URBAN CREATIVE POLES
SWOT ANALYSIS OF CULTURAL AND CREATIVE INDUSTRIES IN COTTBUS

Cottbus, 15 October 2011

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Chair Urban Management

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0 Introduction

1. Background of the study

Cultural and creative industries (CCI), as economic branches, have experienced a clearly visible increase in importance in recent years. This development is due to various reasons: CCI are a dynamic sector that is deemed as a pioneer of the transition from industrial to knowledge economy. High growth rates, including employment effects, are ascribed to CCI. Besides purely economic aspects, CCI have the potential of triggering image effects that should not be underestimated and provide impetuses for urban development.

To date, the situation of cultural and creative industries was mainly analysed in major cities. A recent exception was made during Ruhr 2010 where the potentials of cultural and creative industries were also investigated and presented for medium-sized cities in the Ruhr Area (cf. Regionalverband Ruhr 2009).

What should be considered is that cultural and creative industries are a recently established sector which cannot be deemed a uniform branch. CCI is a combination of various sub-markets from performing arts to programming activities whose common feature is that a creative act is inherent in their productive activities. A certain lack of clarity in this context is due to the fact that several studies of cultural and creative industries coined their own definitions. This study has elaborated and uses uniform definitions modelled on definitions by the German federal government and the European Union (EU).

One fundamental element for the preparation of actions relating to Urban Creative Poles (abbreviated to UCP) is the preparation of this study of the status quo of cultural and creative industries in Cottbus. The study was aimed at providing facts and figures about the current situation of the cultural and creative industries but also identify potentials and challenges for companies active in this field in Cottbus.

This study is not a descriptive representation of the situation but an evaluation of the situation by means of an analysis of strengths and weaknesses. The individual working steps of this study are described in greater detail in the following chapter.

2. Approach and structure of the study

The core of the study is a SWOT analysis which stands for strengths, weaknesses, opportunities and threats. Those four terms are the key evaluation units in a SWOT analysis. Several surveying and analytical steps serve to fill the SWOT analysis with contents and, following evaluation, enable deduction of recommendations for action.
The outcomes of analyses and surveys are presented in the following chapters:

- Description of national, federal state, regional and local contexts – Part A
- Representation of cultural and creative industries in Cottbus – Part B
- Presentation of the public and intermediate cultural sector in Cottbus – Part C
- Presentation of expert interviews, polls and workshops – Part D
- SWOT Analysis – Part E
- Summary and recommendations – Part F

Fehler! Verweisquelle konnte nicht gefunden werden. is a schematic presentation of the structure of the study and performed analytical steps (i.e. of the methodological approach).

Framework conditions
- Development background
- Administrative structures / responsibilities for CCI
- Subsidy structures (promotion instruments)
- Demographic, economic, spatial and cultural trends

CCI sector (private)
- Quantitative description (statistics)
- Qualitative description, supported by
  – Questionnaires
  – Workshops with stakeholders / CCI representatives

Public and intermediate cultural sector
- Quantitative description (statistics)
- Qualitative description, supported by
  – Responsibilities of institutions
  – Workshops with stakeholders / CCI representatives

SWOT
- Strengths
- Weaknesses
- Opportunities
- Threats

Fig. 1: Workflow of the SWOT analysis

Chapters A, B and C are a purely descriptive presentation of surveyed and assessed data and information. Chapter D described the approach to polls and workshops (see below). Chapter E uses the findings of the analytical steps and conducts a comprehensive evaluation by means of a SWOT analysis. The outcomes were used to define recommendations for action, see Chapter F.
**Analytical steps** of the study included:

An **asset survey** of the city was conducted in collaboration with a student project in the Master Course Urban and Regional Planning to acquire the number and locations of creative businesses. This stock-taking exercise was supported by Internet and Yellow Pages research.

The students also assisted the project team in questionnaire polls of businesses. The polls exercise served to obtain an impression of the economic situation, existing networks and spatial conditions in the city. The businesses were also asked for their opinions on urban development, business development and their individual situation to get indications for evaluating the overall situation in Cottbus.

In addition, **expert meetings** were held which went beyond polls through questionnaires and were more open.

Two workshops with local stakeholders were organised and hosted to discuss fundamental issues. The workshop outcomes were also evaluated.

**Statistical data** was obtained from State Statistical Office Brandenburg to perform calculations.

Detailed information regarding analytical steps and use of data as well as explanations of pertinent terms is given in the relevant chapters and in the Appendix.
A. Presentation of framework conditions

1. Framework conditions at national and federal state levels

1.1. Status of cultural and creative industries

1.1.1. Definition of CCI at national and federal state levels

A Monitoring Report on Cultural and Creative Industries in Germany, published in 2009, introduced for the first time a harmonised baseline model for definition of and differentiation between CCI. The model was prepared by order of the Federal Ministry of Economics and Technology (BMWi 2009a). This baseline model provides for the first time a tool for differentiation of CCI which can be uniformly used at least across Germany (cf. BMWi 2009a, p. 3). The model is also compatible with definitions used at the European level (cf. BMWi 2009b, p. XII).

The baseline model distinguishes two possible categorisations: according to so-called statistical sub-groups, which allow for classification to NACE code level 4, and to sub-markets which require classification to NACE code level 5. The baseline model divides the Creative Industries into cultural industries and creative sectors. Cultural industries comprise cultural activities in the narrower sense. According to statistical sub-groups, these are publishing industry, film industry, broadcasting industry, artistic and other groups, trading in cultural goods, the architecture market and Design industry. The statistical groups advertising market and software/games industry are recorded as creative sectors. All the above together constitute the Creative Industries.

1.1.2. Statistical information about the economic situation

As already mentioned, there is data relating to sub-markets at German federal level. This present study is oriented on sub-markets which will be presented in the below charts. In contrast, the State of Brandenburg Report on Cultural and Creative Industries is oriented on statistical sub-groups. Hence, comparability of the two reports is only given for the total of the entire sector of cultural and creative industries.

Fig. 1 below shows the most important general economic coefficients. Brandenburg’s gross domestic product (GDP) amounts to just under 2.25% of the German national economic performance. This figure (and the majority of the following illustrations and charts) provides information about the number of employees paying compulsory social security contributions (SI employees) because the State Statistical Office has made available only such data for the labour market in the cultural and creative industries in Cottbus. This presentation shall enable compatibility of data to the largest possible extent.
### Table: Economic Coefficients 2009/2008 for Germany and Brandenburg

<table>
<thead>
<tr>
<th></th>
<th>GDP 2009 in Mio. €</th>
<th>No. of enterprises 2008</th>
<th>turnover 2008 in Mio. €</th>
<th>No. of employees 2008 in thousands</th>
<th>unemploy-ment rate 2009 in %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>2,407,200</td>
<td>3,636,495</td>
<td>5,412,240</td>
<td>27,487</td>
<td>8,1</td>
</tr>
<tr>
<td>Brandenburg</td>
<td>54,218</td>
<td>100,865</td>
<td>75,005</td>
<td>741</td>
<td>12,3</td>
</tr>
</tbody>
</table>

*Fig. 1: Economic coefficients 2009/2008 for Germany and Brandenburg (Source: Authors’ presentation acc. to Federal Statistical Office 2001-2010, data by State Statistical Office 2011)*

Fig. 2 shows the most important current coefficients for the cultural and creative industries at the German national level.

### Table: Basic Information on CCI in Germany Based on the Different Submarkets

<table>
<thead>
<tr>
<th>Basic Information on CCI in Germany Based on the Different Submarkets</th>
<th>No. of enterprises 2009</th>
<th>Gross added value 2009 in billion €</th>
<th>Percentagé of total GDP in %</th>
<th>Turnover 2009 in million €</th>
<th>Percentagé of total turnover in %</th>
<th>Employees 2009 number</th>
<th>Percentagé of total number in %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>236,837</td>
<td>64,2</td>
<td>2,6</td>
<td>131,407,0</td>
<td>2,7</td>
<td>786,669</td>
<td>2,9</td>
</tr>
</tbody>
</table>

*Fig. 2: Key data of cultural and creative industries in Germany 2009 (Source: Authors’ presentation acc. to BMWi 2010)*

Fig. 3 contrasts the key data of cultural and creative industries in Brandenburg and Germany. 2006 is the reference date because the most current data is available from the Cultural Industries Report of the State of Brandenburg (State of Brandenburg 2009) published in that year. The cultural and creative industries in Brandenburg have a lower share in the overall economy. The percentage of Brandenburg-based businesses in cultural and creative industries in the total number of such firms in Germany is just under 1.7%. A comparison with Fig. 2 reveals that all economic coefficients rose at the federal level by the year 2009.

### Table: Basic Information on CCI

<table>
<thead>
<tr>
<th>Basic Information on CCI</th>
<th>Enterprises 2006 no.</th>
<th>Percentage of total GDP in %</th>
<th>Turnover 2006 in million €</th>
<th>Percentage of total turnover in %</th>
<th>Number of Employees 2006 no.</th>
<th>Percentage of total number in %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>219,376</td>
<td>7,1</td>
<td>126,378,0</td>
<td>2,6</td>
<td>718,667</td>
<td>2,7</td>
</tr>
<tr>
<td>Brandenburg</td>
<td>3,673</td>
<td>4,3</td>
<td>780,9</td>
<td>1,2</td>
<td>12,874</td>
<td>1,8</td>
</tr>
</tbody>
</table>

*Share in overall economy relates to the overall economy in Germany respectively Brandenburg*

*Fig. 3: Key data of cultural and creative industries 2006 for Germany and Brandenburg (Source: Authors’ presentation acc. to BMWi 2009a; MW, MWFK 2009)*

Fig. 4 depicts economic coefficients for the structuring acc. to sub-markets. Year 2006 was chosen as reference date to make local figures comparable to those for the State of Brandenburg.
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CCI SWOT analysis
Faculty 2
Chair of Urban Management
Co-financed by EU INTERREG IV C Program
Baltic Sea Region (BSR)

Basic information on CCI in Germany regarding sub-branches

<table>
<thead>
<tr>
<th>Sub-branch</th>
<th>No. of enterprises 2006</th>
<th>turnover 2006 (in million €)</th>
<th>percentage of CCI in %</th>
<th>number of employees 2006</th>
<th>percentage of CCI in %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performing Art</td>
<td>17.320</td>
<td>4.154</td>
<td>2.9</td>
<td>19.579</td>
<td>2.4</td>
</tr>
<tr>
<td>Art market</td>
<td>10.985</td>
<td>1.767</td>
<td>1.2</td>
<td>4.264</td>
<td>0.5</td>
</tr>
<tr>
<td>Film</td>
<td>17.654</td>
<td>7.609</td>
<td>5.4</td>
<td>36.196</td>
<td>4.5</td>
</tr>
<tr>
<td>Broadcasting</td>
<td>889</td>
<td>7.426</td>
<td>5.2</td>
<td>24.017</td>
<td>3.0</td>
</tr>
<tr>
<td>Music</td>
<td>10.798</td>
<td>5.392</td>
<td>3.8</td>
<td>24.186</td>
<td>3.0</td>
</tr>
<tr>
<td>Book</td>
<td>13.638</td>
<td>14.743</td>
<td>10.4</td>
<td>67.859</td>
<td>8.4</td>
</tr>
<tr>
<td>Press</td>
<td>22.917</td>
<td>27.312</td>
<td>19.3</td>
<td>101.443</td>
<td>12.5</td>
</tr>
<tr>
<td>Design</td>
<td>38.728</td>
<td>14.869</td>
<td>10.5</td>
<td>81.419</td>
<td>10.1</td>
</tr>
<tr>
<td>Architectural</td>
<td>39.737</td>
<td>7.287</td>
<td>5.1</td>
<td>59.889</td>
<td>7.4</td>
</tr>
<tr>
<td>Advertising</td>
<td>39.507</td>
<td>25.797</td>
<td>18.2</td>
<td>102.514</td>
<td>12.7</td>
</tr>
<tr>
<td>Games/Software</td>
<td>35.719</td>
<td>24.103</td>
<td>17.0</td>
<td>270.086</td>
<td>33.4</td>
</tr>
<tr>
<td>Other activities</td>
<td>5.069</td>
<td>1.283</td>
<td>0.9</td>
<td>18.242</td>
<td>2.3</td>
</tr>
<tr>
<td><strong>CCI in total</strong></td>
<td><strong>219.376</strong></td>
<td><strong>126.378</strong></td>
<td><strong>100.0</strong></td>
<td><strong>719.880</strong></td>
<td><strong>100.0</strong></td>
</tr>
</tbody>
</table>

Fig. 4: Key data of cultural and creative industries in Germany acc. to sub-markets to WZ2003
(Source: Authors’ presentation acc. to BMWi 2009a)

The State of Brandenburg has chosen a structuring acc. to statistical sub-groups for its Cultural Industries Report. Hence, Fig. 5 shows key data for the State of Brandenburg after this structuring.

