Business Kolding

REGIONAL NEEDS REPORT – Southern Denmark

CCSI4CCSI

MLS
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Content

# REGIONAL NEEDS REPORT – Southern Denmark

1. Executive Summary

- **Region:** Southern Denmark
- **Date:** March 2025
- **Report Prepared By**: Business Kolding, MLS

- **Key Findings** (summary of top challenges and opportunities):
  - Challenges: Fragmentation in the CCSI ecosystem, difficulty accessing markets, limited digital transformation, and insufficient cross-sector collaboration.
  - Opportunities: Strong potential for digital transformation, internationalization, sustainable creative practices, and creative hub development.

- **Recommendations** (summary of proposed solutions or next steps):
  - Establish creative incubators and digital infrastructure.
  - Promote internationalization strategies.
  - Facilitate cross-sector partnerships.
  - Implement policy support for creative funding and innovation.

2. Introduction

- *Purpose of the Report:*
  To assess the current needs, challenges, and opportunities for the CCSI sector in Southern Denmark.

- *Objectives*:
  - Map challenges hindering CCSI growth.
  - Identify growth opportunities.
  - Recommend strategic and policy solutions.

- *Regional Context:*
  Southern Denmark hosts a strong creative ecosystem with key players like LEGO, ECCO, and Design School Kolding. CCSI sectors include design, architecture, fashion, digital media, crafts, and cultural heritage.

- *Methodology Used:*
  -Desk research, regional ecosystem analysis, stakeholder surveys, focus group consultations.

- *Stakeholders Involved:*
  -Design School Kolding, Business Kolding, SDU, local municipalities, SMEs, creative professionals, cultural institutions.
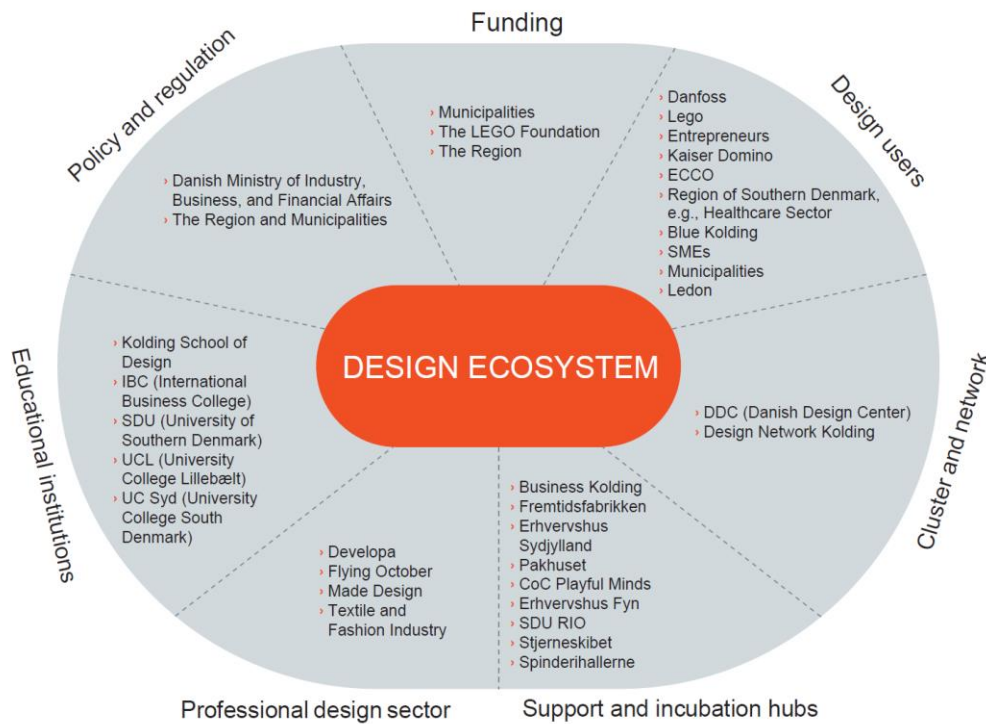
Figure 1: (2021)DESIGNSKOLEN KOLDING & REGION SYDDANMARK, ØKOSYSTEMANALYSE AF DESIGNOMRÅDET I SYDDANMARK (slightly adapted to current ecosystem, and translated to English)

