOŠICE SELF-GOVERNING REGION</p>	<p>Partially CCIs</p>	<p>RICS is a strategic document for the implementation of Integrated Territorial Investment at regional level with a local impact. RICS is an action plan for specific IROP activities.</p>	<p>√</p>
<p>RICS OF THE BANSKÁ BYSTRICA SELF-GOVERNING REGION</p>	<p>Partially CCIs</p>	<p>RICS is a strategic document for the implementation of Integrated Territorial Investment at regional level with a local impact. RICS is an action plan for specific IROP activities.</p>	<p>√</p>
<p>PROGRAM OF ECONOMIC AND SOCIAL DEVELOPMENT OF THE BANSKÁ BYSTRICA SELF-GOVERNING REGION FOR 2015-2023</p>	<p>Partially CCIs/ culture</p>	<p>The Program of Economic and Social Development together with the Territorial Plan are the key documents for the self-governing region. It is usually processed for a period of 7 years.</p>	<p>√</p>

<p>RICS OF THE NITRA SELF-GOVERNING REGION</p>	<p>Partially CCIs</p>	<p>RICS is a strategic document for the implementation of Integrated Territorial Investment at regional level with a local impact. RICS is an action plan for specific IROP activities.</p>	<p>√</p>
<p>REGIONAL INNOVATION STRATEGY OF THE NITRA SELF-GOVERNING REGION FOR 2014-2020</p>	<p>Partially CCIs</p>	<p>The document analyzes the region's innovation potential. It focuses on:</p> <ul style="list-style-type: none"> ▪ developing human potential, cultivating creativity and innovation in people ▪ optimal environment for creative people, life and innovative entrepreneurship ▪ infrastructure of a regional innovation and educational incubator network 	<p>√</p>
<p>RICS OF THE ŽILINA SELF-GOVERNING REGION</p>	<p>Partially CCIs</p>	<p>RICS is a strategic document for the implementation of Integrated Territorial Investment at regional level with a local impact. RICS is an action plan for specific IROP activities.</p>	<p>√</p>
<p>PROGRAM OF ECONOMIC AND SOCIAL DEVELOPMENT OF THE ŽILINA SELF-GOVERNING REGION FOR 2014 - 2020</p>	<p>Partially CCIs/ culture</p>	<p>The Program of Economic and Social Development together with the Territorial Plan are the key documents for the self-governing region. It is usually processed for a period of 7 years.</p>	<p>√</p>
<p>STRATEGY FOR THE DEVELOPMENT OF CULTURE FOR 2015 - 2020 OF BRATISLAVA SELF-GOVERNING REGION</p>	<p>Partially CCIs</p>	<p>The document has the ambition to become a timeless conceptual background for reflection on culture at regional level and a manual for the coming years.</p>	<p>√</p>
<p>PROGRAM OF ECONOMIC AND SOCIAL DEVELOPMENT OF THE BRATISLAVA SELF-GOVERNING REGION FOR 2014 -2020</p>	<p>Partially CCIs/ culture</p>	<p>The Program of Economic and Social Development together with the Territorial Plan are the key documents for the self-governing region. It is usually processed for a period of 7 years.</p>	<p>√</p>
<p>RICS OF THE BRATISLAVA SELF-GOVERNING REGION</p>	<p>Partially CCIs</p>	<p>RICS is a strategic document for the implementation of Integrated Territorial Investment at regional level with a local impact. RICS is an action plan for specific IROP activities.</p>	<p>√</p>

