



WHITE PAPER

Breaking out of the COVID-19 Crisis
Restarting the Cultural Creative Industries is at
the centre of an open and sustainable Europe

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Gerin Trautenberger
email: gerin@microgiants.com
ORCID: 0000-0001-8331-3253

Bernd Fesel
email: bernd@ecbnetwork.eu

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ECBNetwork
Schiekade 189
3013 BR Rotterdam 123 Mesa Street
www.ecbnetwork.eu

EXECUTIVE SUMMARY

Today Cultural Creative Industries are at the core of the European identity, recognised as an indispensable driver of growth and jobs and cherished as facilitator of innovation throughout the economy. Because of the “Coronavirus” lock-up measurements this major European motor is stalling.

First data from the CCI across Europe, provided by approximately 7.000 survey participants¹, indicate that the shutdown is not merely a pause of economic activities which will continue as they were before stopped. The governments lock-down because of the COVID-19 virus turned an economic slump into a system crisis: While around 60% of those surveyed have already experienced or anticipate a drop in sales of over 30%, numerous companies point out that they expect significantly higher failures in the future. Due to the design of the study and the bias of the respondents the estimated magnitude, still to be regarded as a conservative assessment, amounts to worrying numbers: CCIs from having an it's a 5.3% share of the total European Gross Value Added (GVA), (Doerflinger 2016) expect to lose a sum of €273 Bn in turnover until the end of 2020.

Based on this estimation the ECBNetwork concludes that the critical time where the crisis starts to affect the European creative sector spans from beginning of April to the beginning of June. This indicates a tight timeframe for governments and European measures to be taken to avoid a complete collapse of the European creative industries sector.

Given this system crisis of Cultural Creative Industries, Europe's societies, cities and economies, are endangered. CCI turn noise to music, letters to poetry, stones to architectures, and places into venues for diverse cultures and platform of the freedom of expressions. CCI are the base for free press, open society and citizen controlled democracy. CCI are innovators and change makers for the future of smart cities and green economy. If CCI are stalling, the Europe we know today will suffer a heart attack.

Given the severity of this European crisis ECBN issues this white paper with four scenarios where the CCI might stand by the end 2020 and from where we may have to restart the CCI.

This white paper aims to raise awareness that the restart of the Cultural Creative Industries is central to the future of European society. It calls on the European policy makers to engage in a vigorous debate for the best ways to restart the Cultural Creative Industries in a sustainable, innovative way to turn this historical system crisis to a once in a century chance to move forward to a more sustainable and inclusive Society than before.

ECBN calls on the innovative power of Europe and the CCI to kickstart the next economic generation moving towards concepts such as circular economies and commons cities.

ECBN calls for an **IGNITION FUND** to restart the Cultural Creative Industries that provides a lump sum voucher, digitally applied and provided within 4 weeks to invest in the **FIRST IGNITING STEP** of restarting and reopening local and closed production and sales rooms.

ECBN calls for a snapshot **CREATE STUDY** which is used to plan which further midterm frameworks, strategies, investments and actions are needed - following the **IGNITION FUND** - to restart the CCI to contribute best to a Sustainable and Inclusive Europe.

KEYWORDS:

Creative Industries, Economic Geography, COVID-19, Economic Impact

¹ Surveys conducted by Kreatives Sachsen and the ECBNetwork from mid-March until beginning of April 2020, (<https://www.kreatives-sachsen.de/2020/03/13/pressemitteilung-zur-umfrage/>), ECBN study (Trautenberger 2020) doi: 10.25365/phaidra.140

