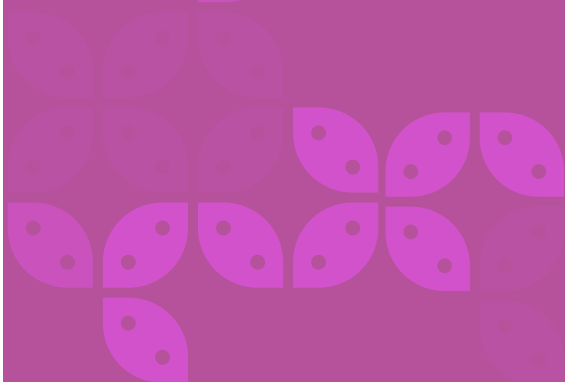
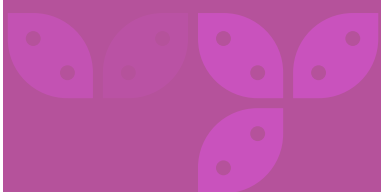


Creative and Social Enterprise in Indonesia



Creative and Social Enterprise in Indonesia



About British Council

The British Council is the United Kingdom's international organisation for educational opportunities and cultural relations.

Our global Developing Inclusive and Creative Economies (DICE) programme aims to address economic and social exclusion through supercharging homegrown creativity, enterprise and collaboration. DICE takes an 'ecosystem' approach to nurturing economic inclusion, with a focus on women, young people, disabled people and other groups often excluded from the mainstream economy. In practice this means DICE works with and for a growing network of entrepreneurs, artists, enterprises, policymakers, investors, researchers, academics, and community leaders. We provide training, mentoring and funding opportunities; convene international dialogue offline and on; undertake research; and provide the space to co-design, form relationships, experiment and explore.

DICE complements the British Council's longstanding work in civil society, creative economy and social enterprise, a portfolio of programmes delivered to date all over the world. Together these programmes are designed to help foster a more sustainable, inclusive and prosperous future and build collaboration, opportunities and trust between the UK and other countries.

About United Nations Economic And Social Commission For Asia And The Pacific (UNESCAP)

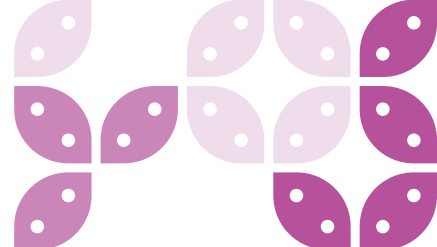
The Economic and Social Commission for Asia and the Pacific (ESCAP) serves as the United Nations' regional hub promoting co-operation among countries to achieve inclusive and sustainable development. The largest regional intergovernmental platform with 53 Member States and 9 associate members, ESCAP has emerged as a strong regional thinktank offering countries sound analytical products that shed insight into the evolving economic, social and environmental dynamics of the region. The Commission's strategic focus is to deliver on the 2030 Agenda for Sustainable Development, which is reinforced and deepened by promoting regional co-operation and integration to advance responses to shared vulnerabilities, connectivity, financial co-operation and market integration. ESCAP's research and analysis coupled with its policy advisory services, capacity building and technical assistance to governments aims to support countries' sustainable and inclusive development ambitions.

About Asian Venture Philanthropy Network (AVPN)

As the only comprehensive funder's network in Asia, AVPN is a leading ecosystem builder for the social investment sector with over 600 members globally. AVPN's mission is to catalyse the movement toward a more strategic, collaborative and outcome-focused approach to social investing, ensuring that resources are deployed as effectively as possible to address key social challenges facing Asia today and in the future.

At AVPN, we see social investment as a continuum that encompasses everything from philanthropy and venture philanthropy to impact investing, CSR and sustainable investment. We call this the 'Continuum of Capital'.





Acknowledgements

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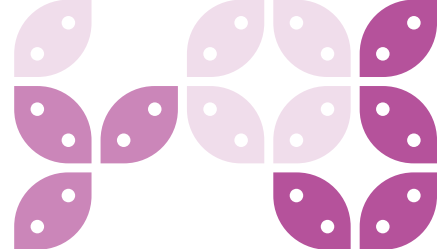
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Foreword

In 2019, in collaboration with the United Nations Economic and Social Commission for Asia Pacific (UNESCAP) and the Asia Venture Philanthropy Network (AVPN) the British Council commissioned a study, to better understand Creative and Social Enterprises in Indonesia. The study was conducted by Parahyangan Catholic University and the University of Surabaya with support from Social Enterprise UK (SEUK)

We are delighted to present the findings from the study in this report which explore creativity, enterprise and how we can combine them to build a more inclusive economy.

Evidence from emerging economies is beginning to demonstrate the role that social enterprise and the creative industries can play in contributing to sustainable and inclusive growth. The British Council's 2018 Indonesian Social Enterprise Landscape Survey revealed that 22% of all social enterprises were to be found in the creative industries, making this the biggest social enterprise sector in the country.

The Ministry of Tourism and Creative Economy in Indonesia is playing an active role not only nationally but also across South East Asia in its preparations for the International Year of Creative Economy for Sustainable Development in 2021 and with over 8 million creative businesses in the country, there is real recognition of the contribution made to the national economy, and huge potential for growth. Government strategy highlights the links between tourism and digital transformation, as well as growing social enterprise approaches for community development

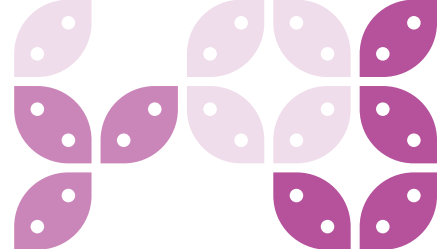
This agenda is important to the British Council and in the UK we are keen to learn from and share experiences with Indonesian creative and social entrepreneurs as we build our respective creative and social enterprise communities and forge UK-Indonesia collaboration for mutual benefit.

The British Council is the UK's international organisation for cultural relations and educational opportunities. We are on the ground in six continents and over 100 countries, bringing international opportunity and people to people connections to life, every day. In Indonesia we partner with local organisations to deliver on this cultural relations mandate—through the arts and creativity, social commentary, education and support of skills development and business.

Creative and social businesses exist for a purpose that is not income generation alone. They reframe the way we measure value; they challenge what success looks like and they demonstrate the crucial role of social value to that success. Collectively they encourage us to consider the macro-perspective in which they sit - how should businesses with social purpose and creativity be built into the design of our economic system? Further, how can the important skills that are held by creative and social entrepreneurs be deployed in policy design, and in community and economic development?

Young people, women and people with disabilities have been, and continue to be, systematically and intentionally excluded from opportunities and from our economy. The economic system has been designed to work for some at the expense of others. We need to rewrite the rules of this economic system and society at large. This was already an enormous concern before the greatest public health crisis for a generation because of COVID-19. It is time to mainstream social purpose in business and celebrate different ways of problem solving to address inequality and economic exclusion in our response to the pandemic.





The Developing Inclusive and Creative Economies (DICE) was launched by the British Council in March 2018 as a cross-sectoral, multi-country cultural relations response to one of the world's greatest challenges. For two years this experimental programme has explored how creativity, human connection, bold and generous collaboration and talent can be harnessed to contribute to the eradication of profound social and economic exclusion. Each activity has been designed specifically to empower women and girls, foster youth employment and/or promote disabled people and other marginalised groups' inclusion and economic empowerment.

As the UK's cultural relations organisation, the British Council's builds trust through knowledge exchange so that communities in the UK and Indonesia can learn from each other and develop models of enterprise, entrepreneurship, experimentation, and economic development.

In support and validation of this work, this study outlines the current operating context, challenges and inclusion data of creative social enterprises. This report presents emerging evidence that harnessing creativity, nurturing purpose and connections, and providing capacity building are three clear ways to build and grow truly inclusive enterprises.

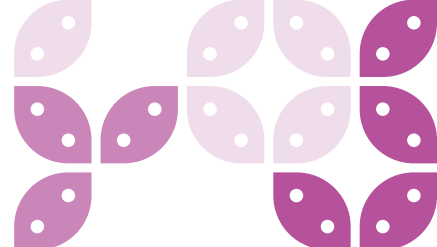
This report makes clear—the value of creative social enterprises is greater than the sum of their parts - social impact, creative and cultural value, and financial returns. They stimulate collaboration, human connection, bringing multiple knowledge systems together to fundamentally challenge the way society is structured in both bold and subtle ways.

We hope that this report is well used and built upon by those wishing to support creative social enterprises. Thank you for joining in our shared goal of a more inclusive economy.

Hugh Moffatt

Country Director, British Council Indonesia

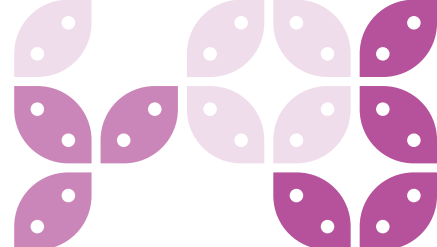




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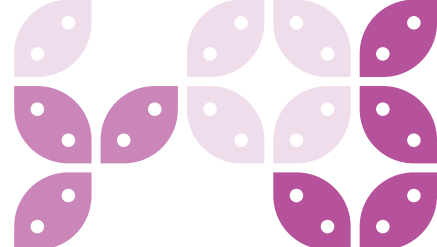
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Acronyms

A	ANDE	Aspen Network of Development Entrepreneurs
	ANGIN	Angel Investor Network Indonesia
	AVPN	Asian Venture Philanthropy Network
B	BAPPENAS	Badan Perencanaan Pembangunan Nasional (Indonesian Ministry of National Development Planning)
	BEKRAF	Badan Ekonomi Kreatif (Indonesia Agency for Creative Economy)
C	BPS	Badan Pusat Statistik (Central Bureau of Statistics)
	CE	Creative Enterprise
	CSE	Creative and Social Enterprise
F	CV	Commanditaire Vennootschap (Limited Partnership)
	FGD	Focus Group Discussion
	GDP	Gross Domestic Product
G	GSG	Global Steering Group
	HEI	Higher Education Institution
H	HKI	Hak Kekayaan Intelektual (Intellectual Property Rights)
	IUMK	Permit for SMEs
L	LKM	Lembaga Keuangan Mikro (Micro Financial Institution)
M	MSMEs	Micro, Small and Medium Enterprises
N	NGO	Non-Governmental Organisation
P	P-IRT	Pangan Industri Rumah Tangga (Certificate of Food Home Industry)
	P2P	Peer to Peer
	PKM	Program Kreativitas Mahasiswa (Student Creativity Program)
	PLUS	Platform Usaha Sosial (Social Enterprise Platform)
	PT	Perseroan Terbatas (Limited Liability Company)
R	RPJMN	Rencana Pembangunan Jangka Menengah Nasional (National Medium-Term Development Plan)
S	SE	Social Enterprise
	SEUK	Social Enterprise United Kingdom
	SMEs	Small and Medium Sized Enterprises
	SIUP	Surat Izin Usaha Perdagangan (Business Licence)
T	TDP	Tanda Daftar Perusahaan (Certificate of Company Registration)



Executive summary

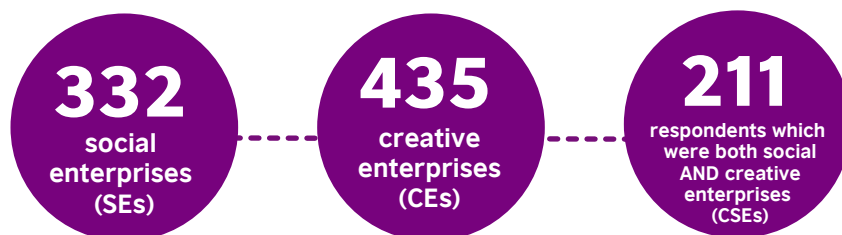


This research seeks to provide data and an insight into creative and social enterprises in Indonesia.

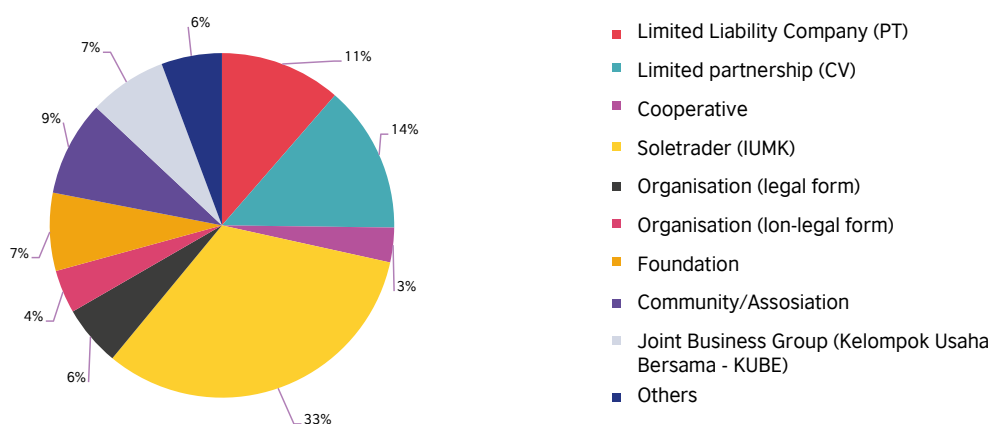
1,388

organisations responded to our survey, both face-to-face and online.

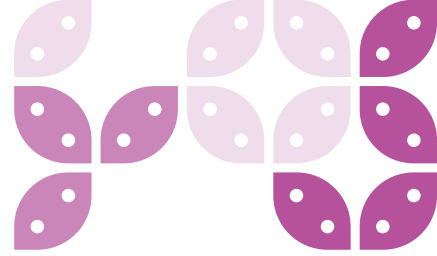
Of these, we used a number of criteria to identify:



Creative social enterprises in Indonesia are young, with the majority established within the last five years. Most are micro enterprises and operate in urban areas. These enterprises take a range of legal forms.

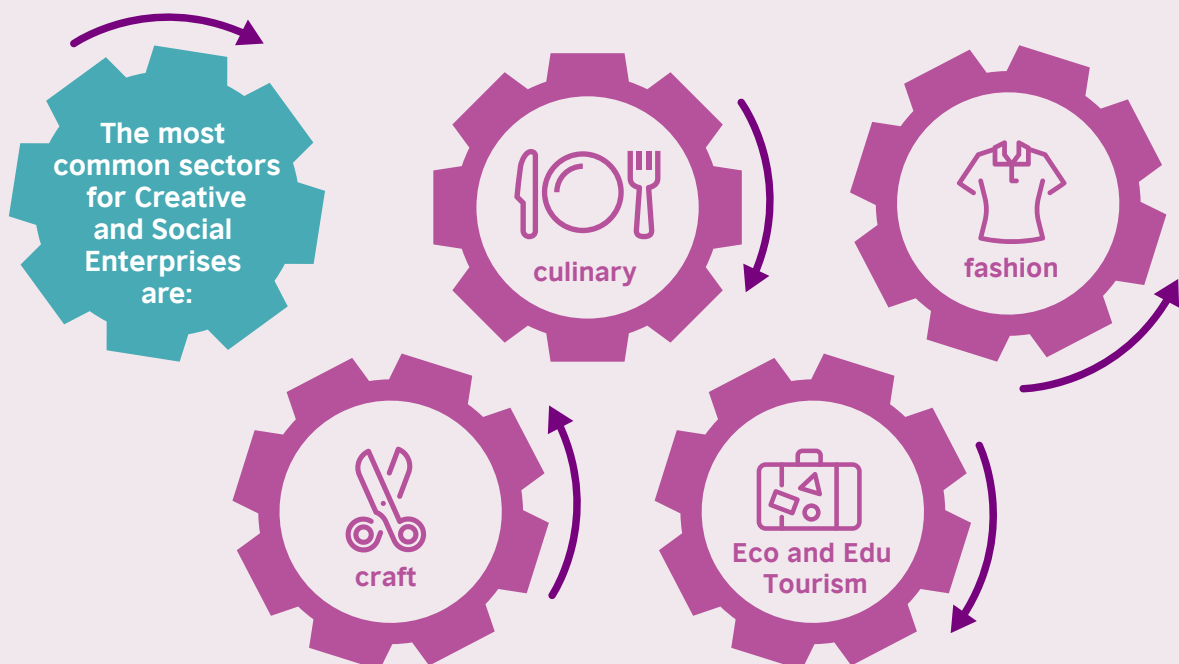


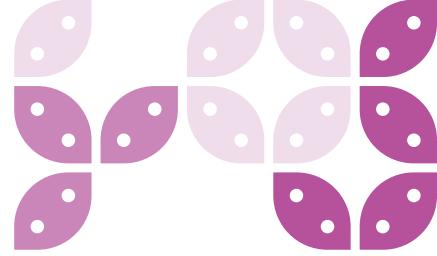
Creative and social enterprises are creating jobs faster than other businesses, for young and old, women and disabled people.



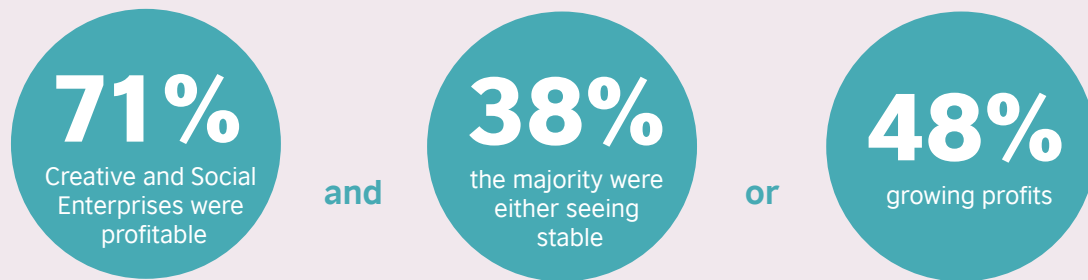
Creative and Social Enterprises are young businesses with over 70% being established within the past five years

Youth lead Creative and Social Enterprises are also more likely to have a clear focus on solving the SDGs, the priority SDG for Creative and Social Enterprises is goal 8 with a particular focus on creating decent work.





Prior to the onset of Covid-19,



Creative and Social Enterprises are having local impact with more than half (60%) selling their products and service in their local communities.

60%



1 Introduction

The British Council is the United Kingdom's international organisation for cultural relations and educational opportunities. Developing Inclusive and Creative Economies (DICE), is a British Council global pilot programme (2018-2020), which takes a holistic approach to imagining and building an economy that is equally accessible to all. DICE is delivered with and for women, youth, people disabled by society, and other groups that are excluded from the mainstream economy. The programme is co-designed by a global team and growing network in Brazil, Egypt, Indonesia, Pakistan, South Africa and the UK.

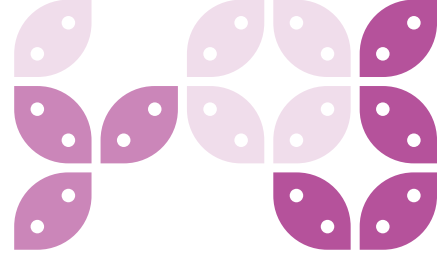
DICE is founded on the hypothesis that supporting the development of creative and social enterprise is an effective way to address the issues of unemployment and unequal economic growth and build more inclusive societies. This hypothesis was underpinned by the rationale that, around the world, communities face common challenges and problems, including:

- unemployment, especially among young people, potentially intensified by automation
- growing wealth inequality and exclusion from 'mainstream' economic opportunities, especially of women, disabled people and minorities
- environmental degradation and the climate emergency
- a sense of a loss of identity and community.

We know that even significant development aid and investment from governments cannot provide all the answers to overcome these challenges on their own. The way we do business with each other has to be part of the solution. This requires bringing together stakeholders in participatory ways to enhance mutual understanding. We need to foster the development of activities that have their origin in individual creativity, skill and talent and with potential for wealth creation. We know that creative and social enterprises have much in common and sometimes overlap. We know that creative and social enterprises can:

- ✓ have low barriers to entry, generating jobs especially for women and young people, harnessing human creative, emotional and social skills—more future-proof and more resistant to automation
- ✓ bring new, disruptive ideas to tackle the challenges we face, providing agile, environmentally and socially sustainable solutions that address market failure, contributing to the SDGs
- ✓ be inclusive, challenging the over-concentration of wealth and capital by spreading ownership, enabling democratic ownership and governance, distributing the benefits of innovation and technology
- ✓ bring new energy and pride to communities and countries, reflecting a country's culture, and changing how people feel about themselves.

Creative and social enterprises in many parts of the world are considered a success story, generating economic contributions and positive social impact. DICE is founded on this experience.



Social Enterprise UK and Catavento Pesquisas in Brazil, Ahead of the Curve in Egypt, the Parahyangan Catholic University (UNPAR) and The University of Surabaya (UBAYA) in Indonesia, SDPI in Pakistan and Simanye in South Africa worked with the British Council to survey creative and social enterprise activity in each of the countries. This work builds on a methodology for mapping social enterprise activity in around 20 countries and also incorporates further expertise on the creative economy and creative enterprise. The surveys seek to provide baseline data on the creative and social enterprise situation in each country in order to:



- **understand the specificities and diversity of the creative economy in the six DICE countries**



- **develop and clarify the British Council's approach and definition of creative and cultural industries, the creative economy and its contribution to inclusive development**



- **clarify the differences and overlaps between the social and creative economy.**

This approach was tested with peers and experts internationally and in-country. It has sought to provide new quantitative data that explores the:



- **contribution to economy and inclusive development of these enterprises (e.g. job creation, turnover, inclusive recruitment, supply chains and customer-bases, impactful products and services)**



- **current financing/funding and support sources and needs/gaps**



- **overlap and complementarities between creative and social enterprises.**

This report sets out the findings from research and survey work conducted between May 2019 and February 2020 and includes a summary of the methodological approach, an overview of survey and research findings and analysis of the significance of these results for inclusive development and the growth of creative and social enterprises in Indonesia.