PROGRAM OF ECONOMIC AND SOCIAL DEVELOPMENT OF THE PREŠOV SELF-GOVERNING REGION FOR 2014 -2020	Partially CCIs	The Program of Economic and Social Development together with the Territorial Plan are the key documents for the self-governing region. It is usually processed for a period of 7 years.	√
RICS OF THE PREŠOV SELF-GOVERNING REGION	Partially CCIs	RICS is a strategic document for the implementation of Integrated Territorial Investment at regional level with a local impact. RICS is an action plan for specific IROP activities.	√
PROGRAM OF ECONOMIC AND SOCIAL DEVELOPMENT OF THE TRENČÍN SELF-GOVERNING REGION FOR 2013 - 2023	Partially CCIs/ culture	The Program of Economic and Social Development together with the Territorial Plan are the key documents for the self-governing region. It is usually processed for a period of 7 years.	√
RICS OF THE TRENČÍN SELF-GOVERNING REGION	Partially CCIs	RICS is a strategic document for the implementation of Integrated Territorial Investment at regional level with a local impact. RICS is an action plan for specific IROP activities.	√
POLICY NAME AT LOCAL LEVEL	SECTORS TARGETED	MAIN FEATURES	ON-GOING STRATEGY
THE STRATEGY FOR THE DEVELOPMENT OF CULTURE 2014-2018 OF KOŠICE	CCI/Culture	A key document on the development and support of culture and creative industries in the territory of Košice.	√
THE PROGRAM OF ECONOMIC AND SOCIAL DEVELOPMENT OF NITRA 2015-2023 + ACTION PLAN	Partially CCI/ culture	The document conceptually and systematically analyzes the current state of the territory and determines the future of development.	√
PROGRAM OF ECONOMIC AND SOCIAL DEVELOPMENT 2010 - 2020 OF BRATISLAVA	Partially CCI/ culture	The document is based on the special status of Bratislava as the capital of the Slovak Republic, which fulfills the position of a political, cultural, business, scientific and social center of Slovakia and determines the future of its development.	√
PREŠOV CITY DEVELOPMENT PROGRAM FOR 2015-2020	Partially CCI/ culture	The document conceptually and systematically analyzes the current state of the territory and determines the future of development.	√
TRENČÍN CITY DEVELOPMENT PROGRAM 2016 - 2022	Partially CCI/ culture	The Development Program represents the key strategic document for regional development support, where Trenčín City declares interest to actively contribute on sustainable development of the territory and on coordination with relevant key stakeholders in the area.	√

3.3. Creative Districts

Since 2011 Ministry of Culture of Slovak Republic adopted new agenda in the field of Cultural and Creative Industries (later “CCIs”) and has been working on several strategic documents such as the Basis of CCIs Development in Slovakia (2013), Analysis of the potential of CCIs in Slovakia (2013), Strategy of CCIs Development (2014) and the Action Plan of realization of Strategy of CCIs Development for the period 2016-2017 (accepted in 2015). The analytical part of the existing documents is based on the analysis from 2013, that has been designed more as a generic review of status quo of the sector, not focusing on economic parameters either from micro- or macro-economic level. The existing Strategy is based on statistical data available at the time (2011) that don’t reflect the structure and dynamics of the sector.

As a result of this the government of Slovakia adopted a task to create a Satellite account for CCIs to improve statistical data in this sector. Ministry of Culture is in charge of this task and is preparing to launch the Satellite account in 2020 and thus provide relevant statistics for future strategic documents for this sector. In 2018 will be first experimental data from the upcoming Satellite account available. After this period, the Slovak Republic will have the final tool for regularly collecting of the necessary data to quantify the economic indicators on CCIs, production and added value of culture and creative industries in the Slovak economy, quantification of employment in the field of culture and creative industry in the Slovak economy, etc.

In 2016, a new department of the Ministry - the Department for Development of Culture and Creativity - was set up within the Ministry of Culture, to fulfill the ministry’s role in the development of culture and creativity in terms of supporting tools for creativity, innovation and internationalization within the Ministry’s competencies. Its main activities included, for example, development of concepts, coordination of the preparation of sectoral strategies, action plans or legislative proposals in the area of culture and creativity; horizontal coordination of support and development of culture and creativity with relevant central authorities of state administration and local authorities; monitoring of trends in given areas at national and regional level; cooperation with intermediate bodies for IROP PA3 and project management in the field of conceptual support and coordination of CCI development in the Slovak Republic regions, or support for the Ministry’s strategic development projects in the CCI.

Creative District, defined as an ecosystem that generates collaboration across public authorities and industrial stakeholders in order to foster the development of culture and creative industries as well as innovation according to RIS3, it is not developed in Slovakia yet. The supporting activities for boosting the CCIs ecosystem are part of the Integrated

regional operational programme 2014 - 2020 - Priority axis No. 3 that will provide sources for creating a needed infrastructure (establishing a creative center in majority of the regions – located in the regional capitals) and non-financial support for creative entities (consulting services, premises and technology for rent, incubator/accelerator services, etc.).

The Ministry of Culture of the Slovak Republic places great emphasis on creating conditions for the development of the cultural and creative industry and its efficient networking. The priority of the Ministry of Culture in this area is in particular to implement activities and actions aimed at building and supporting the overall ecosystem of the creative economy in the regions of the Slovak Republic, ensuring its sustainability and supporting the emergence and growth of micro and small and medium enterprises in the cultural and creative industry with a focus on creating new jobs. Given that the majority of the sector are independent entrepreneurs and SMEs or freelance artists, it is also important for the Ministry of Culture to place emphasis on activities sensitive to such types of entrepreneurs and to focus on reducing administrative burdens and removing legislative barriers.