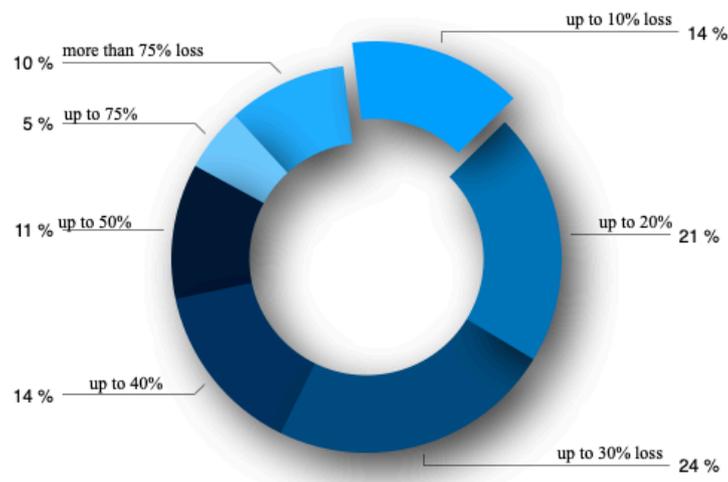
What is happening now?

Undoubtedly the Cultural and Creative Industries (CCIs) play an important role not only for the European economy but also as part of a wider cultural and historical understanding of the European development. Today's CCIs and its predecessors form the core of a European identity and an avant-garde which strives for openness in social, cultural and economic dimensions. The CCIs occupy a leading role between traditional beliefs and future hopes. Literature and recent

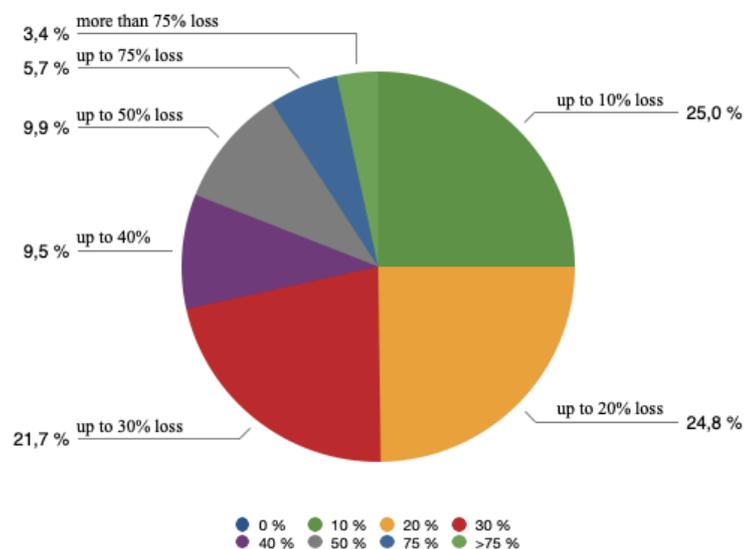
studies show that the CCIs are an agent for change and facilitator of innovation helping to transform traditional business to be fit for future challenges. Due to the recent developments and governmental lock-downs caused by Covid-19 measurements the ECBNetwork sees this major European motor stalled.

Today many reflections in this Covid-19 crisis are concentrating on the effects to the health and care system and few are arguing for economic effects of the Coronavirus. The ECBN sees the effects of this crisis far beyond the obvious as well

Pict 1: Answers to the question: To what extent are you experiencing NOW sales losses as a direct result of the spread of the COVID-19 virus in the current year? (Next 3 Month), Austrian Survey (358 Responses)



Pict 2: Expected percentage of losses until the end of 2020 by Solo self-employed and CCI SMEs, German survey (6000 Responses) conducted by Kreatives Sachsen



as undoubtedly current troubles and demands a broader and view over a longer period. The recent study conducted by the ECBNetwork and Kreative Sachsen (Trautenberger 2020) show a much larger magnitude. It is clear to the ECBNetwork that this crisis will not only have an economic impact on our society, but will also manifest itself in a cultural, social and ecological crisis.

In the first days and weeks of this lock-down we can see clearly the effects on the cultural and creative productions (Kreative Sachsen 2020). Live events (Music, Theatres, Performances,) are forbidden, personal movements are limited only to personal shopping and care taking. The performing arts are obviously affected by the ban on live events, but the rest of the CCIs are also affected by movement restrictions. These circumstances render the normal activities of working in CCIs impossible, as they are highly dependent on personal relationships and interactions.