Together with Social Enterprise UK, UNPAR and UBAYA have also worked with the British Council to better understand the investment landscape, funding and resource ecosystem for creative and social enterprises in Indonesia. This includes



mapping of investors engaging with creative and social enterprises



an assessment of these investors, their aims, objectives and impact, their accessibility to creative and social enterprises



mapping ecosystem builders engaging with these creative and social enterprises



an assessment of these supporters, their objectives and impact in supporting investment in creative and social enterprises



identification of the challenges, barriers and drivers of investment in creative and social enterprises, and an assessment of opportunities, challenges and gaps in this field

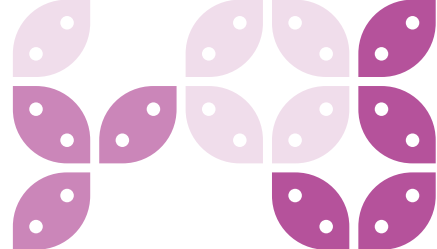


recommendations for different stakeholders with steps to improve the investment landscape.

A companion report commissioned by the British Council and AVPN focused on the investment landscape is presented alongside this research. As the only comprehensive funders' network in Asia, AVPN is a leading ecosystem builder for the social investment sector with over 600 members globally. Together with Social Enterprise UK, UNPAR and UBAYA, British Council and AVPN have set out to better understand the investment landscape for creative and social enterprises.

We hope these two reports can help support and inform policy and programmes in Indonesia and beyond to further encourage the sustainable development of creative and social enterprises across the world.





2 Understanding creative and social enterprise in the context of inclusive development

2.1 Study methodology

Our methodology included both reviewing existing data and providing new primary evidence of social and creative enterprise activity in the context of inclusive economic development. Our primary data collection took place in the summer and autumn of 2019, prior to the Covid-19 pandemic, and comprised a survey of creative and social enterprises and collection of evidence from key stakeholders – in the form of methodology workshops, data validation and interviews with intermediaries and creative and social enterprises. A review of existing evidence to supplement survey findings was also conducted, including existing research on creative and social enterprise activity, data on national economic development and comparative activity of NGOs and MSMEs.

Our survey of social and creative enterprises was conducted in two forms: through a face-to-face survey and online survey (see Annex 1). The face-to-face survey was not conducted exclusively with social and creative enterprises, but all types of enterprises, as part of a wider and random nationwide research study. This gave us a wider comparison group to allow us to benchmark creative and social enterprises against other enterprises. Of the respondents to our face-to face survey,¹ social enterprises were 4.88 per cent of all enterprises and creative enterprises were 16.2 per cent of all enterprises.

Full information on the methodology can be found in Appendix 1 and the survey questions are listed in Appendix 7.

Defining social and creative enterprises

Recognising the lack of internationally agreed definitions of creative and social enterprise, this study set out with core principles to inform which types of organisations should be included in the study, then sense-checked this with national stakeholders to refine inclusion criteria to be used for both the survey tool and the estimate of total populations of creative and social enterprises.

However, compared to many other countries, Indonesia has relatively clear definitions of both creative and social enterprise, based on Government's lead. To ensure a clear understanding of creative and social enterprises, the definitions used in this study are as follows:

A social enterprise is an enterprise which has social vision and mission to address social problems in the community and/or to bring positive impacts to social welfare and the natural environment; it reinvests its profit in the social mission, empowers community and exercises good governance principles in managing its business.²

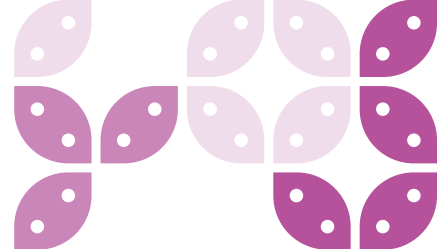
A creative enterprise is an individual, group of individuals or a business entity which carries out creative economy activities. Creative economy is the embodiment of the added value of intellectual properties that are sourced from creativity and based on cultural heritage science and/or technology.³

¹ The data is based on the following filtering procedures. There are 3,960 respondents (adults between 18-64 years old) from 29 (of 34) provinces in Indonesia and there are 964 business owners. From 964 business owners, 156 are categorised as creative enterprises (CE), 47 are categorised as social enterprises (SE) and 20 are categorised as hybrid social & creative enterprises (CSE).

² The definition is taken from the draft Law of Entrepreneurship of the Republic Indonesia.

³ The definition is based on Article 1, Law No. 24/2019 of the Republic of Indonesia on Creative Economy.



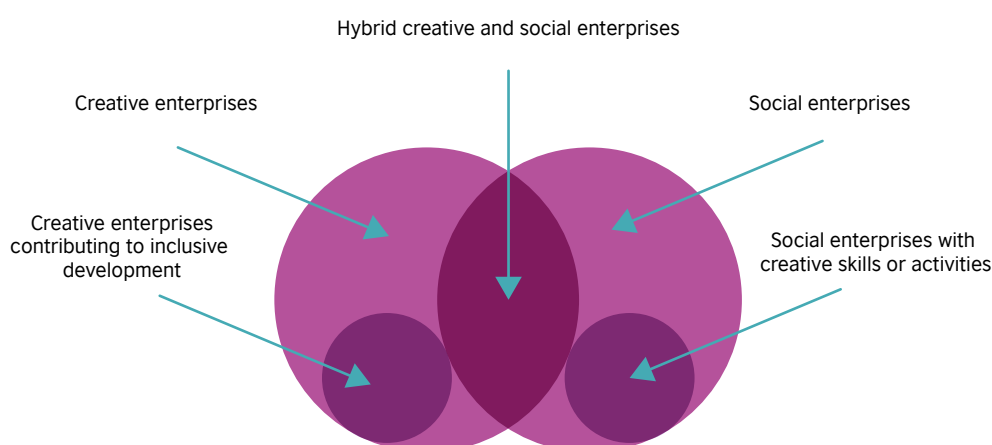


To operationalise these definitions for the purposes of this research, we used questions in our survey to screen eligible enterprises. Social enterprises were required to meet the following criteria:

Those who answer YES to the question: ‘Is the business’ main income from selling products or providing paid services?’

AND those who answer ‘social mission’ or ‘environmental mission’ or both to the question: ‘What is the main purpose of the business?’

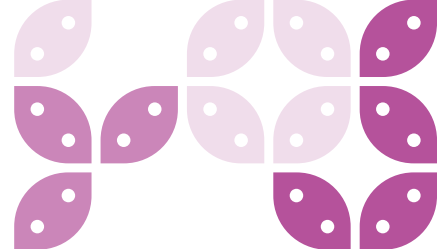
AND those who answer ‘Social/Environmental Mission First – we prioritise maximisation of impact over profit’ OR ‘Both Jointly – we pursue both financial and social/environmental objectives equally’ to the question: ‘Which of the following does your business place the most emphasis on?’



Creative enterprises were identified based on the primary industry or sector in which they operate. If the main business falls into at least one of these categories,⁴ it is classified as creative enterprises: game & app design, architecture, interior design, visual communication design, industrial/product design, fashion, film, animation & video, photography, craft, culinary, music, press and publication, advertisement, performance art, art, television and radio. We were particularly interested in those enterprises which are classified as both social AND creative. We refer to these as ‘creative and social enterprises’ or CSEs.

⁴ Based on classification of creative enterprises from BEKRAF (Indonesia Agency for Creative Economy)





2.2 Creative and social enterprise activity in Indonesia

Creative enterprise

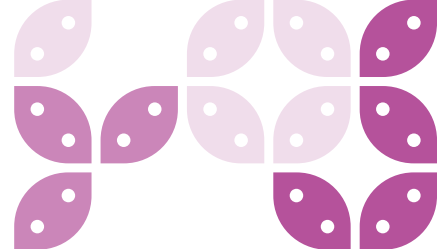
In the Indonesian context, the creative economy has received ever greater attention since 2009, when the Ministry of Tourism and Creative Economy was established. With a strategic plan to speed up the growth of the creative economy, the Government identified 15 sub-sectors, subsequently expanded to 16 sub-sectors in 2014⁵.

A new long-term strategic plan was adopted in 2015 to encourage the creative economy to become a driving force, boosting creativity and stimulating business competitiveness in Indonesia. In 2019, a formal definition of creative economy was developed, 'The embodiment of the added value of intellectual properties that are sourced from creativity and based on cultural heritage science and/or technology' (Law No. 24/2019, Article 1). Therefore, a creative enterprise is an individual, a group of individuals or a business carrying out creative and innovative activities from intellectual origins and which generate economic value in this sector. The creative economy includes 16 sub-sectors:

- | | |
|------------------------------------|--------------------------------------|
| 1) game and application developers | 9) photography |
| 2) architecture | 10) crafts |
| 3) interior design | 11) culinary |
| 4) visual communication design | 12) music |
| 5) industrial or product design | 13) publishing |
| 6) fashion | 14) advertising |
| 7) film | 15) performing arts |
| 8) animation and video | 16) fine arts, television and radio. |

⁵ See Kementerian Pariwisata dan Ekonomi Kreatif, *Ekonomi Kreatif: Kekuatan Baru Indonesia Menuju 2025 (Creative Economy: Indonesian New Force Towards 2025)*. IndonesiaKreatif.net.





Data from a BPS survey in 2015 (Bekraf, 2016) shows that the biggest creative economy sector is culinary (41.7 per cent of the creative economy in terms of contribution to GDP) followed by fashion (18 per cent) and crafts (15.7 per cent). The fastest growing sub-sectors are visual communication design, music and video animation.

In 2014, the Ministry of Tourism and Creative Economy blueprint, *Creative Economy: Indonesia's New Power Towards 2025*, set out the Government's target for how the creative economy is expected to absorb ten–11 per cent of the workforce in five to ten years, with growth in labour absorption of around 1.5 to two per cent per year and increased productivity (in labour force) of three to four per cent per year. In addition, the creative economy is estimated to contribute to around seven to 7.5 per cent national GDP and is expected to contribute two to 2.5 per cent growth to foreign exchanges per year.

With regard to the target set out in the blueprint, in 2015, based on a survey conducted by BEKRAF and BPS (2016), the creative economy has contributed 852 trillion rupiah or 7.3 per cent of the national GDP. This contribution shows the achievement of the Government's target of between seven to 7.5 per cent per year. Of the total Indonesian population who work (114.8 million people), 13.9 per cent work in the creative economy.

Furthermore, 21.5 per cent of first-time workers, or approximately 542,000 workers work in the creative economy. This shows the huge significance of the creative economy for young workers/first-time workers.

The workforce of the creative economy is dominated by young women. In 2015, 54 per cent of the creative economy workforce was female; this is above the proportion of female workers in wider area on national level at around 37 per cent. Seventeen point eight per cent of workers were aged 15-24 years in the creative economy compared to 13.8 per cent more widely. Most of these female creative economy workers are active in fashion, where workers tend to work formally with higher average working hours compared to workers in other sectors.

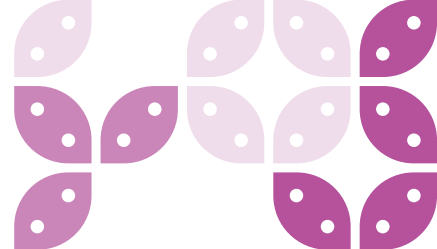
Social enterprise

Along with the influence of the European concept of social economy, various terms are used to describe 'non-conventional' economic initiatives in Asia, including the emerging concept of social enterprise. Defourny and Kim (2011) introduced the first typology of social enterprise in Asia, including trading NPOs, work-integrated social enterprises, and non-profit co-operative enterprises.⁶ In the Indonesia context, social enterprises may be categorised into four types, identified by Pratono, Pramudija, and Sutanti (2016).⁷

⁶ Defourny, J. & Kim, S. (2011) 'Emerging models of social enterprise in Eastern Asia: Across-country analysis', *Social Enterprise Journal*, Vol. 7, No. 1, pp. 86–111.

⁷ Pratono, Pramudija, and Sutanti (2016). 'The Social Enterprise in Indonesia: Emerging models under transition government', in Bidet, E. & Defourny, J. (eds) *Social Enterprise in Asia: Theory, Models, and Practice*, London and New York: Routledge.





- Community-based social enterprise—typically social enterprises that strive to solve problems in their community and focus on improving local resource allocation for the benefit of the community. The resources belong to the community, which adopt village-owned enterprise or other informal models.
- Not-for-profit social enterprise—emerging from non-profit organisations (NPOs). Also called Entrepreneurial NPOs, these social enterprises combine their social mission and economic activities to ensure their sustainability, and adopt a self-governing and independent governance model.
- Social co-operative - social enterprises that emerge from mutual interest organisations and rely on their own resources in terms of finance and management. This includes a new wave of co-operatives, attempting to pursue societal goals as a main co-operative principle.
- Profit-for-benefit social enterprise—businesses that strive to achieve social impact by focusing on financial sustainability. These may include some franchises of big corporations. PT Monica Hijau Lestari, the licence owner of The Bodyshop Group in Indonesia, is the best example of how an Indonesian business group has adopted the social enterprise model under a franchise from Europe. However, some argue that mission drift is a risk due to the conflict of values between profit motivation and social purpose and may not describe these businesses as social enterprises but rather ‘inclusive businesses’.

The Global Entrepreneurship Monitor in 2015⁸ looked at both start-ups and established social enterprises. Data shows that between 1.6 per cent and 2.3 per cent of individuals in Indonesia are involved in social entrepreneurial activity.

According to the BCG report (2015)⁹ and ASEAN Social Enterprise Structuring Guide (Thomson Reuters Foundation, 2018),¹⁰ social enterprises in Indonesia may use a range of existing legal structures, such as:

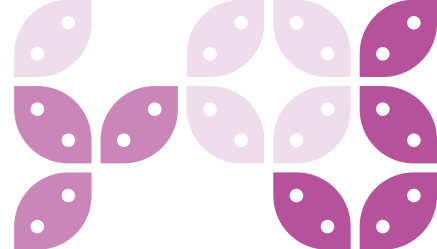
1. Enterprise (PT)—A limited liability organisation owned by shareholders, with a profit-making characteristic, allowed to seek investors.
2. Organisation (Perkumpulan)—A social purpose association without profit-making intentions.
3. Foundation (Yayasan)—A cause-driven organisation which does not operate for profit and which can receive tax benefits and grants to be distributed for charity.
4. Micro Financial Institution (PT LKM)—An organisation that may earn a profit but receives no tax benefit. It makes loans to individuals, SMEs or social enterprises.
5. Co-operative—A membership-based organisation that is allowed to obtain external funding and receives no tax benefit.

⁸ Bosma, N.S., Schøtt, T., Terjesen, A.A., and Kew, P. (2016), Global Entrepreneurship Monitor 2015 to 2016: Special Report on Social Entrepreneurship, Global Entrepreneurship Research Association.

⁹ Yulius, Siregar, H. & Tampubolon, N. (2015), The Art of Sustainable Giving: Priorities to Accelerate Social Enterprise Growth in Indonesia, The Boston Consulting Group.

¹⁰ Thomson Reuter Foundation (2018), ASEAN Social Enterprise Structuring Guide, February 2018, British Council, the Thomson Reuters Foundation and the United Nations ESCAP, with the Indonesia local partners: Indonesia: UnLtd & Socolas.





However, many micro and small social enterprises are not yet legally structured and are still informal, perhaps operating as sole traders or Usaha Perorangan under the IUMK permit (Ijin Usaha Miro Kecil – Micro and Small Enterprise permit).

Yulius et al. (2015) identified that social enterprises in Indonesia have several challenges in relation to funding. There is a perceived overdependence on charitable funding, difficulty in accessing seed funding, and limited business skills and technical capabilities to help these enterprises beyond seed stage. Similar challenges were found by ANGIN, who found that social enterprises have limited capital that hinders them from creating significant social and environmental impact. They also identified a problem of investment readiness among SEs.

A study conducted by British Council, UNESCAP and PLUS in 2018 explored the definition and classification of social enterprise in the Indonesian context. Social enterprise was defined as ‘any business which is primarily motivated by a social or environmental mission and reinvests a significant proportion of its profits toward this mission’. (British Council, 2018 p. 23).

The definition is broadly aligned with the definition and criteria of social enterprise in the National Entrepreneurship Draft Law (Article 1, Section 6). Social enterprises should have: a mission to solve social problems and/or make a measurable positive impact in the welfare of the community and the environment through planning, development, and empowerment and reinvestment of a large portion of profits towards supporting the mission.’

For the 2018 study, British Council, UNESCAP and PLUS interviewed 467 organisations that fell into these criteria. The study found that social enterprises are considered to be much younger than general enterprises. More than 70 per cent of SEs have been operating for two years or less (which is comparable to Yulius et al. (2015) which found that 62 per cent of SEs have been established for less than two years). The older SEs tend to be registered as foundations (more than five years old) and younger SEs (less than five years since establishment) tend to be registered as limited liability companies (LLC) or Perseroan Terbatas (PT).

In terms of talent and employment, the majority of social enterprises leaders (67 per cent) were found to be young, between 18 and 34 years old. While businesses more widely have more male leaders, the 2018 study found that SEs were more likely to be led by women, at 40 per cent. Organisations led by women had a higher proportion of female employees than men-led social enterprises, on average.

In terms of legal registration, this study also found that most social enterprises tend to be registered as PTs (40 per cent) and foundations (27 per cent). Twenty-one per cent of SEs are formed as limited partnerships or CVs and five per cent are co-operatives. The 2018 study found that 22 per cent of SEs are working in the creative economy, an important precursor to this study, while the next common sectors are agriculture and fisheries (16 per cent), education (15 per cent) and services (13 per cent).

In terms of financial support, the study revealed that social enterprises have found difficulties in accessing funding and finance due to their limited track records. In terms of non-financial support, the study also revealed that many SEs that are micro or small have challenges in finding skilled human resources. Some SEs led by young people may have difficulties in sourcing specific skills and attracting experienced mentors and support.



3 Overview of creative and social enterprises

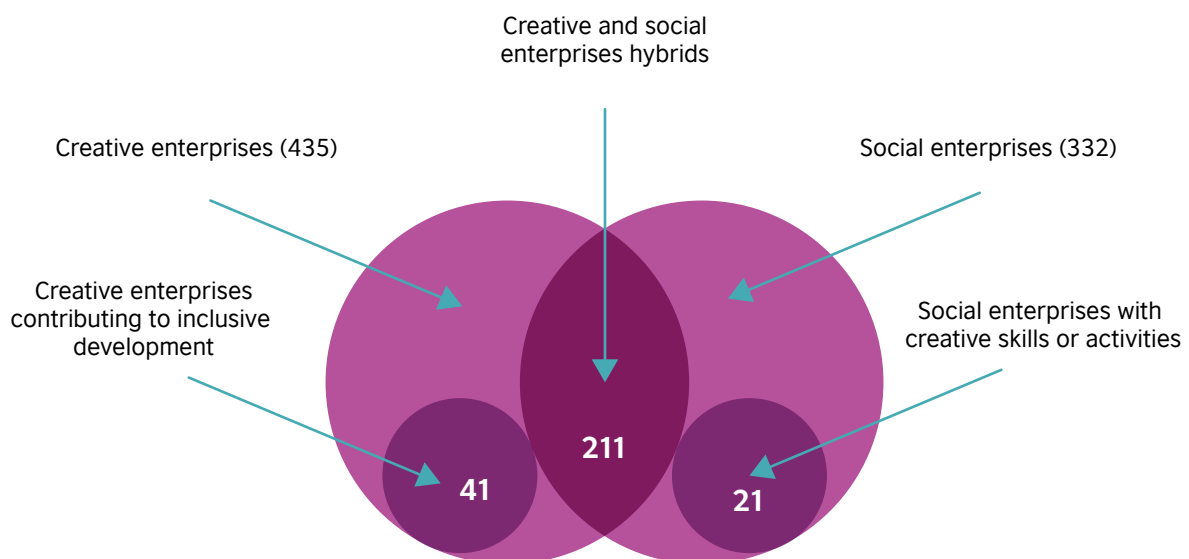
This section presents the findings from our survey in terms of the type of enterprises, their staff, turnover, age, geography and sectors. We also aim to compare the findings specific to social and creative enterprises with the wider SME and Indonesian context, where possible.

3.1 Survey sample

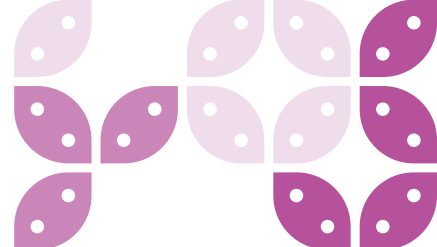
We gathered 1,388 survey responses through both face-to-face surveys and online. Of these, we used our criteria set out above to identify:

- 332 social enterprises (SEs)
- 435 creative enterprises (CEs)
- 211 which were both creative AND social enterprises (CSEs)

We further identified 21 SEs (which do not fall into creative economy subsectors) that carry out creative activities or exercise creative skills (as defined below). We also identified 41 creative enterprises which work to deliver one or more of the SDGs and could therefore be considered to contribute to inclusive development.



Creative social enterprises are relatively young, with the majority established within the last five years. Most are operating their businesses in urban areas and run as micro enterprises.



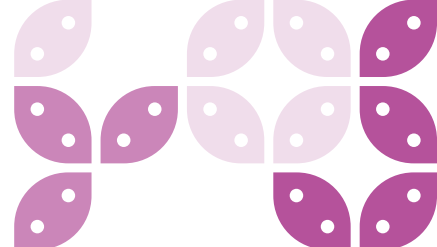
Perceptions of social and creative enterprises

Our face-to-face survey respondents were not told in advance the definitions of social enterprise or creative enterprise being used for the research. They were asked about their perceptions of their own organisation. The following table sets out how they perceive themselves and how this aligns to the definition used for the study.