At the moment, Ministry of Culture of Slovak Republic needs to focus more on specific CCIs sector analysis consisting of the following main points:

- Suggestions for development of investment opportunities for Slovak CCIs.
- Evaluation and Analysis of public investments for Slovak CCIs.

The analysis is needed to update the Strategy of Creative Industry and also to create a new Action Plan for Cultural and Creative Industry with the view for the years 2020+ as key documents for regulation and implementation of new mechanisms. The Analysis will be used to improve the system of public investments through public institutions under the policy of the Ministry of Culture of Slovak Republic.

Regarding to the fact, that the implementation process of the Action Plan mentioned above has ended in the end of the 2017, Ministry of Culture is currently evaluating its outcomes, based on which the new Action Plan for Cultural and Creative Industry with the view for the years 2020+ will be created, as well as on the methodology and outputs of the CREADIS3 project.

4/ CCI-S SECTOR CHARACTERIZATION

4.1. Stakeholders

Members of the stakeholders group (“SG”) are representatives of the Ministry of Culture of the Slovak Republic; Ministry of Economy of the Slovak Republic; Ministry of Finance of the Slovak Republic; Ministry of Education, Science, Research and Sports of the Slovak Republic; Ministry of Transport and Construction of the Slovak Republic; Audiovisual Fund; Arts Support Fund; Of the Slovak Chamber of Architects; Club of Advertising Agencies of Slovakia; The Slovak Association of Hernandy Developers; The Slovak Chamber of Commerce and Industry and the Office of the Deputy Prime Minister of the Slovak Republic for Investment and Informatization.

The selection of SG members was made by addressing, in particular, representatives of the Ministries, as support for CCIs is carried out either directly through the Ministries themselves or their established organizations. Other members of the SG are representatives of chambers and fund providing organisations as well as selected representatives of the associations in order to cover all CCI sectors.

LIST OF STAKEHOLDERS GROUP REPRESENTATIVES

NR.	INSTITUTION	NAME
1	Ministry of Culture of the Slovak republic	PhDr. Denisa Zlatá Chairperson of stakeholders group
2	Ministry of Culture of the Slovak republic	JUDr. Anton Škrekó, PhD. Director General of Media, Audiovisual and Copyright Department
3	Ministry of Economy of the Slovak republic	Ing. Mgr. Miriam Letašiová Director General for Business Environment and Innovation
4	Ministry of finance of the Slovak republic	Ing. Martin Polónyi Director of Department of financial tools and international organizations
5	Ministry of Education, Science, research and Sport of the Slovak republic	PhDr. Luboš Svetoň Science and Technology Department State policy implementation, European and international R & D initiatives
6	Ministry of Transport and Construction of the Slovak republic	Mgr. František Morong Tourist Industry Department
7	Audiovisual Fund	Prof. Martin Šmatlák Director
8	Slovak Arts Council	Mgr. Jozef Kovalčík, PhD. Director
9	The Slovak Chamber of Architects	JUDr. Viera Hanuláková Director
10	The Club of advertising agencies Slovakia (KRAS)	Robert Slovák President
11	Slovak Game Developers association	Marián Ferko President
12	Slovak Chamber of Commerce	Juraj Paľa Chairman
13	Office of the Deputy Prime Minister of the Slovak Republic for Investment and Informatization	Alena Sabelová General director of the Investment Management Department

4.2. Mapping 1 - Competences

Competences per administrative level in the Slovak Republic

At national level, the central bodies, ministries and their organizations support culture and CCIs in particular through the implementation of policies and European structural funds, of which a substantial part of the support measures in the CCI area is funded. Financial support in the field of culture and CCIs is provided to entities through funds and other support schemes. At national level supporting programmes and subsidies for culture and the CCIs are covered mainly through operational programs, grant schemes and funds from ESIF.

Another important entities, mostly operate at national level, are professional associations. They are usually a nonprofit organizations seeking to further a particular profession, the interests of individuals engaged in that profession and the public interest. All these institutions are established under the Citizens Civil Law Associations Act. No. 83/1990. These organizations are task-oriented and driven by people with a common interest, perform a variety of service and humanitarian functions, bring their specific concerns to Governments, advocate and monitor policies, provide analysis and expertise and present themselves to the public.

In the Slovak Republic are self-govern bodies participating in cultural and creative policies divided to two different levels - regional and local level. Regional or local self-government is legal entity which, under the conditions established by the Act on Self-Governing Regions No. 302/2001, independently manages its own property and its financial resources. The self-governing region takes care of the all-round development of its territory and the needs of its inhabitants. In particular, it ensures the creation and implementation of a program of social, economic and cultural development of the territory of the self-governing region. Within the regional self-government, each region has an organizational unit responsible for the area of culture (including creative industry as well) which is associated with, for example, education or tourism.