Basic information on CCI in Brandenburg regarding sub-branches

<table>
<thead>
<tr>
<th>Sub-branch</th>
<th>No. of enterprises 2006</th>
<th>turnover 2006 (in million €)</th>
<th>percentage of CCI in %</th>
<th>number of employees 2006</th>
<th>percentage of CCI in %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Press</td>
<td>108</td>
<td>118,8</td>
<td>15,2</td>
<td>1.832</td>
<td>14,2</td>
</tr>
<tr>
<td>Film</td>
<td>194</td>
<td>61,7</td>
<td>7,9</td>
<td>1.430</td>
<td>11,1</td>
</tr>
<tr>
<td>Broadcasting</td>
<td>30</td>
<td>24,0</td>
<td>3,1</td>
<td>1.535</td>
<td>11,9</td>
</tr>
<tr>
<td>Performing Art, Music, Literature</td>
<td>821</td>
<td>80,7</td>
<td>10,3</td>
<td>1.681</td>
<td>13,1</td>
</tr>
<tr>
<td>Journalists, news agencies</td>
<td>296</td>
<td>43,8</td>
<td>5,6</td>
<td>88</td>
<td>0,7</td>
</tr>
<tr>
<td>museum shops, art exhibits</td>
<td>31</td>
<td>9,0</td>
<td>1,2</td>
<td>1.054</td>
<td>8,2</td>
</tr>
<tr>
<td>trade with book, music and art</td>
<td>260</td>
<td>65,6</td>
<td>8,4</td>
<td>536</td>
<td>4,2</td>
</tr>
<tr>
<td>architecture studios</td>
<td>624</td>
<td>90,2</td>
<td>11,6</td>
<td>1.341</td>
<td>10,4</td>
</tr>
<tr>
<td>design offices</td>
<td>471</td>
<td>75,2</td>
<td>9,6</td>
<td>745</td>
<td>5,8</td>
</tr>
<tr>
<td>advertising offices</td>
<td>307</td>
<td>56,2</td>
<td>7,2</td>
<td>366</td>
<td>2,8</td>
</tr>
<tr>
<td>Software/Games</td>
<td>531</td>
<td>155,7</td>
<td>19,9</td>
<td>2.266</td>
<td>17,6</td>
</tr>
<tr>
<td><strong>Total CCI</strong></td>
<td><strong>3.673</strong></td>
<td><strong>780,9</strong></td>
<td><strong>100.0</strong></td>
<td><strong>12.874</strong></td>
<td><strong>100.0</strong></td>
</tr>
</tbody>
</table>

Fig. 5: Key data of cultural and creative industries in Brandenburg acc. to statistical sub-groups to WZ 2003 (Source: Authors’ presentation acc. to MW, MWFK 2009)

The above economic figures, in summary, reflect that cultural and creative industries are an increasingly important sector. In addition, CCI boast considerable growth – in contrast to other economic sectors. In Brandenburg, however, cultural and creative industries have only a smaller per-
percentage in the overall economy which points to the fact that there are considerable growth potentials. It is necessary for Brandenburg in order to its own in economic structural change to further division of tasks advance promotion of cultural and creative industries.

1.2. Organisation of administration

Germany is structured into a federal System which means that sovereign tasks are shared by the national state (Federal Republic) and the individual states (federal states). This division of tasks is formalised in the German Grundgesetz [Constitution] under which the national and federal state governments have exclusive legislative powers in certain specified regulatory areas. The legal basis is stipulated in Grundgesetz articles 71 and 73. Federal states, e.g., are entitled to adopt their own regulations in the fields of culture and education as well as in municipal law. The level of regulatory detail of federal states is prescribed by framework legislation passed by the national government (e.g. Framework Act for Higher Education [HRG]). The authority of the federal government to make framework legislation, however, was subject of a political discourse and was abandoned with the federalism reform of September 2006. Previous law is being continued as federal law until the federal states will have adopted their own regulations.

Some regulatory areas are subject to concurrent legislation which empowers federal states to adopt regulations as long as such are not passed by the federal government. (cf. Andersen; Woyke 2003.)

There are administrative bodies both at national and federal state levels as well as at municipal level. National laws are essentially implemented by federal states. Municipalities in Germany operate their own administrative bodies in the meaning of municipal self-administration as defined in Grundgesetz article 28, para. 2, and various federal state constitutions. The tasks for which they are responsible are determined by their being rooted in communal coexistence. Municipalities have the right to take on priority tasks in order to identify, define and exercise tasks at the local level while also exercising compulsory governmental responsibilities.

Municipalities notably enjoy municipal ‘cultural sovereignty’, i.e. they are free to decide which cultural tasks they want to fulfil. Municipalities can independently decide if and how they want to exercise such tasks. Tasks in the cultural sphere relate, e.g. to administration of schools and kindergartens, operation of libraries, music schools and adult education programs, museums, theatres and sports facilities.
1.3. Institutions, activities and funding programs at the federal level

1.3.1. Institutions at the federal level

At the federal level, there are various agencies of the Bundestag [German Parliament] and the federal government as well as combinations of federal state governments which are involved in the field of cultural and creative industries. There are also associations and funding institutions that are organised entirely along civil society lines or act by order of the federal government.

Central entities for (political) government-level support are the Federal Ministry of Economics and Technology (BMWi) and the Federal Government Commissioner for Culture and the Media. The Federal Ministry of Labour and Social Affairs (BMAS) is also partially responsible for cultural and creative industries, e.g. by bearing political responsibility for the social security scheme for artists.

In addition, various agencies of the Bundestag and federal government (such as committees and commissions) and combinations of federal states are respectively were actively involved in the topic of cultural and creative industries. Such entities notably include:

- the Bundestag Committee on Culture,
- the Study Commission ‘Culture in Germany’, appointed by the Bundestag in 2003, completed its work in 2007,
- and the Conference of Economics Ministers of the federal states.

Also non-government organisations [NGOs], such as German Cultural Council, Society for Cultural Policy or Cultural Guild, play a significant role at the national level by advocating the interests of cultural and creative professionals vis-à-vis law-making bodies. In addition, several CCI sub-sectors maintain their own sector associations at the federal level.

Institutions and agencies which are acting by order of the federal government to support the CCI include:

- the federal government Initiative Cultural and Creative Industries, supported by the Federal Ministry of Economics and Technology (BMWT) and the Federal Government Commissioner for Culture and the Media
- the Competence Centre Cultural and Creative Industries.

Besides the aforementioned agencies which are actively involved in impartation and funding of the cultural and creative Industries, there are institutions that are performing basic groundwork for the creative industries. This means that there are agencies which are engaged in finding out what cultural and creative industries shall be; one of those is the Task Force for Cultural Statistics (Arbeitskreis Kulturstatistik e.V.).
1.3.2.  Activities at the federal level

Cultural and creative industries are a fledgling sector; hence, it is also necessary at the German national level, to elaborate adequate bases regarding definition, functional principle and public funding strategies.

The currently most important federal-level activities are the Initiative Cultural and Creative Industries of the federal government and the Competence Centre Cultural and Creative Industries.

The federal government Initiative Cultural and Creative Industries, supported by the BMWi and the Federal Government Commissioner for Culture and the Media

The Competence Centre Cultural and Creative Industries (see paragraph below) is an important element of this initiative. The initiative’s website provides extensive information relating to the development of individual sub-sectors and continuative consultancy. Other services offered include hosting of regional conferences where stakeholders in creative Industries can get together, exchange views and articulate their interests. Moreover, creative professionals are assisted by means of trade fairs, prize awards, network meetings.

Competence Centre Cultural and Creative Industries

The Competence Centre is the responsible body for funding measures for the cultural and creative industries at the federal level. One specific feature is that the Competence Centre does not only work supra-regionally but is also active at the regional level. Regional offices (ROs) were established in each federal state as local points of contact for the cultural and creative industries. The ROs offer orientation and consultation meetings in order to clarify entrepreneurial ideas, point roads through the system of public financial assistance and, if need be, organise exchanges of experience in networks. The ROs are tasked to closely cooperate with regional consultancy and funding providers.

The Brandenburg regional office also supports Berlin. It is headquarteried in Berlin and offers regular consultations in metropolitan cities in the State of Brandenburg, e.g. in Cottbus.

1.3.3.  Funding programs at the federal level

Public funding conditions at the federal level, funding demands and funding gap are analysed in the study on Economic Prospects for the Cultural and Creative Industries in Germany (BMWi 2009). The study found that different CCI sub-sectors are targeted by support programs to different extents. A distinction can be made between technology-oriented and non-technology-oriented sectors. A considerable funding gap was identified for non-technology-oriented sectors.

There are a large variety of support programs which, however, are not oriented to the specificities of cultural and creative industries. The study names the following necessary actions in this respect:
- Targeting the heterogeneity of the entire sector
- Targeting of free-lancers and micro-businesses

These deficits are addressed by the federal-government Initiative Cultural and Creative Industries.

In the meantime there are support offers available that were prepared for individual sub-markets (e.g. film industry) or that were developed with the ulterior motive that such may be sought by a large number of stakeholders, especially in the creative industries (e.g. micro-credit fund).

Kreditanstalt für Wiederaufbau (KfW) is the federal-level development bank. KfW grants loans to enterprises across Germany. Besides business credit programs to which also businesses in the creative industries are eligible, special programs were launched to address start-ups. There is only one KfW program which addresses a CCI sector, namely the film industry for which KfW provides film financing.

In 2010, the micro-credit fund was established on an initiative by the federal government for micro-businesses and start-up companies. This fund closes a gap in financing aids because previously there were no offers with a low amount of capital which are often still refused by relationship banks. The micro-credit fund is managed by GLS Bank.