Questions	Social Enterprises (SEs)	Creative enterprises (CEs)	Creative and Social Enterprises (CSEs)
What is the main purpose of the business?	Social mission or Environmental mission	Others	Social mission or Environmental mission
Which of the following does your business place the most emphasis on?	Social/Environmental mission first OR Social/Environmental and Economy jointly	Economy mission	Social/Environmental mission first OR Social/Environmental and Economy jointly
What is your main business activity?	Other than 16 subsectors in creative economy	16 subsectors	16 subsectors
With spectrum of inclusive development or creative skills			
Do you think creativity, innovation, and idea generation are important, very important or extremely important?	SEs with creative skills or activities		
Do you have inclusive development activities? (List of SDGs)			

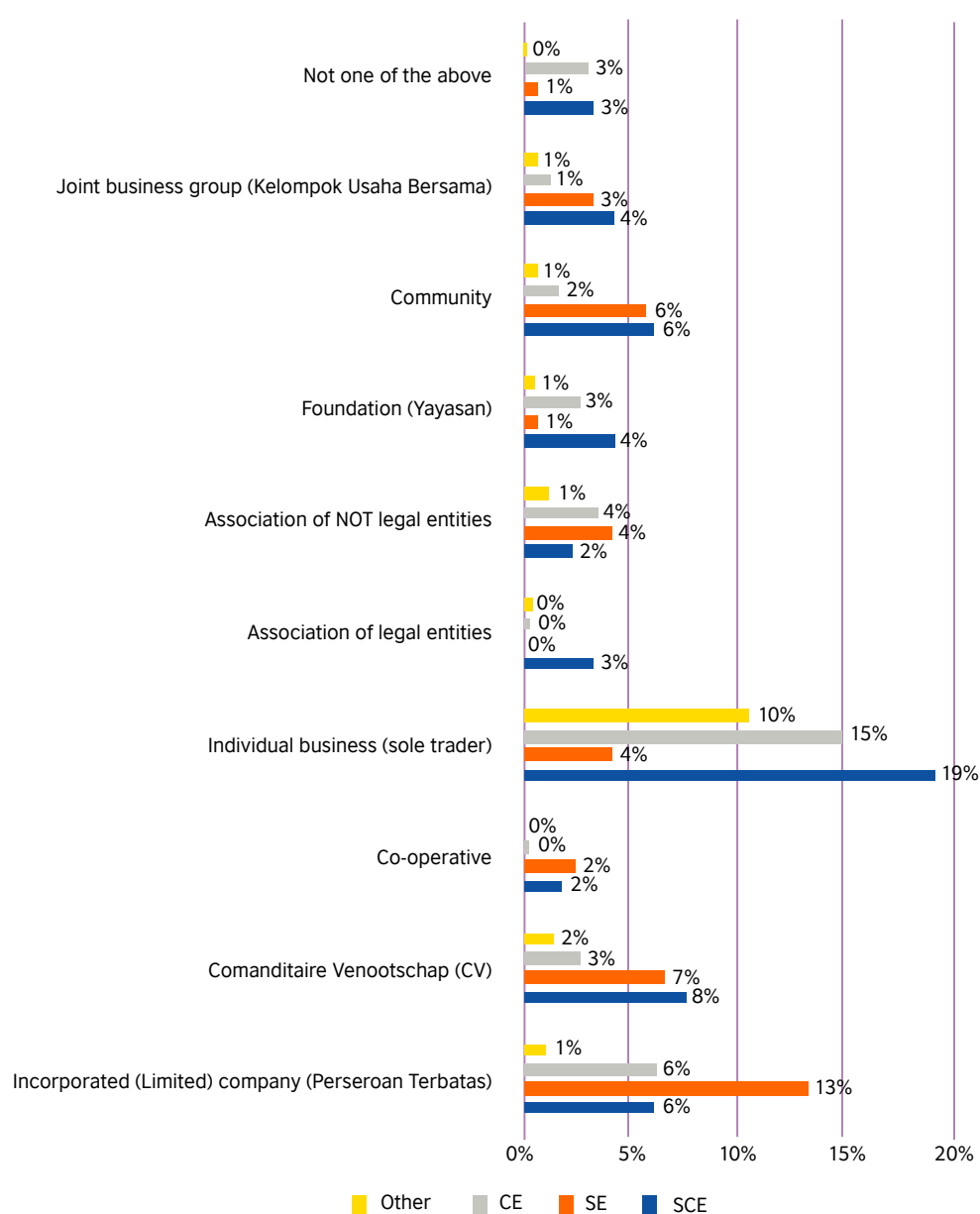
Many organisations identified themselves through a number of different terms, showing they were comfortable with this idea of hybridity—being social and creative, or perhaps cultural and making a social impact.

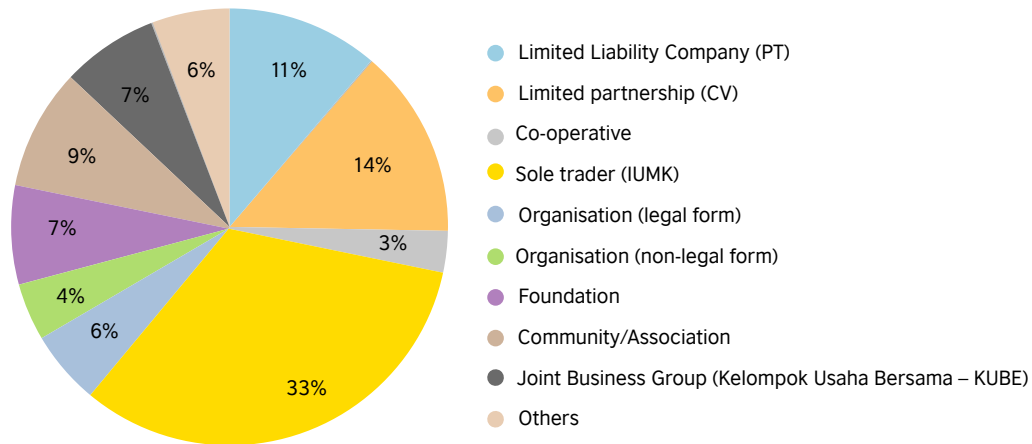
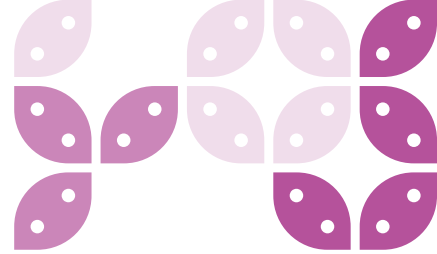




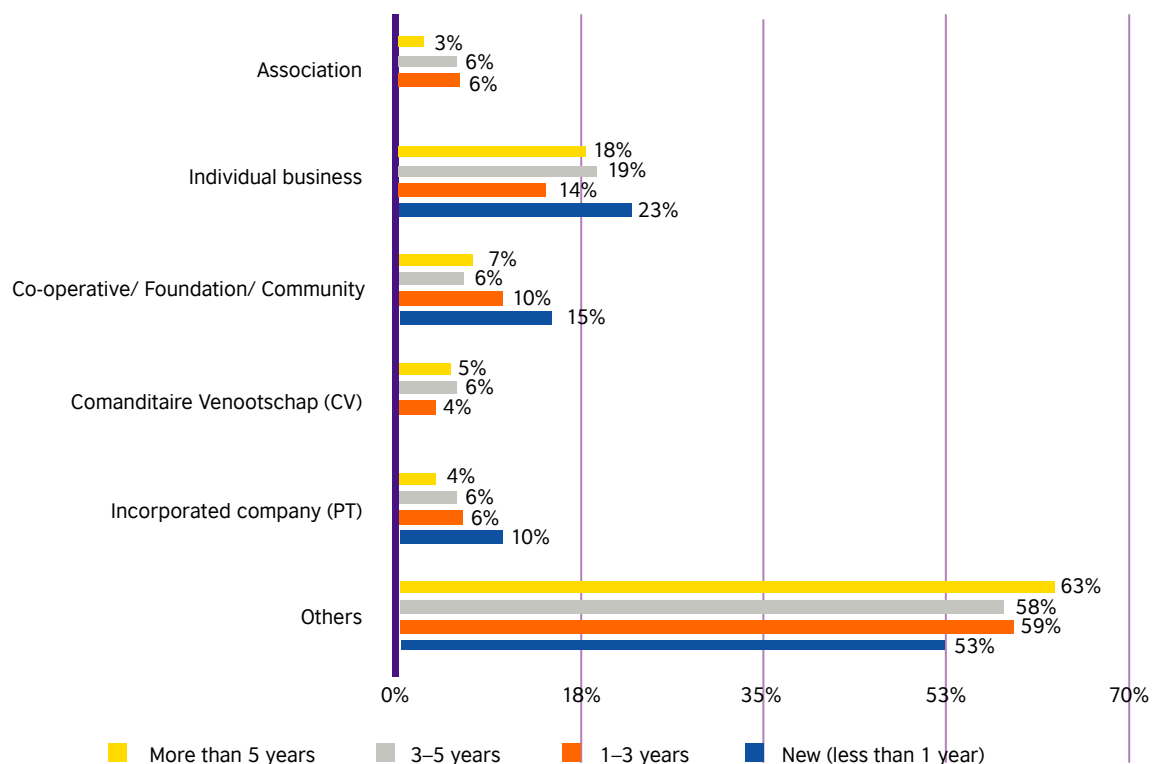
3.2 Legal forms

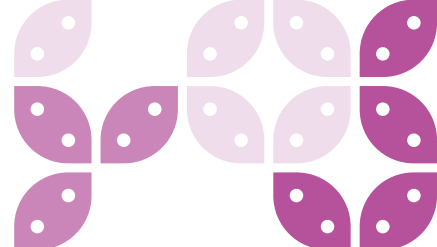
Creative and social enterprises take diverse legal forms. But only 29 per cent of our respondents reported that they were formally registered as legal entities and 71 per cent preferred not to respond to the question. Of those who identified their legal form, the majority are individual businesses or sole traders (with micro or small enterprise permits–IUMK). This is partly linked to their recent establishment and small scale but also as they may lack knowledge about basic business structures and legal forms.





Most CSEs are individual businesses, while most social enterprises are limited or incorporated company or Perseroan Terbatas. A small number of respondents were co-operatives or associations. Thirty-three per cent of CSEs are sole traders with a micro or small enterprise permit. Fourteen per cent are registered as a limited partnership (CV) and 11 per cent are ‘Perseroan Terbatas’ or limited liability company. Only half of the respondents have adopted a formal business form: either PT, CV, co-operatives, legally-bound organisation (Perkumpulan berbadan hukum), foundation or association. The other half are sole traders, non-legal organisations (Perkumpulan tidak berbadan hukum), joint business groups or other businesses without a legal foundation.

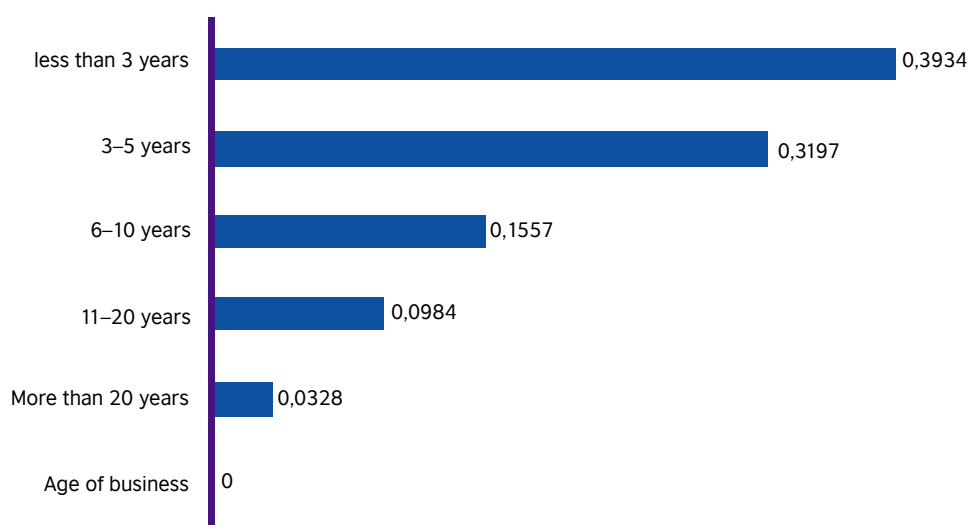




Although the majority of these enterprises have not adopted a legal entity, newer businesses (less than three years old) are slightly more likely to have done so.

Year started

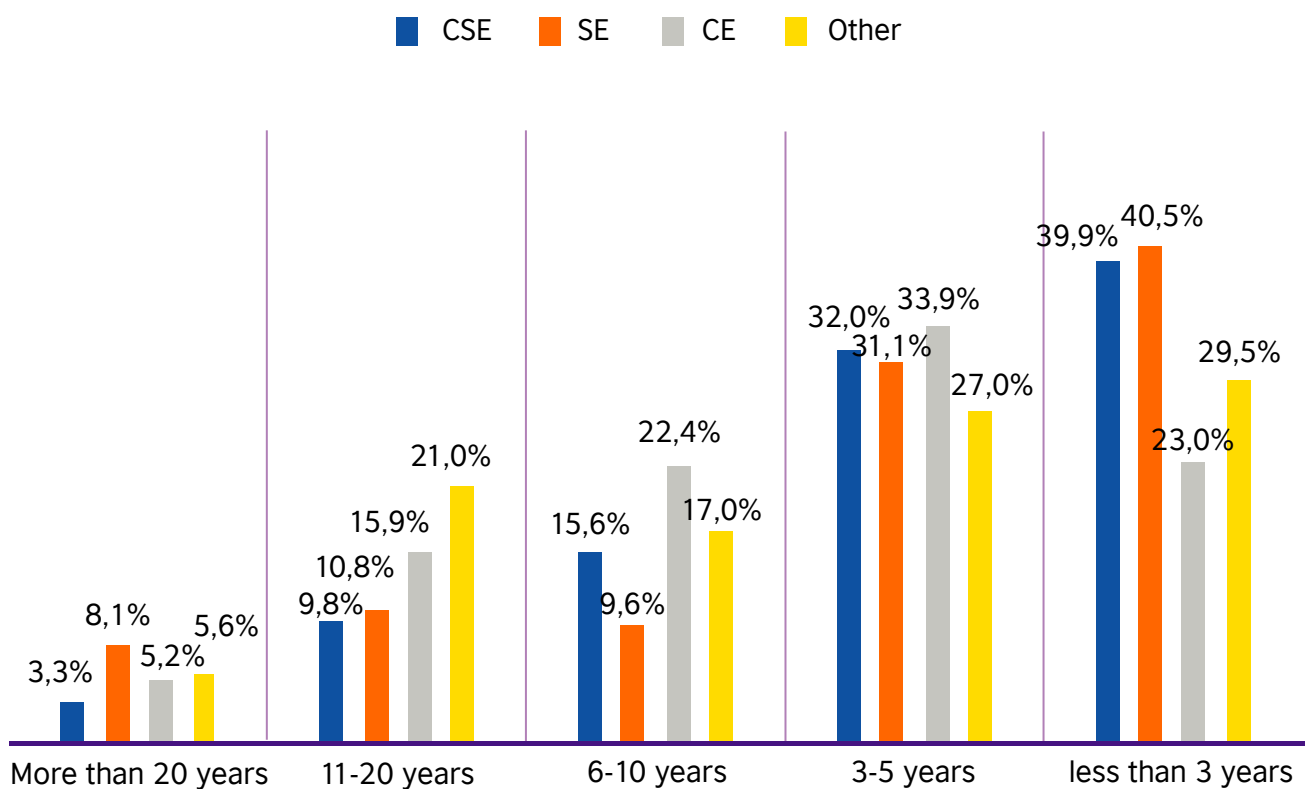
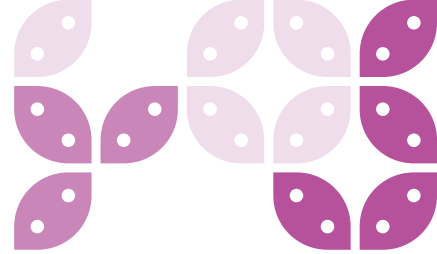
Creative and social enterprises in Indonesia are young. A hundred thirty-nine CSEs told us about their year of establishment and over half are less than five years old.



The oldest CSE in our survey (an organisation that enables disabled people to create crafts) was founded in 1990. A handful (3.3 per cent) have been operating for over 20 years and 9.8 per cent have been running their business for between 11 and 20 years. The others started operations less than ten years ago, with the highest proportion of those having operated for less than three years. On average, the age of these businesses is 4.5 years. These are relatively young businesses compared to CEs, SEs and general enterprises more widely. The graph below compares the age of businesses for each category.

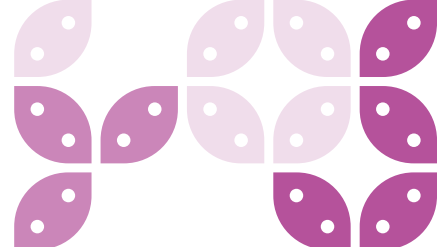
	CSE	SE	CE	Other	Average
Average business age	4.5	6.4	7.1	7.7	7.1





CSEs are, on average, younger than either creative or social enterprises and all are younger than other enterprises more widely. This is a relatively new phenomenon in Indonesia and is becoming more popular, with many under three years old.

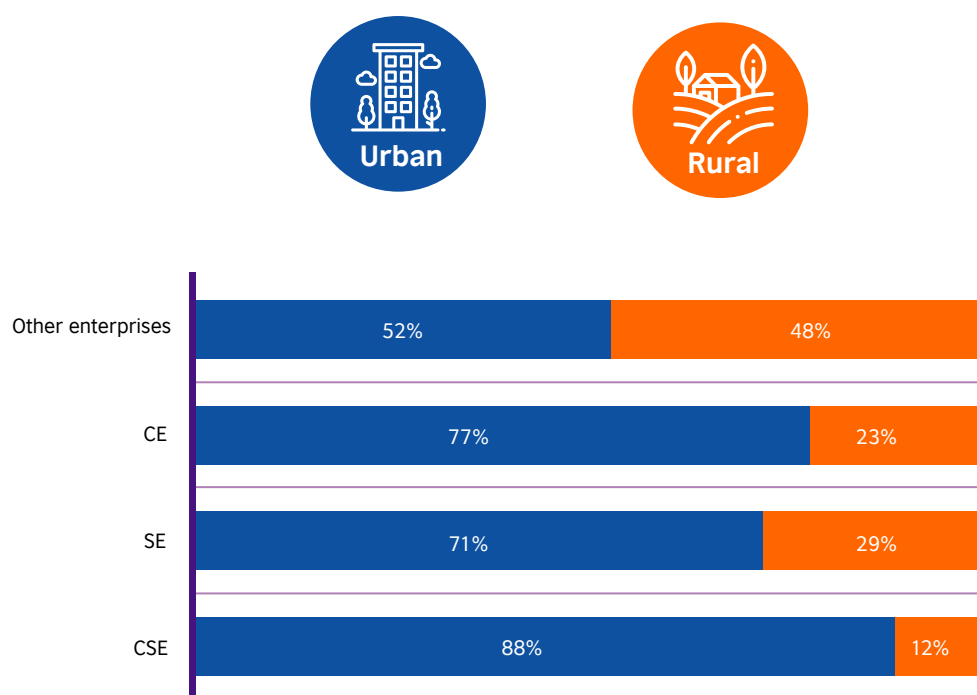




Location of business

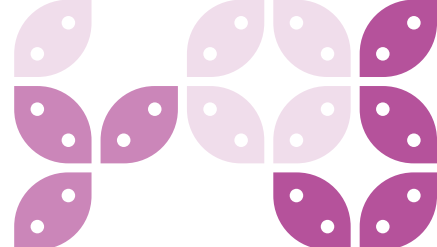
Most CSEs are based in urban areas. 84 per cent do their businesses in urban areas and only 16 per cent operate in rural areas, with most operating in Java and Bali.

CSEs are also more commonly operating in urban areas than other types of enterprises,¹¹ which are almost equally split between urban and rural areas (52 per cent and 48 per cent respectively). Creative enterprises are slightly more likely to be based in urban areas than social enterprises—77 per cent of CEs run their business in urban areas while only 71 per cent of SEs operate in urban areas.



¹¹ Referring to Figure X, from 1,388 valid respondents, there are 211 CSEs, 332 SEs, and 435 CEs. Thus, there are 410 enterprises that are categorised as general enterprises which do not fall into the category of any social or creative enterprises.





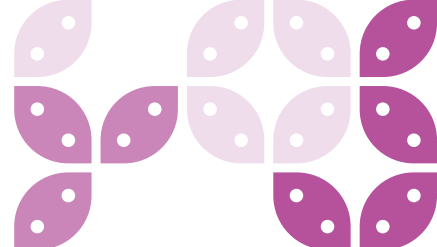
The most common sub-sector for CSEs is the culinary sector, followed by fashion and craft. The finding is consistent with the Bekraf¹² and BPS data that identify three main sub-sectors in creative economies (culinary, fashion and craft).

Sub-sector	Number of businesses
Culinary	70
Fashion	35
Craft	25
Eco-tourism, edu-tourism, tourism and education	24
Game and App design	6
Performance art	13
Art, television and radio	1
Press and publications	6
Product design	6
Animation & video	7
Interior design	6
Visual communication design	6
Advertisement	1
Film	1
Music	2
Photography	2
Total	211

The pattern is similar for creative enterprises (CEs) with the three main sub-sectors, culinary, fashion and craft, followed by product design and art.