3. Current Challenges in the CCSI

- *Challenge 1: Funding*
  Description: Limited access to business or project financing reported by 16.67% of stakeholders.
  Severity: Moderate
  Data/Evidence: Needs assessment survey

- *Challenge 2: Access to Markets*
  Description: 33.33% of stakeholders cite challenges in market access and audience engagement.
  Severity: High
  Data/Evidence: Needs assessment survey

- *Challenge 3: Skills Development*
  Description: Gaps in digital skills and international marketing training.
  Severity: Moderate
  Data/Evidence: Desk Research

- *Challenge 4: Cross-Sector Collaboration*
  Description: Collaboration between sectors like tourism and education is insufficient.
  Severity: High
  Data/Evidence: 33.33% of survey respondents highlighted this issue.

4. Opportunities for Growth in the CCSI

- *Opportunity 1: Digital Transformation*
  Description: Adoption of digital tools and platforms for content creation, delivery, and promotion.
  Potential Impact: High – Enables scalability and audience reach.

- *Opportunity 2: Cross-Sector Collaboration*
  Description: Strong interest in working across sectors such as tech, education, and tourism (83.33%).
  Potential Impact: High – Encourages innovation and resilience.

- *Opportunity 3: Internationalization*
  Description: Exporting creative goods and services.
  Potential Impact: Medium – Growth in cultural exports and global brand visibility.

- *Opportunity 4: Creative Hubs & Sustainability*
  Description: Interest in developing sustainable practices and creative incubators.
  Potential Impact: High – Aligns with EU green goals and supports talent development.

5. Support Mechanisms Needed

- *Support Mechanism 1: Funding and Grants*
  Description: Need for accessible public and private grants for creative startups.
  Recommended Solutions: Establish regionally coordinated funding programs and EU fund facilitation.

- *Support Mechanism 2: Business Development and Training*
  Description: Skills development in entrepreneurship, digitalization, and internationalization.
  Recommended Solutions: Partner with universities and hubs to deliver modular training.

- *Support Mechanism 3: Networking and Collaboration*
  Description: Lack of regular collaboration opportunities among sectors.
  Recommended Solutions: Expand regional creative networks and cross-sector initiatives.

6. Policy Recommendations

- *Recommendation 1: Policy Reform for Funding*
  Description: Expand regional grant schemes and ease access to national/EU funding.
  Rationale: Address identified funding barriers.
  Expected Outcomes: Increased project sustainability and startup success.

- *Recommendation 2: Enhancing Digital Infrastructure*
  Description: Invest in digital tools, and digital training hubs.
  Rationale: Low uptake of digital transformation among stakeholders.
  Expected Outcomes: Greater competitiveness and innovation capacity.

- *Recommendation 3: Fostering Cross-Sector Partnerships*
  Description: Develop a regional CCSI collaboration strategy.
  Rationale: Stakeholders highlight weak sectoral integration.
  Expected Outcomes: Enhanced innovation and joint project opportunities.

7. Conclusion and Next Steps

- *Summary of Key Findings:*
  Southern Denmark's CCSI is strong in design and innovation but faces gaps in market access, funding, and collaboration. Opportunities exist in digitalization, sustainability, and internationalization.

- *Immediate Next Steps could be:*
  - Initiate pilot training programs.
  - Establish digital hubs and regional networks.
  - Begin cross-sector strategy development.

- *Timeline for Implementation:*
  Q2–Q4 2025

- *Responsible Parties:*
  Business Kolding, local municipalities, Design School Kolding, cultural institutions, regional policy makers.

8. Appendices

Include any supplementary materials, such as survey questionnaires, data tables, charts, or additional notes from stakeholder consultations.