1.4. Institutions, activities and funding programs at the federal state level

1.4.1. Institutions at the federal state level

The below agencies are relevant in terms of supporting cultural and creative industries in the State of Brandenburg:

- Ministry for Science, Research and Culture (MWFK)
- Ministry for Economics and European Affairs (MWE)
- Ministry for Labour, Social Affairs, Health and Family Affairs (MASGF)
- ZukunftsAgentur Brandenburg GmbH [FutureAgency Brandenburg GmbH (Ltd.)]
- State Agency for Structure and Labour (LASA) Brandenburg GmbH
- Investitions- und Landesbank Brandenburg (ILB)
- MediaBoard Berlin- Brandenburg

Specific details of the key institutions are given below:

The MWE is the responsible ministry for all affairs relating to economy and economic policy. It is the most significant institution at the federal state level for cultural and creative industries working in the private sector. The MWE takes care of business development in the federal state and is responsible for EU grant programs.
The **MWFK** has three specialist departments: Sciences, research and culture which means that one aspect relating to CCI is covered by the supreme administrative level. The ministry’s culture department is not focusing on commercially-oriented priorities of culture but on topics such as commemorative culture, (public) arts and heritage management. The MWFK is also responsible for support programs that are also relevant for artists relevant, e.g. scholarships, and the Local Authority Cultural Investment Program (KKIP) under ERDF 2007-2013.

The **ZukunftAgentur Brandenburg GmbH** (ZAB) is the business development corporation of the State of Brandenburg. It assists businesses with expertise, contacts and information on the support programs of the federal state, the national government and the European Union. The ZAB also provides cross-sectoral start-up consultancy. A further priority of its work is assisting and development projects, *inter alia* through supporting networks.

The **MediaBoard Berlin-Brandenburg** is the first point of contact for all creative professionals in the film and media industry in Berlin-Brandenburg. Key activities of the MediaBoard include location marketing and support for film funding. Besides its active involvement in those subject areas, the MediaBoard also provides general information about other sub-sectors, such as music, games or publishing houses.

### 1.4.2. Activities for the promotion of cultural and creative industries

Also the State of Brandenburg prepared a report about the situation of the cultural and creative industries to take stock of the status quo in the sector. The report was published in 2009 and had been commissioned by the MWE and the MWFK (MWE;MWFK 2009).

The State of Brandenburg also had a culture development concept prepared by the MWFK (*Landtag* [State Parliament] Brandenburg 2009). This concept includes also a chapter that deals with the relationship between culture and economy. The relevance of cultural and creative industries for the economic location of Brandenburg is explained and the intention is declared to use the arts and culture to make a contribution to the labour and employment market. The Innopunkt Campaign 14 is cited as an example in this context.

The **INNOPUNKT Campaign 14** - ‘Alliances between culture and economy promote growth and employment market in the State of Brandenburg’ was initiated in 2005 by the MASGF and supported by the LASA. Its duration was two years. The project was aimed creating and strengthening interfaces between the arts, culture and the business community in order to exploit employment market potentials. (LASA Brandenburg no date)

Support programs in the State of Brandenburg are managed and provided by the ILB. This relates to federal state programs and also to provision of EU support programs. Support programs that exclusively address cultural and creative industries were identified in the film sector. There is a
program for interim financing of film productions. The MWFK provide artist scholarships for the arts market. Also the MediaBoard Berlin-Brandenburg offers funding of film projects.

2. Framework conditions of the city of Cottbus

2.1. Framework information and data for city of Cottbus

2.1.1. General information and geography

The urban municipality of Cottbus is situated in southern Brandenburg, half-way between Berlin and Dresden. Cottbus has just over 100,000 inhabitants and is, besides Potsdam, the only major city in the State of Brandenburg. Cottbus is the only high-order centre in southern Brandenburg and thus has supra-regional significance for the economy and provision of services of general interest for the surrounding region.

Cottbus is the centre of the ‘energy region of Lusatia’ and a strong location of the energy industry, notably lignite industry. Vattenfall Europe Mining AG, e.g., maintains its HQ in Cottbus.

The city is a major regional and supra-regional transportation hub in the south of the Berlin metropolitan region. Cottbus has both rail and road connections to the European Transport Corridor to Wroclaw and Krakow. In terms of road transport, Cottbus is well connected to the surrounding region and supra-regionally through federal motorway A 15 and a well-developed and B and state roads (B 97, B 168, B 169). Key access to air transport is provided by the general aviation airport Berlin-Schönefeld to the south of Berlin. The new major airport BBI, currently under construction, is well accessible from Cottbus by road while currently there is no direct train connection (cf. Municipality of Cottbus 2007: 14)

2.1.2. Demographic development

The population of Cottbus is decreasing and getting older. The reasons are that the mortality rate is higher than the birth rate and a high level of out-migration.

The negative balance of the natural population development from 2005 to 2010 was -300 to -400 persons. A birth rate of 1.1 children per woman brings Cottbus clearly below the German average of 1.36. The increase in deaths is due to the fact that relatively strong age groups advanced in years are succeeding. (cf. Municipality of Cottbus 2007: 15) In 2001, the average age of the city’s population was 41.1 years; in 2006 it was already 43.6 years.
2.1.1. Spatial structure

The characterising feature of the urban structure of Cottbus is its marked linear extension and the division of the city by vast railway installations. The city topos has a strong North-South and a somewhat lesser East-West orientation. This cross-like structure is complemented by the poly-central settlement system of incorporated districts with still recognisable village centres. River Spree transcends the city like a green ribbon. Numerous parks and open spaces are lining the Spree meadows and mark large parts of the urban structure. (cf. Municipality of Cottbus 2007: 24)

Several city districts are severely affected by the above-mentioned population decrease and increasing aging. This development entails demolition and adaptation measures. In addition, there was an enormous rehabilitation backlog in historic urban quarters in the 1990s which required quick action. Already in 1992, the rehabilitation area ‘Model City of Cottbus’ was represented in the city centre with a project duration of 25 years. This instrument enabled private and public property owners to carry out refurbishment work which led to the fact the rehabilitation backlog has been largely made up and Cottbus centre has gained quality as a dwelling and working location. (cf. www.modellcity-cottbus.de 2011)

Comprehensive urban redevelopment measures have been carried out in the city since 2000, mainly funded under the support program ‘Urban Redevelopment East – for liveable cities and attractive dwelling (cf. Municipality of Cottbus 2005: 4). Those conversion measures are adopting a
strategy of shrinkage, from the periphery to the centre, i.e. a concentration of the city to its central area. What shall be prevented is a ‘thinning-out’ of the urban structure in order to pre-empt capacity underutilisation of infrastructures and thus increased economic inefficiency.

2.2. Economic data on the overall economy and the CCI in Cottbus

Almost 4 % of the inhabitants of the State of Brandenburg are living in Cottbus (cf. Fig. 2). The unemployment rate is slightly higher than that in the State of Brandenburg. The percentage of Cottbus-based creative industry businesses in that of the State of Brandenburg (2010) is with 4.1 % as high as the total number of businesses (2010). These are good figures at first glance.

A look at Fig. 3, however, which shows the coefficients of cultural and creative industries for Germany, Brandenburg and Cottbus, reveals that the number of businesses at the German national level takes a much higher percentage in the overall economy, with higher figures in terms of turnover and numbers of employees paying compulsory social security contributions.

<table>
<thead>
<tr>
<th></th>
<th>Brandenburg</th>
<th>Cottbus</th>
<th>% of Brandenburg</th>
</tr>
</thead>
<tbody>
<tr>
<td>inhabitants (2010)</td>
<td>2,503,273</td>
<td>100,034</td>
<td>4,0</td>
</tr>
<tr>
<td>GDP in million EUR (2009)</td>
<td>54,218</td>
<td>3,070</td>
<td>5,7</td>
</tr>
<tr>
<td>no. of enterprises (2009)</td>
<td>100,257</td>
<td>4,066</td>
<td>4,1</td>
</tr>
<tr>
<td>no. of employees (2010)</td>
<td>750,998</td>
<td>46,603</td>
<td>6,2</td>
</tr>
<tr>
<td>no. of CCI enterprises (2010)</td>
<td>4,171</td>
<td>170</td>
<td>4,1</td>
</tr>
<tr>
<td>unemployment rate (2010)</td>
<td>11,1%</td>
<td>12,1%</td>
<td></td>
</tr>
</tbody>
</table>

Fig. 2: Comparison of outline data Brandenburg and Cottbus (Statistical Yearbook Germany 2010; Statistical Yearbook Brandenburg 2010; Data source: Results of macroeconomic accounting, employment statistics and Brandenburg Register of Companies; Labour market data by Federal Employment Agency)

It should be noted that figures in Fig. 3 relate to 2006. This is the only year for which data for Cottbus are comparable to some extent to that at other spatial levels. Valid data protection regulations prevent a complete calculation of data for Cottbus (see Chapter B.1.2 for more details). What can be stated, however, is that the State of Brandenburg and Cottbus have untapped potentials for economic extension of creative industries.
The gross domestic product (GDP) in Cottbus has increased (cf. Fig. 4). Fig. 5 shows, however, that the growth rate was lower than that at national and federal state levels.
GDP development (percentage) 2000-2009
(2000 = 100%)

Fig. 5: Percentage GDP development 2000-2009 - Base year=2000 (Authors’ calculation acc. to data supplied by Statistical Office Berlin-Brandenburg, Statistical Yearbook Germany)

The number of companies in Cottbus has been almost constant since 2006, as reflected in register-of-companies data. The number of enterprises at the federal state level has risen; hence, the percentage of Cottbus-based firms in those in the State of Brandenburg decreased (cf. Fig. 6). Available data also shows that the number of creative industry businesses in Cottbus decreased from 2006 to 2010. The number is levelling off at a percentage in the total economy in Cottbus between 4.2% and 4.4%.

Fig. 6: 2006:2009 comparison of Cottbus-based companies (Authors’ presentation and calculation acc. to Brandenburg Register of Companies 2009-2011)
The development of the number of businesses per se does not say much about their actual economic power or their employment market effects. A dramatic development can be stated for the number of employees paying compulsory social security contributions in Cottbus for the period 2000-2009 (cf. Fig. 9 and Fig. 10). Their number decreased by almost 11% and thus dropped much steeper than at national or federal state level.
Yet, the unemployment rate in Cottbus decreased (cf. Fig. 11). The explanation is that the reduction in employment entailed a decrease of the economically active population living in Cottbus.

### 2.3. Administrative and institutional situation and local-level support structures for CCI

#### 2.3.1. Responsible government authorities and agencies and marketing strategies of the city of Cottbus for the culture and creative Industries

The Municipality does not maintain a specifically set up service provider body for the promotion of cultural and creative industries. To date, the administration has not taken any steps to launch relevant initiatives.
At the Municipality level, especially the department ‘Youth, Culture, Social Affairs’ is responsible for the cultural affairs of the city. Cottbus does not have an office of economic affairs. Tasks, such as business development, new business location services and close communications with existing enterprises, were outsourced to a municipal subsidiary company, Entwicklungsgesellschaft Cottbus mbH (EGC) which is also responsible for marketing the city of Cottbus.

Besides EGC, there is also Cottbus Marketing und Touristik (CMT) GmbH, another municipal subsidiary company which actively advertises the city of Cottbus, however, mainly in the field of tourism. CMT also manages various event locations in the city and thus qualifies also partially for the field of cultural and creative industries.

The Stadtmarketingverein Cottbus (City Marketing Association) pursues a holistic city marketing approach that is aimed at sustainable development of the city at all levels – economy, culture and tourism. The association supports relevant businesses and conceives of itself as a service provider whose activities are targeted at combining manifold activities or opinions in order to present Cottbus as liveable and lovable, both internally and externally.

Four key priorities for marketing activities were defined within the location marketing concept of the city of Cottbus; one priority is marketing of culture in Cottbus. This priority, however, mainly addresses cultural assets like the Fürst-Pückler-Park or the Staatstheater and to a lesser extent CCI entities.