First empirical analysis where CCI stands today

The study conducted by ECBNetwork (Trautenberger 2020) and Kreatives Sachsen (2020) clearly show the high level of uncertainty that prevails in the cultural and creative industries at the moment. All Creative Industry companies expect sales to decline. Almost two out of three (59%) say they expect up to a third less sales in the short term (until the beginning of June). Around a quarter of respondents (26%) expect sales to fall between 40% to 50%, and 15% expect order declines of 75% or more. In the long term, almost half of the respondents (45%) expect a decline in sales of up to 40%, and the other half (52%) expect losses of 50% to 75%. Less than 3% of entrepreneurs expect a normalisation and a compensation for the losses caused by the COVID-19 crisis by the end of the year.

From the ECBN Survey, it can be concluded that the national and international market development and order acquisition have largely come to a standstill. All respondents have a high degree of planning uncertainty regarding the upcoming changes and the unforeseeable time

horizon of the prescribed measures. The respondents clearly emphasised that the limitations imposed on people's mobility mean that the implementation of projects will come or has already come to a standstill. Freelancers and micro-enterprises in particular are expecting a loss in sales that can threaten their very existence.

Around two third of those surveyed have already experienced or anticipate a drop in sales of over 30% of their income. Numerous companies point out that they expect significantly higher failures in the future. In comparison with the eighth Creative Industries Report (KAT 2019), and based on the assessments of the respondents, a loss in sales of up to a third can be expected. From today's perspective, this decline means that the Austrian creative industries will lose Gross Value Added (GVA) of three billion Euros by the end of the year compared to the previous year. Due to the design of the study and the bias of the respondents, the estimated magnitude is to be regarded as a conservative assessment. These worrying numbers, translated to European figures, mean that CCIs from having a 5.3 % share of the total European GVA (Doerflinger 2016), will lose a sum of 273 Bn € until the end of the year.

Similar to the impact of COVID-19 on the health care system, one can expect that the effect on the cultural and creative economy will depend on the timing of the measures taken. Due to the very low equity ratio of 23.4%²(KAT 2010: 32) in the cultural and creative sector, which is 7% below the average for Austrian companies, the consequences will be drastic. Due to limited financial reserves, the time period these businesses will be able to survive for is very short. Figures from Kreative Sachsen³ (2020) taken from their Covid-19 survey participants indicate a financial survival rate from 4 up to 8 Weeks without any financial aid from governments. There is thus an urgent need for direct and indirect financial support and protective measures. Without appropriate subsidies and government support the creative industries will be hit fast, and the impact will be deep. Based on this estimation the ECBNetwork concludes that the critical time where the crisis starts to affect the European creative sector spans from beginning of

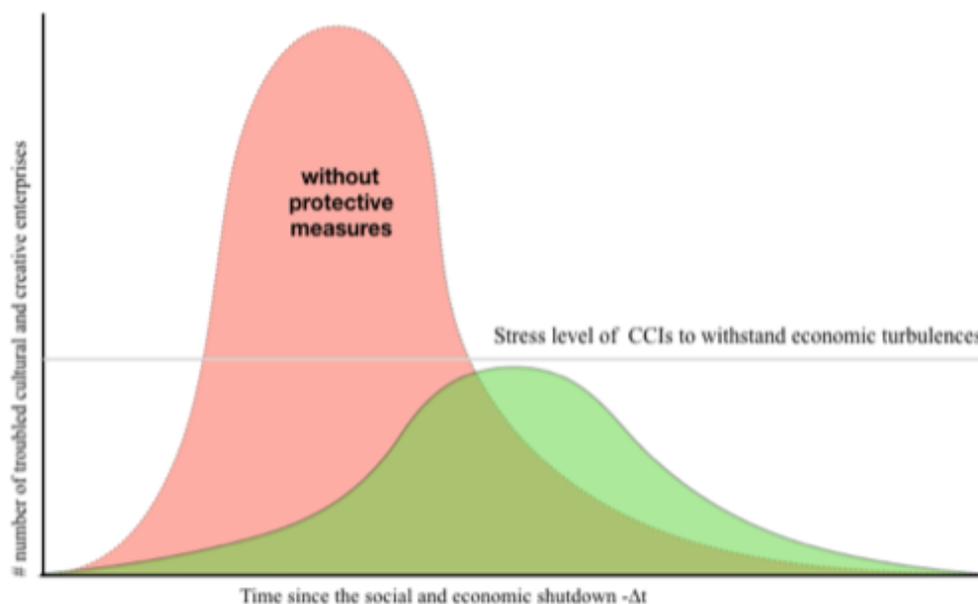
² Achter Kreativwirtschaftsbericht 2019, www.kreativwirtschaft.at