At regional level, each region has an Economic and Social Development Program, which is based on Act No. 539/2008 Coll. support for regional development. This is a medium-term development document, which is elaborated in accordance with the objectives and priorities set out in the National Strategy of Regional Development of the Slovak Republic. The program of economic development and social development of the region consists of the analytical-strategic part and the program part, which contains concrete measures. These measures also partly cover cultural and CCI developments.

Supporting measures for the development of CCIs at regional level are mentioned in particular in documents related to the implementation of ERDF, Regional innovation strategies

or Regional Integrated Territorial Strategy (RICS). RICS is a planning tool for the implementation of the integrated approach to be used in the implementation of the IROP in the 2014-2020 programming period. Under the conditions of the Slovak Republic, integrated territorial investments will be implemented on the basis of RICS based on the economic development and social development programs of the self-government regions, the programs of economic development and social development of cities and municipalities, regional, sectoral and other relevant strategic documents. RICS is a binding strategic document for the implementation of the IROP (ERDF) in a given region defining the specific planned measures that will be the basis for the planned measures, with an emphasis on an integrated approach to territorial development. RICS also includes an analysis of the region and its potential in the CCI area within the IROP PA 3 Mobilization of Creative Potential.

At regional level the supporting programs and subsidies are mainly focused on culture, or partly on cultural industries. This support is provided through grant systems, almost every year each region allocates a specific amount from their budget and sets rules for possible applicants. As for creative industries, this kind of support is not covered in the regions yet. But in the upcoming years there are planned activities within the frame of Integrated regional operational programme 2014 - 2020 - Priority axis No. 3 and Operational programme research and innovation 2014 – 2020 (OPVa) - Priority axis No. 3 that will provide sources for creating a needed infrastructure (establishing a creative center in majority of the regions) and non-financial support for creative entities (consulting services, premises and technology for rent, incubator/accelerator services, etc.).

Within the local level each city has an organizational unit responsible for the area of culture (including creative industry as well) which is associated with, for example, education or tourism. Specific policies and strategic documents focus on CCIs at local level are only present in some cities. Most local strategy papers do not focus on these areas, but they form part of the local development documents. However, some cities also have specific strategic materials focused on the development of culture and CCIs, for example The Strategy for the Development of Culture 2014-2018 of Košice. Sustainable Urban Development (“SUD”) is part of a Regional Integrated Territorial Strategy (RICS) which is based on the Integrated Regional Operational Program (IROP). The SUD strategy needs to be set with emphasis on the needs of the functional city area with the most significant impact on the development of the territory. The preparation of the SUD strategy is ensured by the regional authorities. The UMR will be implemented through Integrated Territorial Investments within the scope of the Priority Axes of the Integrated Regional Operational Program (IROP). One of the priority axes is PA3 Mobilization of creative potential in the regions, which aims to create conditions for the development of CCI in the given area.

The situation relating to the support for culture and CCIs on local level is very similar to the regional one. Supporting programs and subsidies are also mainly focused on culture, or partly on cultural industries. Each local administration has their own grant system and almost every year each one of them allocates a specific amount from their budget and sets rules for possible applicants.

As for creative industries, this kind of support is not covered on this level yet. But as previously mentioned above, in the upcoming years there are planned activities within the frame of Integrated regional operational programme 2014 - 2020 - Priority axis No. 3 and Operational programme research and innovation 2014 – 2020 (OPVal) - Priority axis No. 3 that will provide sources for creating a needed infrastructure (establishing a creative center in majority of the regions – located in the regional capitals) and non-financial support for creative entities (consulting services, premises and technology for rent, incubator/accelerator services, etc.).

At the end of this report as a part of the APPENDIX can be find tables of competencies for national, regional and local level. They show the main focus (for support) of the state and self-governments within the culture and creative industry and its sectors.

4.3. Mapping 2 - Regional creative ecosystem

Regional creative ecosystem in the Slovak Republic

The main objective of Mapping 2 was to identify the regional ecosystem around CCIs in the Slovak Republic. This mapping made with focus on supporting policies and tools, stakeholders involved (e.g. universities, tech and creative hubs, incubators, etc.) and services provided (e.g. skills development, business management capacity building, internationalisation support schemes for SMEs, etc.) which were described in following categories:

- Competences development.
- Creation.
- Entrepreneurship.
- Innovation.
- Growth.
- Financing.

