



Herstart agenda voor handelsbevordering post Corona

Creative Industry USA

Commissioned by NLinBusiness

**GLOBAL CHALLENGES,
DUTCH SOLUTIONS.**

POST COVID-19 BOUNCE BACK OF THE CREATIVE INDUSTRIES CREATING MARKET OPPORTUNITIES & COLLABORATIONS IN THE USA

June 2020



CONTENT

1. Summary and Conclusion	3	3.5 Other	12
<hr/>		<ul style="list-style-type: none">• Thematic US market entry programming offered by RVO and NLIB• Additional sub-sectors and opportunities identified within Creative Industries<ul style="list-style-type: none">- Photography (World Press Photo)- (Digital) Heritage- Fashion Tech (wearable technologies and smart textiles)- Social Design and Dutch Design Week	
2. Introduction	4	<hr/>	
2.1 Economic Impact of the Topsector in the Netherlands	4	4. Overarching and longer term market opportunities and collaborations	14
2.2 Dutch Creative Sector and the USA	4	4.1 Suggested plan for Accelerated Business development for Creative Industries	14
2.3 Set up of this report	5	4.2 Creative (Holland USA) Embassy projects with crossovers	15
<hr/>		4.3 Creative Holland USA Internship program	15
3. Impact of Covid-19 and Recovery: a sector analysis for market opportunities in the US	6	4.4 (Annual) Creative Holland Showcase or Bid Book highlighting 'Mission oriented Innovation' and 'Creative Activism'	15
3.1 Applied Gaming	6	<hr/>	
<ul style="list-style-type: none">• Current overview• Post-Covid 19 opportunities• Action Agenda for restart of internationalisation efforts		5. Overview of persons interviewed (interviews and key points are available upon request)	16
3.2 Digital Design	7	<hr/>	
<ul style="list-style-type: none">• Current overview• Post-Covid 19 opportunities• Action Agenda for restart of internationalisation efforts		6. Additional Sources	17
3.2 Music	8		
<ul style="list-style-type: none">• Current overview• Post-Covid 19 opportunities• Action Agenda for restart of internationalisation efforts			
3.3 Media & Entertainment	9		
<ul style="list-style-type: none">• Current overview• Post-Covid 19 opportunities• Action Agenda for restart of internationalisation efforts			
3.4 Architecture	11		
<ul style="list-style-type: none">• Current overview• Post-Covid 19 opportunities• Action Agenda for restart of internationalisation efforts			

1. SUMMARY AND CONCLUSION

With the current situation, the cultural and creative sectors face serious challenges, varying from event makers to the pop industry who experienced a total shutdown of their regular financial streams as well as so many independent creative entrepreneurs who are in real trouble and find themselves without work. All performance spaces have been closed, concerts are cancelled and even though cultural institutions in the Netherlands have been allowed to slowly reopen, the industry as a whole will remain disrupted for a long time and organizations are expected to suffer great losses, many of which will not make it. This will remain until a vaccine has been developed. Measures might change depending on the situation, it is hard for this industry to make any commitment.

Now is the time to set new efforts in motion. Short term wins at hand might differ per sub-sector. Overall, looking at digital festivals and conferences taking place, there is an opportunity to insert Dutch creatives and those entrepreneurs who seem ready to start positioning themselves again into the US market.

In addition to identifying low hanging fruits for the various sub sectors, this report also lays out a suggested initial approach for a longer term strategy and action items for the coming years. Now it is more important than ever to showcase the Netherlands' creative sector in a more strategic and durable way. By taking the long term approach and strategy into account, an alignment with the overall strategy of the Dutch government to focus on mission oriented innovation comes organically. Also with the new US approach to "Build a sustainable creative bridge between NL and US" there is an opportunity to implement and execute on a longer term strategy in collaboration with NBSO LA and the new business hub in SF.

More than ever it is in the interest of the Creative Industry sector to join forces as a group, align in its internationalisation efforts and where relevant collaborate with the Dutch government. It is crucial for the creative sector to keep professionalizing itself and generate new business and therefore opportunities to participate in conferences and missions for this fall and 2021.