³ See Kreatives-Sachsen.de

April to the beginning of June. This indicates a tight timeframe for government and European measures to be taken to avoid a complete collapse of the European creative sector.

The ECBNetwork calls for a similar approach to support the European CCIs as many nation states are preparing for their traditional sectors. The goal is to *curb the curve* also for the CCI businesses. One can say that under these circumstances all CCI enterprises are affected by the measurements taken to control the infections by the Covid-19 Virus. Similar to the epidemiological element of this crisis, the cultural and creative economy is limited by a certain stress level. Below this level the survival rate of enterprises is high but above the days are limited where creative entrepreneurs can survive. Without adequate measures the CCI death rate will be exponential.

Pict 3: Flatten the curve of CCI Business closing



Four scenarios for an open and creative Europe in a near and distant future.

Against the background of ECBN's previous sobering empirical analysis (see above) of the European CCIs affected by the Covid-19 Crisis, the ECBNetwork has taken the liberty to develop four possible scenarios for the coming month and years. The ECBN is committed to observing today's Cultural and Creative economy and phenomena with the goal to develop recommendations for decision-makers or support the organisation of European creative collaborations. In today's extreme situation, at the beginning of the coming crisis, where the future seems to be unpredictable and more uncertain than ever, it seems necessary to sketch up different possible routes for the CCIs. The ECBN propose a playbook approach for possible developments by means of scenarios, from today's perspective. The four proposed scenarios outline a space of possibilities that are open to all of us under today's circumstances. These scenarios were developed by trying to answer following questions:

- What economic developments can we expect?
- What are the effects and affects for the European CCIs?
- What are the wider frameworks and trends?

Pre Covid-19 developments

Today's developments must be seen against the efforts and measures taken shortly before the Covid-19 crisis began. Today's cultural and creative sector crisis has not only been triggered by the economic impact of Covid-19, but must be seen in a broader context. In 2020 the new *EU-President von der Leyen* started her office. At that time Europe was had reached the linchpin of the beginning of its transformation by starting the European Green Deal. This effort included a transformation to a green economy and a sustainable society by following three aims:

- Zero net emissions by 2050

- Economic growth is decoupled from the use of resources
- no person and no place are left behind

In their Circular Economy Action Plan (2020) the Commission stated that "applying ambitious circular economy measures in Europe can increase EU's GDP by an additional 0.5% by 2030 and create around 700,000 new jobs," also several hundred Billion Euros are planned to be invested between 2020 and 2027.

Parallel to the outbreak of the Covid-19 Pandemic in Wuhan, China, EU-President von der Leyen announced the Green Deal program with the aim to work for a safe future and change European economy and society. It now seems that these efforts and investments for a Green Europe, which presented a great opportunity for the European CCIs, are postponed or under heavy scrutiny.