Stakeholder Mapping - Southern Denmark (CCSI4CCSI)

Stakeholder Category	Stakeholder Name	Role in CCSI	Influence Level (Low/Medium/High)	Interest Level (Low/Medium/High)	Engagement Strategy
Public Authorities	Kolding Municipality	Policy creation, funding, cultural infrastructure	High	High	Regular consultation and involvement in decision-making processes
Public Authorities	Business Kolding	Local development support for CCSI entrepreneurs	High	High	n.a.
Public Authorities	Odense, Sønderborg, Esbjerg, Vejle Municipalities	Local policy development and event facilitation	Low	High	Consultation and co-organization of events
Public Authorities	Region of Southern Denmark	Strategic regional development and funding	Medium	High	Formal regional coordination and policy input
Educational Institutions	Design School Kolding	Education, design research, innovation	High	High	Research collaboration, skills development, policy advice
Educational Institutions	University of Southern Denmark (SDU)	Higher education, cross-disciplinary research	High	High	Strategic partnerships and knowledge exchange
Educational Institutions	UCL, UC Syd	Vocational training and regional competence building	Medium	High	Curriculum development and joint programs
Business Sector	Gnist Marketing, Bureau Syd, Compell	Advertising & branding services	Medium	High	Business incubators, B2B networks, joint projects
Business Sector	FilmFyn, M2Film, TV Syd	Audiovisual and film production	High	Medium	Public-private collaboration, regional co-productions
Business Sector	Crunchy Frog, Esbjerg Ensemble, Syddansk Musikkonservatorium	Music production and performance	Medium	Low	Festivals, talent development, creative hubs

Business Sector	Funday Factory, Troldspejlet & Co.	Gaming and digital experiences	Low	Low	Tech-partnerships and creative labs
Business Sector	Noa Noa, Molo, Masai	Fashion and textile innovation	High	High	Sustainability projects, export initiatives
Business Sector	Book Lab, Gyldendal (local printing)	Publishing and editorial design	Medium	Low	Workshops, creative content collaborations
Business Sector	Cebra, Transform Architects	Architecture and design for urban spaces	Medium	Low	Urban development projects and exhibitions
Business Sector	Odense Teater, Vejle Musikteater, Sønderborg Teater	Performing arts venues and production	High	Low	Creative productions, community engagement
Business Sector	Trapholt, Brandts, Tirpitz	Museums and cultural heritage	High	High	educational programs, public dialogue
Funders & Investors	Erhvervshus Sydjylland	Funding and growth advice for SMEs	High	High	Advisory services, growth programs
Funders & Investors	Vækstfonden	Investment in startups and scale-ups	High	Medium	Investment partnerships, capital networks
Funders & Investors	EU Interreg Projects	Cross-border funding and development	High	High	Grant programs, regional policy coordination
Creative Hubs/Networks	Creative Business Network (Odense)	Support for creative entrepreneurship	Medium	Low	Workshops, matchmaking, internationalization
Creative Hubs/Networks	Lifestyle & Design Cluster	Sector innovation and cluster development	High	High	Cluster facilitation, innovation labs
Creative Hubs/Networks	Danish Creative Industries Network (Kolding)	CCSI platform for collaboration and advocacy	Medium	High	Joint statements, conferences, lobbying
Creative Hubs/Networks	CoC Playful Minds (Billund)	Creative education and play innovation	Medium	High	Pilot programs, collaboration with schools

Regional CCSI Environment: SWOT Analysis – Southern Denmark

Strengths

Identify the internal strengths within the region that support cultural and creative sectors and industries.

• Strong Design and Innovation Ecosystem: Home to leading global companies (LEGO, ECCO, Danfoss) and institutions like Design School Kolding.

• Educational and Research Capacity: Presence of SDU, UC Syd, UCL, and Design School Kolding fosters talent and interdisciplinary knowledge.

• Public-Private Collaboration: Active support from municipalities and regional actors like Business Kolding and Erhvervshus Sydjylland.

• Cultural Infrastructure: Museums (Trapholt, Brandts), theatres, festivals, and creative hubs support engagement and visibility.

Weaknesses

Identify internal challenges and limitations that may hinder the growth of CCSI.

• Fragmentation Across the Sector: Lack of coordination and strategic partnerships limits scaling potential. (50% in the survey)

• Limited Access to Business or project Financing: Survey shows 16.67% of respondents find financing a challenge.

• Skills Development Gaps: Though educational institutions are strong, there is a gap in digital and international marketing skills.

• Infrastructure Gaps: Some areas lack accessible creative spaces and digital transformation resources.