Looking at the longer term resilience and growth of the sector, as well the importance of showcasing the best creative and innovative concepts from the Netherlands into the US, the strategy should contain help with business development, including an effective and smart use of government tools available to help entrepreneurs be successful internationally. This can include a portal for entrepreneurs with access to soft landing tools and dedicated business developers and mentors, but also an internship program for young professionals at top notch creative companies. In addition, new innovative collaborations can be set up in the form of "Creative Embassies", through cross-sectoral partnerships with parties like local governments, universities and corporates, thereby providing a platform for growth for the best Dutch cutting-edge innovative entrepreneurs. A yearly "Bid Book of Innovation" showcasing these efforts and examples can be an effective tool for business and marketing purposes.

Finally, it is important to further research cross-sectoral opportunities in order to provide additional business opportunities for those Creative Industry innovators and entrepreneurs who have proven to be vital contributors to other sectors such as HTSM including mobility, smart cities and energy transition, Health (LSH), AgroFood and more. Opportunities should therefore be further explored to maximize cross-pollination of creative entrepreneurs within those sectors. There is a need for further identification of partners within the startup and tech ecosystem for collaboration. Examples such as marketing social design for infrastructure or digital design, media and applied gaming in health care should be further explored and developed.

2. INTRODUCTION

2.1 Economic Impact of the Topsector Creative Industries in the Netherlands

The Topsector Creative Industries is one of nine top sectors and one of the fastest growing sectors of the Dutch economy with a 7.1 billion euros in turnover. In 2019 Creative Industries in the Netherlands represented 4% of employment, which adds up to 344.000 jobs in total and 11,3 percent of all established companies in the country, including freelance entrepreneurs.

Next to the economic value of the sector, there is a much larger contribution to society. Creative sub-sectors (such as design, media and entertainment, fashion, gaming, architecture and pop music) make cities attractive to work, live and visit. On top of that the creative sector boosts and accelerates innovation in other sectors and provides for creative solutions to societal challenges.

The Creative Industries sector also plays a vital role in looking at different creative angles to find solutions for real global challenges. In the process of looking at a challenge it is important besides the technology to also look at the end-users. In this way the creative industry looks for solutions in spatial challenges, energy transition as well as the health care sector. It is also important to notice that the power of creativity is larger than just the creative sector, with around 40-60 percent of the creative professionals in the Netherlands, working outside of the creative industry and therefore included in different sector areas.

The overall output of all these creative professionals strengthen the innovation capabilities as well as the competitiveness of its clients and the non-creative companies they work for, through delivering product designs or creative outlines for communications or marketing campaigns. This additional cross-over effect has never been really measured but is nevertheless supported and acknowledged. In regards to market expansion, the Topsector Creative Industries puts a major emphasis on internationalisation. It acknowledges the importance of export as a part of its annual turnover is earned abroad, with the Netherlands ranking in 8th place for creative export across the globe.

4

2.2 Dutch Creative Sector and the USA

The Dutch creative sector is already well represented in the United States with some popular icons who have received great recognition over the years. Multiple research projects, missions and some great efforts by entrepreneurs have led to great business in the past and has confirmed that the market in the US provides for huge opportunities and collaborations to help grow the Dutch creative industries. Over the years multiple efforts have been made by entrepreneurs to create a soft landing spot in Los Angeles, acknowledging the need to work together and help each other to enter the market. Unfortunately there was never enough infrastructure to build something more permanent.

The Netherlands is also recognized in the US as an advanced, innovative and creative country and created a strong profile in music (EDM specifically), design, applied gaming, arts, fashion, photography and architecture. Specifically on the West Coast, in LA, with a growing creative, media and entertainment and tech scene it appears that beyond those icons, there is still a lot of opportunity and work to be done in order to create a sustainable bridge for the creative industries to the region. With the opening of a new NBSO office in LA, a “business hub” in SF and the kick start of this report, which will lay out a new post-Corona strategy as well as identify actionable items and opportunities on the short and longer term for the sector, there is an opportunity to grow interests and increase business opportunities in the United States, with focus on the West Coast.

2.3 Set up of this report

This report mainly focuses on 5 subsectors (applied gaming, digital design, music, media & entertainment and architecture), each sub sector has been analysed through desk research and interviews with entrepreneurs and sector organizations both in the Netherlands and the US. Within the time frame of a few weeks a quick scan was conducted. By no means is this complete, this report is therefore primarily a starting point for a new approach in a (post)-covid environment. More sub-sectors such as Fashion Tech, Photography and (Digital) Heritage are worth exploring further. Its main immediate purpose is to kick start new opportunities now in order to generate new mission-oriented business, as well as build a more sustainable and durable business opportunity for the Dutch entrepreneurs entering the US, with a focus on the West Coast.