This document was mapping just the most important actions, institutions and programmes provided in given areas. **Based on mapping results, we can see that actions targeted specifically on CCIs are rare, so we were reporting most of the programs that provide support for all sectors, not just specifically for CCIs.**

One of the tools to stimulate creativity and create conditions for CCIs development in the Slovak Republic is also vocational training. At present, **education in CCIs** is implemented through specialized study programs and departments of secondary vocational schools and universities. The development of human resources in the cultural and creative industries is one of the priorities defined in the framework of the Strategy of CCIs Development in the Slovak Republic 2014-2020. Its current Action Plan sets out specific tasks focusing on the promotion of entrepreneurial education and entrepreneurship at primary and secondary schools as well as tasks related to the development of incubation and acceleration schemes to support CCIs in the Slovak Republic, which should be implemented from 2019 via IROP PO3. Currently, there are several business centers, incubators and laboratories in the Slovak Republic. As part of their services, they provide specialized trainings for the development of entrepreneurial skills such as:

- Consultation services.

- Designing of business plans for future businessmen.
- Short-term education (workshop, seminars, conferences, etc.).

An indispensable condition for the development of CCI is the **creation of infrastructure** to support the work of individual creators. Due to the fact that there is still insufficient infrastructure to systematically cover the needs of CCIs in Slovakia, this need is partly covered by the activities of associations and non-government organisations. State systematic support for the development of the infrastructure will be realized through the activities implemented via the IROP PA3 operational programme in the upcoming years through establishment of creative centers in the regions of Slovakia. At present, several entities have been identified in Slovakia that partially cover the infrastructure in CCIs and provide the following types of services:

- Providing services including rents and coworking spaces.
- Providing services excluding rents and coworking spaces.
- Providing promoting creators and creation in CCIs.

The list of organizations providing services mentioned above is adduced in Mapping 2.

In June 2015, the Government of the Slovak Republic approved the Conception on support and development of Start-ups ecosystem in the Slovak Republic, where the support of incubators is seen as the source of innovative solutions with significant growth potential. The idea of this concept is to support the start-up ecosystem in the Slovak Republic by creating a business environment and a state support system that could activate Slovak subjects and individuals with unique ideas, attract foreign subjects with innovative ideas and make investment in startups more attractive. An important support for the CCIs will be also the implementation of incubation and acceleration schemes **specifically aimed at supporting CCIs** in the Slovak Republic through IROP PA3, which should be implemented from 2019 onwards. Regarding the support of entrepreneurship in CCIs, the following supporting structures was identified in Slovakia:

- Technological and Business Incubators.
- Business and Innovation Centers.

E.g. of selected programmes provided in this field:

- Support programmes for SMEs - Slovak Business Agency.
- Incubation - National Business Centre.

SME-E-learning

In the area of **innovation**, universities also have an important place to provide a suitable environment for innovation in Slovakia, in particular through research and academic activities that they carry out in addition to their main focus. Important parts of supporting the innovation in CCIs are also the labs, which were created especially at the universities (supported via ESIF). The platform for innovation in the Slovak Republic is the Competence Centers. They are tools to support collaborative applied research. The founders of the centers are academic institutions and the partners are industrial companies (overview of selected labs, significant institutions in this field and programmes to promote innovation is shown in Mapping 2).

In the area of **growth** (including internationalisation) two project focus on acceleration programmes was identified within services provided by following organisations:

- National Business Center (Acceleration Program, Internship, Growth programme for SMEs).
- Escalator – Creative Industry Košice (intensive program to educate and develop the creativity, talent and professionalism of people working in the creative industry).

Speaking of **internationalisation**, the Slovak Republic still has a low rate of involvement of Slovak SMEs in internationalization. The share of Slovak SMEs in exports and imports is higher than the EU average. Overall, however, Slovakia lags behind the EU average due to higher bureaucracy (time, cost and number of export and import documents). The organizational structure of foreign trade of the Slovak Republic, as well as the support of its foreign trade activities, is ensured by the state administration, its central authorities for each area. The Ministry of Economy of the Slovak Republic is a key player in support of foreign trade activities. Other forms of business support and foreign trade activities are also addressed by other central government authorities and several institutions and bodies which you can find in the Mapping 2.

The last area that we mapped in the Mapping 2 was public and private **financing for culture and CCIs** in Slovakia.

At public level financing for culture and CCIs is **covered mainly through non-refundable financial tools** such as operational programs, grant schemes and funds (overview of identified supporting programmes and subsidies for culture and CCIs is available in Mapping 2). Public subsidies and grant schemes for supporting culture and CCIs can be identified at each administrative level. Their focus and the total amount of support provided vary in each region.