¹² Between 2015 and 2019, the Indonesian government body with responsibility for the creative economy was the Creative Economy Agency, or Bekraf. In November 2019, Bekraf was merged with the Ministry of Tourism and Creative Economy (MoTCE or Kementerian Pariwisata dan Ekonomi Kreatif/Badan Pariwisata dan Ekonomi Kreatif) to form Baperekraf.



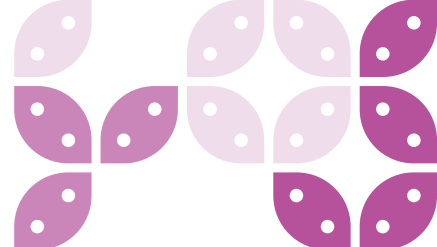


Creative economy sub-sector	CEs	Creative economy sub-sector	CEs
Culinary	74	Performance art	5
Fashion	52	Animation & video	5
Craft	20	Eco-tourism, edu-tourism, tourism and education	4
Product design	12	Music	4
Art, television and radio	12	Photography	3
Interior design	8	Film	2
Press and Publication	7	IT-based e-commerce	2
Game and App design	6	Advertisement	1
Visual communication design	6	Others	3
Total	226		

However, SEs are more likely to work in retail and then the food and beverages industry, more akin to businesses more widely.¹³ A further ten per cent work in agriculture and eight per cent in education. SEs are also working as incubators and accelerators and creating co-working spaces for other SEs or entrepreneurs. Business more widely in Indonesia is dominated by retail (48 per cent) and the food industry (23 per cent), followed by business-to-customer (B2C) services, such as brokerage, consulting services or repairs.

¹³ NB these food and beverage businesses are more generic restaurants or catering services that do not focus on the creative or cultural dimensions of food.

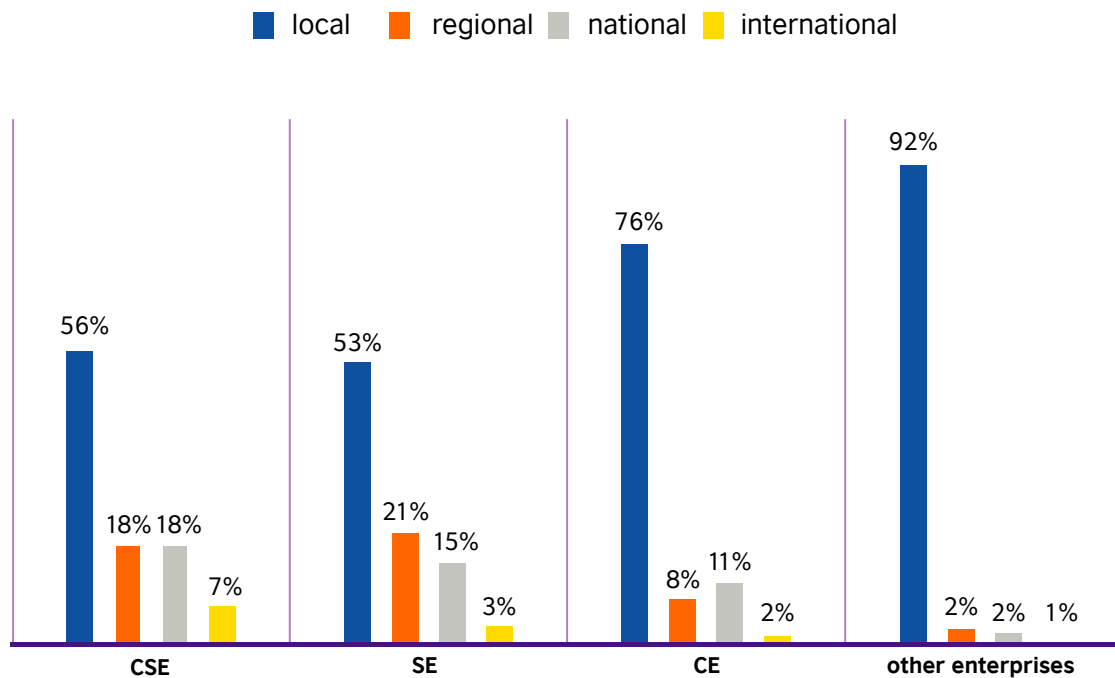
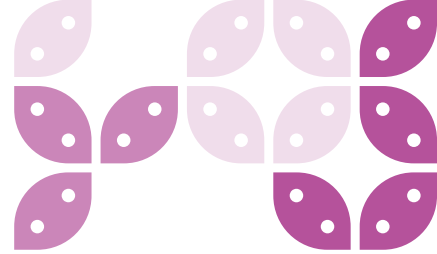




Sectors	SE	General enterprises
Retail	21	399
Food and beverages	17	190
B2C service	15	87
Agriculture	12	43
Education	9	9
Fashion	5	13
Waste management	4	0
IT	3	1
Travel	3	2
Co-working space	3	0
Finance	3	2
Manufacturing	3	14
Others	20	73
Total	118	833

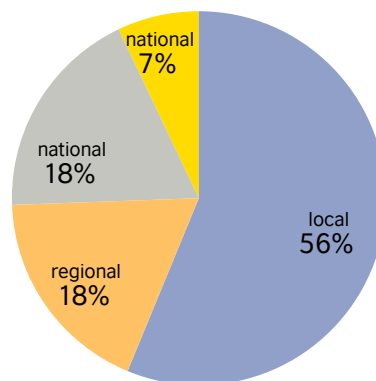
Most CSEs in Indonesia are selling their goods and services locally. However, they do tend to have greater links to international markets than other enterprises (seven per cent) and compared to other SEs, other CE and business more widely (three per cent, two per cent and one per cent respectively). Businesses more widely are more likely to be selling their products or services in the local market (92 per cent) while SEs are more likely to be trading across a region or province (21 per cent). Around a quarter of CSEs are trading nationally or internationally.





60 per cent of CSEs sell their products or services in their local vicinities (town/district) while 7 per cent of CSEs sell their products and services internationally.

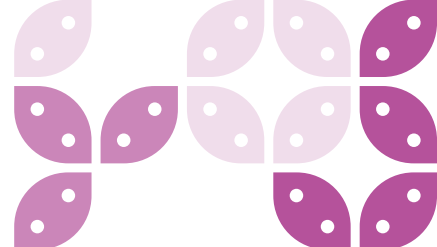
Sales coverage



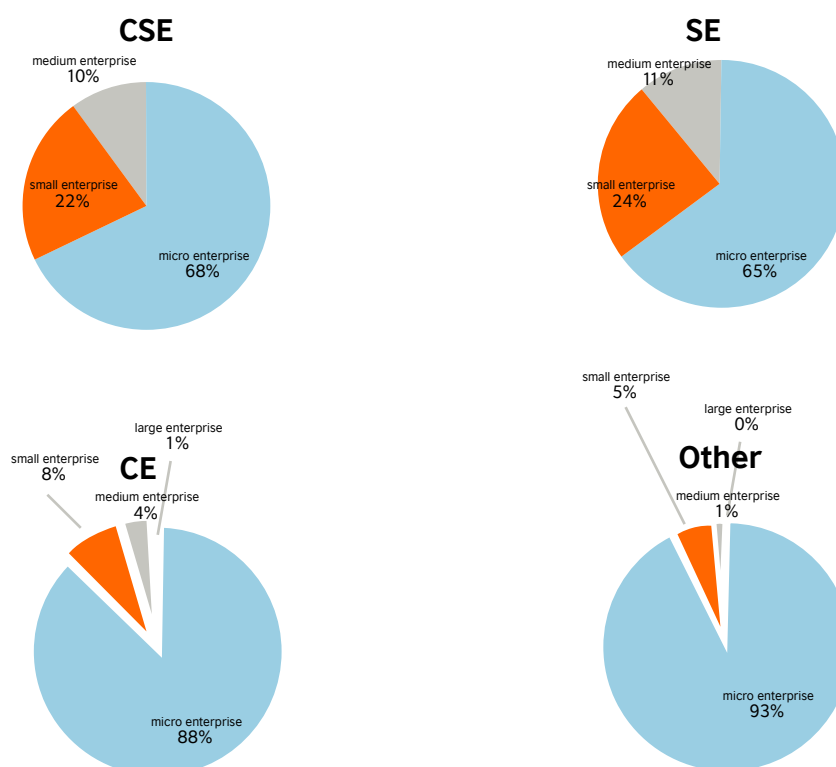
Annual turnover

CSEs have a higher average annual turnover than other businesses at IDR236 million and compared to IDR97 million for social enterprises, IDR10 million for creative enterprises and IDR14 million for all other enterprises. There were more medium sized CSEs among our survey respondents than either SEs or CEs. Only two of our survey respondents were large enterprises.





	CSEs	SEs	CEs	Other enterprises
No. of responses	61	52	144	762
Refused to answer	150	66	82	71
Average annual turnover (IDR)	236,294,100	97,865,736	10,626,048	14,474,526
Minimum annual turnover (IDR)	0	0	(150,000,000)	0
Maximum annual turnover (IDR)	7,200,000,000	3,500,000,000	500,000,000	7,200,000,000



SEs and CSEs are less likely to be micro enterprises compared to CEs and other enterprises. While business more widely in Indonesia is mostly composed of micro enterprises (93 per cent) for social enterprises this is only 65 per cent and for CSEs it is 68 per cent.

Micro, small and medium enterprises are defined according to the Law No. 20/2008 on Micro, Small, and Medium Enterprises.

Medium enterprises:

Value of assets between 0.5 and Rp 10 billion and annual turnover between IDR2.5 and IDR50 billion.

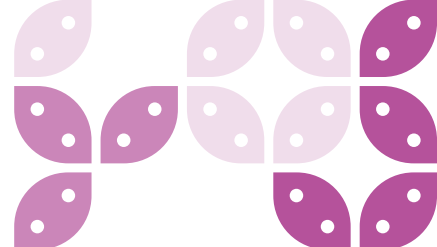
Small enterprises:

Value of assets between IDR50 billion and IDR0.5 billion and annual turnover between IDR300 million and IDR2.5 billion.

Micro enterprises:

Value of asset up to IDR50 million and annual turnover up to IDR300 million.





Access to grants

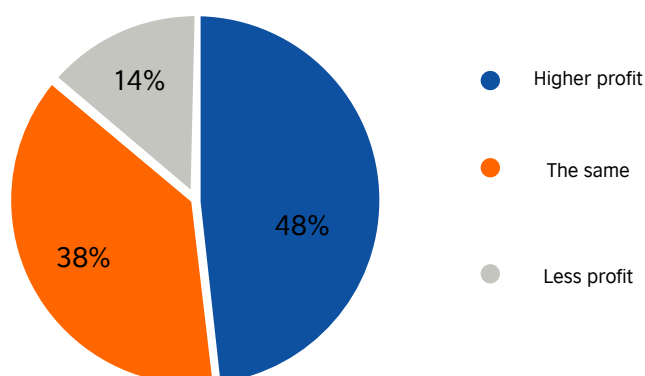
Businesses in Indonesia tend to generate their own trading income and access to grants is rare. Our survey asked CSEs if they received grants and only 27 per cent of CSEs did, although this is higher than SEs, CE and other enterprises (at 22 per cent, 11 per cent and eight per cent respectively). These grants could be from governments, INGOs, the private sector or donors. The most common proportion of grants received by CSEs and SEs is less than 25 per cent of income, while for that small proportion of CEs and other enterprises which do receive grants, it is higher, between 25 per cent and 49 per cent.

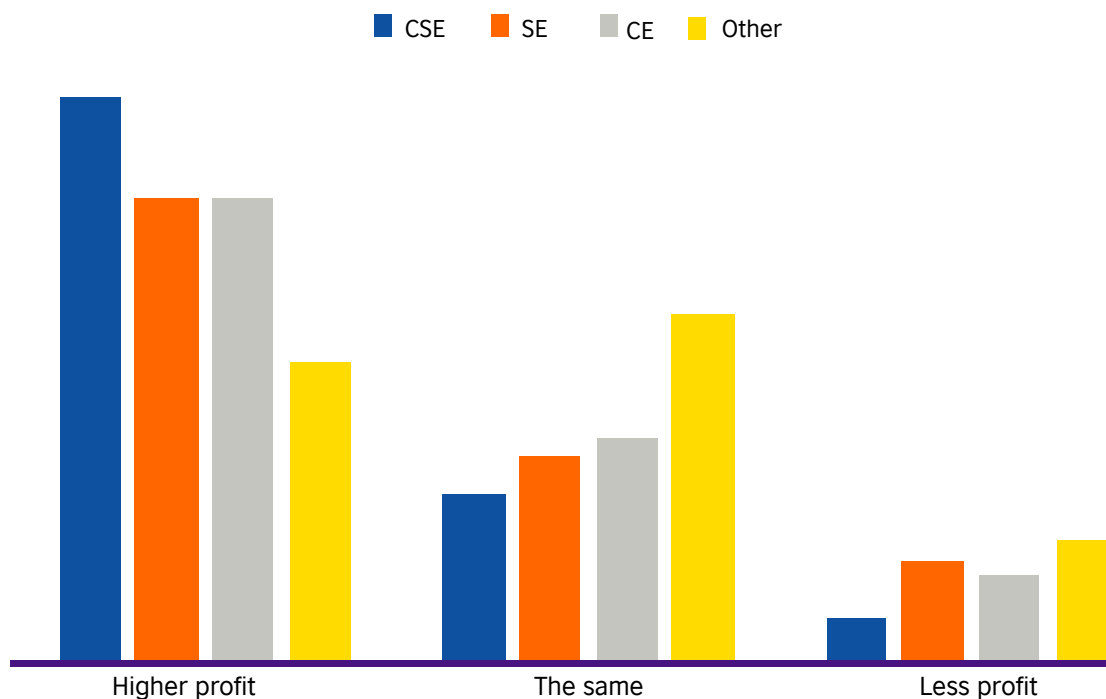
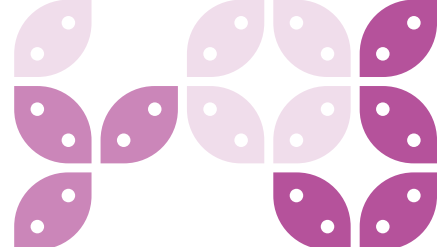
What proportion of your business income comes from grants	CSE	SE	CE	Other
1–24 %	17	7	5	14
25–49 %	3	1	7	24
50–74 %	5	2	2	1
75–100 % and will stay like that next year	1	0	0	2
75–100 % but intend to reduce grants below 75 per cent next year	2	1	1	3
None	74	40	117	495
Total	102	51	132	539
Percentage of grant recipients	28%	22%	11%	8%

Profit and loss

Creative and social enterprises in Indonesia are profitable businesses. 71 per cent of CSEs are making a profit compared to 60 per cent of social enterprises and 59 per cent of creative enterprises in our sample.

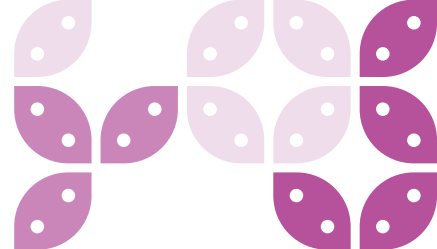
When asked about their financial performance in 2018 as compared to 2017, 48 per cent of enterprises reported higher profits and 38 per cent the same level of profit as in 2017, while 14 per cent reported lower profits.





The next sections explore the validity of our main ‘hypothesis’. First, we try to ascertain whether these enterprises have low barriers to entry, are generating jobs especially for women and young people, harnessing human creative, emotional and social skills – making them more future-proof and more resistant to automation. Then, we try to shed some light on whether creative and social enterprises bring new, disruptive ideas to tackle the challenges we face, innovating to provide agile, environmentally and socially sustainable solutions that address market failure, contributing to the SDGs. Third, we show how these businesses can be inclusive, challenging the over-concentration of wealth and capital by spreading ownership, enabling democratic ownership and governance, distributing the benefits of innovation and technology. Next, we explore how these enterprises can bring new energy and pride to communities and countries, reflecting a country’s culture, and changing how people feel about themselves. Finally, we consider the ecosystem’s strengths and gaps and close our report with some conclusions and recommendations.





4 Creating jobs and inclusive access to employment for women, young people, and vulnerable groups

Creative and social enterprises are creating jobs for women and young people compared to other types of enterprises.

Indonesia is the fourth largest country in the world by population, with approximately 268 million people—48.6 per cent are female and 23.8 per cent are aged between 20 and 34 years old.¹⁴ Based on BPS data in August 2019,¹⁵ the working age population is 197.9 million people, which is 73.8 per cent of the population. The percentage of the working age population who are economically active is 83.1 per cent for males but only 51.9 per cent for females.

4.1 Employment and talent

Our hypothesis states that creative and social enterprises can have low barriers to entry, generating jobs especially for women and young people, harnessing human creative, emotional and social skills – thus making them more potentially future-proof and more resistant to automation. The table below shows the characteristics of staff working in SEs and CEs in terms of gender,¹⁶ age and disability.¹⁷

	CE	SE	CSE	All enterprises
No. of respondents	435	332	211	1,388
No. of paid workers	4	7	6	2.5
The average number of owners who are female	0.8	2.2	2.7	0.9
The average number of owners who are 35 years old and below	1.5	2.6	2.5	0.8
Average no. of owners	1.7	19.5 ¹⁸	2.55	4
Average no. of female workers	1.4	2.9	3.8	0.6
Average no. of staff who are you 35 and below	1.7	6.3	3.9	0.7
Average no. of staff who are elderly	0.3	0.6	0.6	0.2
Average no. of staff who are people with disability	0.3	0.3	1.2	0.2

¹⁴ Data from Kementerian PPN/Bappenas (2013), Indonesia Populatio Proejection 2010-2035 based on BPS data

¹⁵ BPS (2019), Labor Force Situation in Indonesia August 2019, Publication Number: 04120.1905, Catalog: 2303004, Badan Pusat Statistik.

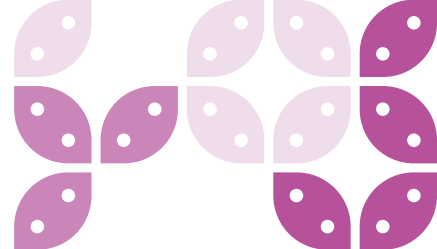
¹⁶ For this research we asked if respondent was male, female, or other.

¹⁷ The British Council tends to use the 'social model of disability' while also aiming to be context specific in the language used to describe disability.

The social model of disability is a way of viewing the world, developed by disabled people, which says that people are disabled by barriers in society, not by their difference. Barriers can be physical, like buildings not having accessible toilets or caused by people's attitudes to difference, like assuming disabled people can't do certain things.

¹⁸ One enterprise (a credit union) reports it has 3,000 owners.

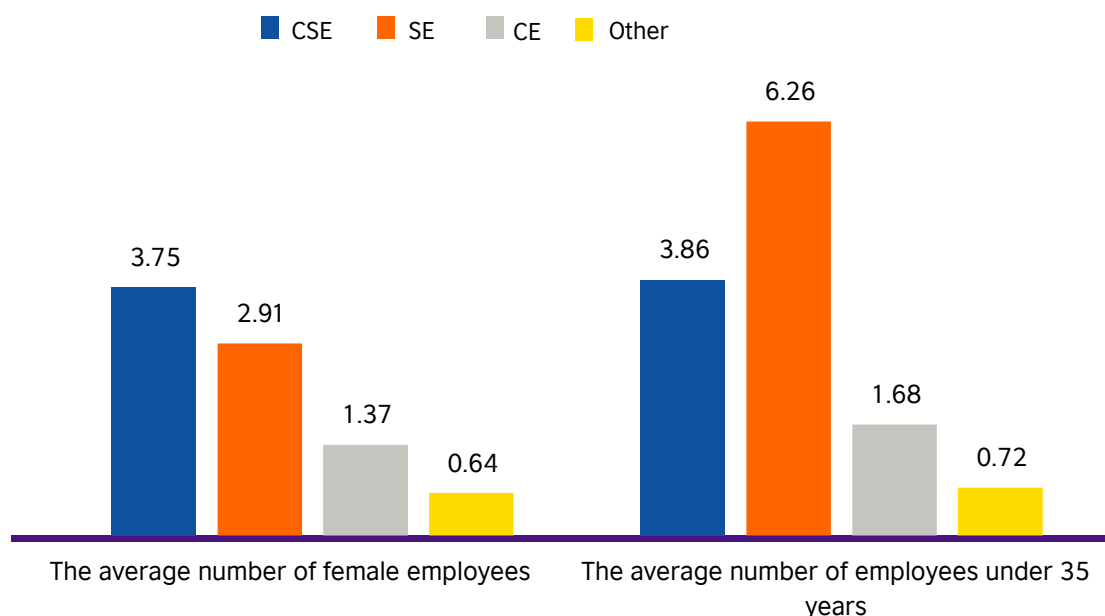




The table shows the breakdown of paid workers among the businesses surveyed, with averages. SEs tend to employ more young people (6.3) and more elderly people (0.6) compared to other enterprises. CSEs, on average, have more women (3.8) and people with disabilities (1.2) in their workforce.