On the basis of this analysis, the strategy of each sub sector has been (re)formulated and prioritized as it relates to opportunities in the US market for each subsequent subsector. Also a start has been made for an operational action agenda for the restart of internationalization efforts based on feedback from entrepreneurs and sector organizations which can be built upon and further developed at length in the near future.

Finally, some general recommendations are made for longer term opportunities because we're looking to build a sustainable bridge. This approach also aligns with the NBSO LA Plan of Approach to "Building a Sustainable Creative Bridge between NL and US" which is currently in the making and has the primary goal to build a solid fundament within the sector and align committed parties in the Netherlands.

3. IMPACT OF COVID-19 AND RECOVERY: A SECTOR ANALYSIS FOR MARKET OPPORTUNITIES IN THE US

3.1 Applied Gaming

Current overview

Gaming in the US is perceived as an attractive market with big budgets and an easier and larger market opportunity than in the Netherlands. In regards to applied games however, Hans Luyckx from IJsfontijn confirms the US market is difficult for business opportunities since the buyers market is dominated by big parties such as the Ministry of Defence and NASA. Over the years, the Dutch Applied Gaming industry has received significant attention and won numerous awards at festivals, greatly contributing to their leadership role within the industry and overall reputation. Until now however it has been really hard to translate this recognition into real business and entrepreneurs have been mostly focussed on creative collaborations with universities and research organisations.

Post-COVID Opportunities

Events taking place digitally can offer substantial opportunities for new connections and networking in a virtual environment

Serious gaming can be integrated as a Dutch social design showcase, building and expanding the image and reputation of the Dutch creative sector in the US.

It is recommended that bureaus from the Netherlands join forces as they require scale and more body in order to be able to compete for the larger accounts. They might also want to consider US based companies to partner with in order to develop business.

Action Agenda for restart of internationalisation

Short term digital opportunity for business development:

- #G4C2020, 'Games for Change Conference' this year is offering free tickets for entrepreneurs. There is an opportunity to promote this event in the Netherlands and additional programming geared towards matchmaking for Dutch entrepreneurs should be discussed. More info can be found [here](#).

Building sustainable connections and collaboration opportunities:

- In regards to Applied Gaming, specifically creative collaborations in line with the Creative Embassy in Germany should be further explored. For example, IJsfontein could be a great match to collaborate with the MediaLab and RLab in Brooklyn, NY with NYU.
- There is no real Applied Gaming festival in the Netherlands, investigating attracting an existing showcase or festival to the Netherlands would help position the subsector and further develop its potential. Amsterdam (specifically Marineterrein) has expressed interest to collaborate and potentially host.

3.2 Digital Design

Current overview

Dutch Design has been well established and successful in the United States and thanks to its cultural successes that translated into commercial opportunities, the Dutch Digital Design scene was able to follow suit and establish itself over the last years in the US, specifically New York and Los Angeles. The Covid-19 pandemic has left the design community in disarray with many companies who might not make it through the pandemic. Some members of the Dutch Digital Design community are having a really hard time, others have been successful at attracting new clients and are doing fine. This current time demands new products and services and marketing efforts where brands take a position that aligns with the global challenges we are faced with. This has been confirmed by Dimi Albers, CEO of Dept during a recent interview in Adformatie Connects Live. There has been a tremendous increase in online marketplaces and other clients follow suit and transition to ecommerce.

Post-Covid 19 opportunities

Also for advertising in general, the more digital you are the more stable a company can be and focus on new business is key. This provides for new opportunities and those companies that are lean and creative are most apt to do well during this crazy time. Damien Hirsch, a serial creative entrepreneur based in New York, confirms in this interview that the large advertising agencies in the US haven't been doing well as they are slow to transition and adapt. This allows opportunities for new digitally focused data driven design agencies to come in and get new work.

Action Agenda for restart of internationalisation efforts

Explore and identify (digital) showcase opportunities in the US for social and societal impact showcases that can be compiled through various editorial sources and are a true showcase of Dutch creativity. There is interest from the Dutch Digital Design members to collaborate in a webinar and potential showcase that can help present their work to a larger audience in the US. NBSO LA is leading charge in this effort from the US which will allow for a kick start to build a stronger network and strong presentation of the sector on the West Coast.

Embassy of Dutch Creativity which will go on a road show this summer in Europe could be something to explore in the LA area in the near future.