Private sources of financing are represented by individual or corporate donations as well as funds from domestic and foreign foundations. Financial contributions can also be obtained from private companies. As for the private sector, donations and advertising contracts are the most common forms of private financing. The problem of private sector funding is a problematic legislative arrangement for sponsorship. Donation does not currently allow the donor to reduce his tax base by the cost associated with the value of the donation and does not impose the obligation on the recipient to tax the amount received.

Companies use different project selection criteria. This can be done through a direct selection, or through selection based on detailed criteria set by the most corporate foundation's grant system. Private companies when selecting a project expect successfully forepassed implemented activities and visible results of the applicant's organization.

In the Slovak Republic, foundations and private companies providing private financing are focused on many different areas. As for supporting culture, they are mainly focused on supporting core arts fields, in general mostly protection of cultural heritage and support for visual arts. Lately, the focus has started to be wider and as the trend of creative industries (mainly design) and startups has started to occur, the support of the private sector (mostly from banks or big companies such as Orange) has started to focused on this progressive area as well.

4.4. Good practices

Due to the fact, that the theme of CCIs is relatively new in Slovakia, the creation of its ecosystem is still in its initial phase. Regarding this situation, it was not an easy task to choose the best practice with proven track of evidence in this area. The Ministry of Culture of the Slovak republic had to consider not just the practices directly focused to the CCIs area (these are still quite limited in Slovakia), but practices focused on the starting entrepreneurs and SMEs in general as well. The final three good practices chosen reflect this specific situation presented by:

- Creative Industry Košice - fully focused on CCIs without a certain sectoral preference.
- National Business Centre & its Creative Point - focused mainly on the entrepreneurs in general, but offering at least some of the services dedicated to CCI.
- MediaLab.

1. Creative Industry Košice /CIKE/⁸

The mission of Creative Industry Košice is deeply rooted in its origins, the organization of Košice - European Capital of Culture 2013. The city acquired this prestigious title after the approval of the Interface 2013 project by an international selection committee in September 2008 in Bratislava.

A non-profit organization of the same name was created to take care of the preparation, implementation, monitoring and evaluation of the project “Košice Interface 2013”. Its main task was primarily to prepare the programme for 2013 and the supporting programme activities, to address development projects (creative economy, community development, etc.), the operation of the cultural centres Barracks/Kulturpark, the SPOTs project, marketing, international cooperation and other related activities.

⁸ <http://www.cike.sk/en/about>

The non-profit organization went through a fundamental change at the end of 2013, when the City of Košice founded the subsidized organization, K 13 – Košice Cultural Centres, which took over responsibility for the administration and operation of the renovated buildings. The Košice 2013 non-profit began to focus on activities listed in the materials “Košice Interface 2013” and the resulting materials “Košice 2020 - the Creative Economy Master Plan 2013-2015” and “Cultural Strategy for Košice 2014-2018”.

This means particularly the development of human capital, creating conditions for talented people in the city and raising the profile of the city at the local, national and international level, which still serves as the fundamental objective and mission of the organization called Creative Industry Košice.

Creative Industry Košice helps people from the cultural and creative environment to become professionals, opening international markets and educating them. The organisation also participate in the creation of strategic cultural documents at national and international levels in order to create ideal conditions for the growth and development of cultural and creative industries in Slovakia. It provides education for talented individuals and cultural institutions, increasing their international profile, for example by providing foreign trips, mobility and residential programmes. Its task also includes the creation of favourable conditions for cooperation with the private sector and its involvement in the cultural life of the city. It also helps the city and region develop policies and sustainable regional development through its consultancy and advice on strategic documents.

Typology of services provided: information, news and skills (soft skills), education programme consists of a set of workshops, seminars and lectures, which are designed for the needs of people working in creative industries and culture.

2. National Business Centre /NBC/⁹

Establishment and Development of the National Business Centre in Slovakia is a national project, which has been realized through operational programme: Research and Development, co-funded by European Regional Development Fund (eligible expenditures: €9,989,602.86). The first phase of the project was implemented in the period of May 2014-December 2015.

⁹ <http://www.npc.sk/en/>

The strategic goal of the national project was to create a National Business Centre as an interface among the private/business sector, research and development (hereinafter “R&D”) sector and academia. The National Business Centre (hereinafter “NBC”) strives to meet the needs of entrepreneurs, increasing their competitiveness and innovative performance, and to allow applying R&D knowledge through the business sector both in the market and in society.

The role of the National Business Centre is to underpin and develop the potential of future and starting entrepreneurs during the seed and start-up phase, to prospectively attract foreign, mainly technological and innovative, companies and to build professional and specialized capacities to provide a wide portfolio of high quality support services for potential, starting and existing small and medium-sized companies from various sectors of the economy, including innovative businesses.