2.3.2. Support structures in the city of Cottbus

Counselling regarding support programs and further public assistance services in Cottbus is the responsibility of the Chamber of industry and Commerce (if CCI businesses are members) and the EGC. Cottbus-based CCI businesses are also eligible for relevant services at national and federal state levels. ILB representatives and the regional office of the Competence Centre Cultural and Creative Industries provide consultation in Cottbus at regular intervals.

Funding programs for the cultural and creative industries are not provided by the Municipality. The Municipality, however, gives comprehensive support to public and intermediate cultural entities which have strong ties to the cultural and creative industries (see Chap. C).

Moreover, Cottbus boasts consultancy and coaching agencies which specifically take care of start-ups, including e.g. ‘Zukunft Lausitz’ [Future Lusatia ] and the Centrum for Start-up Promotion and Research ‘BIEM at the BTU’. Start-up companies in the cultural and creative industries can be eligible for such services provided that they meet certain preconditions.
B. Cultural and creative industries in Cottbus

1. Set-up, presentation of origin of data and data quality

1.1. Set-up, origin of data and data quality

The below chapters provide a more detailed description of the cultural and creative industries in Cottbus, including the various sub-sectors. First, statistical evaluations and data acquired by the authors’ of the study are presented. Important coaching offers and networks in Cottbus are not restricted to one sector but are rather cross-sector; hence, relevant agencies are presented in the following chapter (Chap. B.3). Next are chapters on coaching offers (Chap. B.4) and on networks in the cultural and creative industries (Chap. B.5). These chapters do not yet evaluate the situation but are purely descriptive. An evaluation is given as part of the SWOT analysis in Chapter E.

The data presented in the following charts are results of calculations by the authors based on data provided by the State Statistical Office (StaLa) surveyed by the authors. The StaLa supplied information taken from the register of companies, such numbers of businesses, employees paying compulsory social security contributions and turnover figures. Data could only be obtained for the years 2006-2010 and are available for level 4 of WZ [economic activities] respectively NACE codes. As a result of the authors’ calculations, the data was assigned to the sub-markets defined under the UCP concept.

Data obtained from the register of companies cover businesses that are liable to value-added tax (typically businesses with annual sales over 17,500 €) and/or have at least one employee who is subject to social insurance contributions. Free-lancers, self-employed persons and businesses to which the above criteria do not apply are not entered into the register of companies. The number of employees paying compulsory social security contributions and sales figures that are included in the register of companies relate to the number of registered businesses. Companies without registered offices in Cottbus (i.e. are either a branch or regional office) are not included in the data.

The basic problem of the data and its presentation, however, is that a lot of information relating to level 4 of WZ groups for Cottbus has to be treated confidentially for data protection reasons. Hence, the information per WZ group and calculated total figures per sub-market shown in the below charts should be treated with utmost prudence. Figures are shown in grey in cases where only incomplete and thus inaccurate total figures can be given. Absence of or incomprehensibility of data for a chart line is marked by a hyphen (‘-‘). Dotted out spots indicate confidentiality of date for data protection reasons. Unfortunately, the above-mentioned inaccurate and incomplete presentation of information relates to almost all data for the cultural and creative industries in.

Data surveyed by the authors was collected during an asset survey in the city of Cottbus during which locations of CCI businesses were recorded. The data is complemented by findings of sub-
sequent research in Yellow Pages and Websites. Thus, data marked as having been surveyed by
the authors can be deemed to be extremely complete. The asset survey exercise, however, could
only record the number of businesses and self-employed persons in the CCI sphere.

2. Portrait of the cultural and creative industries in Cottbus

Key coefficients for the overall situation of cultural and creative industries were already presented
in Chapter A.2. This present chapter details results of the authors’ survey and presents key coeffi-
cients of individual sub-markets. Fig. 12 shows sub-markets and their coefficients over time based
on data by the Brandenburg Register of Companies. Dotted out fields in the chart indicate various
gaps in the presentation auf. Only the number of businesses for 2006-2010 could be reliably used.

<table>
<thead>
<tr>
<th>enterprises at WZ4 level</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>BTU survey</th>
</tr>
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<tbody>
<tr>
<td>no. of enterprises</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>turnover</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>no. of employees</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>turnover</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>no. of employees</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Performing Art</td>
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<td>12</td>
<td>11</td>
<td>9</td>
<td>9</td>
<td>13</td>
</tr>
<tr>
<td>Art market</td>
<td>30</td>
<td>12</td>
<td>14</td>
<td>14</td>
<td>14</td>
<td>43</td>
</tr>
<tr>
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<td>12</td>
<td>16</td>
<td>11</td>
<td>11</td>
<td>32</td>
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<tr>
<td>Broadcasting</td>
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<td>1</td>
<td>1</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
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<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Book</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Press</td>
<td>9</td>
<td>9</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>12</td>
</tr>
<tr>
<td>Design</td>
<td>3</td>
<td>3</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Architectural</td>
<td>49</td>
<td>43</td>
<td>42</td>
<td>42</td>
<td>42</td>
<td>53</td>
</tr>
<tr>
<td>Advertising</td>
<td>41</td>
<td>42</td>
<td>40</td>
<td>40</td>
<td>40</td>
<td>40</td>
</tr>
<tr>
<td>Games/Software</td>
<td>23</td>
<td>26</td>
<td>26</td>
<td>26</td>
<td>26</td>
<td>21</td>
</tr>
<tr>
<td>Other activities</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>SUMME</td>
<td>181</td>
<td>173</td>
<td>178</td>
<td>180</td>
<td>170</td>
<td>311</td>
</tr>
</tbody>
</table>

Fig. 12: Sub-market coefficients in Cottbus (Authors’ calculation, Data source: Brandenburg Register
of Companies; Authors’ survey)

Fig. 13: Development of number of businesses to sub-markets in Cottbus (Authors’ calculation, Data
source: Brandenburg Register of Companies)
URBAN CREATIVE POLES
CCI SWOT analysis

Faculty 2
Chair of Urban Management
Co-financed by EU INTERREG IVC Program
Baltic Sea Region (BSR)

no. of CCI enterprises          2010          2011

<table>
<thead>
<tr>
<th></th>
<th>Brandenburg</th>
<th>Cottbus</th>
<th>share of Cottbus in Brandenburg in %</th>
<th>Cottbus - BTU survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performing Art</td>
<td>359</td>
<td>10</td>
<td>2.8%</td>
<td>13</td>
</tr>
<tr>
<td>Art market</td>
<td>1,030</td>
<td>24</td>
<td>2.3%</td>
<td>43</td>
</tr>
<tr>
<td>Film</td>
<td>190</td>
<td>6</td>
<td>3.2%</td>
<td>11</td>
</tr>
<tr>
<td>Broadcasting</td>
<td>18</td>
<td>2</td>
<td>11.1%</td>
<td>6</td>
</tr>
<tr>
<td>Music</td>
<td>19</td>
<td>1</td>
<td>5.3%</td>
<td>32</td>
</tr>
<tr>
<td>Book</td>
<td>25</td>
<td>0</td>
<td>0.0%</td>
<td>13</td>
</tr>
<tr>
<td>Press</td>
<td>122</td>
<td>7</td>
<td>5.7%</td>
<td>12</td>
</tr>
<tr>
<td>Design</td>
<td>119</td>
<td>5</td>
<td>4.2%</td>
<td>50</td>
</tr>
<tr>
<td>Architectural</td>
<td>776</td>
<td>41</td>
<td>5.3%</td>
<td>53</td>
</tr>
<tr>
<td>Advertising</td>
<td>882</td>
<td>38</td>
<td>4.3%</td>
<td>40</td>
</tr>
<tr>
<td>Games/Software</td>
<td>530</td>
<td>29</td>
<td>5.5%</td>
<td>21</td>
</tr>
<tr>
<td>Other activities</td>
<td>101</td>
<td>7</td>
<td>6.9%</td>
<td>17</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>4,171</strong></td>
<td><strong>170</strong></td>
<td></td>
<td><strong>311</strong></td>
</tr>
</tbody>
</table>

Fig. 14: Number of businesses Brandenburg and Cottbus 2010 in comparison (Authors’ calculation, Data source: Brandenburg Register of Companies)

Fig. 7: Number of businesses in sub-markets of cultural and creative industries in Cottbus (Authors’ survey)
Fig. 7 shows the results of the authors’ survey portions of which severely deviate from State Statistical Office data. The reason is that the authors’ survey also recorded free-lance and self-employed creative professionals who do not pay value-added tax and/or do not have employees subject to social insurance contributions. The above figure shows that especially the art market, design industry, architecture market and the advertising industry are well positioned in terms of figures.

3. Key institutions in cultural and creative industries for coaching and networks in the State of Brandenburg

A clear distinction whether institutions take special care of funding programs, coaching offers or representation of interests or act as networks is not always possible. There are several agencies which perform several of the above functions. In addition, some agencies provide services for several sectors. Some agencies, such as MediaBoard Berlin-Brandenburg, were already presented in Chapter A. Other key institutions for the whole cultural and creative industries include:

- Sector Transfer Unit ICT and Media (BIIkU),
- Media.net berlinbrandenburg

The Sector Transfer Unit ICT and Media provides consultancy and networking services for businesses in the ICT and media sector. Its activities include placement of graduands or graduates, enhancing competitiveness of businesses through accelerated innovations or easy access to research funding. There are also offers for scientific institutions.

media.net berlinbrandenburg is a cross-sectoral alliance for businesses in the media industry in the capital region. This entity cooperates with institutions, associations and opinion leaders from economy, research and culture in shaping economic framework conditions for the region. It responds to current needs of its members and offers up-to-date events and practice-oriented advanced training courses.

4. Coaching services for the cultural and creative industries

Coaching services can be distinguished into offers aimed at strengthening general entrepreneurial capabilities regarding business and management know-how (e.g. comprehensive support and consultancy of businesses in certain development phases), offers addressed to individual aspects of entrepreneurial actions (e.g. promotion of PR knowledge or impartation of book-keeping knowledge) and offers designed to improve creative-artistic, technical and practical capabilities.

This present study focuses mainly on offers that pursue the two first-mentioned objectives. Another essential distinguishing feature is whether such offers are addressed to start-ups, junior entrepreneurs or established businesses. The following chapters will present offers for business and management coaching.
Further relevant points of contact are the respective professional association and interest groups in the sub-sectors which can either arrange or offer training measures themselves. This study does not mention all such points of contact but major services provided by them are presented in sub-chapters of the portraits of sub-sectors.

a. General coaching offers

General coaching offers are provided, e.g. by IHK Education Centre Cottbus in the form of courses on topics such as law and taxes, HR management, retail and sale and also special seminars. Their orientation to latest developments in economy, science and technology is a specific quality approach.

b. Coaching for start-ups and young businesses

Support services for start-ups have increased in recent years. This study cannot give a complete overview of the whole range of such services. This chapter details especially such offers that are focusing businesses in the cultural and creative industries or that are made by certain institutions directly to Cottbus-based businesses or people planning a start-up. The Appendix contains a list of further relevant offers. The following chart contains offers to start-ups for which mainly stakeholders in cultural and creative industries are eligible.