7

3.2 Music

Current overview

The live music industry is one of the last sub-sectors that is being allowed to reopen as risks seem less. Lots of artists and supporting companies do not have any income at the moment as a result and tens of thousands of jobs in the Netherlands alone are at stake.

Also in the US, all major festivals and live concerts have been cancelled for at least the next year. In addition, artist visas are on hold for the foreseeable future so it will be very difficult for Dutch artists to book tours or physically participate in any opportunities in the US at this moment and in the near future. Musicians and entrepreneurs from the music sector confirmed it will be very hard to travel and work in the US in the short term. Therefore it is important to focus on digital and streamed opportunities.

The direct effects of Covid have not just been confined to the artists and musicians, however it has affected the entire workforce in the industry, including studio's, production companies, programmers that create jingles, app songs, voice-overs, background music and so much more.

Analysts at Goldman Sachs confirm in a recent research paper that live events are severely impacted with overall revenue expected to drop this year by up to 75% as a result of cancellations of all major live events. However, over the longer term those analysts are expecting a strong rebound with considerable growth in the online streaming market projected to capture 1.2 billion users by 2030 and reach \$142 billion by the end of this decade which reflects a growth of 84% compared to 2019 (\$77 million).

Post-Covid-19 opportunities

Success and opportunity can now be found in the “experiential phase” as it relates to helping the fan base engage with their artists, as well as providing the artists with new or increased digital revenue streams in a Post-Covid-19 world. Events will come back eventually but we are likely to expect some hybrid experiences according to Damien Hirsch, serial entrepreneur and investor based in NYC.

People (in the United States) are expected to be afraid or hesitant to get back to regular full crowd performances so new digital platforms and hybrid tools that facilitate virtual and digital participation and interaction also have an opportunity to remain and grow significantly post-Covid.

A new area has kicked off for the industry in terms of digital media and internet supporting this industry as people are craving for new entertainment. It also allows and motivates the artists to find new ways to formulate and create content and explore new business opportunities. Dutch artists, platforms and tools can potentially now attract larger international audiences and find new ways to gain recognition in the United States, in ways that previously might not have been possible.

Action Agenda for restart of internationalisation efforts

Short term digital opportunity for business development

- Dutch Music Export in collaboration with Dutch Culture USA is collaborating virtually this month with A2IM Indie Week 2020 in NYC, the largest independent music conference in the world. The event has proven in 2019 very relevant for participating managers and music industry representatives and has contributed to build a stronger and bigger network and more insights into the US market. A music trade mission in collaboration with Dutch Music Export also focused on coordinating additional efforts to invite emerging bands and talented artists with a US following and market potential. 20 industry professionals from the Netherlands have been invited to participate digitally at no cost.
- BMIM Synch Mission around MusExpo: Currently on hold but new dates to be announced. Led by Buma Music in Motion, this can become a relevant composers trade mission. Continuation of relationship based on 2019 collaboration. Dutch Culture USA sponsored a networking event as well.
- Smaller non-profit organizations are putting virtual events together in a more successful way as they adjust faster to the current situation. Both musicians as well as creative entrepreneurs confirm it would be worthwhile to further investigate those smaller initiatives as they see an uptick in attendance from key crowds. These events are also likely to be the first ones to go back to real in-person events, as they are smaller in size and can adjust quickly to new situations.
- Investigate platforms and tools in the Netherlands that could be relevant to introduce in the US sector.
- Worthwhile to investigate putting a Dutch Music Showcase together on one of the new live streaming platforms as people are longing for new content and successful platforms can provide a great new audience without the need to travel.
- For artists in the Netherlands it is more important than ever to make use of programs offered in the Netherlands to educate themselves on their rights and the opportunities around intellectual property. Entrepreneur Kevin de Randemie confirms there is a real need to educate our artists as they might be missing out on potential revenue streams. This is not only true in music but any performing arts opportunity that might arise, including “Spoken World platforms” and podcasts.

Building sustainable connections and collaboration opportunities

- All short term opportunities mentioned above are part of the longer term strategy to expose the Dutch B2B music industry as well as its arts and technology companies serving the music industry which have been actively promoted by Dutch Music Export, along with Buma Cultuur and Dutch Culture USA (CGNY). NBSO LA has also earmarked the music industry as one of those Dutch anchors that can be built on towards creating a more sustainable bridge to the US from the Netherlands.
- NBSO LA also identified this sub-sector as one of the upcoming webinars as part of building a sustainable bridge between the Netherlands and the US.