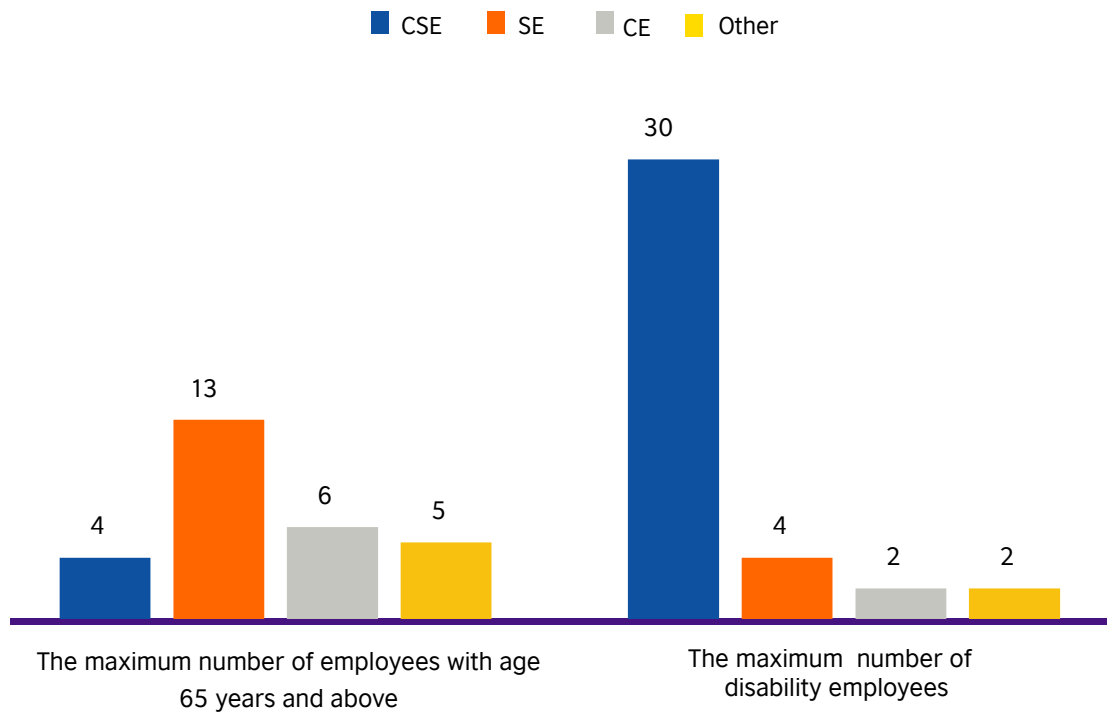
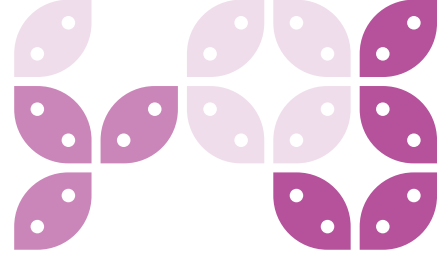
CSEs are more likely to employ women workers (2.9) compared to other enterprises. The table also shows that CSEs tend to more frequently employ women, young people, the elderly and people with disabilities compared to businesses more widely. SEs employ young people and elderly people more often than other businesses and CSEs more than CE.

The following figure shows the comparison of employees between SEs, CEs, CSEs and business more widely.



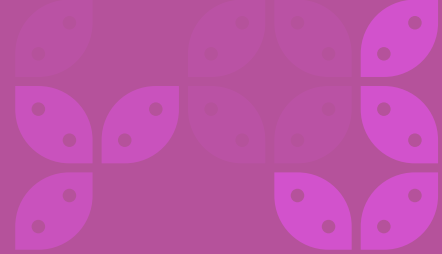
When it comes to employment of elderly and people with disabilities, there are relatively low rates of employment for those categories. However, there are some CSEs and SEs which have dedicated their business to employing these people. One, for example, called Pulas Katumbiri employs 30 people with a disability. The organisation is located in Bandung West Java and focuses on the design and production of fashion accessories and provides training to youths with disabilities. Elsewhere, Difa City Tours or Difabike focuses on transportation for people with a disability and employs people with a disability to ride modified motorcycles. The graph overleaf shows the maximum number of employees for each category, for both elderly and people with a disability.





These findings were also backed up through our Focus Group Discussions and interviews with creative enterprises and social enterprises. The creative enterprises we interviewed tend to employ a small number of workers from e.g. three to 14 or so. Most of these creative enterprises employ a small number of permanent employees but also harness the work of project contractors and interns.





CASE STUDY

Organisation name: Eco-Ethno Center

Founded: 1997

Location: HQ in Bandung, West-Java, operation covers the city of Bandung and the village in Pangalengan, West-Java

SCE: Hybrid CSE

Sector: Tourism and Education

Activities: Eco-tourism and eco-education for children

Detail: Eco-Ethno is a service provider in the Tourism and Education sector based on spreading environmental and cultural wisdom through nature-based activities. Eco-Ethno is divided into two enterprises. The first is the Eco-Ethno centre, which carries out activities for children outside of school, such as eco-education camps, human resources development and leadership camps. Activities are conducted mostly at weekends.

The second is the Eco-Ethno site, a campsite in Pangalengan, a small city located 45 km south of Bandung.

The Eco-Ethno centre relies upon both volunteers and employees, with some contract workers or interns. The Centre is focused on young people with youth volunteers invited to co-design a programme with school institutions and paid through a cross-subsidy system from the Eco-Ethno site.

The Eco-Ethno site often recruits young people from the local village youth as volunteers and employees, done deliberately to transfer agency to the local community with basic levels of education. They also employ older people from local villages who were unemployed.

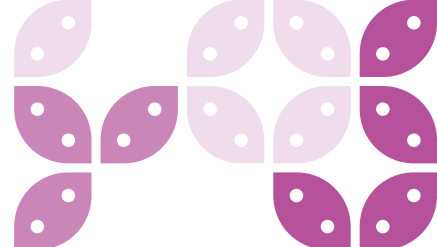
Eco-Ethno has two missions: the first is about the end users; to create capacity building programmes for children so that they can learn compassion, leadership skills and local values through the environment. The second is to help alleviate the problem of poverty in the surrounding 'low- income' areas. Eco-Ethno is trying to reduce unemployment rates and educate the surrounding community. They are also trying to empower young people in the local community through the production of eco-friendly crafts, developing businesses with local citizens.

Support received: The company receives funding from angel investors. Eco-Ethno also receives financial support from the Pelopor Youth programme in West Java. But most income is generated through site rental or personal funds.

Impact: Eco-Ethno measures the impact of its work itself in an informal way by identifying the benefit to the community. This includes the empowerment of young villagers and extra income earned, for instance.

Organisation leadership: The Eco-Ethno was established by Ira Shinta in 1997.





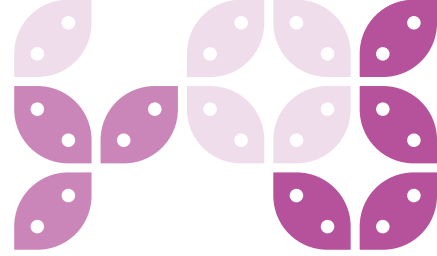
4.2 Job growth of creative and social enterprises

Our survey also identified the growth of these enterprises. The table below compares employment between 2018 and 2019. The table show the average number of employees in 2018 and 2019. The growth rate shows the increase in number across the two years.

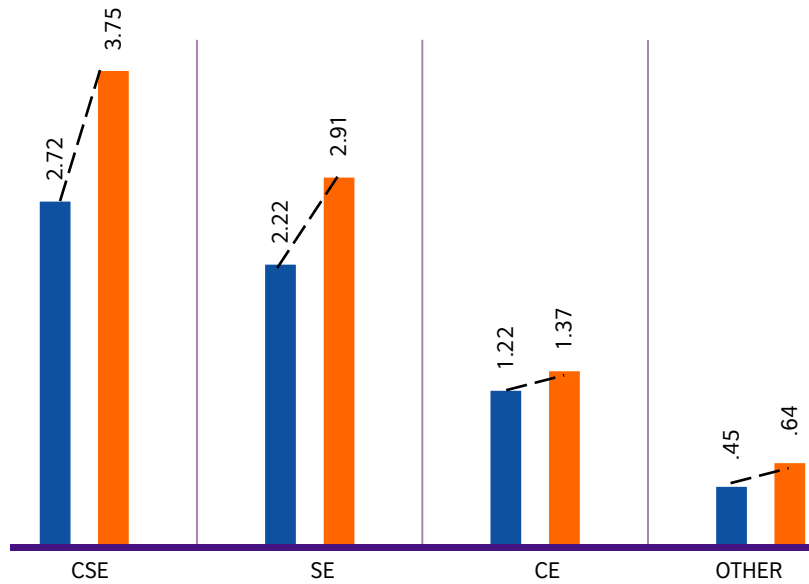
		CSE	SE	CE
Average no. of female employees	2019	3.8	2.9	1.4
	2018	2.7	2.2	1.2
	Growth rate	1.0	0.7	0.2
Average no. of youth employees (under 35 years)	2019	3.9	6.3	1.7
	2018	3.0	4.8	1.2
	Growth rate	0.9	1.5	0.4
Average no. of senior employees (65 years and above)	2019	0.6	0.6	0.3
	2018	0.5	0.7	0.3
	Growth rate	0.0	-0.1	0.0
Average no. of disability employees	2019	1.2	0.3	0.3
	2018	1.4	0.2	0.3
	Growth rate	-0.2	0.1	0.0

CSEs are creating jobs faster than other businesses, for young and old, women and disabled workers. Based on the data above, there are no significant differences between CSEs, SEs, CE and other enterprises in terms of the employment of older people and people with disabilities. However, there are differences in the average number of young people and women employed as well as the growth rate of this employment. The table shows growth in the number of young people and women employed by these enterprises between 2018 and 2019. While there is job growth for women and young people among all these enterprises, CSEs have the highest growth rates of women employees and SEs the highest growth for young people.

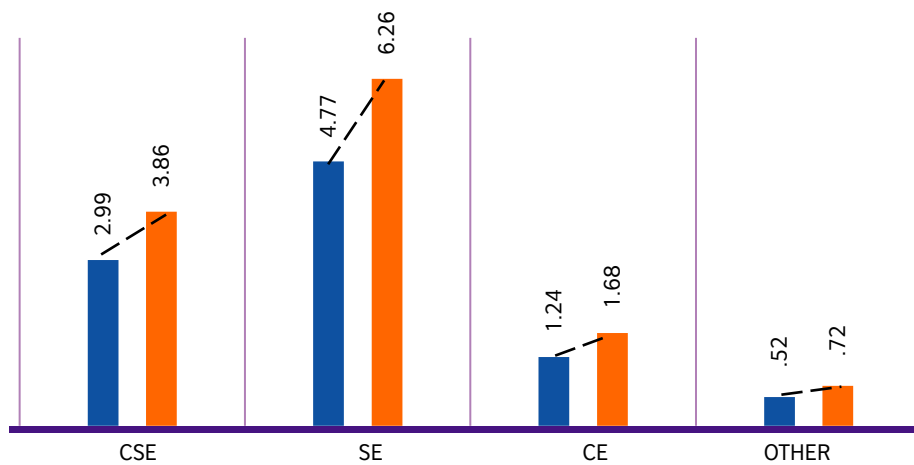




■ The number of female employees (2018) ■ The number of female employees (2019)



■ The number of employee under 35 years (2018)
■ The number of employee under 35 years (2019)



Our research therefore suggests that the DICE hypothesis around jobs is true for social and creative enterprises in Indonesia. CSEs and SEs in Indonesia are creating more jobs amongst young people, women and elderly workers compared to other businesses. CSEs and SEs are creating more jobs overall and faster than other businesses. While CEs have a lower tendency to employ young people and women compared to CSEs and SEs they are still creating more jobs compared to business more widely.





CASE STUDY

Organisation name: IKABOGA's Women Co-operatives Group

Founded: 2006

Location: HQ in Padang, West Sumatera Operations cover Padang SCE: Hybrid CSE

Sector: Food and Beverages

Activities: Empower Women

Detail: IKABOGA's Women Co-operatives Group is group of 30 women's micro, small and medium enterprises (MSMEs) in Padang which share a vision to support the sale of traditional Minangkabau food products to the general public.

IKABOGA's Women Co-operatives Group empowers vulnerable women in society (single parents or main breadwinners) by creating jobs through opening rendang making classes in urban villages (kelurahan) throughout West Sumatera. It also opens its membership to all women who want to increase their income through producing and selling traditional Minangkabau food products.

IKABOGA's Women Co-operatives Group's members are all women and mostly aged over 45. At the moment, 20 of 30 members of IKABOGA's Woman Co-operatives Group focus mainly on rendang production. In 2016 the Co-operatives Group launched Padang's Rendang House (Rumah Rendang Padang) as a Centre for Rendang creation and point of sale. IKABOGA also collaborates with multiple Government agencies and hotels in West Sumatera for product marketing.

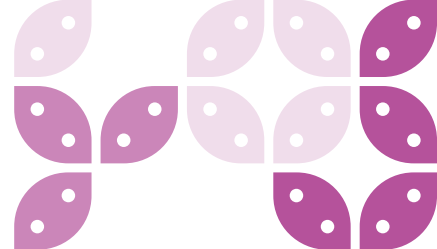
Support received: IKABOGA's Women Co-operatives Group has received 250 million rupiah in grants for brand creation and packaging from the State Minister for Co-operatives, Small and Medium Enterprises based on the One Village One Product (OVOP) scheme. The co-operatives received another 150 million rupiah grant from the Padang City Government for the establishment of Co-operatives' Randang production house in Padang. It also obtained a 875 million rupiah loan from PT. Pemodalan Nasional Madani (Persero), Padang City Government and PT. Pemodalan Nasional Madani also provided grants for product expos and conducting comparative studies.

Impact: IKABOGA's Women Co-operatives Group has conducted internal reviews of their impact and is partnering with Andalas University to improve their operations.

A beneficiary: 'Our products have sold in several Provinces outside West Sumatera, namely Riau, Jambi, South Sumatera, Lampung and in Java, ...we are preparing our products for sale to Saudi Arabia, China, Singapore and Malaysia.' (Harti)

Organisation leadership: IKABOGA's Women Co-operatives Group is led by Mrs. Marnis, a Rendang entrepreneur in Padang, while the Rendang Team is led by Mrs. Yen Zagalo and the Rendang House Director is Mrs. Evi Amalia.





5 New, disruptive and sustainable solutions to environmental and social challenges

Creative and social enterprises in Indonesia are working to tackle a wider range of the Sustainable Development Goals, with infrastructure and inclusive education the most common challenges.

For Indonesia, the implementation of Sustainable Development Goals (SDGs) is part of the country's programme of national development. Most of the SDG targets are aligned with national targets or are relevant to the Government's National Development Agenda. In the report, 'Roadmap of SDGs in Indonesia towards 2030', the Ministry of National Development Planning stated that Indonesia's commitment to achieve the SDGs is not merely about fulfilling a global agreement but is also about delivering Indonesia's vision of increasing people's welfare.

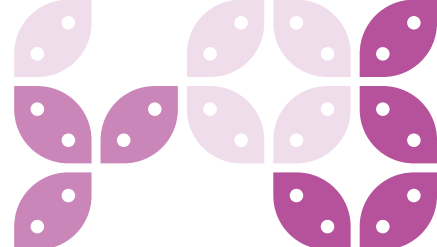
Most Indonesian people live in urban areas (53.3 per cent in 2015). This has grown together with the rise of the millennial middle-class in Indonesia, reinforcing the need for sustainable cities and communities, with decent and affordable settlements and an integrated transport system. The Government also suggests that, given limited resources, targeted priorities are health, education, social protection, food security and sustainable agriculture, infrastructure, ecosystem services and biodiversity, and the financing of government administration.

As businesses with a social purpose, we might logically expect social enterprises to play a significant role in delivering the Sustainable Development Goals. Social enterprises have social objectives at the core of their businesses and sustainable development should therefore be not an externality but central to their business models. We know already that social enterprises pursue diverse objectives from health advocacy to gender equality, the environment and food security, to sustainable cities, education and beyond.

The pursuit of SDGs may not be how creative enterprises define or position themselves. Yet UNCTAD (2008, 2010), UNESCO (2013, 2015), and others have argued that creative industries can contribute to the reduction of poverty and inequality, economic growth and institutional development.

We asked social and creative enterprises about their aims and objectives, based on the SDGs. The table overleaf shows the comparison between CSEs, SEs and CE in terms of which SDGs they are pursuing through their business (respondents could select more than one).

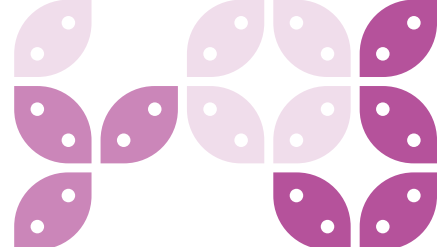




	CSE		SE		CE		Other		All enterprises	
End poverty in all its forms	37	18%	25	21%	42	19%	153	18%	257	19%
End hunger, improve food security and nutrition, promote sustainable agriculture	29	14%	24	20%	44	19%	201	24%	298	21%
Encourage healthy lives and promote well being	42	20%	23	19%	25	11%	46	6%	136	10%
Ensure inclusive and quality education and life-long learning	39	18%	18	15%	31	14%	69	8%	157	11%
Promote gender equality and empower women and girls	30	14%	11	9%	19	8%	34	4%	94	7%
Promote access to clean water and sanitation	9	4%	8	7%	14	6%	43	5%	74	5%
Promote affordable, sustainable and clean energy	14	7%	11	9%	30	13%	84	10%	139	10%
Promote productive employment and decent work for all	44	21%	17	14%	21	9%	31	4%	113	8%
Build resilient infrastructure	9	4%	7	6%	16	7%	35	4%	67	5%
Promote inclusive and sustainable industrialisation	22	10%	11	9%	22	10%	41	5%	96	7%
Reduce inequality within your country	17	8%	11	9%	16	7%	35	4%	79	6%
Make cities and settlements inclusive, safe, resilient, and sustainable	16	8%	9	8%	32	14%	132	16%	189	14%
Promote sustainable production and consumption	35	17%	9	8%	16	7%	25	3%	85	6%
Address climate change	12	6%	15	13%	14	6%	44	5%	85	6%
Conserve and sustainably use water	6	3%	6	5%	10	4%	34	4%	56	4%
Sustainable use of land, forests, addressing desertification and sustainable	19	9%	9	8%	14	6%	23	3%	65	5%
Promote peace and justice, building strong and accountable institutions	23	11%	14	12%	35	15%	88	11%	160	12%
Promote the needs of young people	33	16%	17	14%	37	16%	75	9%	162	12%

Social and creative enterprises are working to deliver all the SDGs. In particular, they are working to end poverty in all its forms as well as ending hunger, improve food security and nutrition, promote sustainable agriculture – these are common priorities across all groups.

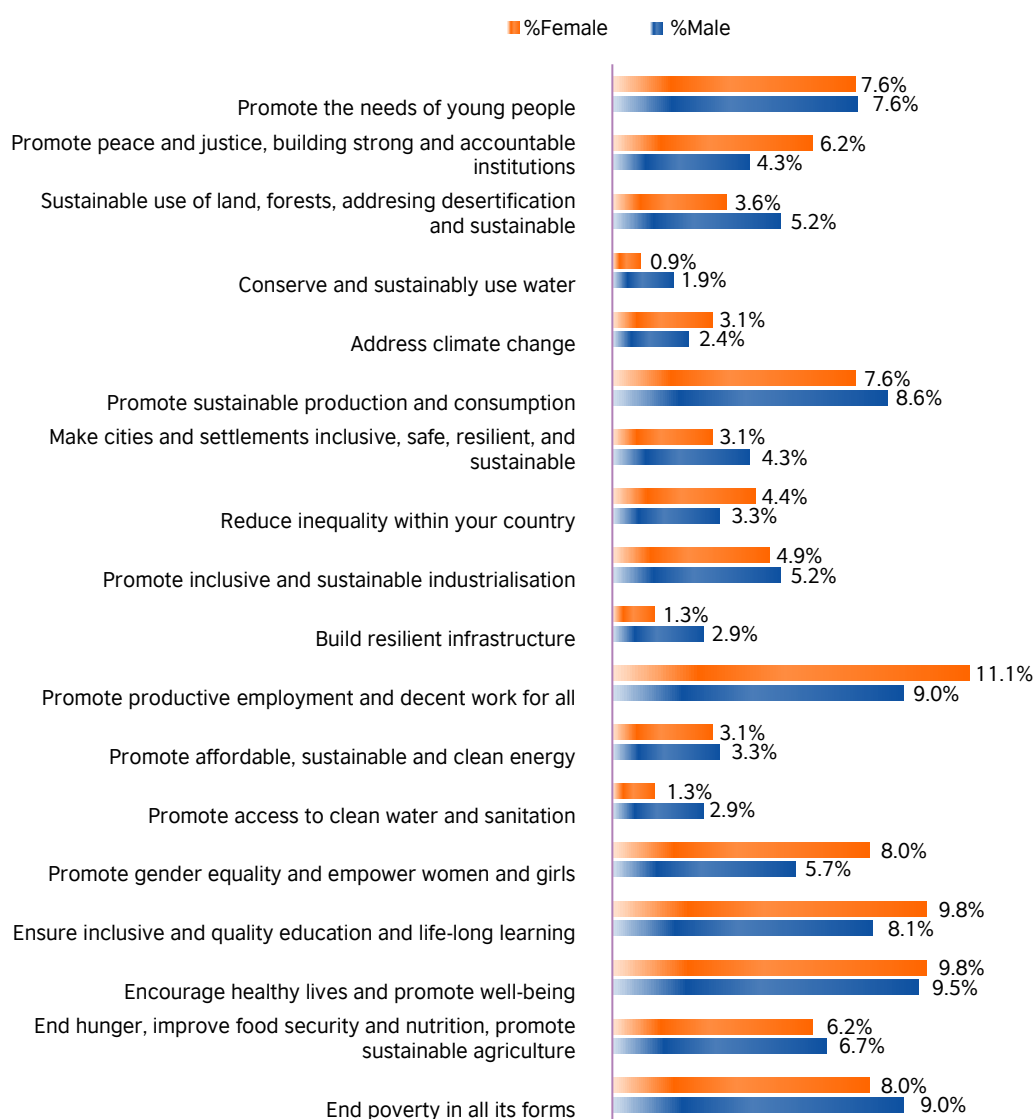




CSEs are also especially focused on promoting productive employment and decent work for all and also encouraging healthy lives and promote well-being. By focusing on productive employment and decent works, CSEs can create opportunity, empower communities and marginalised people.