Disruptions, threats and uncertainties in a broader perspective

In addition to the alarming results of the empirical data and the conditions and developments of the European Union, ECBN sees today the successes of the European Green Deal brought into question. In view of the crisis, traditional industries and lobbies are calling for the radical change in Europe's old economy to be reversed. Traditional and back minded politicians even question the core identity of the single European Market. Closed borders and voluntarily curfew are the first measures in a fight against the spread of the Covid-19 virus. But some member states even go one step further and extend the executive power of governments and presidents. For the ECBNetwork these are alarming tendencies which should be monitored and sanctioned when extended far beyond any necessity.

Mobility

The free mobility across borders paired with the freedom of speech and expression represents a fundamental necessity for the European CCIs.

If the restrictions on the free movement and speech of people continue beyond necessities to include artists, gallerists, filmmakers, designers, architects, musicians and performing artists - to

name a few - Europe will suffer a double catastrophe:

- The power of artistic freedom, the inspiration for intercultural exchange and the creativity of unconventional thinking are severely restricted, thereby threatening the European values of a free, open and democratic society.
- The power of economic strengths of CCI is restrained and crippled by border and travel obstacles within the European Single Market. Exchanging goods in the Cultural and Creative Industries is often based on exchanging persons - no international concerts without musicians and no smart cities without architects travelling.

Digitalisation

Computers and ICT are a driving and determining force in society and the economy. ECBN firmly believes that the CCIs are an avant-garde when it comes to applying new technologies to their field of experience and their daily work. Experiments and living labs are the basis for the creative industries and the natural habitat within which the CCIs work, live and produce. As it currently turns out, the CCIs are quickly adapting to the changing requirements and the different circumstances of the Covid-19 crisis. Social distance and restrictions on movement catapult the creative industry into a new age of pure online communication and production. We experience the birth of various online events such as "Hack the Crisis - Hackathon" (Austrian Startups 2020) or live performances by musicians, theatres or readings. These activities can be seen as role models for the age after Covid-19 and are a blueprint for online work and collaboration in a radically changed near future society. The European institutions and national or local governments must promote these initiatives to prevent the collapse of today's creative industries:

- In this crisis mode, new forms of cooperation and innovation are developed. The institutions must address these changes and support every new development.
- These changes should not be seen as a reason to revert to old habits and traditional business models that are already out of date, but to look for new ways and solutions.

The creative industries should not be seen as a threat but be included in this discussion and viewed as intermediaries for the search for better solutions.

European Green Deal

“The European Green Deal is a programme outlined in the political guidelines of the new President of the European Commission, Ursula von der Leyen. It aims to make Europe the first climate neutral continent by 2050, while boosting the competitiveness of European industry and ensuring a just transition for the regions and workers affected. Preserving Europe's natural environment and biodiversity, a 'farm to fork' strategy for sustainable food, and a new circular economy action plan are other key elements.” (EU-Plenary Documentation, Dec 11 2019). As stated, the “new European Climate Pact should bring together regional and local authorities, civil society, industry and schools to agree on commitments to change behaviour.”

The circular economy is the next form of industrial production in which all output is input, in which waste of one sector is reused by design in another sector. In fact, the word “waste” will become redundant.

This highly integrated usage of resources and sources across all sectors needs a next generation of cross-sectorial value-chains, cooperation's, sharing and business models - all of which are competences and contributions of the Cultural and Creative Industries already today, known fe. as design thinking, interface design, storytelling or gamification.

A circular economy is also built on new materials and new value chains in sectors such as fashion and architecture, whose potential in carbon reduction are just starting to be tapped. The next generation of carbon-free housing cannot be reached without innovations in architecture. The next generation of mobility cannot be reached without redesigning the processes of multi-modular mobility.

The European Green Deal will only be successful with innovations delivered by the CCI especially because the green society is dependent on citizen awareness, participation and behavioural change, again a key competence of the cultural and creative industries.

These broader perspectives try to frame the expectations for the CCIs in the near future. In combination with the expected duration of social distancing regulations of today the CCIs want to contribute to possible solutions and help to tackle systematic new problems as they arise.

The prospects for the European Green Deal and the free movement of people in Europe must be seen as parallel to pandemic rules on social distancing and not as opposing positions.