3.3. Media and Entertainment

Current overview

In total a third of the overall worldwide revenue of media and entertainment derives from opportunities in the US. Most innovations in the media and entertainment sector are created or marketed on a global scale from the US. Since the US sector often still has a traditional approach, there is a unique opportunity for innovative, creative and efficient Dutch companies to come in and do business. For the purpose of this report digital design agencies, which are also often regarded as media companies, are primarily handled in the Design chapter.

The Dutch have had some successes in the media and entertainment industry in the US, making the Netherlands the second largest exporter of television formats with great success such as *The Voice* and *Big Brother*. However, beyond the well known success stories and artists we only see a few really make it in the United States. In terms of content production, technological development and innovation, the West Coast is where the great opportunities are, specifically Los Angeles and San Francisco. They also form the most important hub in the world for digital media and the entertainment industry. Great success stories of Dutch creative companies in LA are for example MediaMonks and WeTransfer who have confirmed that there's a lot of growth opportunity in the Los Angeles area with its new media companies and booming sector.

With a great suite of digital and technology media companies in the Netherlands, we see that the current situation is shifting the trends and new opportunities in the sector. Market behaviour changes and potential impact on the industry have been outlined by KPMG and include TV and streaming services going up dramatically in numbers of audience but monetization is a current challenge with ad revenue that has dropped significantly. Due to social distancing, event attendance has been suspended and productions have been delayed, creating a gap of content in the near future and challenges with distribution strategies and revenue streams connected with it.

The media has played a very significant role throughout the pandemic, having to adapt in order to fulfil its obligation to the public to inform, including removing paywalls, adjusting policies etc. It also played a vital role for schools and teachers as part of the entire online education experience. And entertainment has been critical during this time, helping people to get through the day.

As for entertainment games, one would assume that industry hasn't fared that badly with an overall increase of gaming happening globally due to the lock down and games overall providing a great source of relief and relaxation in difficult times. This only applies however to games currently on the market and with lockdown easing and summer kicking in, a decline already set in with the economy slowing down as a whole..

According to the Dutch Games Association representing about 100 gaming entrepreneurs, the Dutch gaming industry is being hit hard and is facing many challenges during this Pandemic. The value chain is vulnerable and with the cancellation of trade missions and conferences new business comes to a hold.

Post-Covid-19 opportunities

The Dutch media industry is currently facing significant disruption, however the streaming platforms and other digital entertainment services enhance an accelerated change which will allow new business models to grow fast. According to a recent PwC report on the Dutch Media industry, the expectation is that the larger part of the Dutch media industry will be able to return to growth rather quickly. Opportunities vary per sub-sector within the media industry, the PwC report provides a deep dive into the short term trends as well as short term and long-term trend predictions.

The new reality comes with the need to change strategies for many companies in the media industries in order to stay resilient and recover during this time. Actions by the industry should therefore include opportunities to accelerate the return to experiences, digitally in the short term but also inspire confidence and be prepared through safety measures that should be put in place. There is also an opportunity to reach larger audiences since people are at home. Companies with solutions who have adjusted and adopted pivots and new digital ways to connect with their audiences have an opportunity to do business.

As for the Dutch gaming companies, it will be more important than ever to acquire new clients in order to survive as most companies are relatively small. They are largely depending on those B2B connections so in the meantime, they are turning to digital conferences and matchmaking.

Overall, according to a recent report by the World Economic Forum and Accenture, accelerating innovations in the creation and the distribution of content will reshape the media for good.

Action Agenda for restart of internationalisation efforts

Short term digital opportunity for business development

- Media Perspectives: Media Perspectives and Media Matters run programming in the Netherlands for local media entrepreneurs for opportunities. Media Matters has also scheduled some facilitated matchmaking later in June between Dutch media companies and international startups and during Dutch Media Week (3-11 oktober) there is a plan to connect Dutch media entrepreneurs (startups) to international media companies.
- New Filmmakers Los Angeles: InFocus Dutch Cinema Event at NFMLA. The event is scheduled to continue in December 2020, potentially online. Dutch Culture USA will be collaborating. Potential for the Producers guild from the Netherlands to participate who haven't really connected yet to this opportunity. It is a strong gathering place for independent cinema with 2500+ films from over 73 countries. Its objective is to promote the economic, educational, social and cultural advancement of filmmaking, arts and culture and has great alliances with the major talent agencies as well as media organizations, studios and networks (Fox, Disney, Netflix etc..)
- Game Developers Conference (GDC): Help identify entertainment gaming events for the Dutch Gaming industry. Full list put together by the European Games Developer Federation can be found [here](#). As events will restart physically in the near future it makes sense to focus on smaller events as they are more likely to happen. First upcoming conference is GDC which is going all-digital August 4-6, 2020