Opportunities

Identify external factors that could foster growth and expansion for CCSI.

• Internationalization Potential: 33.33% of survey respondents see exporting creative products/services as a key opportunity.

• Cross-Sector Collaboration: High interest (83.33%) in working with other sectors (tech, tourism, education).

• Sustainable and Eco-Friendly Innovation: 50% of stakeholders prioritize sustainable practices, aligning with regional and EU green goals.

• Cluster Development: Strong potential to strengthen local creative hubs and incubators (50% support).

Threats

Identify external factors that could pose challenges or barriers to the success of CCSI.

• Post-COVID Cultural Recovery: 33.33% still identify pandemic impact as an ongoing challenge.

• Audience Engagement: 16.67% report challenges with reaching or engaging audiences.

• Competition from Larger Creative Hubs: National and international cities may outpace Southern Denmark in attracting talent and investment.

• Uncertain Policy Landscape: Changes in EU/regional funding or national priorities could affect cultural project financing.

1. Policy and Strategic Framework

Local and Regional Policies (National can also be included):
Southern Denmark actively supports CCSI through initiatives such as Business Kolding's previous design-driven growth programs (VekselWirk), municipal cultural strategies, and funding opportunities viaErhvervshus Syddanmark). Nationally, Denmark's cultural policy emphasizes access to culture, innovation, and digital development within the arts.

Strategic Alignment:
CCSI aligns with regional smart specialization strategies by promoting innovation, digital transformation, sustainability, and education. It contributes to regional priorities in creative education, green growth, and tourism.

Legislative Environment:
Denmark's robust legal framework protects intellectual property, facilitates entrepreneurship, and supports open access to cultural heritage.

Funding & Incentives (mainly on local and regional level, but national can also be included):
Key funding bodies include the Danish Arts Foundation, EU Interreg programs, and regional business development centers. Local municipalities and cultural foundations also provide grants and networking support.

2. Economic Contribution of CCSI

GDP and Revenue Generation:
CCSI contributes approximately 6% to Denmark's national GDP. In Southern Denmark, over 2,500 creative enterprises operate in sectors such as design, architecture, fashion, digital content, and crafts.

Employment & Workforce Trends:
Thousands of jobs are linked to CCSI in the region. Talent is fostered through Design School Kolding, SDU, and vocational institutions. There are growing demands for digital and international marketing skills.

Business Ecosystem:
The region features a strong mix of SMEs, cultural institutions, and global players like LEGO and ECCO. Startups and freelancers are supported by creative networks and local business hubs.

Export and Trade:
Internationalization is growing, with 33% of surveyed stakeholders identifying export as a major opportunity. Cultural exports and collaborations are expanding through EU programs.

3. Innovation and Digital Transformation

Creative Innovation Hubs:
Entities such as CoC Playful Minds (Billund), Creative Business Network (Odense), and Design School Kolding drive entrepreneurship, education, and innovation within CCSI.

Technology Integration:
While only 33% of survey respondents emphasized digital transformation, there is rising interest in using digital tools, virtual reality, and AI across subsectors.

Research & Development (R&D):
SDU and Design School Kolding are key players in CCSI R&D. Cross-sector innovation with healthcare, education, and green design is increasing.

4. Social and Cultural Impact

Community Engagement:
Local cultural institutions (e.g., Trapholt, Brandts, Nicolai Kultur) engage the community through events, exhibitions, and workshops. CCSI fosters inclusion and place-based identity.

Cultural Identity & Heritage:
The region's museums and festivals celebrate Danish design heritage, crafts, and performing arts. Storytelling and visual culture are key assets.

Sustainability & Environmental Impact:
50% of surveyed stakeholders see sustainable design and green production as priorities. Fashion and architecture sectors increasingly embrace circular economy practices.

5. Challenges & Opportunities

Gaps and Barriers:
Key challenges include fragmentation in the sector, limited cross-sector collaboration (33.33%), lack of digital infrastructure in some areas, and limited access to business/project financing (16.67%).

Opportunities for Growth:
Stakeholders highlight expansion of local networks (83.33%), cross-sector collaboration (83.33%), and innovation in business models (66.67%) as key opportunities. Export potential and incubator development are also major growth areas.