<table>
<thead>
<tr>
<th>Name of institution</th>
<th>Support offer</th>
<th>Spatial level</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Media.net:catapult</td>
<td>1-year mentor program for start-ups and young businesses</td>
<td>Berlin - Brandenburg</td>
<td><a href="http://www.medianet-bb.de/DE/medianetcatapult/">http://www.medianet-bb.de/DE/medianetcatapult/</a></td>
</tr>
<tr>
<td>GründerInnen-Center des Instituts Berufsforschung und Unternehmensplanung e.V. (IBF) und der Hochschule für Film und Fernsehen (HFF)</td>
<td>Coaching offer tailored to specific needs of applicants</td>
<td>Brandenburg</td>
<td><a href="http://www.ibf-institut.de/">http://www.ibf-institut.de/</a></td>
</tr>
<tr>
<td>IbM (Innovationen brauchen Mut) (Joint project of IBF-Institut and ZAB Zukunftsauftragur Brandenburg)</td>
<td>Various programs for start-up companies</td>
<td>Berlin - Brandenburg</td>
<td><a href="http://www.innovationen-brauchen-mut.de/">http://www.innovationen-brauchen-mut.de/</a></td>
</tr>
<tr>
<td>MEDIA EXIST - Das Existenzgründungszentrum für Medienschaffende</td>
<td></td>
<td></td>
<td><a href="http://www.mediaexist.com/mediaexist.php">http://www.mediaexist.com/mediaexist.php</a></td>
</tr>
</tbody>
</table>

Tab. 1: Overview of relevant start-up coaching programs (Source: Authors’ compilation)
The two below agencies specifically address Cottbus-based businesses:

The Zukunft Lausitz and the Zentrum für Gründungsförderung und -forschung ‘BIEM an der BTU’ specifically address start-ups in Cottbus and provide consultancy and education services directly on site. In addition, the IHK is hosting a start-up coaching program.

c. Offers for the cultural and creative industries

Coaching measures are offered in the State of Brandenburg by Master School Drehbuch GmbH, Medieninnovationszentrum Babelsberg (MIZ) and Kulturgewinn: Beratung für Kunst & Kultur.

Specific offers in Cottbus that are addressed to the cultural and creative industries are provided by KUNST.FABRIK. Interested parties receive from KUNST.FABRIK in Cottbus information about how to maintain and improve their entrepreneurial potentials. Key topics include tapping of new products, sales routes, markets and forms of cooperation. Moreover, KUNST.FABRIK supports the preparation and implementation of start-up schemes in the creative industries.

5. Networks in the cultural and creative industries

5.1. Cross-sectoral networks

Cross-sectoral networks also include such agencies as the Unternehmerverband Brandenburg e.V. Also respective sector combinations, e.g. Bund Deutscher Architekten, are important points of contacts for stakeholders in the relevant sub-markets of cultural and creative industries. Below mainly such agencies are detailed which aspire creation of cross-sectoral networks in cultural and creative industries or are themselves network and have eminent significance for Cottbus-based businesses.

Such entities include, e.g., Media.connect and Marketingclub Lausitz. Media.connect is a platform for cross-sectoral networking of stakeholders in the media industry. Establishment of an area-covering media and ICT network in the State of Brandenburg is the target of Media.connect. Marketingclub Lausitz constitutes an intersection in Bundesdeutsches Marketing-Netzwerk. It advocates safeguarding of interests resulting from marketing functions of companies. The members of Marketingclub Lausitz are inter-disciplinary and hail from industry and trade, are banks or advertising agencies.

5.2. Networks in sub-markets

a. Art market

Activities at federal state level are hallmarks of GEDOK BRANDENBURG - Gemeinschaft der Künstlerinnen und Kunstförderer e.V. and Brandenburgischer Verband Bildender Künstler e.V. (BVBK) as networks for Cottbus-based artists.
In the Lusatia region, the artist networks Pro Ars Lausitz e.V. and Kreis 07 have formed, whose members meet at regular intervals and, e.g., host joint exhibitions.

b. **Film industry**
Berlin Brandenburg FilmCommission (BBFC) represents the interests of film workers in the State of Brandenburg. Connecting Cottbus, an East-West coproduction market for producer, author and director teams is active in Cottbus and seeks and places partners for the realisation of new feature film projects.

c. **Music industry**
Brandenburgischer Rockmusikerverband e.V. (BRV) is a non-profit association and a platform to represent rock musicians’ interests vis-à-vis political federal state bodies and other institutions.

d. **Book market**
Brandenburgisches Literaturbüro organises and support readings and series of readings as well as literature exhibitions together with authors and actors and prepares forums on literature and society.

e. **Press market**
Journalistenverband Berlin-Brandenburg is the representation of interests of full-time journalists vis-à-vis employers and publishing houses.

f. **Design industry**
Verband Deutscher Industrie Designer (VDID ) e.V. - Regional group Berlin, Brandenburg, Mecklenburg-Vorpommern, Sachsen, Sachsen-Anhalt, Thüringen represents the work of its members in politics and society and thus supports their professional activities.

Verband Deutscher Mode- und Textildesigner VDMD() e.V. - Regional group Berlin, Brandenburg, Mecklenburg-Vorpommern, Sachsen, Sachsen-Anhalt, Thüringen is the strongest trade representation for fashion and textile designers in Germany.
6. Map representation of sub-markets and further places with relevance for the CCI
URBAN CREATIVE POLES
CCI SWOT analysis

Faculty 2
Chair of Urban Management

Co-financed by EU INTERREG IVC Program
Baltic Sea Region (BSR)

Locations
Architectural market

Locations
Advertising market

Base Map: Digital city map of the city administration, department of geoinformation and cadastral land register; additional own drawings
Data base: Own survey
6.1. **Map of the entire cultural and creative industries**

The following maps show a complete overview of locations of creative industry businesses as well as public and intermediate stakeholders. The second map displays also frequencies of locations of creative industry businesses per city district. The frequencies are depicted by colour scaling. Also locations of so-called Third Places are displayed. Third Places are semi-public spaces, such as cafés, restaurants, bars and clubs, which permit intertwining of leisure-time and the world of employment, places where stakeholders meet by opportunity or planned and can exchange views.
Locations of Cultural and Creative Industries (CCI) in Cottbus

Base Map: Digital city map of the city administration, department of geoinformation and cadastral land register; additional own drawings
Data base: Own survey

- Black: Performing Art market
- Blue: Art market
- Purple: Film industry
- Violet: Broadcasting industry
- Green: Book market
- Olive: Press market
- Yellow: Design industry
- Orange: Architectural market
- Pink: Games/Software industry
- Red: Event Promoters
- Maroon: Other/new activities
- Cyan: Music industry
- Magenta: Advertising market
Overview of the actors of Cultural and creative industries (CCI) in Cottbus
C. Presentation of public and intermediate cultural sectors

1. Public sphere

Cottbus boasts a strong public cultural sector. The Culture Department of ‘Business Unit III – Youth, Culture, Social Affairs’ is also responsible for public institution. Besides supporting public institution, financial aid is also granted to the intermediate and private cultural sphere.

The largest and most important public cultural institution in Cottbus is the foundation Brandenburgische Kulturstiftung Cottbus. The Staatstheater Cottbus and the Brandenburgischen Kunstsammlungen Cottbus were merged under its umbrella in July 2004. The art collections Brandenburgische Kunstsammlungen moved to a new location, a disused diesel power station, and changed their name to Kunstmuseum Dieselkraftwerk.

<table>
<thead>
<tr>
<th>Institution</th>
<th>Investments in EUR</th>
<th>federal funding in EUR</th>
<th>state funding in EUR</th>
<th>funding by City of Cottbus in EUR</th>
<th>additional expenditures</th>
<th>further fundings</th>
<th>no. of employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>theatre, opera house</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staatstheater (State theatre)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>361</td>
</tr>
<tr>
<td>Piccolo-Theater (children’s theatre)</td>
<td>180.000</td>
<td>52.000</td>
<td>468.000</td>
<td>45.500</td>
<td>5.300</td>
<td>11.000</td>
<td>15</td>
</tr>
<tr>
<td>Brandenburgische Kulturstiftung (cultural foundation of the state of Brandenburg)</td>
<td>5.300</td>
<td>4.118.000</td>
<td>4.670.000</td>
<td></td>
<td></td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>library</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>city and regional library</td>
<td></td>
<td>1.651.000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>13</td>
</tr>
<tr>
<td>museums</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Städtische Sammlung (city collection)</td>
<td></td>
<td>1.027.600</td>
<td>155.900</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>public music schools</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Konservatorium</td>
<td>320.000</td>
<td>900.000</td>
<td>136.200</td>
<td>2.150.500</td>
<td>75.000</td>
<td>458.900</td>
<td>49</td>
</tr>
<tr>
<td>Glad-House (youth club and event location)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>15</td>
</tr>
<tr>
<td>subsidies</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>private theatres</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Festival of East European Cinema</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>cultural associations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Fig. 15: Budget spending on public and intermediate institutions and staff figures 2011 (Authors’ presentation acc. to Budget Report Cottbus and authors’ research)

The Staatstheater operates several stages, including ‘Großes Haus’, Kammerbühne, Theater scheune and Kammermusiksaal. The theatre is not only a place for the performing arts but also has opera, drama and ballet ensembles and an orchestra.

Another significant public institution with a strong relation to creative industries is the Konservatorium Cottbus, the music school of the city.

Gladhouse is a further important institution, a municipal undertaking of Cottbus which provides a variety of cultural offers for youths and young adults, such as advanced training courses in the field
of media design and literature. The Gladhouse also promotes concerts at regular intervals and operates an art-house cinema – Oben-Kino.

Fig. 15 shows the city’s budget spending and related staff figures. The chart illustrates that Cottbus Municipality does not only fund public institutions but also intermediate and private activities in the fields of culture and creative industries, mainly private and intermediate theatre stages, Filmfestival Cottbus (Festival of Eastern European Films) and various cultural associations.

2. Intermediate sphere

A total of 38 institutions were identified that can be classified as intermediate and have a strong relation to cultural and creative industries. Fig. 16 shows that 10 of those institutions are also locations for cultural events. 26 intermediate entities are associations and interest groups. However, several associations also are culturally active, e.g. by performing on stage in Cottbus as free independent theatre ensembles.
Fig. 17: Relation of public and intermediate institutions to CCI sub-markets (Authors’ survey)

The strongest relation of intermediate institutions is to performing arts (cf. Fig. 17), followed by the music market and mixed offers. The latter is due to the fact that several intermediate institutions do not focus on but one cultural field but are active in various cultural activities.
D. Presentation of polls, expert interviews, workshops and selected findings

Key sources of the contents of the SWOT analysis are the polls, expert interviews and two workshops that were hosted with local stakeholders. This section of the report presents the related working steps.

1. Implementation and procedure

1.1. Polls and expert interviews in the cultural and creative industries in Cottbus

The polls and expert interviews were conducted from April 2011 to July 2011. The polls were made with a questionnaire with both closed and open questions. Closed questions can be evaluated quantitatively, i.e. answers are presented numerically. Open questions are evaluated qualitatively and provide background information as well as an image of opinions and attitudes within the cultural and creative industries. The questions were structured into various sets of topics that were derived from the thematic structure of the SWOT analysis (see next chapter) and included:

- Locations and spatial environment
- Networks and ties to administrative and other institutions
- Economic development of one’s own business and the respective CCI sub-market
- Awareness and assessment of coaching offers and support programs
- Assessment of various factors in the whole city of Cottbus

Suggestions for improvements of the situation were also queried.

The expert interviews were also conducted in an ‘open’ manner— the above statements for open questions applied there as well. A guideline containing the key topics to be queried was used in the expert interviews we conducted. Certain elements of the questionnaire were also used in expert interviews in order to obtain a higher response rate for questions that were quantitatively evaluated. Hence, people may have been queried twice, during polls and expert interviews.