According to researchers around the world, social distance regulations will shape our society for a long time. Against this background, the ECBN has used the Covid-19 crisis as an opportunity to develop four scenarios that describe the state of the CCIs today and in the near and distance future after the pandemic.

ABOUT THE SCENARIOS

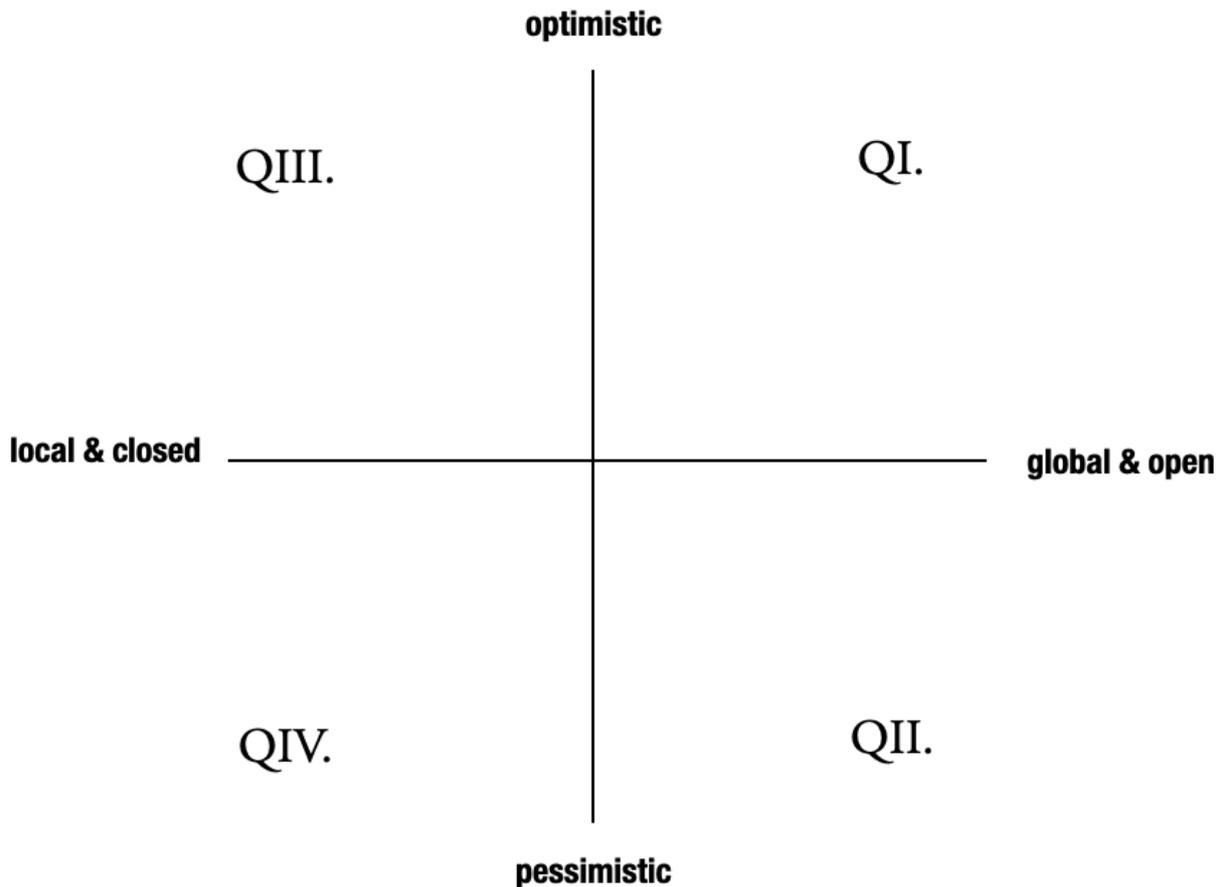
The four future scenarios developed by ECBNetwork focus on two different dimensions that describe the possible direction of developments for the European CCIs and society