From these findings, SEs are delivering against the SDGs, especially in ending poverty in all forms and reducing inequalities. CE are also delivering against the SDGs, particularly in goal of promoting affordable, sustainable and clean energy and promoting inclusive and sustainable industrialisation.

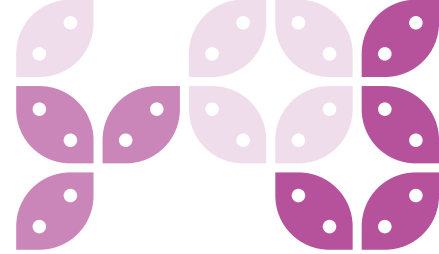
The following graph shows there are no significant differences between the focus of male and female-led CSEs but female-led CSEs tend to have a greater focus on promoting productive employment and decent work for all and ensuring inclusive and quality education and life-long learning.



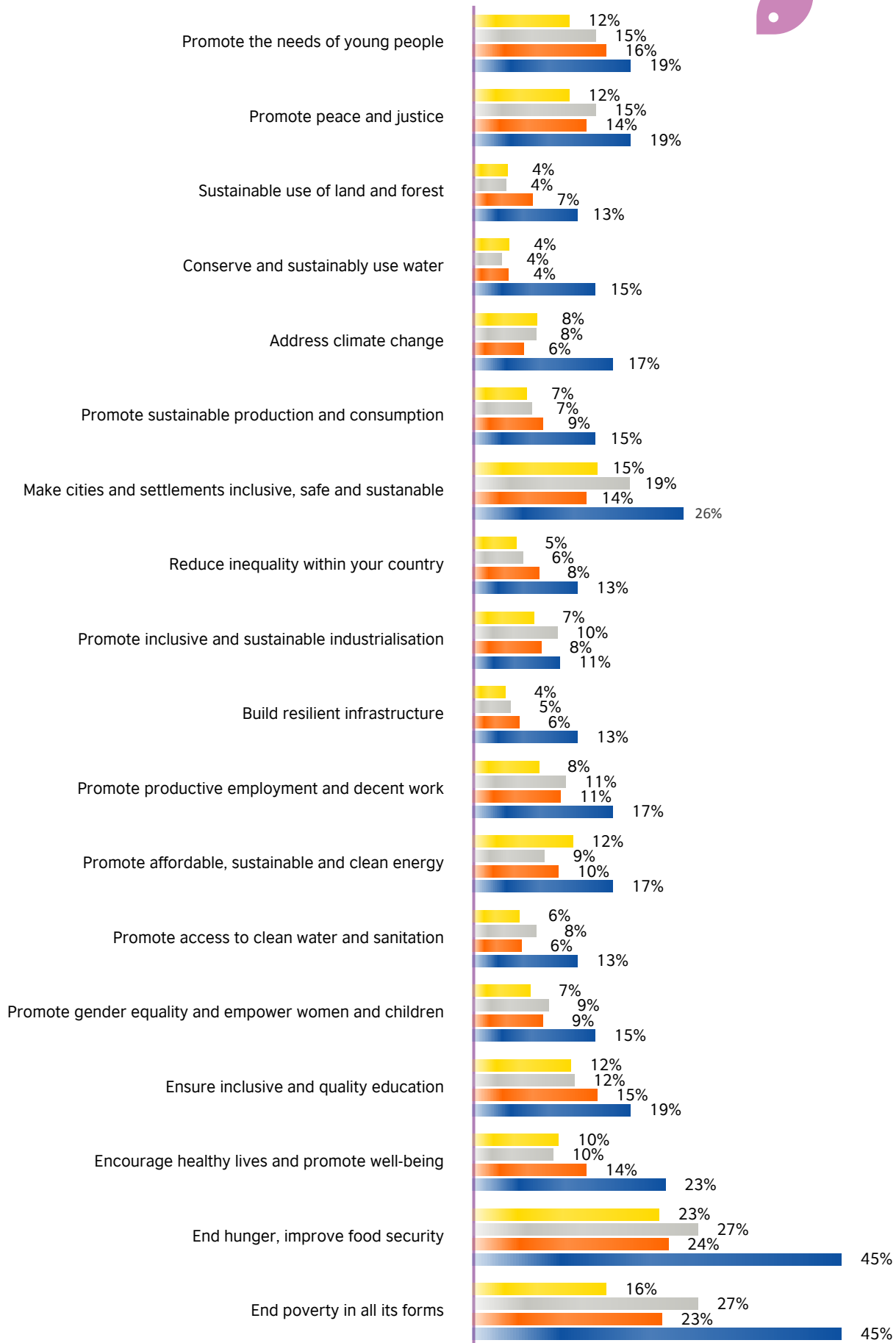
The survey shows that social and creative enterprises tackle social problems in many ways. Of course, social and creative enterprises may address needs other than those articulated in the SDGs, and for them, understanding how they can contribute to the SDGs may be of limited value compared to other indicators.

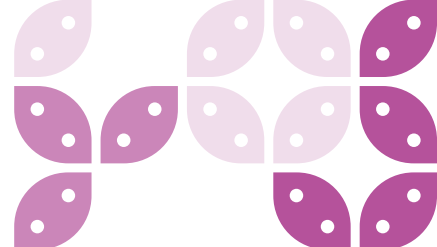
The younger the enterprise, the more likely they are to aim to respond to the SDGs, especially the goals related to poverty and food security.





■ More than 5 years ■ 3–5 years ■ 1–3 years ■ New (less than 1 year)

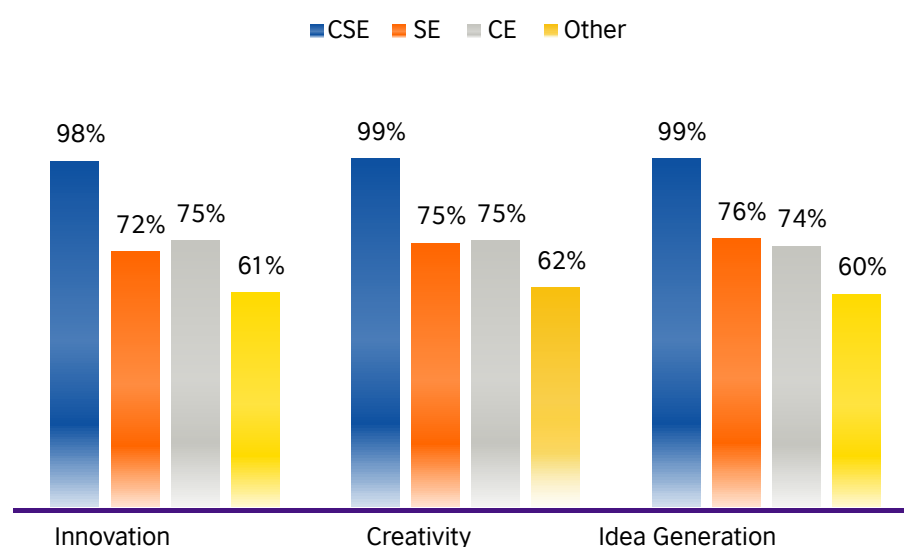




There is some variation in the degree to which social and creative enterprises engage with the SDGs, including in their external communications. Social enterprises may be contributing significantly to the SDGs but do not tend to convey their impact in these terms. Equally, it may be that social enterprises' engagement with the SDGs may be quite 'ceremonial' with the aim of garnering donor support.

Innovation and creativity

Most of the enterprises in our survey reported that innovation and creativity are important for their businesses.



Almost all CSEs (99 per cent) agree that idea generation¹⁹ and creativity²⁰ are important for their business performance, and 98 per cent of CSEs agree that innovation is also an important factor.

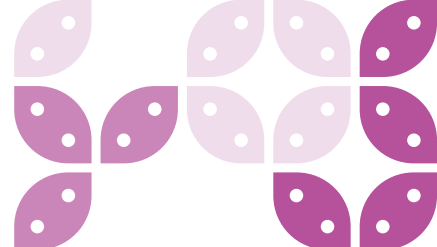
Seventy-five per cent of creative enterprises agree on the importance of creativity and innovation and 74 per cent agree that idea generation is important. This is also similar for social enterprises. Other businesses place less importance on idea generation, creativity and innovation at 60 per cent, 62 per cent and 61 per cent respectively. So it appears that both a social and creative focus are associated with placing greater significance on idea generation and creativity and especially when both are combined.

When it comes to investment in business expansion or development related to research and development and design, we asked respondents if they had invested in internal activities; acquisition of research and development; or any design process during the last three years. Internal Research and Development (R&D) can be understood as creative work undertaken within an organisation that increases knowledge for developing new and improved goods or services and processes, while the acquisition of R&D is similar but performed by another third party and bought in. The design process can be understood as engagement in any form of design activity, including strategic, for the development or implementation of new or improved goods, services and processes.

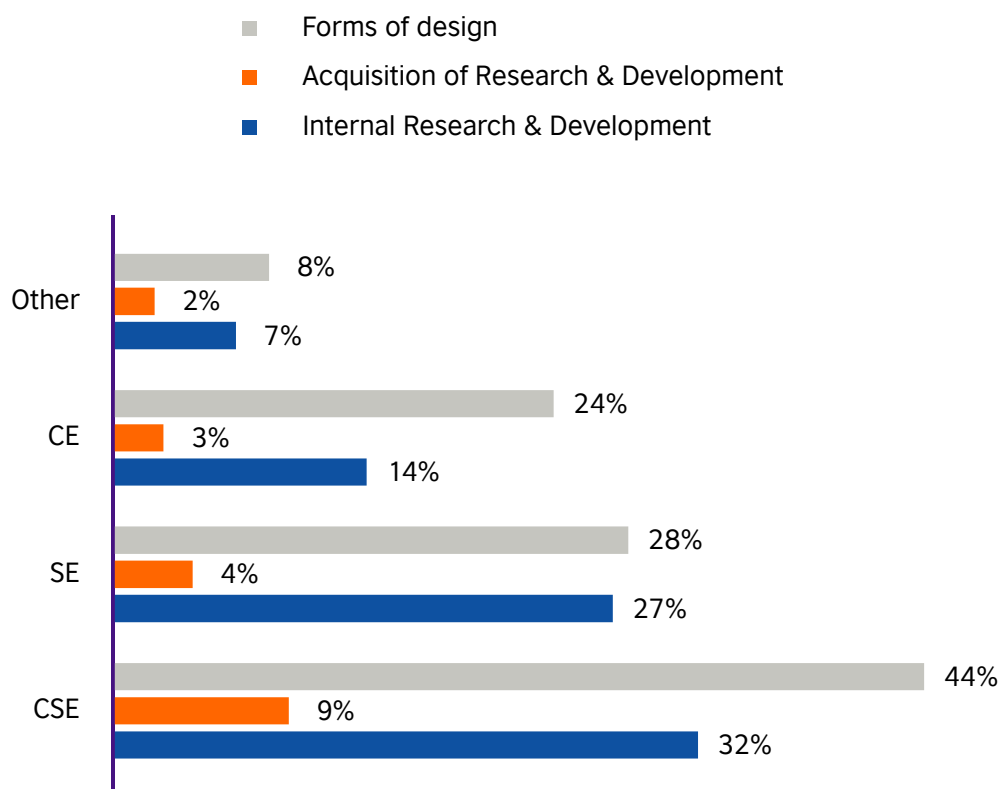
¹⁹ Idea generation can be defined as the ability to come up with a number of ideas about a topic (the number of ideas is important not their quality, correctness, or creativity)

²⁰ Creativity can be defined as developing, designing, or creating new applications, ideas, relationships, systems, or products, including artistic contribution.





In Indonesia, R&D activities are not a priority for many businesses. This is supported by the World Economic Forum findings in the Global Competitiveness Index that Indonesia scores the country low on innovation.²¹ Less than one third of the business we surveyed are investing in R&D. CSEs tend to allocate budget towards R&D more than other businesses (32 per cent), and acquire R&D from other organisations (nine per cent). But investment in design²² is comparably higher with 44 per cent of CSEs allocating resources in this way, 28 per cent of SEs and 24 per cent of CEs.



²¹ Based on the GCI in 2019, the innovation pillar rating is 37.7/100, and the R&D expenditure is only 0.1% of the Indonesian GDP (See: Schwab, K. (2019), The Global Competitiveness Report 2019, World Economic Forum).

²² Design can be defined as engagement in any form of design activity, including strategic, for the development or implementation of new or improved goods, services and processes.



6 Power, purpose and profits

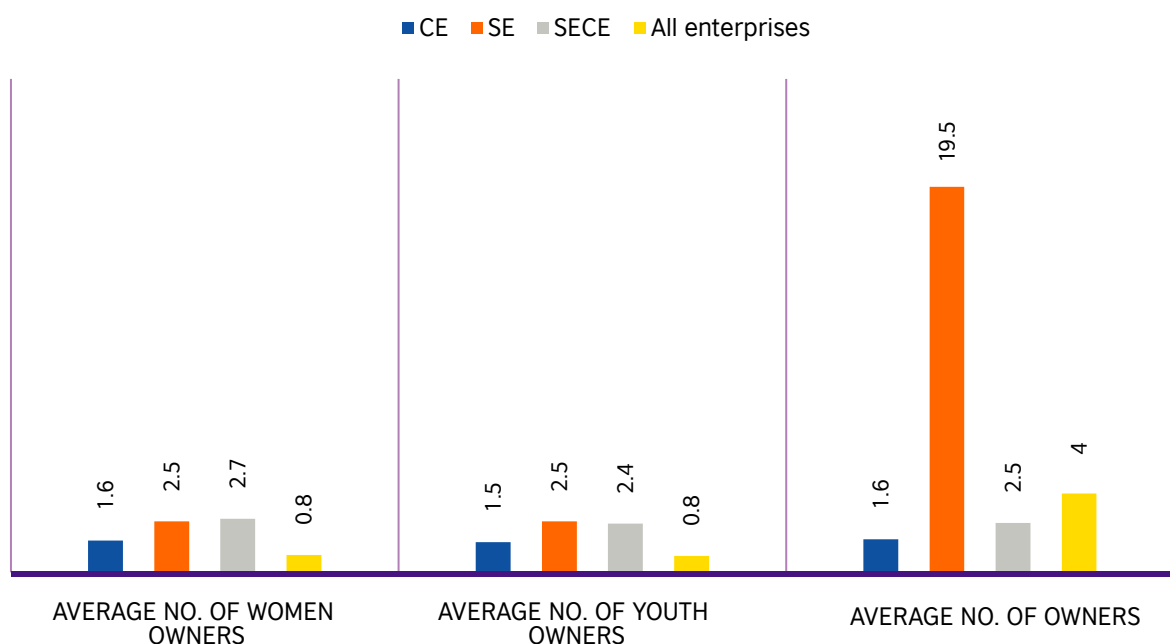
Creative and social enterprises are distributing ownership among different groups and have a greater proportion of women and young people as owners compared to other businesses. But many social and creative enterprises, however, have relatively weak governance structure or lack formal legal status.

This study also seeks to understand the ownership structure of these creative and social enterprises.

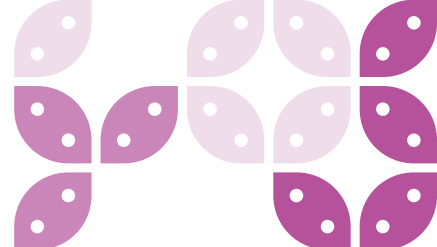
The graph below shows the ownership characteristics of these businesses. SEs in Indonesia tend to have a greater number of owners or shareholders with an average of 19.5 people, while creative enterprises tend to have a much smaller number of owners. The higher number of owners for SEs is because some SEs are co-operatives that include their members to be the owners.

Social enterprises (SEs) have more young people as owners compared to CEs, CSEs and other businesses, with an average of 2.5 young people as owners and 2.4 among CSEs per enterprise. This is high compared to businesses more widely (see the figure below).²³

CSEs have more women owners and shareholders than SEs, CEs and other businesses with an average of 2.7 women. But there are almost no enterprises in our sample owned by people with a disability (only one of total 1,388 respondents has an owner with a disability).



²³ The average number of owners for SEs is 19.5 and there is an average of 2.5 young owners, giving the youths representative of ownership is 0.1 youth/owner. The average number of owners for SECEs is 2.5, and the average number of young owners is 2.4, showing much higher representative of youths in ownership (0.9 youth/owner).



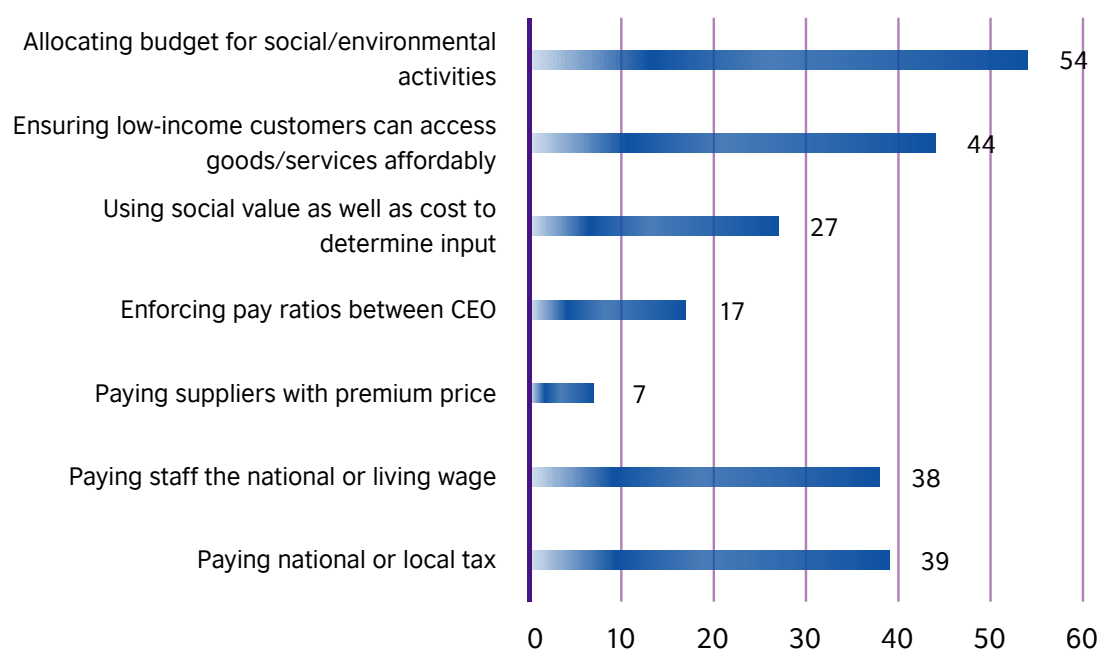
6.1 Good business practice

Our survey asked questions related to good practices in leading and governing business. We asked about the following business practices:

1. Paying national or local tax
2. Paying staff with the national/regional standardised living wage
3. Paying suppliers with premium price
4. Enforcing maximum pay ratios between CEO and other staff
5. Using social value as well as cost to determine inputs
6. Ensuring low-income customers can affordably access goods/services
7. Allocating budget for social/environmental activities

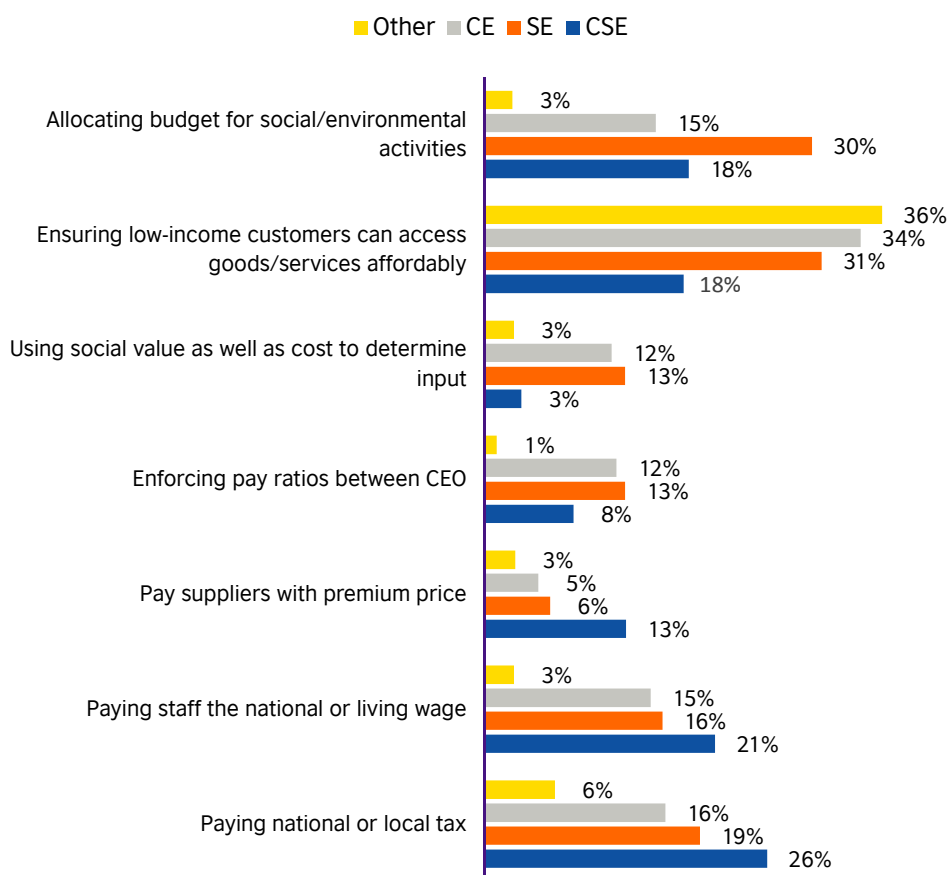
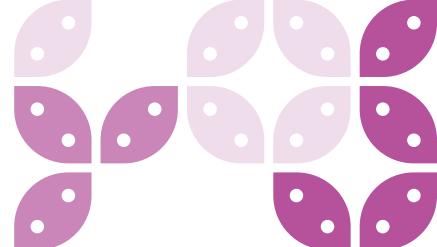
These business behaviours can each demonstrate whether social and creative enterprises are making a strong contribution to inclusive economic development.