This centre offers comprehensive support to SMEs and those interested in starting their business. The main mission of the NBC is to implement the concept of a one-stop-shop offering a wide portfolio of information and supplementary services to all starting and established businesses in different stages of their life cycles and aspiring entrepreneurs as well as to creative and innovative people who are considering commercializing their idea or product.

NBC offers three types of support and services:

- Support for starting a business (Services involved: Acceleration Program, Incubation Program, Finance, Startup events, Business support).
- Business support (Services involved: Growth Program, Internship Program, Support Program, Business environment monitoring, Better Regulation Center, Finance).
- Innovation support (services involved: intellectual property and technology transfer, scientific and research cooperation, financial support of SMEs, information resources, FabLab).

Within NBC, specialized especially on CCIs, can be identified Creative Point, which is a self-standing component of the Acceleration Program. It is basically a creative workshop offering services that are tailored to creating modules and prototypes as well as development of new products.

The main goal of Creative Point is to provide access to new technologies – enhancing creativity, knowledge sharing, proven procedures and further resources for creative ideas to a wide target group and inspiring entrepreneurs.

3. MediaLab

MediaLab is a specialized space within the Department of Visual Communication at the Academy of Fine Arts in Bratislava, that aims to create technological and theoretical background in use of new technologies and principles in fields of art, design and visual communication and incorporate them into educational process.

One of MediaLab's main tasks is to create connections in different fields i.e. between art and tech, academic field and practice. MediaLab builds network of individuals and organisations to help connecting participants and support the execution of projects to success. Project based system encourage students to focus on a problem solving in a holistic way. Besides of projects execution, MediaLab initiates presentations, workshops and lectures in particular fields of art and technology.

Students attend the Medialab as a part of their study programmes or they can attend it as an optional activity. Programme is time based on academic calendar so its main time frame is one semester (3 months).

MediaLab also collaborates with ateliers within the Department of Visual Communication on students semester assignments, addressing specific problems. Thus, students have the opportunity to consider the use of visual communication in an interdisciplinary context, for example through the use of multimedia.

As one of the MediaLab's main tasks is to create connections between different fields with the aim to help students to gain not just theoretical but practice knowledge and relevant work experience at the same time, evidence of success is presented by the high number of students that are successfully finding their jobs after graduation each year. Many of the students participate and implement various projects even during their study and many of them gets different kind of awards.

MediaLab also participates in the infrastructure of local fab labs and creative centres with the aim to build a background for project and prototype implementation.

5/ SWOT ANALYSIS OF THE CCI SECTOR



STRENGTHS		WEAKNESSES	
1	Developed ICT sector and multimedia sector	1	In the field of export: a) weak support of export and internationalization of goods and services in CCI's
2	Human potential of involved subjects	2	In the field of awareness: a) low public awareness of CCI's b) perception of culture as an exclusive recipient of public support
3	Systematic solutions of financing from public sources (Audiovisual Fund, Fund for Arts, Slovak Business Agency)	3	In the field of education: a) lack of education focused on innovation in a system of education of CCI's b) low motivation of employers from CCI's for education of their employees
4	Existing cultural infrastructure	4	In the field of innovation: a) low participation of subjects of CCI's on creation of technological, non-technological and cross-sectorial innovation b) lack of cooperation between subjects of CCI's in a field of creation of innovative products and subjects of CCI's with technological sector and traditional industries c) low knowledge and lack of implementation of content-based innovation processes into product creation of cultural and creative industries to respond to market needs d) low motivation of CCI's companies for cooperation in the field of R&D
		5	In the field of financing: a) low motivation of investors to invest to CCI's b) absence of analysis and evaluation of existing support mechanisms in the field of public finances for the cultural and creative industries c) lack of legislation supporting the investment to CCI's d) lack of tools supporting the access to finance for CCI's
		6	In the field of multilevel-governance in CCI's: a) lack of structure b) lack of effective collaboration
OPPORTUNITIES		THREATS	
1	Global support for development of information society	1	Persistence of low public awareness of CCI's and their products
2	Bigger markets for CCI's	2	Strong international competition
3	Increase of interest in products of CCI's	3	Brain drain
4	Educated and internationalized young generation	4	Regional asymmetry in access to finance
5	Access to finance from EU Operational programmes: - Integrated regional operational programme 2014 – 2020, PA No.3: Mobilization of creative potential in the regions - Operational programme Research and Innovation 2014 – 2020 PA No. 3: Strengthening Competitiveness and Growth of SMEs	5	Access to private financing for CCI's
6	Change of the paradigm of relationship between culture and tourism		