61 people participated in the questionnaire-supported polls. The return rate was almost 20% which is quite high in comparison with similar studies. The participating persons covered all sub-markets of cultural and creative industries ab. In addition, 20 expert interviews were conducted.

Respondents were selected randomly. During the asset survey, all personally met businesses and self-employed persons were asked whether they wanted to take part in the polls. The polling teams
tried to contact stakeholders who were not met personally on the phone. Stakeholders who did not show any interest were not queried.

Experts to be invited to conduct interviews were selected according to the criteria of their good overview of the sector or they were recommended to the study team by the city as points of contact.

<table>
<thead>
<tr>
<th>Number of respondents</th>
<th>Sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Performing arts market</td>
</tr>
<tr>
<td>8</td>
<td>Art market</td>
</tr>
<tr>
<td>1</td>
<td>Film industry</td>
</tr>
<tr>
<td>3</td>
<td>Radio industry</td>
</tr>
<tr>
<td>3</td>
<td>Music industry</td>
</tr>
<tr>
<td>2</td>
<td>Book market</td>
</tr>
<tr>
<td>3</td>
<td>Press market</td>
</tr>
<tr>
<td>14</td>
<td>Design industry</td>
</tr>
<tr>
<td>7</td>
<td>Architecture market</td>
</tr>
<tr>
<td>9</td>
<td>Advertising market</td>
</tr>
<tr>
<td>5</td>
<td>Games / software industry</td>
</tr>
<tr>
<td>1</td>
<td>Other / new activities</td>
</tr>
<tr>
<td>2</td>
<td>Events market</td>
</tr>
<tr>
<td>Of that:</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Public institutions</td>
</tr>
<tr>
<td>1</td>
<td>Intermediate institutions</td>
</tr>
</tbody>
</table>

1.2. Workshops

We organised and hosted two individual workshops to which CCI businesses and artists based in Cottbus were invited. The workshop participants discussed potentials of and challenges for businesses but also for the city as location of the businesses. Potential ideas for future actions were elaborated which may serve as basis for preparation and implementation of future measures.

Each workshop was attended by about 25 representatives of creative industries, artists from various fields, representatives of Cottbus Municipality, business development and cultural institutions as well as Technische Universität Cottbus.

The centre piece of the workshops was hosting a so-called World Café where a variety of questions were discussed in small groups. Each table manned by a group was chaired by a table moderator. The following questions were discussed:

- What do think is good about Cottbus as a (business) location? What is not? Why do you not move to another city?
• What do you require to further develop your business (or artistic activities)?

• What should be changed in this respect in Cottbus?
  Which kind of support for your plans do you expect from Cottbus Municipality?

• Assuming Cottbus Municipality intends to develop a Cultural and Creativity Centre. Where should such a centre be established (e.g. urban district? / disused industrial building? / at a centralised location?)?
  (This questions was only asked during the first workshop)

Essential statements made during the discussions were taken down on the ‘table cloths’ (see pictures in Appendix). The discussion sessions were changed only once during both workshops. After completion of the last discussion session, the table moderators compiled key statements in summary on file cards.

The posters and file cards were subsequently displayed and could be viewed by all participants. Every participant had the opportunity to mark statements he/she deemed to be important and which should be taken account or implemented in the future with a green dot. Statements which remained unclear and required further explanation were marked with a red dot.

The workshop attendants emphasised that investments into promotion of competences were more reasonable than an investment into a building. They said that it was also more important to generally improve spatial conditions (irrespective of the establishment of a new creativity centre) and enhance the consultancy situation in Cottbus.
E. SWOT analysis

1. Set-up and structure of the SWOT analysis

The SWOT analysis is an evaluation of various aspects which are relevant for the development of cultural and creative industries. These aspects are classified into four evaluation categories for the purposes of the SWOT analysis: Strength, Weakness, Opportunity and Threat. The categories ‘strength’ and ‘weakness’ address internal factors of an object under review while ‘opportunity’ and ‘threat’ relate to external influencing variables ab. This distinction, however, cannot be made for every analytical case. The defined subject to be analysed in our study was the sector of cultural and creative industries in Cottbus, their associated institutions (public and intermediate cultural institutions, education and supporting/funding institutions related to creative industries) and the related public financial assistance policy. External influencing variables occur at higher-ranking spatial levels due to political and legal requirements, result from socioeconomic developments and an overall economic view.

The following general questions may be asked for evaluation purposes:

- Strengths: What are the strengths of the sector and the support extended to the sector?
- Weaknesses: What are the weaknesses of the sector and the support extended to the sector?
- Opportunities: Which opportunities influence the development of the sector and the support extended to the sector?
- Threats: Which threats influence the development of the sector and the support extended to the sector?

Main topics were defined in order to obtain a clearly laid out overview of the evaluation. The main topics contained more specific detailed questions for certain aspects. The main topics are:

- Tradition,
- Economic development,
- Administration/support programs,
- Locations,
- Urban situation,
- Networks,
- Coaching/mentoring,
- Marketing/promotion

A SWOT analysis is once carried out from a cross-sectoral and city-wide perspective and then for each individual sector. A SWOT analysis from a cross-sectoral and city-wide perspective became necessary because many analytical elements are valid for all sub-sectors of the cultural and creative industries. The findings of this evaluation step were directly integrated into the summarising SWOT analysis in Chapter 2.12. Opportunities and threats typically apply also to several sub-markets and, hence, were also laid out in a separate sub-section (Chap. 2.11). In exceptional cases opportunities and threats were listed for a specific sub-market only if such opportunities and threats are only relevant for such a sub-market.
2. SWOT evaluations

2.1. Performing arts

2.1.1. Strengths

- The city has a strong theatre sector which is mainly characterised by the Staatstheater and various intermediate, partially publicly funded theatres. It can be assumed that these institutions also have respective effects on the private sector of performing arts. In addition, those public and intermediate institutions have strong demands for other offers by creative industries.
- The theatre sector can look back on a certain tradition in Cottbus. The Staatstheater, e.g., was founded in 1908.
- The Municipality’s culture department is available as a point of contact for this sub-market. We were unable to fully identify the extent to which this department also looks after stakeholders that are not yet supported.
- The Kunstfabrik is an institution which specifically advocates affairs of creative professionals.
- The theatre stages are located near the city centre and are well accessible.
- There are various stages where theatre workers can rehearse plays or hone their acting skills.
- The various divisions of performing arts are strongly represented through numerous associations and have close ties to public theatres.
- The theatre for children and young audiences provides a good entrance into the performing arts for children.
- The theatres maintain advertising campaigns.

2.1.2. Weaknesses

- A lack of adequately skilled personnel was not reported (actors, directors).
- The impact of the Kunstfabrik is restricted to a small group of addressees; opportunities to influence other institutions are rather low.
- There is no special theatre school.
- There is no exchange or networking between private, intermediate and public theatre institutions.
2.2. Art market

2.2.1. Strengths

- The number of visual artists suggests that this sub-market is strongly positioned.
- Visual artists dominate this sub-market in Cottbus; hence, considerably fluctuating economic situations can be assumed. More profound statements cannot be made on the basis of the available data material.
- The Dieselkraftwerk is a supra-regionally known exhibition location for the visual arts.
- There are various formal and informal artist groups that are also open to external people.
- The Municipality is funding the visual arts, however, above all public Institutions, such as the Dieselkraftwerk.
- There are several ties between the artists and the Municipality, e.g. artists are frequently offered to exhibit their works in municipal spaces.
- The Kunstoffabrik provides specific coaching measures for the visual arts.
- Artists are supported by making exhibition area in public buildings available to them (e.g. in the town hall).

2.2.2. Weaknesses

- The art market – despite the high number of artists – is not a generally recognised sector in the city. What is also lacking is – except for a few central institutions and stakeholders – an equally strong supportive environment.
- The value-added chains are rather weakly developed. Artists requisition various services in the city. Many working materials are also bought outside of the city to save costs. The more important value-added chain exists between artists and galleries which directly sell art. Existing galleries have built a certain stock of artists. The galleries do not seem to be frequent by high customer demands but are rather operated on an honorary basis (e.g. Galerie Haus 23). These are only prudent assessments; there are no quantitative data to underpin these statements.
- The economic situation of the majority of artists is evaluated to be rather poor. Also the galleries do not have sufficient incomes to become better known or recruit staffs to maintain regular opening hours.
- The Culture Department is exclusively taking care of public institutions. Activities of private artists and agencies are neglected.
- The impact of the Kunstoffabrik is only geared to a small group of addressees; opportunities to influence other institutions are rather low.
- There is not a single privately active gallery owner.
- Existing (intermediate) galleries are not known supra-regionally to attract visitors and potential buyers from outside of Cottbus.
- Despite a large number of existing networks, requests for further networking were made in this sub-market. This relates mainly to possible exchanges beyond the local artist circles.
- This means also that there no networks that connect businesses and administrative staffs with the artists.
- Adapted funding instruments are requested that support visual artists in Cottbus and notably promote the up-and-coming generation.
2.2.3. Neutral issues

- The only exchange between visual artists and the local university is given by the fact that several artists work at the university as professors or academic staffs. Further connections were not identified.

2.3. Film industry

2.3.1. Strengths

- During the GDR era, Cottbus was a location for test shows of cinema films that were produce elsewhere. The event location was the cinema ‘Weltspiegel’ that was recently re-opened.
- Gladhouse and Bühne 8 are also actively supporting film workers by providing relevant education offers or networking offers.
- The Filmfestival Cottbus and Lausitz.TV form a key infrastructure (or part of the value-added chain) as they either requisition services from the film industry or provide a prominent platform for film workers.
- The IKMZ of BTU Cottbus is also active in the film sector – but a special connection to local businesses could not be identified.
- The Filmfestival is of course also a major marketing platform for local film workers.
- The Stadtmarketing, in consultation with other stakeholders, is also active in order to market Cottbus e.g. as scenery and movie location – it waits to be seen if and how those efforts will have a positive effect on other film workers in Cottbus.

2.3.2. Weaknesses

- There are various stakeholders in the film industry. In terms of its number of businesses, this sector is not well positioned.

2.3.3. Neutral issues

- The economic situation of the sector is fair to middling. On the one hand, there are young, up-and-coming stakeholders who want to gain a foothold in the film market and do not (yet) operate economically efficiently. One the other hand, there are established representatives with safe incomes. All in all, there appear to be some (as yet) untapped potentials.
- There are no specific policies recognisable, although the question arises whether such would be necessary. The Filmfestival is unconditionally supported, also by local politics.
- Networks are especially important when it comes to producing film. The Cottbus-based stakeholders in this sub-market know each other. In view of the small number of privately active stakeholders, however, formal network structures would not be reasonable in this sub-market.
2.4. Radio industry

2.4.1. Strengths

- Cottbus has a local TV station and several radio stations have their main or secondary business seats in the city. It can be stated notably in this field that Cottbus, in comparison with other medium-sized cities, has an eminent significance as a radio location in the State of Brandenburg.
- Lausitz.TV and the radio stations are potential buyers of radio and film pieces, although there is a lot of in-house production. Identification of important value-added chains and their quantitative evaluation was not possible.
- A number of radio moderators are involved into the cultural life in Cottbus – the extent to which this strengthens further value-added chains cannot be evaluated.
- Networks are recognised as important developments opportunities for stakeholders who voiced the request to intensify their cooperation in such networks.

2.4.2. Weaknesses

- The regional TV station very much relies on advertising income. A decrease of such revenues due to external factors (e.g. Internet offers) may jeopardise its operation.