Firstly, the relationship of optimistic versus pessimistic perspectives on duration of the Covid-19 lockdown is applied on the vertical axis

Secondly, the relationships of local & closed versus global & open is represented on the horizontal axis

Based on this analysis, the assumed developments take up a space of different possibilities, which is divided into four quadrants (I.-IV.), and describe the importance for the CCIs and society as a whole. The type of possible scenarios and their representation only clarifies the space of possibilities and does not claim to represent "reality". However, this model should be read in such a way that it contributes to orientation and tries to open up a new space for a forward-looking attitude and provides a playbook for possible developments.

Pict 4: Scenarios for the European Creative and Cultural Industries until 2020



Scenario 1: Return Possible

The scenario of QI. in the first quadrant sees optimistic market development with global and open borders. Given an optimistic assumption that social distancing is ended by end of April, businesses with currently (mostly) global sales and now running digital distribution could return to their Pre-Corona business model without substantial investments needed to re-establish market positions. In this scenario we assume that digital sales until April will not increase in a way to fully substitute sales from digital and non-digital distribution, however the loss is so short termed that it does not endanger the companies return to the full market. How long this return to Pre-Corona business will take is itself dependent on the wider context outlined above - free movement of artists and cultural productions and of course the (after Corona-crisis left over) purchasing power of consumers.

Scenario 2: Return Hard but Possible

The scenario of QII. in the second quadrant sees a pessimistic time development but with soon opening global and open borders. Given an assumption that social distancing is ended in December 2020 businesses which are currently depending on global sales and personal savings besides digital distribution could return to their Pre-Corona business model only with even larger substantial investments in re-establishing their market position. How long this return to Pre-Corona Business will take is itself dependent on the wider context outline above - free movement of artists and cultural productions and of course the (after Covid-19-Crisis left over) purchasing power of consumers.

Scenario 3: Return Unlikely

The scenario of QIII. in the third quadrant sees positive time development with local and closed borders. Given an assumption that

social distancing is ended by end of April, local businesses with currently only small global sales and now newly digital distribution could return to their Pre-Corona business model only with substantial investments to re-establish their market position. In this scenario we assume that digital sales will be far from substituting the closed local sales - in difference to the first Scenario. This will drain the companies savings and thus weaken their market position, locally and globally. Companies must reinvest to build their former business model, creating a situation of drained savings and a bleak market outlook.

How long this return to Pre-Corona Business will take is itself depending on the wider context outline above - free movement of artists and cultural productions and of course the (after COVID-19 crisis left over) purchasing power of consumers.

Scenario 4: Return Near to Impossible

Given a pessimistic assumption in QIV. that social distancing is ended by December businesses formerly depending on local sales and personal savings besides digital distribution could return to their Pre-Corona business model only by the largest substantial investments in re-establishing their market as a whole. Re-opening investments are highest in this scenario of long local closure, while the loss from continuing costs on rents are highest as well. It is a double trap. A business must reinvest to build its former market as a whole, in a situation of drained savings and a bleak market outlook. If the company has lost its premises because of unpaid rents - and must re-locate, reopen and re-establish a local audience, a quick rebuilding of the company is near to impossible. It must be viewed rather as starting the company anew.

How long this return to Pre-Corona Business will take is itself depending on the wider context outline above - free movement of artists and cultural productions and of course the (after COVID-19 crisis left over) purchasing power of consumers.

What does this really mean?

Three out of four scenarios support the assumption that CCI - as almost all sectors in the Covid-19 Economy - is in a systemic crisis - is not just the cyclic downturn of consumption and investment.

First, the system crisis of CCI is a danger for the incomes of at least 80% of the 12 Mio. employees and companies in Europe.

The so-called soft infrastructures accounting for the positive impacts and spill over effects of CCI for cities, the economy and the wider society and wellbeing are also endangered. The Creative and Cultural Industries are hard structures for the fabric of society.