Building sustainable connections and collaboration opportunities

- More ground work and research needs to be done to get a better understanding of the real needs and opportunities of this sector in the market. Above opportunities can serve as pilots to help define a more strategic and longer term approach.
- With media and entertainment becoming a focus industry for NFIA (Netherlands Foreign Investment Agency) in the West Coast there is also an opportunity to collaborate with building up a network etc..

3.4 Architecture

Current overview

It is hard to predict the future but we do know that architects around the world have been affected by the crisis and we also know that they have put their knowledge to use to help fight the virus and are creating innovative solutions with social distancing and all other limitations in place. We see architects who are redesigning cities and others are rethinking our work space or other facilities. It is unclear what the longer term impact will be of the Corona Crisis but as BNA mentioned in a recently published article on its website, working internationally is key as it allows architectural firms to be stronger and more resilient. The report based on a survey with its member base shows that almost two thirds of the respondents currently work abroad. Top three countries of focus are closer to home, namely Germany, Belgium and France, but there is definitely a lot of interest in working in the US.

Post-Covid 19 opportunities

With the industry resuming we will look at the urban environment in a different way, with a need to look at interdisciplinary approaches and a collaborative mindset when trying to find solutions to our world-wide challenges.

UN Studio for example is taking a leading role in this conversation. We have to look at public and personal health, mobility and transportation and even agriculture in a collaborative way. Also sustainability will now become more important than ever as well as looking at underused spaces in different ways. The sector is continuously looking to build out its network and look for opportunities to connect internationally, even when travel is not possible, digital conferences might be of value.

According to experts at BNA, architects want to be present at the big real estate meetings and conferences that take place in order to generate new business. European counterparts include Expo Real and MIPIM perceived as important networking events for its entire member base.

A large study was done by BNA International in 2018 on how to best enter the US architectural market via the West Coast. The work is still very current as it provides a lot of insights on the restrictions and constraints related to working in the US as well as a theoretical framework and external analysis relevant for a larger group of architects. It also outlines the various entry strategies that can be considered.

Action items Creative Holland:

- Support and collaborate with BNA and NBSO-LA on further developing opportunities for the Dutch sector to the LA region.

3.5 Other

Thematic US market entry programming offered by RVO and NLIB

It is important to work closely with RVO, NLIB, Techleap, StartupAmsterdam and other organizations to identify new programs that focus on business development to the US, through future missions and market studies on specific industry topics where the creative sector plays an important role. Creative entrepreneurs could benefit by joining these programs as they are likely to be smaller than before and more tailor made to the group in regards to matchmaking and network building. Steps should be taken to further identify these types of opportunities and in return there will be a role for the sector to help identify the right entrepreneurs. Current program development that is in the works for fall 2020 and 2021 will be in the areas of e-health, clean tech, life sciences, urban mobility and more infrastructure programming. Further conversations will be necessary to work on a specific plan but there is potential cross-over in all of these programs for the creative sector.

Additional sub-sectors and opportunities identified within Creative Industries

There are many more sub-sectors within the Creative Industries that deserve further research as there are real business opportunities at hand in the US. The major ones are identified below and deserve to be explored further.

Two key topics within the sector itself to further explore are Photography (World Press Photo) and (Digital) Heritage as they can provide great commercial opportunities and will benefit from more research.

Fashion Tech (wearable technologies and smart textiles)

The Dutch fashion industry is very successful and Dutch designers are celebrated around the world. Fashion and Tech are more and more intertwined and overall Fashion Tech is booming in the Netherlands with some great new designers getting recognition internationally, also in the United States. The time frame of this report unfortunately did not allow for further assessment of the opportunities, but we are aware that there is a lot of international demand and great collaborations can be further established for entrepreneurs in fashion tech in the US. It is recommended to investigate this further.