| 6/ CONCLUSIONS



CONCLUSIONS	HOW COULD WE FACE IT?
<p>Lack of awareness and missing data on CCI</p> <p>The awareness of CCI in Slovakia is still on the low level. This leads to several difficulties and problems for the CCI such as low motivation of investors to invest to CCI, low public perception of culture as an exclusive recipient of public support, or low participation and cooperation of subjects of CCI (and other fields) on creation of technological, non-technological and cross-sectorial innovation, etc. Other problem is absence of official data specifically focused on economic indicators of CCI, which would help to consider CCI as an perspective area for contribution to production of the slovak economy.</p>	<p>N/A – the concrete actions will be decided later as a part of the new Action plan</p> <p>The government of Slovakia adopted a task to create a Satellite account for Culture and Creative Industry to improve statistical data in this area. Ministry of Culture is in charge of this task and is preparing to launch the Culture and Creative Industry Satellite Account in 2020 and thus provide relevant statistics for future strategic documents for this sector.</p>
<p>Supporting structures</p> <p>Lack of incubation and acceleration schemes specifically aimed at supporting CCI in Slovakia.</p>	<p>Implementation of these missing support schemes will be partially covered through IROP PA3 from 2019 onwards by establishing creative centers in the regions of Slovakia.</p>
<p>Missing multilevel-governance collaboration in CCI</p> <p>For creating effective policies and conditions for CCI, we need to establish a new model for multilevel-governance collaboration and its structures.</p>	<p>N/A – the concrete actions will be decided later as a part of the new Action plan</p>
<p>Internationalisation of CCI</p> <p>Weak support of export and internationalization of goods and services in CCI.</p>	<p>N/A – the concrete actions will be decided later as a part of the new Action plan</p>
<p>Investing & Financing CCI</p> <p>There is still lack of private investments in CCI and lack of tools for support the private investment in CCI too (low motivation of investors to invest to CCI, lack of legislation supporting the investment to CCI, lack of tools supporting the access to finance for CCI).</p>	<p>N/A – the concrete actions will be decided later as a part of the new Action plan</p>
<p>Legislation</p> <p>CCI are nowadays facing legislative hurdles, such as intellectual property rights and varying tax regimes, lack of legislation supporting the investment to CCI , etc.</p>	<p>N/A – the concrete actions will be decided later as a part of the new Action plan</p>



7/ APPENDIX



APPENDIX 1
Table of Competencies: National and regional level

SECTORS	SLOVAK GOVERNMENT			SELF- GOVERNMENT OF REGION BRATISLAVA			SELF- GOVERNMENT OF REGION BANSKÁ BYSTRICA			SELF- GOVERNMENT OF REGION TREŇČÍN			SELF- GOVERNMENT OF REGION TRNAVA			SELF- GOVERNMENT OF REGION NITRA			SELF- GOVERNMENT OF REGION ŽILINA			SELF- GOVERNMENT OF REGION PREŠOV			SELF- GOVERNMENT OF REGION KOŠICE		
	CUL	IND	IND	CUL	IND	IND	CUL	IND	IND	CUL	IND	IND	CUL	IND	IND	CUL	IND	IND	CUL	IND	IND	CUL	IND	IND	CUL	IND	IND
AUDIOVISUAL	X																										
DIGITAL CONTENT/ MULTIMEDIA	X	X																									
DESIGN (INCLUDING FASHION)	X	X																									
PERFORMING ARTS	X																										
CRAFTS	X																										
MUSIC	X																										
VISUALARTS	X																										
ADVERTISING																											
ARCHITECTURE	X																										
LITERATURE/ PUBLISHING	X																										
CULT.HERITAGE	X																										

APPENDIX 2
Table of Competencies: Local level

SECTORS	LOCAL GOVERNMENTS																
	BRATISLAVA		BANSKÁ BYSTRICA		TRENČÍN		TRNAVA		NITRA		ŽILINA		PREŠOV		KOŠICE		
	CUL	IND	CUL	IND	CUL	IND	CUL	IND	CUL	IND	CUL	IND	CUL	IND	CUL	IND	
AUDIOVISUAL						X											X
DIGITAL CONTENT/ MULTIMEDIA			X		X												X
DESIGN (INCLUDING FASHION)			X		X												X
PERFORMING ARTS			X		X				X		X						X
CRAFTS			X		X				X								X
MUSIC			X		X				X		X						X
VISUAL ARTS					X				X		X						X
ADVERTISING																	
ARCHITECTURE																	X
LITERATURE/ PUBLISHING			X		X				X		X						X
CULT. HERITAGE					X						X						X

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