We asked creative and social enterprises about the extent to which they engaged in these practices and the responses were varied. For example, 54 CSEs allocate a budget towards social or environmental activities, while very few (seven CSEs) pay suppliers a premium price.



As a comparison, the graph overleaf shows the extent to which these practices are undertaken among other businesses.



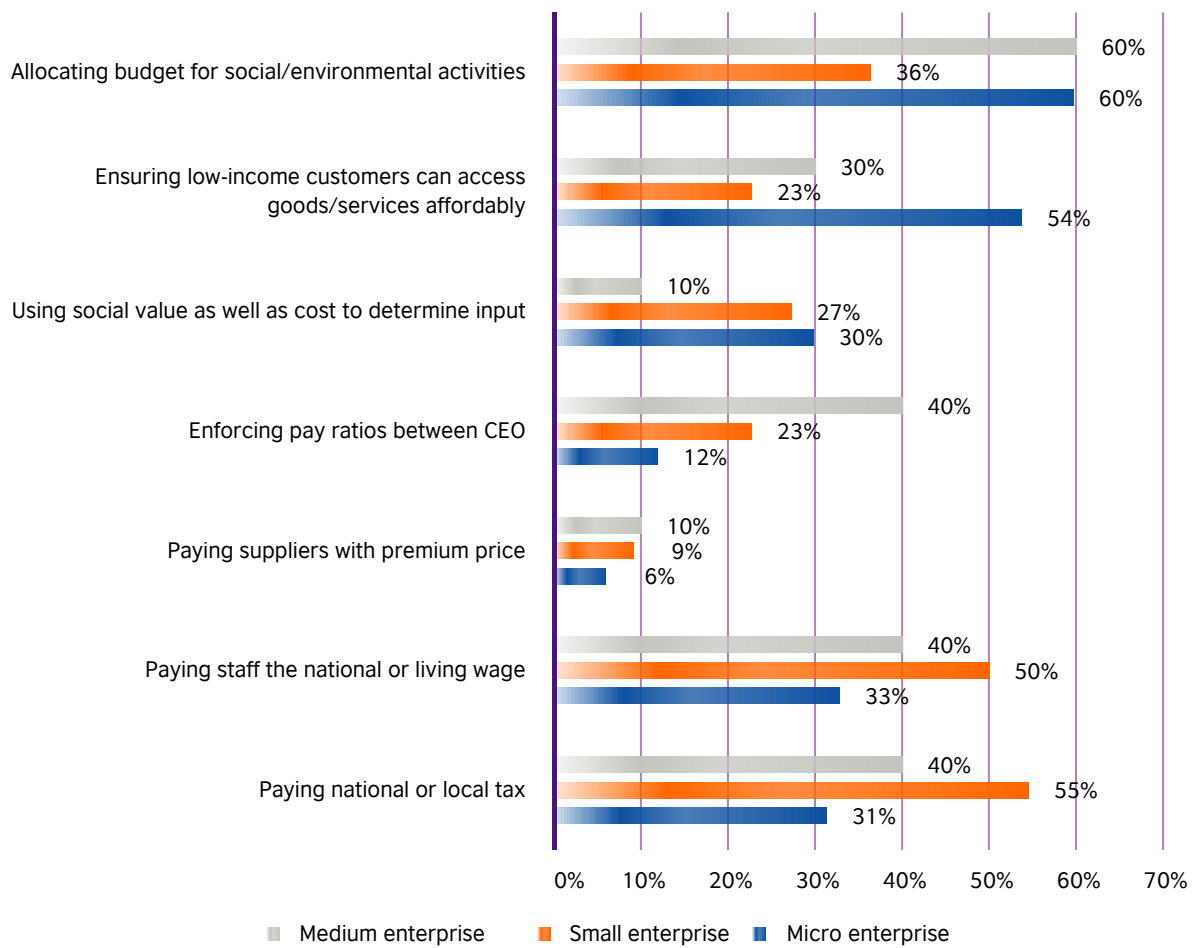
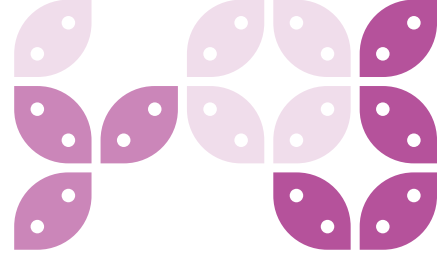


Not surprisingly, SEs allocate their budget towards social or environmental activities more frequently than other enterprises. Thirty per cent of SEs stated that they allocate budgets towards social or environmental activities.

Enterprises that are not categorised as either social or creative enterprises appear to work more frequently to ensure low-income customers can access affordable goods or services (36 per cent, compared to social enterprises at 34 per cent and creative enterprises at 31 per cent). CSEs tend to be less focused on selling their products or services to low-income customers but do more to pay proper wages, taxes and premium prices to the supplier compared to other types of enterprises.

Further analysis tells us that smaller businesses are more likely to be focused on low-income customers. Micro enterprises most frequently allocate budgets towards social and environmental activities and ensure their products and services are affordable. But they are less likely to pay suppliers a premium price. At the next level up, small enterprises are more likely to pay decent wages and appropriate taxes.







CASE STUDY

Organisation name: Bina Swadaya

Founded: 1967

Location: Cimanggis, Depok, West Java

SCE: CSE

Sector: Agriculture, Microfinance, Community Development and Education

Activities: The enterprise runs a range of activities: (1) community empowerment in regional development, public health, sanitation, environment, agriculture and employment (through Bina Swadaya Consultant); (2) microfinance development; (3) agribusiness development (Trubus Mitra and Trubus Agri Sarana); (4) communication development through publishing; (5) alternative tourism development (development-oriented tourism program); (6) development of printing services (Graphic Sarana Kata); and (7) development of training facilities (Wisma Hijau).

Detail: Trubus is an iconic Indonesian farming magazine, now expanding into online services. The journey began in 1965 when the Pancasila Farmer Association was founded by Bambang Ismawan, Sayogo and Suradiman to promote agricultural productivity with co-operative principles. In May 1967, the association established a foundation named YSTM (Yayasan Sosial Tani Membangun or Social Farmer Development). Along with an initial investment of IDR10,000, the foundation published the Bulletin for Farmers Development to promote innovation in agriculture. In 1969, the bulletin was renamed Trubus Magazine.

In 1979, the Bina Swadaya Foundation established a training centre to support its growing network. Located in Cimanggis, a refreshingly cool highland area in Bogor, south of Jakarta, this centre offered various training activities, with financial support for local community leaders. These activities developed into a four-month professional programme, providing training for volunteers from the self-help community, management training for the self-help community, and training for co-operatives.

In 1983, the foundation established a farm shop named Toko Trubus, located at Jalan Gunung Sahari, Jakarta and another in Cimanggis, Depok. The shops provided a range of products from mature trees to bedding plants, immature plants as plug plants, and more.

In 1985, a national regulation under the authoritarian government stated that all publishers in Indonesia had to focus on publication activities and other social activities were prohibited. YSTM therefore focused on publication activities, while the other agricultural activities were taken forward under the Bina Swadaya Foundation. Bina Swadaya supported sustainable agricultural techniques, such as using organic fertilisers and drip irrigation techniques among community-based enterprises and co-operatives. Bina Swadaya also helped farmers to introduce other economic activities in order to diversify business risk (Ismawan, 2018). The organisation provided not only financial services but also technical assistance to help rural communities: for example, providing agricultural technology, offering a training programme for chicken farms, and developing a marketing programme for agriculture products. Typically, these farmers worked as tenant farmers with less than 500 square meters.





In 1992, the foundation established a microfinance institution named PT BPR Jatiartha Swadaya. In 2007 the name changed to PT BPR Bina Artha Swadaya, with 93 per cent of shares owned by the Bina Swadaya Foundation. The company registered as a venture capital company, which offered working capital exclusively to women who did not have access to the formal financial sector, through a modified version of the traditional microfinance Grameen group methodology. The organisation also managed four other banks and 18 microfinance branches.

Around 1994, the training centre saw a decreasing number of participants. So in 1997, the organisation moved into a new market by seeking customers from other businesses. The centre turned into a green hotel, named Wisma Hijau, designed primarily for conferences and training seminars.

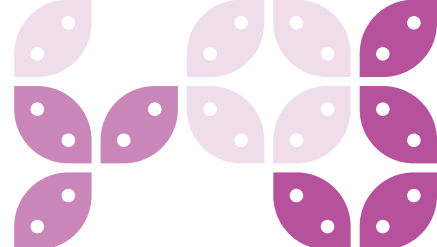
In the 2000s, the organisation promoted the idea of buying local food and encouraged customers to participate in the 'local food' movement by establishing an eco-tourism industry. This initiative continues to grow and evolve, and Bina Swadaya is experimenting with novel ways to make local agriculture an integral part of urban life. They believe that their consumers increasingly expect brands not only to have financial benefits but also to have a social impact. However, in 2010 the shops experienced declining sales performance due to the increasing number of competitors.

In 2018, the company managed 18 farm stores across the country. Toko Trubus at Bintaro, Gunung Sahari, and Cimanggis were the largest among them and accounted for 50 per cent of total sales. The business also provided an online shop, with the benefit of enabling customers to obtain items from a distance and order more plants than they could fit in their car.

The shops attempted to promote food sovereignty (the right of people to consume healthy, culturally appropriate food, produced by ecologically sound means) by being located near urban dwellers, providing community development, and offering technical assistance. The shops regularly responded to requests for advice on growing specific types of plants or ways to eliminate garden pests.

Impact: As a long-standing social enterprise that has already expanded and evolved its business to the provision of microfinancing, facilities for meetings, publishers and shops, Bina Swadaya has provided benefits to the community in many areas: agricultural development, financing micro and small businesses, and even creating many social enterprises in different working areas.

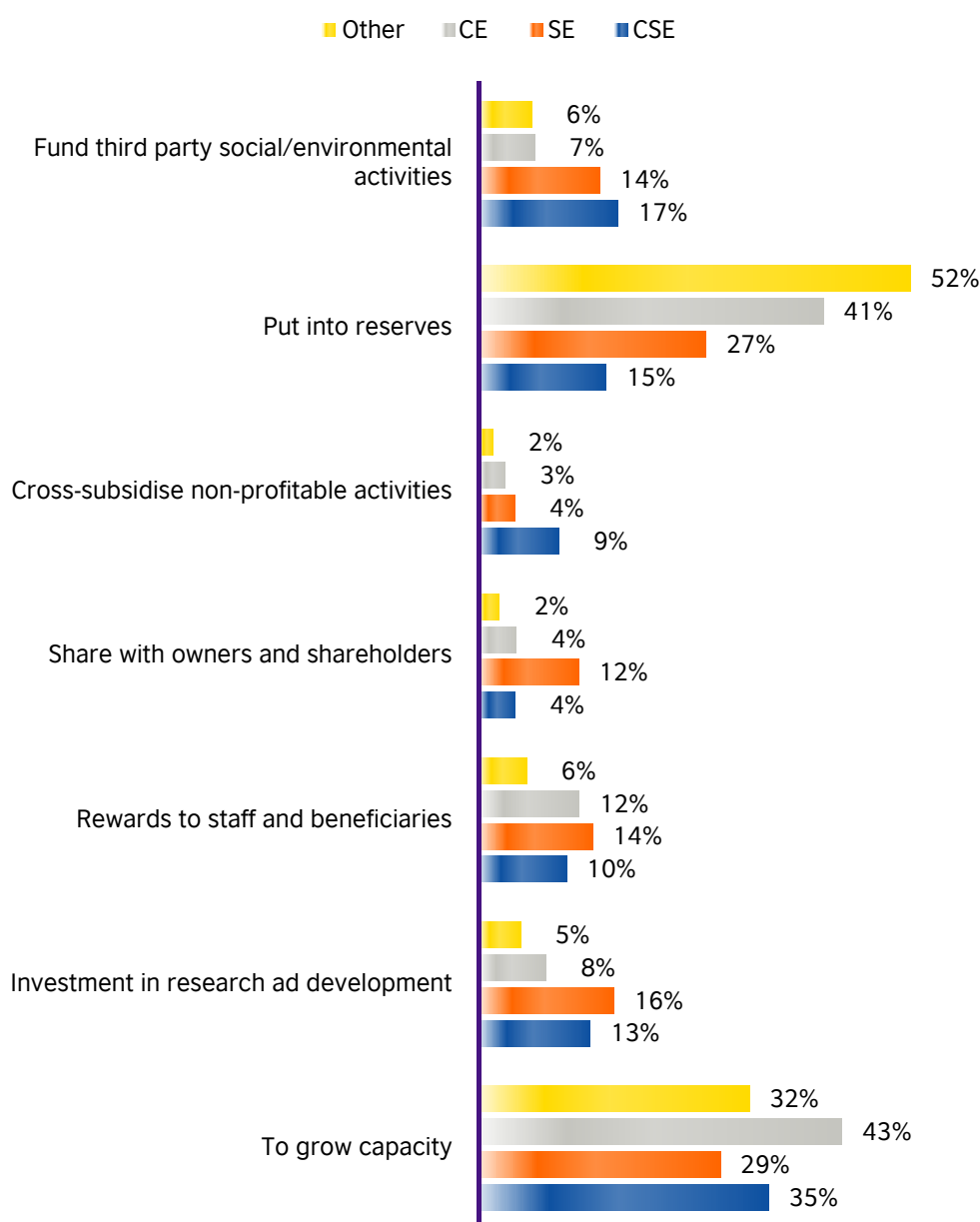




6.2 Profits

We asked respondents what they do with their profits. The most common response is that they reinvest them in their organisation, to grow their business capacity or to build reserves.

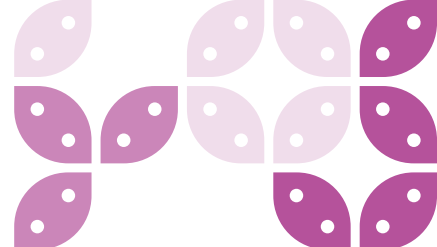
CSEs have a higher tendency to fund social or environmental activities of third parties (17 per cent) and to cross-subsidise non profitable activities. SEs are more likely to share profits with owners and shareholders (12 per cent) and to invest in R&D (16 per cent) compared to CSEs, CE and other enterprises. While CEs prefer to use their profit to grow their business capacity (43 per cent), which is the highest percentage compared to CSEs, SEs or other enterprises.



Ownership

CSEs are more likely to have women owners compared to other enterprises and SEs tend to have greater proportion of women owners than business more widely. Although lower than SEs, CEs also 50 tend to have women owners more often than other businesses more widely. SEs tend to be owned by young people more often than CEs and other businesses.





7 Impact on communities and culture

Creative and social enterprises are working to bring positive benefits to local communities as are social enterprises more widely.

Creative enterprises tend to be more focused on providing value to their customers or direct beneficiaries.

7.1 Impact measurement

The DICE hypothesis suggests that creative and social enterprises can have a positive effect on communities and culture. According to UNESCO (2013), micro and small companies have potentially more impact on local development and vulnerable social groups than large enterprises. Creative and social enterprises are making a significant impact in communities in Indonesia and are often set up with the purpose of generating a positive outcome to society as a whole or for a specific group.

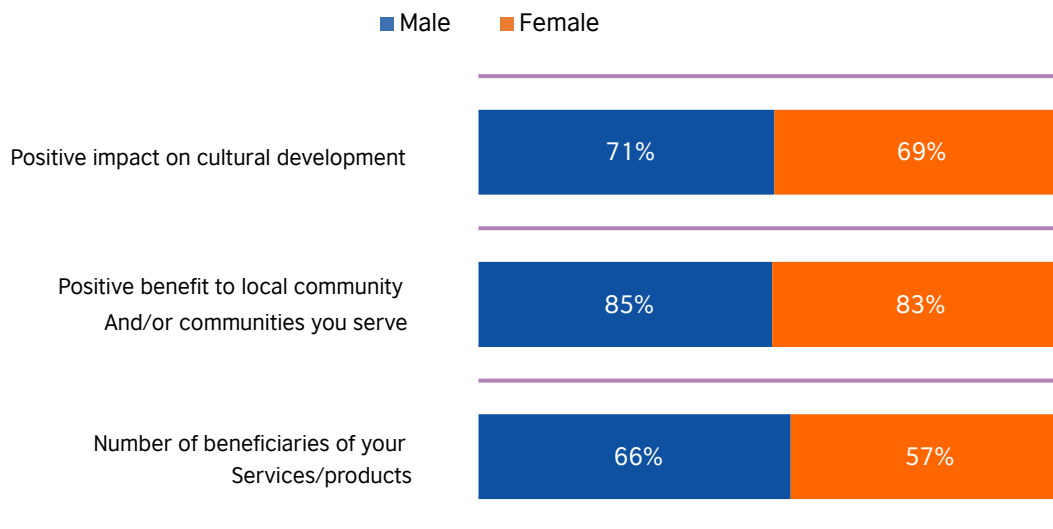
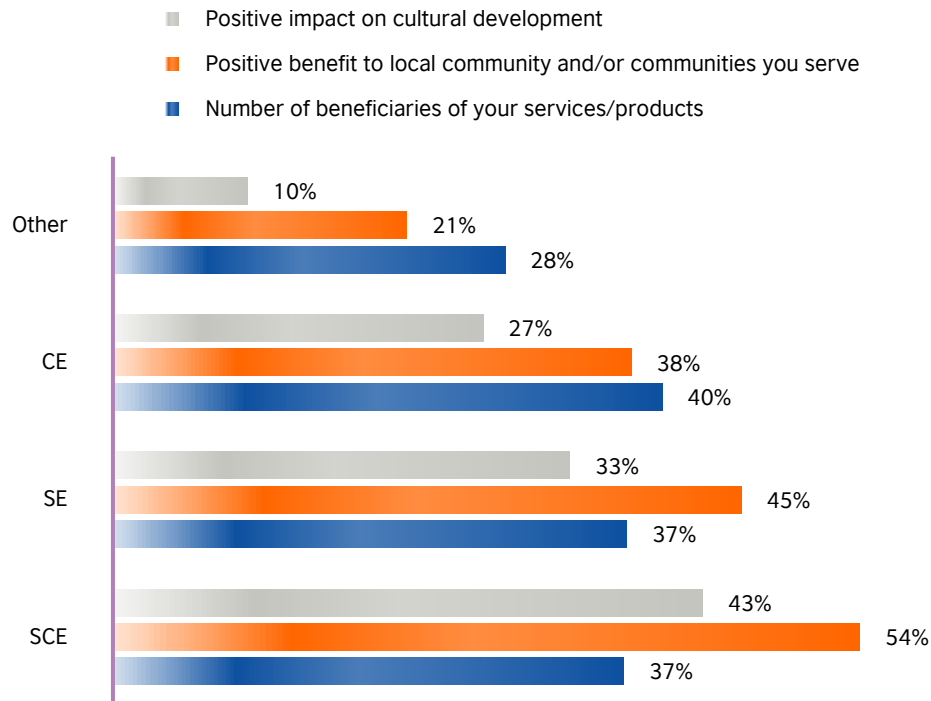
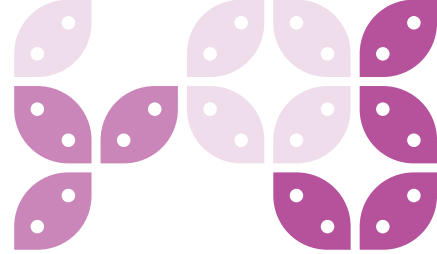
The measurement of social and environmental impacts is part of understanding an enterprise's contribution to the community. In our survey, 55 per cent of CSEs (117 enterprises) reported that they identify and measure the impact they bring to the community they serve. Thirty-eight per cent of CSEs also identify the numbers of their beneficiaries, but do not yet record and report them consistently and regularly.

Those who measure their impact tend to have received financial support from external parties to do so.