Second, the system crisis of CCI will also severely impede:

- the recovery of cities and their life quality for its citizen
- innovations in the wider economy, especially in ICT, IoT and the Circular Economy.
- the personal well-being of millions of citizen as free personal time is solely depending on cultural and creative contents.

Third, the system crisis of CCI will - if prolonging for more than a year - lead most of all to a crisis of living freedoms, values and citizen rights.

Curbing the freedom of movement and the right to assemble hinder the diversity of artistic expressions and endanger the freedom of arts and culture. Free individual expression and urban life as an open and tolerant platform for the diversity of cultures and creativity are at stake if the CCIs do not recover fully. Without a full recovery of the CCIs, the open and inclusive society of today might be history.

The long-term effects of the Covid-19 virus on the arts, culture and cultural creative Industries may manifest as a less open, democratic and sustainable Europe.

What is needed now?

ECBN calls on policy makers to acknowledge the fundamental danger to an open, democratic and sustainable Europe that may result from the system crisis of the arts, culture and creative industries.

ECBN calls on policy makers to restart a PostCovid-19 Europe firmly committed to sustainability in its economic, social and ecological and cultural dimensions.

ECBN calls on policy makers to turn the system crisis of Covid-19 into a once in a century historical transformation and to fast forward into an open, citizen-centred and green Europe.

ECBN calls on policy makers to leverage the Arts, Culture and Creative Industries as the enabler and facilitator it has been for decades. Bringing:

- the daily sense of belonging, identity and well being
- the open, diverse and democratic society
- the innovations for the next transformation towards green and circular economy.

ECBN calls on policy makers to safeguard or re-establish the socio-economic frameworks necessary for artists and creators, cultural creative entrepreneurs, companies and institutions to act freely and produce cultural and creative contents.

Europe cannot do without the arts, culture and creativity ensuring that

- citizens are living - that is living with films, bookstores or festivals
- citizens are freely expressing themselves, freely meeting and freely moving
- companies are thinking out of the box and innovating
- economies are citizen focused and value based

The Restart of Cultural Creative Industries is central to the Future of European Society.

ECBN calls for an **IGNITION FUND** to restart the Cultural Creative Industries. This would provide a lump sum voucher, digital applied and available within four weeks

- from 10.000 to 50.000 Euro per artists, creator and single entrepreneurs or

- from 50.000 to 250.000 Euro per company and business

to invest in the **FIRST IGNITING STEP** of restarting and reopening local and closed production and sales rooms, such as cultural venues, clubs, exhibitions rooms, bookstores, cinemas and offices of fe. design, architecture, publishers in film, games or music as well as the accompanying marketing and sales activities. Further details on application and reporting procedures of these measures are to be formulated in a decree.

ECBN calls for a snapshot **CREATE STUDY** which further assesses which midterm frameworks, strategies, investments and actions are needed following the **IGNITION FUND** - to restart the CCI to be able to contribute best to an open, sustainable and democratic Europe.

What is the ECBNetwork?

The European Creative Business Network (ECBN) is a unique not for profit foundation, founded in 2011, promoting the interests of the cultural creative industries in Europe. Given the diversity of cultural expressions as well as of cultural and creative markets across Europe, ECBN works – on purposes indirectly and decentralised – by supporting leading agencies, funders and intermediaries on local, regional and/or national level to help them support their cultural and creative entrepreneurs.

ECBN is an independent foundation funded by its members fees and in kind contributions. ECBN pushes for specific policy initiatives and actions for the cultural creative industries and represents its members in the main European events and debates, especially cross-innovation driven by CCIs to tackle the great challenges of our times such as circular economy and resilient society.



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94 Cities & Regions
36 Countries

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Liz Nolan

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Kompetenzteam KuK
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Kreatives Sachsen
Munich Members
STADT ESSEN
sternemann media
sxcs Communication

ESTONIA

Creative Estonia

LATVIA

National Ass. of CCIs

LITHUANIA

Northern Dimension

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