2.5. Music market

2.5.1. Strengths

- Strong educational sector for classical-oriented music genres that covers age groups from children via young people to adults (conservatoire, UAS, private music schools)
- There are also successful stakeholders in pop culture. They have created their own ‘Home-base’ as economic foundation in Cottbus. This statement applies also to some DJs, which are currently being booked across Germany and also internationally.
- There are various opportunities for public performance by bands and artists in pop/rock/techno, i.e. a sufficient number of diverse clubs and discotheques.
- Festivals like the Toni-Festival and Kontour concerts serve as ‘launching pads’ for young, aspiring artists.
- As regards jazz, there is a lack of opportunities to perform, i.e. complaints are made that places to publicly perform in relevant locations are rare (jazz clubs, pubs with stages).
2.5.2. Weaknesses

- There are numerous bands in Cottbus. Their name recognition and thus also their value-adding activities, however, are rather limited.
- Networks seem to be rather underdeveloped. Each music scene has smaller networks.
- There are no record labels in Cottbus but a few recording studios and other support activities for pop bands. Only a few associations are active in this field, e.g. Chekov, Toni-Festival or Bebel.
- Potential places for gigs partially suffer from drops in visitor numbers and entailed income problem. Some well-known performance locations are threatened by closure or have already been closed (Muggefug).

2.6. Book market

2.6.1. Strengths

- Various authors are living in the city, some publish worldwide.
- The Gladhouse Kulturwerkstatt P12 hosts a literature workshop.
- Many publishers are working just for the lover of literature.

2.6.2. Weaknesses

- Classical publishing houses are poorly presented in the growing online segment.
- Existing publishing houses are rather focusing on the region.
- Economic situation of many publishing houses is rather weak due to low sales.

2.7. Press market

2.7.1. Strengths

- Strong regional daily newspaper (Lausitzer Rundschau), which is also economically active in other press markets.
- Further active dailies.
- Also a multi-faceted magazine landscape exists, both as print media and online, reports and informs about local cultural offers (Hermann, blicklicht, Localido, nachtleben-city.de, city-guidecottbus.de)
- Sufficient numbers of skilled personnel (editorial vacancies).

2.7.2. Weaknesses

- A high number of networks was not identified.
2.8. Design industry

2.8.1. Strengths
- Various design agencies with different orientations.

2.8.2. Weaknesses
- High competitive pressure due to large number of businesses.
- Several businesses suffer from demand problems – they cannot sell large quantities of their design products.

2.9. Architecture market

2.9.1. Strengths
- There are numerous architecture firms in Cottbus and thus multi-faceted offers.
- The university and the UAS (FH) offer relevant study courses.

2.9.2. Weaknesses
- It is difficult to estimate the demand for services in this sub-market. General experiences and decreasing construction activities suggest that the future prospects for the architecture market are not particularly good.

2.9.3. Discussion
- Only weak networking of architects amongst each other or with other sectors was found. It could be queried, however, which value-added could be generated by networking of architects.

2.10. Advertising market

2.10.1. Strengths
- The advertising market is strongly represented in Cottbus.
- There are formal networks for the advertising market in place (Marketing club network).
- Highly committed stakeholders are active in the advertising markets who, *inter alia*, are trying to intensify networking in this market.

2.10.2. Weaknesses
- There is a high competitive pressure.
- Especially smaller businesses find it difficult to hold their ground in the market or compete against bigger advertising service providers.
### 2.11. External influencing factors (opportunities/threats)

#### 2.11.1. Opportunities

<table>
<thead>
<tr>
<th>Economic situation</th>
</tr>
</thead>
<tbody>
<tr>
<td>- The FilmCity Babelsberg has made Brandenburg into a well-known film shooting and production location of which Cottbus can profit.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Support structures, politics, administration</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Political direction decisions regarding support for CCI were made at national and federal state levels, also stakeholders at the local level can profit from the results.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Urban situation/soft factors</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Good leisure-time offers</td>
</tr>
<tr>
<td>- ‘Green” city with a high quality of life</td>
</tr>
<tr>
<td>- Low rental rates for commercial and office uses</td>
</tr>
<tr>
<td>- Potential properties for use by creative professionals are available (vacancies)</td>
</tr>
<tr>
<td>- In certain locations: Good to very good building stock</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Locations</th>
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</thead>
<tbody>
<tr>
<td>- Partially good locational factors (motorway access, available commercial spaces)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Infrastructure</th>
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</thead>
<tbody>
<tr>
<td>- University and UAS (FH) provide potentials of qualified staff</td>
</tr>
<tr>
<td>- Good access to transport infrastructures</td>
</tr>
<tr>
<td>- Good cultural and social infrastructure for adults, youths and children</td>
</tr>
<tr>
<td>- There are excellent mutually complementing intermediate and public institutions in the sphere of culture (theatre sector, partially in the art market, classical music)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Networks</th>
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</thead>
<tbody>
<tr>
<td>- Intermediate institutions (associations, interest groups) are active in many sectors of the creative industries sand have strong ties to public institutions.</td>
</tr>
</tbody>
</table>

#### 2.11.2. Threats

<table>
<thead>
<tr>
<th>Economic situation</th>
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</thead>
<tbody>
<tr>
<td>- Demographic development will result in further potential drop in demand for creative industry products and services.</td>
</tr>
<tr>
<td>- Low wage levels</td>
</tr>
<tr>
<td>- Low price levels</td>
</tr>
<tr>
<td>- In some sectors, lack of skilled personnel and qualified young talent</td>
</tr>
<tr>
<td>- Locational competition between cities</td>
</tr>
<tr>
<td>- Increasing locational flexibility of businesses</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Socioeconomic development</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Out-migration of qualified people, danger of skilled personnel shortage</td>
</tr>
<tr>
<td>- Drop in consumer numbers</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Support structures, politics, administration</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Budget of the city of Cottbus is threatened by further curbing, i.e. leeway for support initiatives will become narrower.</td>
</tr>
</tbody>
</table>
Urban situation/soft factors

- Comparably high housing rental rates.
- Partially unoccupied and potential properties that could be interesting for creative uses, high rehabilitation demands (e.g. disused factories along railway route)
- Cottbus, despite local university and UAS, is not conceived as a city of students.

Locations

- Inner-city commercial properties: further increasing rental rates.
- Existing hotspots are not properly strengthened (e.g. Friedrich-Ebert-Str.).
- Hotspot in Parzellenstraβe: poor transport access.
- This means: Potentially positive effects of clusters/hotspots, induced by spatial proximity, cannot be exploited.

Infrastructure

- In relation to population figures: low number of ‘Third Places’ and in-bars/in-pubs
- Budget situation may prompt decommissioning of key infrastructures.

Other aspects

- Proximity between stakeholders

2.11.3. Neutral issues

- The proximity to Berlin can be deemed a threat because it accelerates out-migration of creative stakeholders and businesses while Berlin, on the other hand, is also a potential sales and cooperation market.

2.12. Summarising SWOT

2.12.1. Strengths

**Tradition**

- High level of loyalty towards the city:
  - High rate of owner-operated businesses (ca. 92%)
  - 84% of respondents are not thinking about moving to another city
- The theatre sector has a certain tradition in Cottbus. The Staatstheater was founded in 1908.

**Economic situation**

- There are experienced and established businesses in the sectors design, advertising, architecture and software/games which, as anchor companies, can generate further growth in their respective sub-markets.
- There is a staffing demand, i.e. a potential demand for employees.

**Support structures, politics, administration**

- There is a major general support funding program.
- The Kunstfabrik is an institution which specifically advocates affairs of creative professionals.

**Locations**
- High rate of inner-city locations in Cottbus that are much sought after by businesses.

### Infrastructure

- The UAS (FH) and BTU provide major advanced education offers which, however, have only limited education offers for creative industries.
- Advanced training offers for start-ups in the creative industries are available.
- Strong offers are available in the sub-cultural sphere that may be used as ‘launching pads’ for up-and-coming artists and creative professionals (Toni-Festival, Kontour-Projekte, Muggefug, Seitensprung, Chekov, Gladhouse).
- The theatre for children and young audiences provides a good entrance into the performing arts for children.
- There are information media which report about certain sectors in cultural and creative industries, notably in the event sphere (e.g. Localido, Hermann, Blicklicht).

### Networks

- Knowledge of creative businesses of each other: Potential cooperation partners for new projects and implementation of ideas are known.
- There are various formal and informal artist circles which are also accessible by external people.

### Coaching/mentoring

- There are coaching programs for the creative industry professionals in place.

### Marketing/promotion

- There are several stakeholders in Cottbus which come out with high commitment for their sub-market and/or the entire creative industries (Kunstfabrik, Tafelrunde).
- There are information media which report about certain sectors in cultural and creative industries, notably in the event sphere (e.g. Localido, Hermann, Blicklicht).

### 2.12.2. Weaknesses

### Tradition

- There are no internationally popular artists living in Cottbus.
- Cottbus is mainly perceived as a (former) working-class city, whose structures reflect on the economic situation of creative professionals. Expressions are, e.g., a low demand for specific offers by the creative industries.
- The sub-markets music industry and art market, e.g., are strongly represented in terms of figures but what is missing is a highly supportive environment.

### Business and management aspects

- Investments required for further development of businesses are in some instances avoided.
- Despite a high number of offers, notably young creative businesses have severe problems in marketing and selling their products and services. The reasons include lack of capital (to outsource such activities or recruit skilled employees) but also missing expertise.
- New sales markets are developed in several sub-markets only to a minor extent or not at all.
### Economic situation

- In some instances, there is a lack of skilled personnel and qualified young talent.
- Several sub-markets (notably in the events market) are characterised by competitive relationships that are based on a perceived unequal preference of certain stakeholders by the Municipality or the university.
- The economic situation and future prospects are assessed by stakeholders to be merely average.
- New staff members are not recruited because the risk of hardly assessable future prospects is shunned although there is a demand for additional staffs in several sub-markets.
- Development of new sales markets is lagging or not initiated at all.
- Reluctant preparedness to invest.

### Support structures, politics, administration

- To date, there is no explicit local policy relating to cultural and creative industries. National government and federal state policies made it to the local level only through third parties (e.g. regional office of the Competence Centre).
- Cottbus Municipality does not maintain known points of contact for the cultural and creative industries.
- Funding schemes are difficult to access. Responding stakeholders lament high level of lack of orientation in the field of public funding programs.
- Public offers for consultancy and support are difficult to identify by creative stakeholders.
- The impact of the Kunstfabrik is only geared to a small group of addressees; opportunities to influence other institutions are rather low.
- Sub-cultural activities and networks feel neglected or disadvantaged by the Municipality.

### Locations

- Excepting the sectors performing arts and music industry, there are hardly any focal points that were specifically established for a given sector.

### Infrastructure

- Several sub-markets suffer from weak infrastructure facilities for distribution of products by creative industries and low supra-regional name recognition. This relates to galleries, music clubs and trade fairs.
- Trade fairs at regular intervals for the creative industries are almost completely absent.
- There are no online exchange platforms in Cottbus.
- Physical meeting points and presentation platforms for sub-markets or the entire creative industries are rather poorly developed. There are no further local offers besides festivals such as the Filmfestival of Eastern European Films, ‘Night of Creative Brains’, music festivals and the Creative Trade Fair which is not held at regular intervals. The art festival ‘kottbuskus akut’, e.g., was discontinued.

### Networks

- A lack of commitment among administrative stakeholders is complained about. Administrative level contact persons for the creative Industries are not known.
- Close acquaintance of stakeholders with each other may give rise to lock-in effects: It is always assumed that potential project partners are known and new developments are not perceived. At the same time, new stakeholders find it difficult to access existing networks and thus provide new stimulations. Several respondents, e.g., feel poorly networked in Cottbus.
- There are some connections between businesses and the university but such are deemed by many responding stakeholders as being too underdeveloped.