Social Design and Dutch Design Week

There have been some great efforts and showcases coming out of the Netherlands to portray the power of design when trying to find solutions to global problems we are faced with today, not only the recurring topics around the Covid-19 Pandemic (health, spatial,...), but also larger societal challenges such as lack of diversity and racism. This is visible across all different platforms and sub-disciplines within design.

Recent showcases can serve as an inspiration and can very well resonate in the US. Examples include design showcases of solutions to future challenges, researching unconventional solutions and thought processes that stimulate the resilience of the sector such as This is Not A Simulation organized by the Creative Industries Fund, Federation of Creative Industry and the Dutch Design Foundation. Also Creative Holland changed its portal into a showcase of great initiatives of the creative industries showcasing the ability of the creative sector to adapt and respond in a moment of crisis. This showcase is also considered to be a tribute to the resilience of our economy and society. Another great example is UN Sense's recently published essay stating "the time is now to lay the foundation for the well-designed technology to serve the public cause" as well as 'What Design Can Do' in times of Corona. In addition, new opportunities arise as well with a new Future Lab for Design and Technology in Amsterdam as well as additional support granted to Dutch Design Week Eindhoven and its digital extensions this year.

Opportunities at hand:

- Explore and identify (digital) showcase opportunities in the US for social and societal impact that have already been assembled and are a true showcase of Dutch creativity. Perhaps a digital press preview for Dutch Design Week this summer? DDW with its digital extensions this year is uniquely positioned to attract a larger international crowd.
- Dutch Design Week also offers a great platform to kick off and explore new international creative embassies type of collaborations with digital collaborations now being an option. Definitely worthwhile to explore further collaborations.

4. OVERARCHING AND LONG TERM MARKET OPPORTUNITIES AND COLLABORATIONS

It is important to ensure that all internationalization efforts digitally or abroad that potentially generate high visibility also translate into business. Prior to organizing however, it is important to look at the type of companies or creatives that would be ready and interested in participating. In order to generate deals and sales in the US, companies or creatives need to be really committed. Success can depend on the size, capacity, bandwidth and financial health of a company. Thorough prep needs to be done, it is vital to know your pricing strategy, how to find clients and know how to pitch a story and the product.

4.1 Suggested plan for Accelerated Business development for Creative Industries

Creative Holland can serve as a permanent bridge between the Netherlands and the US (as well as China and Germany) and can serve as a platform for international growth and help provide tools and information that entrepreneurs need in order to scale and market their product, service or craft successfully abroad. This (extension of the) digital portal can be framed as part of the existing framework and a great way to collaborate with all relevant membership based network organisations with an international agenda.

14

- Orientation/Education/Learning: Information on doing business abroad, navigating all tools and opportunities, what you need to know, including links to multiple government websites and other relevant resources. Currently it is difficult to find or not available online, for example the Dutch Design toolkit for the US compiled by Dutch Culture USA.
- Getting started: Webinars, masterclasses and mentor sessions guide you through the early process of doing business abroad, including legal/admin/pricing, Intellectual property, sales cycle culture etc.
- Doing business: The way of helping creatives create exposure and generate business abroad can be tackled in 3 ways:
 - Individual: Organisations or entrepreneurs who are recommended as high potentials by “a group of experts” can be assisted on an individual basis during their business development (at a fee). They will receive help to navigate the US market and get introductions to a validated network in order to access potential business partners as well as potential clients or investors.
 - Missions: Opportunities are identified to participate in missions along with other top sectors or collaborations across multiple disciplines where various types of parties are invited to participate around expo's, festivals or B2B industry events.

4.2 Creative (Holland USA) Embassy projects

The Netherlands has some groundbreaking, innovative and cutting edge creatives who can be seen as best in class and also contribute across sectors to help solve the true global problems we are facing today from a societal and environmental perspective. High-end longer term durable collaborations can be formed and initiated using the triple helix collaboration of governments, knowledge institutions and the creative industries.

The international collaborations are based on reciprocity where local and international companies work on local innovation challenges, linked to programming and contact moments with additional potential clients. The multiple interviews conducted for the purpose of this report identified multiple opportunities or partners that could be an interesting starting point for further exploration. Looking at a hybrid model between “business challenges” and “MOU’s between governments or high level institutions” could serve as a starting ground for collaborations as such. The ultimate goal is to create and ensure more durable long term collaborations that allow those true creative innovators from the Netherlands to work on top-notch projects internationally that in turn can generate business.

4.3 Creative Holland USA Internship program

For the new generation of creatives it would be helpful to also create a program that exposes them to the US way of working and mindset and help them gain more experience, so they become a higher asset to the Dutch economy down the road. This program can be in line with the existing Holland in the Valley Internship program where top Dutch students get the opportunity to be matched with internship positions at some of the largest tech organisations. Similarly, some of the most inspiring creative companies in the LA region can be approached to create similar spots. This will also significantly contribute to a more entrepreneurial mindset in our community and have a spillover effect helping to elevate the education system as well as new professionals entering the market.

4.4 (Annual) Creative Holland Showcase or a Bid Book highlighting Mission Oriented Innovation and a Creative Activism

15

In order to provide exposure to mission oriented innovation from the Netherlands, there is an opportunity to inspire and highlight best practices in a more annually returning format. In line with the “National Icons” from the Ministry of Economic Affairs but put forward in such a way that the bid book is a true showcase of the Creative Industries and therefore an organic extension of all the great showcases currently out there. Examples include: Resilient Creative Holland currently accessible via the Creative Holland website and the new initiative “This is Not a Simulation” organized by the Creative industries Fund, Federatie Creatieve Industrie en Dutch Design Foundation. The bid book can not only provide for exposure to entrepreneurs and innovators, it can also be used to present to investors and potential clients and overall increase the power of creative activism and inspire the world to become a more inclusive and better place.

The opportunity to create and a willingness to participate in a digital showcase was mentioned by several of the parties interviewed for the purpose of this report, ideally immersing all disciplines within the Dutch Creative Industries with an impactful and mission-driven message. There are opportunities to collaborate with small non-profit organisations in the US to help drive traffic of high-potential to the showcase. This could be a music festival highlighting Dutch musicians and industry folks but could also be a pre-show teaser built around DDW with a focus to attract new audiences in the major cities in the US (West Coast and East Coast). This could serve as a “press-preview” or “teaser” and help drive more digital traffic to DDW.

5. OVERVIEW OF PERSONS INTERVIEWED (INTERVIEWS AND KEY POINTS ARE AVAILABLE UPON REQUEST)

Entrepreneurs

Kevin de Randamie, *Creative Strategist, Rean Industry, Topteam Creatieve Industrie*

Dotan, *musician, entrepreneur, Los Angeles*

Hans Luyckx, *IJsfontein, Amsterdam*

Martin van de Werff, *The Very Creative Firm, Los Angeles*

Derk de Geus, *Co-founder Paladin Studios, Voorzitter Dutch Gaming Association, Amsterdam*

Damien Hirsch, *Hi.Fi, Investor and serial entrepreneur USA*

Bert Hagedoorn, *Specialist in Positioning and Growth Strategy, Chairman Dutch Digital Design*

Infrastructure

Gerbrand Bas, *Secretary to the Board Federatie Creatieve Industrie*

Simone van Bennekom en Femke Blok, *Creative Holland, Amsterdam*

Daniel van Vulpen, *Deputy Head Americas NFIA, Amsterdam*

Vincent Storimans, *Deputy CG San Francisco*

Laurens Tideman, *NFIA San Francisco*

Mir Wermuth, *Media Perspectives, Amsterdam*

Peter Post en Danielle Berden, *NBSO LA*

Mathias Lehner, *Branchevereniging Nederlandse Architectenbureaus*

Vera Kuijpers, *CGNY, Music, Performing Arts and Film, Dutch Culture USA, New York City*

Robert Kloos, *CGNY, Design, Architecture and Visual Arts, Dutch Culture USA, New York City*

Ingrid van der Wacht, *International & Public Affairs Dutch Design Foundation*

Peter Post, *Chief Representative NBSO LA*

Stephan van de Wall, *Special Advisor Business Development USA/ Menno Schrok, BD USA RVO*

Lise Hordwijk, *NLinBusiness*

Note: There are key stakeholders and other sub sectors who were not included in this report due to time constraints. In the follow up phase it would be recommended to speak with additional entrepreneurs and organisations including: BNO, Dutch Music Export, Buma, DDA, Photographers, Fashion tech entrepreneurs, Members of the Federation of the Creative Industries and so on

6. ADDITIONAL SOURCES

Topsector Creatieve Industrie: Vraagontwikkeling Verre Markten CI, Ideeschets en voorstel voor ontwikkelprogramma 2016

Exploring the West Coast of North America, A research on how to enter the North American architectural market with the Innovators of NA International, available through BNA International 2018

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