**Coaching/mentoring**

- Coaching offers are available in Cottbus. Offers specifically geared to the needs of creative professionals, however, are under-represented.

**Marketing/promotion**

- There is no marketing strategy of the creative industries in place.
F. Conclusions and recommendations for action

The issues relating to strengths and weaknesses detailed in the previous chapter will be summarised in the following chapter and appropriate conclusions will be drawn (Chap. 1). Recommendations for action can be deduced from various SWOT issues and conclusions and will be explained in Chapter 2 below (Chap. 2).

1. Conclusions

Strengths and weaknesses in individual sector of cultural and creative industries in Cottbus come in different manifestations. It is not possible to underpin all weaknesses with adequate measures within the scope of the UCP Project. It should also be borne in mind that not necessarily all weaknesses have tackled when their remediation requires unreasonable efforts. It is often worthwhile to continue to strengthen existing strengths and focus on relevant priorities. Such a strategy seems to be much more promising because it can be based on proven approaches. Examples of the latter include the Internationale Filmfestival, the multi-faceted theatre sce and the comprehensive visual art market.

But also threats and opportunities play a major role:

The sectors of cultural and creative industries in Cottbus have to respond to different overall economy-related and sector-specific tendencies and developments. Such comprise trends like globalisation, increasing digitisation of previously analog contents, the further increasing significance of the Internet but also demographic change and its consequences.

Businesses and artists have to successfully cope with such challenges in order to be successful in the future. In this context it is up to each individual business and its employees to be or stay successful. This UCP Project but also the Municipality in general can only improve framework conditions or making supportive offers available.

'Being successful' does not necessarily mean that the revenues of a business or an artistically active person have to continually grow and new employees have to be permanently hired. It became evident from the interviews that it may suffice for many a stakeholder to generate income which covers his/her personal cost of living. This is a totally reasonable purpose for operating a business or working as a free-lancer.

Framework conditions and funding programs can be modified at economic policy and urban development policy levels in order to provide a good starting situation to local CCI businesses and artists so that they gain acceptance in the market. Both the Municipality and the UCP Project can contribute towards this end. Adequate potential proactive approaches will be explained in the following chapter.
2. Conclusions and recommendations from a business and management perspective – Acquisition of new markets and extension of sales areas

Digitisation of markets, in particular of creative industry offers, is a challenge which many businesses in Cottbus still have to face. There is an urgent demand for action in this context to avoid losing sales markets and distribution channels and not lag behind competitors in other cities. This applies especially to the press market, the book market and the music industry.

Several initiatives were already launched in Cottbus and should now be intensified. What is recommended in this respect is to step up cooperation of companies in the IT sector and the advertising market which have already gathered experiences. The Municipality could act in this area as an initiator by commissioning development of relevant applications or lending a hand in bringing together relevant stakeholders.

Another aspect that relates to sales markets comes as a consequence of demographic change, i.e. a decline in consumers with local demands for products and services. Businesses can compensate such decrease by extending their sales areas. A number of businesses in cultural and creative industries in Cottbus have already successfully managed to do so. Others are lacking the necessary know-how and adequate resources to successful operate supra-regionally. Urgent action is adamant in this field.

Extension of sales markets and a respective orientation of businesses and self-employed people gives rise to new threats: Positioning at the supra-regional level requires adequate precautions which entail capital expenditure. A return on such investments, however, is not guaranteed.

3. Recommendations for action by framework-setting stakeholders

a. Enhancing acceptance of creative industry businesses

It became apparent that the cultural and creative industries are not given the requested attention by public stakeholders, such as business development and Municipality, or institutions like IHK. Acceptance of CCI businesses by public authorities and institutional stakeholders must be continually strengthened.

Various individual measures, which will be described in the following, can be deemed parts of such improvement of acceptance – e.g. naming of a concrete point of contact.

In the context of enhancing acceptance, the whole range of creative industries has to be taken into consideration, as it is made up not only of businesses but also of free-lance artists and sub-culture oriented stakeholders. The latter are parts of the intermediate sector. But there are also sub-culture
oriented stakeholders that dare to move from the sector to private-sector initiatives and require special consideration. What should also be borne in mind is that especially a sub-cultural environment, irrespective of whether it is part of the private or intermediate sector, provides a free space for experimenting, trying out and testing new ideas before launching them into the market. This is why sub-culture is an important element of the whole field of economy for many sub-markets of the cultural and creative industries (especially for music). This fact must not be neglected in future funding measures.

Another issue can contribute to enhance acceptance which was re-iterated by responding stakeholders: Local businesses should be better considered in public contract awards.

b. Information and consultancy (funding counselling)

Many creative industry professionals are not aware which funding programs exist for financing creative industry ideas and business start-ups and how such funds can be obtained. This situation should be remedied. Overviews of information on existing funding and consultancy offers that are specifically suitable for the cultural and creative industries could be made available.

However, often it does not suffice to merely inform about relevant programs. The application filing process is so time-consuming that companies find it difficult to deal with it besides their day-to-day business. Possibilities should be reviewed whether business consultants could be commissioned at reasonable rates or institutional stakeholders could assist in checking support programs for their suitability and process relevant applications for creative businesses.

The point of contact mentioned in the preceding section would also be suitable and could take on a more comprehensive function. The point of contact would not only be in charge of communication between administration, institutions and entrepreneurs but also of mediation and assistance in filing applications for support programs.

It would offer itself in this context to establish a consultancy centre, which may be done connection with setting up a creativity centre (s. Lit. g.) or independently. Such a consultancy centre could be a central place where businesses can obtain various public and private-economy consultancy services: The services would reach from arranging the correct contact person in the administration via supporting financial aid consultancy to legal counselling and business and management support. The issue of the responsible body and financing will have to be clarified. The financing options for a network manager explained in the following section can be transferred to a consultancy centre.

c. Building new / strengthening existing networks and ties between businesses, artists and (public) institutions

As already explained above, there are several networks and associations in Cottbus. In some cases there are also good relations between individual stakeholders in creative industries and public institutions, such as the Municipality or the university.
All in all, though, the network structures seem to be in need of improvement. Then the question arises what the networks should look like to generate synergies? Who will take care of the networks and will they require certain focal points or organised meetings in order to function?

Cultural and creative industries are a very heterogeneous body; hence, establishing one overall networks for the entire creative industries is not likely to achieve the intended purpose. Because sector-internal networking in itself will increase the mutual level of acquaintance and may lead to some partnerships but will not be able to exploit the comprehensive potentials for cooperation in Cottbus. The reason is that the biggest value-added is anticipated from project-related cooperation between stakeholders with differing operations backgrounds.

This means: Any networks to be set up should be oriented towards achieving the defined objectives. Other networks, e.g. such serving exchanges of artistic ideas, seem to be already partially in place. Another aspect worth considering is the fact that organisations like Marketing-Club Cottbus are existing and provide ample opportunities to get to know each other. Hence, a newly created offer should be closely harmonised with existing ones.

Likewise of eminent importance is that network structures to be created must be consistent and require somebody to take the professional management of such network to make it a success.

Both aspects – target orientation and consistency of new network structures – can only be achieved with support by a network manager. Such a manager has to be appointed.

There are no funds available under the UCP Project for financing a network manager. Hence, this function would have to be financed by a different body. Possible options could be:

- Participating artists, creative professionals and businesses pay contributions towards financing this position.
- The Municipality will become involved.
- A third source of financing will be sought in order to fund the position – at least for an initial period (EU grants, etc.).
- A combination of the three above options will be implemented.

The suggested options should be further discussed in detail during the further course of the project.

d. Improving the external presentation of businesses and Cottbus Municipality

The perception and external presentation of activities by cultural and creative industries have to be strengthened.

What is missing is a shared marketing platform for businesses and/or artists in order to increase their external conspicuousness. This may be, e.g., a Website where businesses and artists from
sectors cultural and creative industries extensively present themselves and their products/services or provide links to their own Websites in order to attract customers/clients.

A large number of respondents think that the city itself would require an innovative and attractive corporate design (e.g. via the city’s Website) and an adequate marketing strategy.

e. Coaching offers

Coaching offers may form part of advanced business and management training for creative industry businesses, like specific assistance in sales and marketing. There are already a number of coaching schemes available in Cottbus but it became apparent that such are not always accurately targeted to creative industry professionals and that there is still a further demand.

A review should be performed which offers are necessary in the field of coaching. There is a small UCP budget available for this exercise.

f. Locational conditions and property situation in Cottbus

The situation regarding suitable commercial properties or rooms is largely deemed to be good. Some creative professionals, however, seem to have difficulties finding suitable working spaces.

It was suggested in this context to make inner-city vacancies should available for temporary uses.

g. Creativity Centre

The idea of a creativity centre met with a mixed response. On the one hand, the idea was shared that such a centre could act as a hotspot of creative professionals and could provide assistance for the entire cultural and creative industries in Cottbus, also in connection with the centre-provided consultancy offers. What would have to be fully considered is which targets and purpose such a creativity centre to avoid competing against existing institutions.

On the other hand, it was emphasised that capital expenditure on promoting competences would be more reasonable than investments in a building. It was also deemed more important to generally improve spatial conditions (irrespective of establishing a new creativity centre) and the consultancy situation in Cottbus.

h. Other aspects

A further general suggestion was made in connection with the above-mentioned deficits in institutional counselling – namely establishment of a central point of contact to support ideas and provide consultancy.

The promotion of culture is perceived to be too one-sided and well-worn.

It was suggested for the artistic sector to grant scholarships to up-and-coming artists in order to counter the decrease in young talent.
It was emphasised that this must be a sustainable project in order to be successful. This aspect should be considered in the further project progress.

The previous support of public and intermediate but also private-sector cultural agencies and events by the Municipality should be continued. This approach was the important backbone for the cultural and creative industries in the city.
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Herr Brune, Geschäftsinhaber adtower, Befragung am 4.7.11 in Cottbus
Herr Dietrich, Stellvertretender Direktor Konservatorium Cottbus, Befragung in Cottbus
Dr. Franke, Geschäftsführer Architekturbüro Jürgen Franke BDA, Befragung am 06.06.2011 in der Neustädter Straße 6 in Cottbus
Herr Fricke, Geschäftsführer Eis Skulpturen Manufaktur Cottbus, Befragung am 25.05.2011 in Cottbus
Frau Fröner, Leiterin Cottbus Service (Stadthalle Cottbus), Befragung in Cottbus
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Herr Grund, Inhaber WESEG Werbeservice, Befragung am 08.06.2011 am Stadtring 3 in Cottbus
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Frau Kaiser, Studio für Fotografie Goethe, Befragung am 20.05.2011 in Cottbus
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Frau Grube und Frau Paulig, Stadtmarketing- und Tourismusverband Cottbus, Gespräch am 06.07.2011 in ihrem Büro

Herr Hanitzsch, Chillout Lichtdesign, Gespräch am 17.06.2011 in seinen Ausstellungsräumen, Cottbus

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Herr Dr. Mund, Geschäftsführender Direktor, Gespräch am 07.06.2011 in der Lausitzer Straße 33 in Cottbus

Herr Pittasch, Redakteur Blicklicht und Geschäftsführer P.I.S.A, Gespräch am 31.5.11 in Cottbus

Herr Richard, Chefredakteur Der Fabrik Verlag GmbH, Gespräch am 30.05.2011 in Cottbus

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