Number of beneficiaries	81	38%
Positive benefits to communities	117	55%
Positive impact to cultural development	91	43%

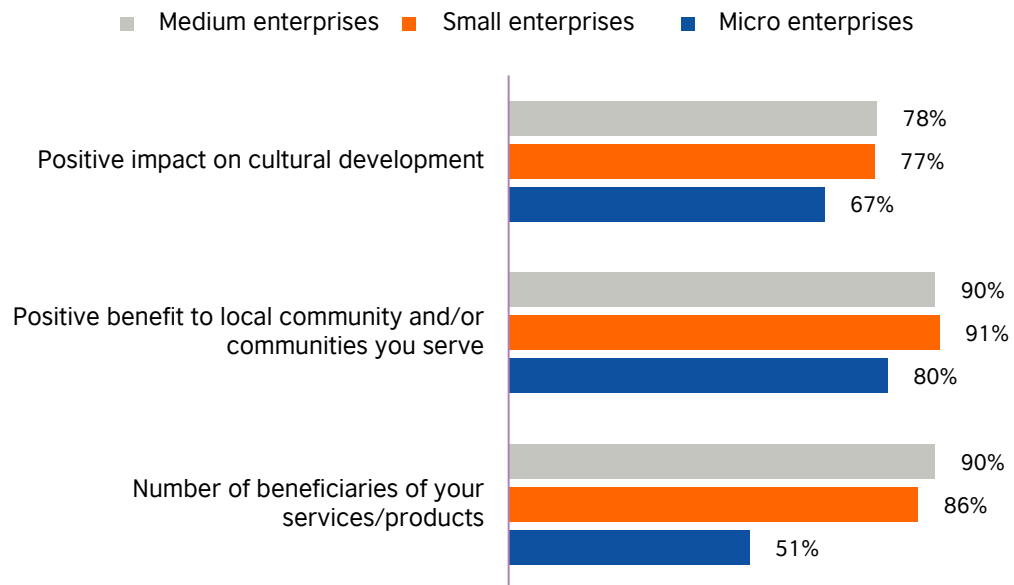
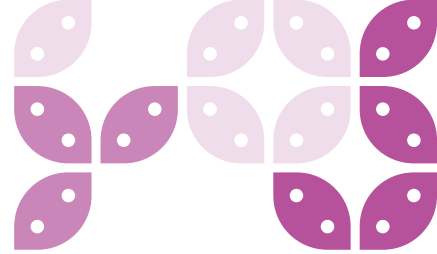
CSEs tend to do more when it comes to evaluating the impact of their business. While creative and other businesses focus more on the number of beneficiaries, CSEs and SEs place more emphasis on the positive benefits to local communities.





We then considered the extent to which male and female-led CSEs measure the impact of their enterprises. The figure above shows that there is no significant difference between female-led CSEs and male-led CSEs. Larger enterprises are more likely to measure their impact.







CASE STUDY

Organisation name: Dagadu Djokdja

Founded: 1994

Location: Yogyakarta

CSE: Hybrid CSE

Sector: Alternative souvenirs: creative fashion and crafts

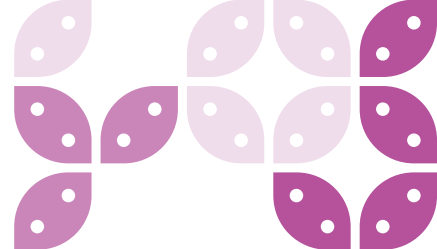
Detail: Dagadu is a t-shirt brand from Yogyakarta, which promotes local culture and values. It has become one of the most popular brands for local souvenir products in the city, selling more than 200,000 t-shirts per year. The business has now expanded into a unique co-working space, called Yogyatorium, a new building which provides an enabling space for young art workers with various events, networks, and business gatherings.

A group of 25 architecture students, who studied in Gadjah Mada University originally came together to support projects under the supervision of their professor, including designing the Malioboro Mall, the first mall in Yogyakarta. With a passion for graphic design, they went on to produce t-shirts for events as a low-risk enterprise initiative. Initially, the group of students used their own resources to invest in the business, to rent a space at the Malioboro Mall, and to buy raw material and labour. The company was established in January 1994.

The outlet at Malioboro Mall provided a great opportunity for Dagadu. To respond to tourist demand, Dagadu opened extra outlets at their workshop during the peak season. Seasonal business meant the needed to take on a loan to purchase materials before the sales come in. However, the business failed to find financial support from banks and investors so took on a short-term loan from friends and relatives.

The enterprise's new office includes not only production space and a showroom, but also provides a space to promote the creativity of young people by establishing a museum for art and creative design. The centre has a track record in finding affordable live-work spaces for young graphic designers in Yogyakarta and an education programme for local schools. The hub also attempts to offer solutions for creative people who are at risk of being priced out of the city. The hub attempts to embrace Yogyakarta as the capital of culture in Indonesia. Arief says that 'if we let the young creative workers move out from here then Yogyakarta will lose so much'.





7.2 Community and cultural cohesion

Besides their commitment to a mission and to tackle social problems, creative and social enterprises can also help enable communities to develop their identity. Our Focus Group Discussions explored how community and cultural cohesion may be deliberately created by creative and social enterprises. This includes local cultural preservation, building a sense of community identity and energising communities. We explore these below.

Local cultural preservation

Many creative and social enterprises working in the fashion and traditional culinary industries have missions focused on preserving culture. One co-operative in Madura, a community-based social enterprise in the batik industry, provides a great example of community benefit and cultural cohesion. The Madura batik industry has been emerging over the last couple of years and is different from the batik on Java Island, which favours templates to produce a specific pattern. The Madurese batik tends to be naturalistic with an expressive drawing style, which has led women away from templates or fixed patterns. This enables local culture and values to permeate through the traditional batik designs. Batik skills are taught at home from mothers to teenage daughters, transferring skills and principles to younger generations.

Another creative and social enterprise in Mojokerto, the Yensen Project, started out with a focus on health services for poor people. The owner then hired puppet artists and sponsored them to manage exhibitions and performances, promoting aspects of Indonesian culture. Besides the puppet shows, the Yensen Project also established the Gubug Wayang Museum that has a collection of wayang puppets. This museum tells the story of a dying art in this country. The museum regularly manages a series of workshop to pass on the skills involved in performing with the puppets and the musical instruments.

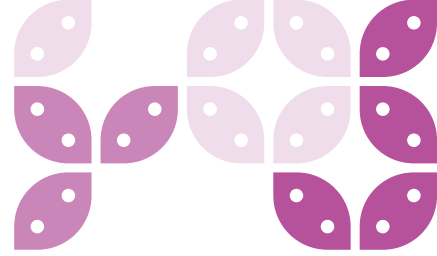
Coffee shops can also focus on local culture preservation. The Archipelago Coffee Community attempts to acknowledge the rich varieties of local coffees by encouraging local communities to consume coffees of single local origin. Coffee trail expeditions can be intriguing for coffee lovers, to research coffee trails, meet coffee farmers, visit the farms, observe harvests, learn the post-harvest process, and local roasting and brewing traditions. Each café offers a unique variety of beans to become part of the island identity, offering local beans, including Flores, Kintamani and Sumatra Aceh Gayo.

Community identity

A number of creative and social enterprises in our research play a significant role in fostering the development of community identities. The Nusantara Coffee Community, for example, was established in Yogyakarta with the idea that the café can demonstrate local cultural activities. For local artists in Yogyakarta, a café is not only a place to hang out with friend or to relax after a hectic day. A café also allows the artists to reach a wider public.

The Surabaya Green and Clean Festival has encouraged local communities in Surabaya City to develop environmentally friendly neighbourhoods, engaging in waste collection but also promoting the local culture, compost industry and creative industry. In Bali, Rumah Sanur is a creative hub that supports creative and social enterprises, promoting and curating their products. Also in Bali, Cushcush Gallery in Denpasar, promotes cultural pride through its gallery for contemporary design and art. It embraces interaction and celebrates multi-disciplinary creativity through the exploration of art, design, material, techniques and craft. One of the founders, Sagung Alit, emphasises how ‘Pride of our culture is an important way to introduce our culture, our identity to people with different cultural backgrounds. This gallery is a place to learn about culture and to develop it so that we can grow together to preserve and subsequently promote our culture.’





Energising communities

Creative and social enterprises promote well-being, not only for individuals but for community and society more widely. The owners of Dagadu, after successfully promoting local culture through fashion, created the creative hub, Yogyatorium. This building provides a space to promote the creativity of young people by establishing a museum for art and creative design. Meanwhile, Isa Wahyudi, CEO of Inspire that set up Kampung Budaya Polowijen in Malang East Java provides examples of how game developers and animation designers are creating new communities gathering and sharing their stories: 'It boosts pride among the community'.





8 The creative and social enterprise ecosystem

The creative and social enterprise enabling ecosystem has been developing in Indonesia and CSEs have greater access to business supports than many other enterprises. Nevertheless, business support is not yet fully developed, especially in terms of access to finance and protecting intellectual property rights.

In the companion report to this research, we have set out to understand the investment landscape, funding and resource ecosystem for creative and social enterprises in Indonesia. We have classified the actors in the ecosystem of investment in creative and social enterprises as follows:

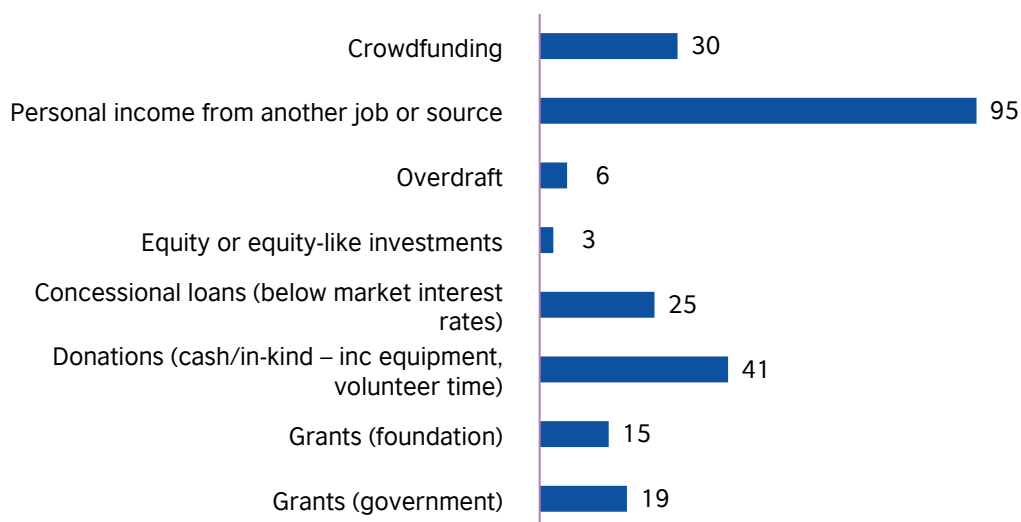
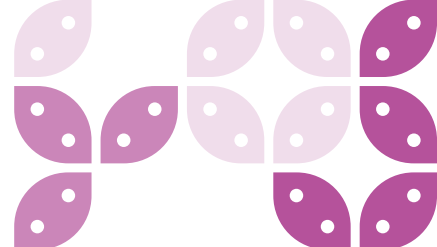
- (1) Financially motivated investors – including private investors and venture capitalists
- (2) Investors with ‘blended’ motivation – including social or impact investors
- (3) Grantmakers (for example not looking for a financial return) – donors (bilateral and multilateral) and venture philanthropists
- (4) Government – shaping policy and the enabling environment
- (5) Start-up support – incubators and accelerators
- (6) Networks - the likes of Aspen Network of Development Entrepreneurs (ANDE), Asian Venture Philanthropy Network (AVPN), Global Steering Group (GSG) and Angel Investment Network Indonesia (ANGIN)

We aim to explore in our partner report the extent to which these players in the ecosystem provide finance or support to creative and social enterprises.

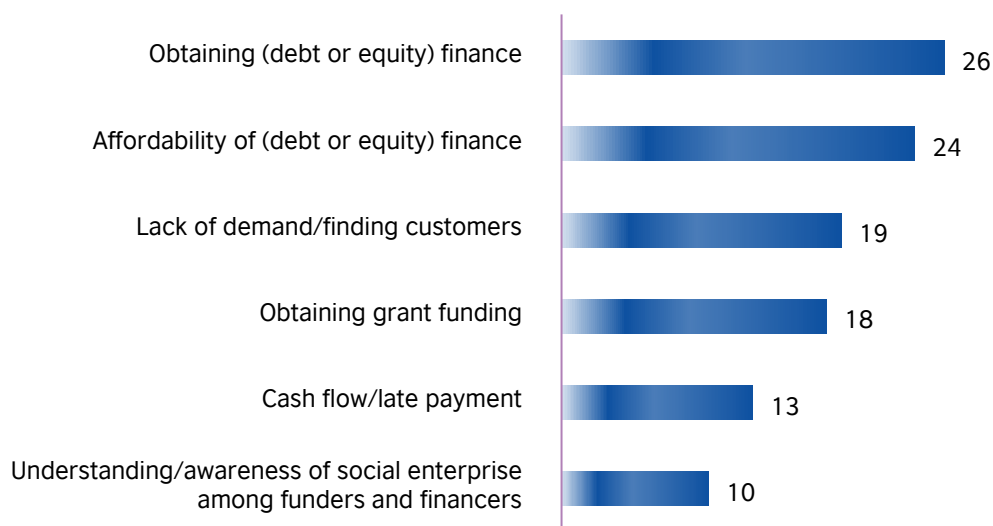
Here, however, we focus on the perspective of the creative and social enterprises in our survey. Our survey suggests that many creative and social enterprises are relatively young organisations and tend to be micro or small-sized enterprises. In this report, we aim to focus on their perspective.

8.1 Access to financial support

Our survey reveals that many CSEs have not yet had access to any financial support beyond their own circle of contacts. Many CSEs (44 per cent) have invested their own personal income from other sources to finance their enterprises. Only 19 CSEs have received grants from government and 15 from other institutions. Donations and crowdfunding are two most common sources of external funding or finance. Around 20 per cent of CSEs have received donations and 14 per cent have accessed crowdfunding.

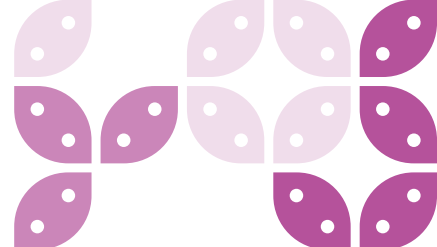


When asked about their finance challenges, most respondents point to difficulties in obtaining finance or grants.



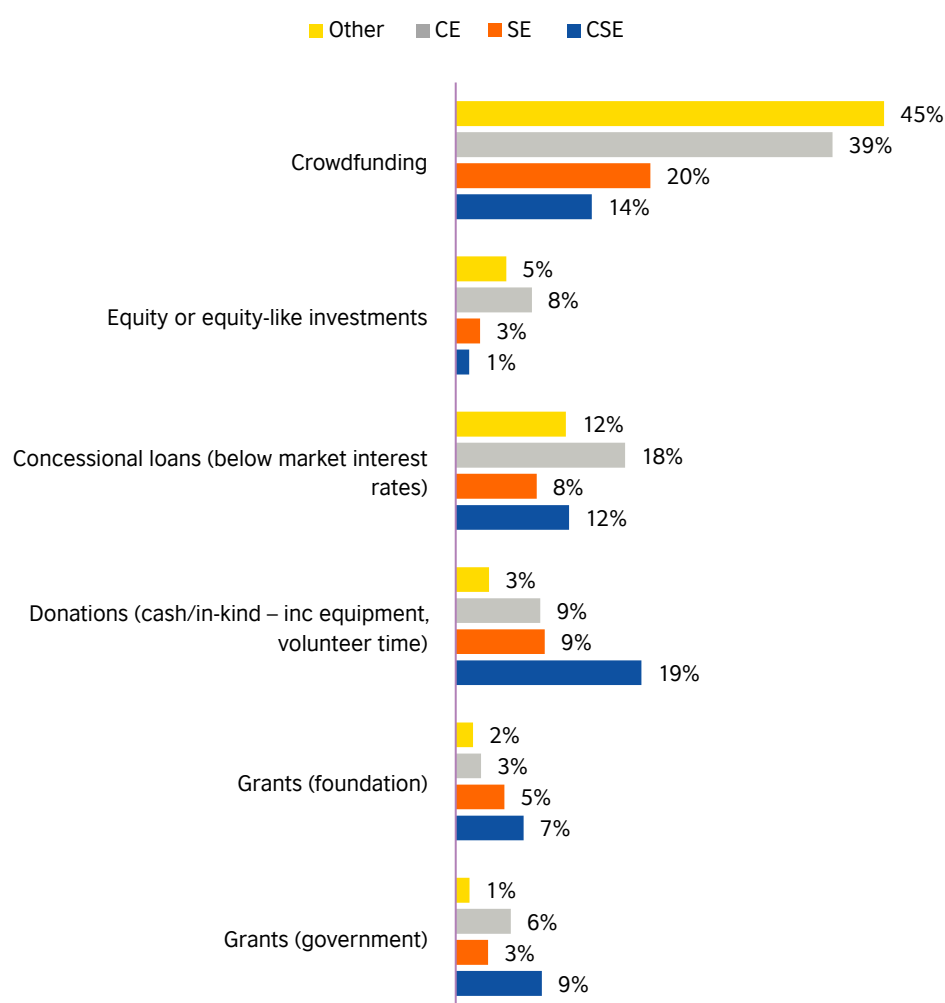
When asked further about the barriers they face, most report limited access to investors. Other common responses include a lack of required collateral, the business model still being premature, a limited track record, complicated requirements and more.





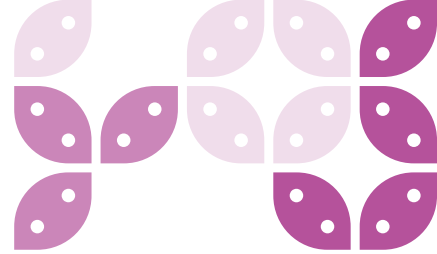
Barrier to access funding	No. of responses
Limited access to investors (not relevant contacts, limited network)	83
Finding guarantors/meeting collateral requirements	57
Business model not refined	54
Limited track/performance record	54
Regulatory constraints when securing international capitalise	53
Terms and conditions to onerous or difficult to understand	53
Demonstrating/achieving revenue/profit for equity investors and banks	52

The graph below shows the percentage of grants, donation, loans, equity investment and crowdfunding for each type of enterprise. CSEs tend to report better access to donations and grants. However, business more widely and creative enterprises have greater access to crowdfunding and – although it's only a small proportion – creative enterprises report greater access to equity investments than other types of enterprises.

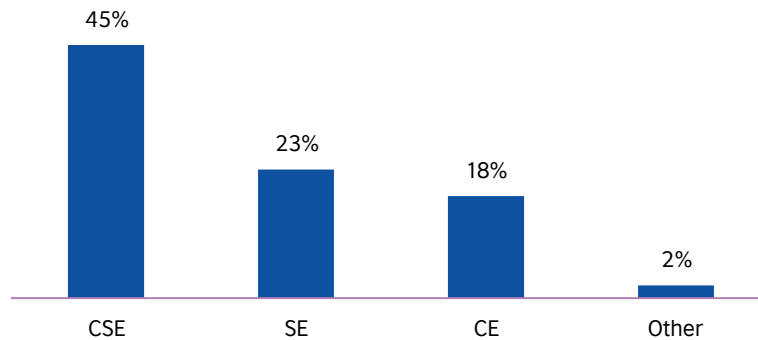


The figures below show the proportion of enterprises relying on personal income from other jobs or sources. CSEs have the highest proportion of enterprises using personal income at 45 per cent.





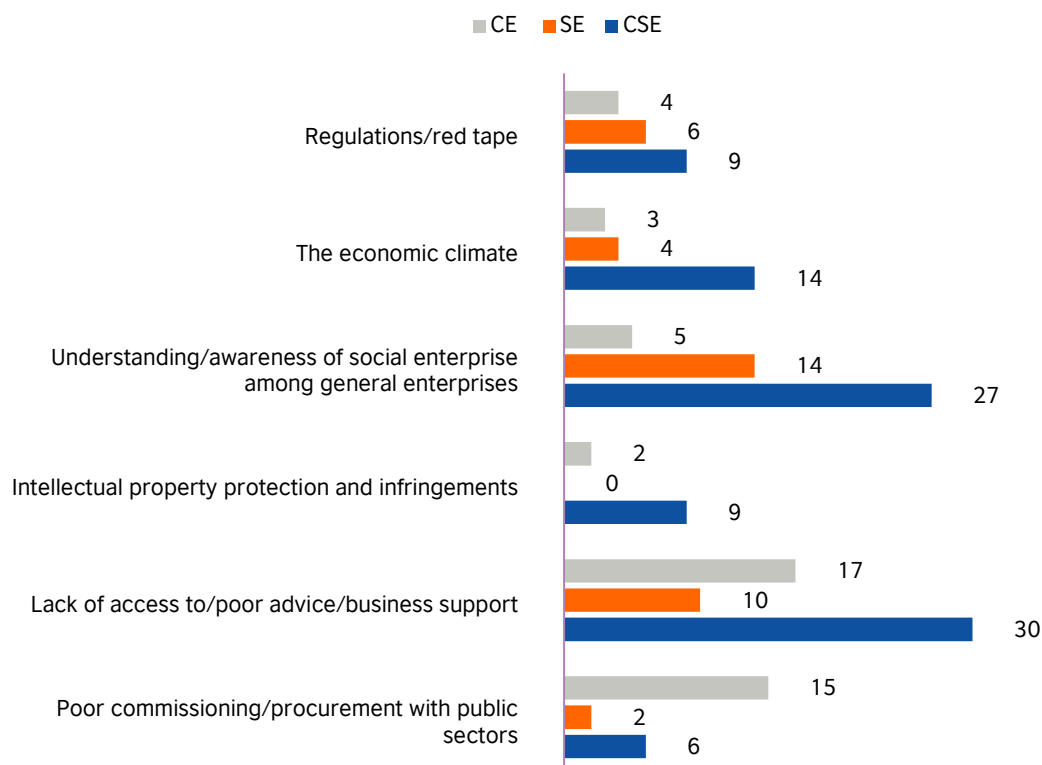
Personal income from another job or source

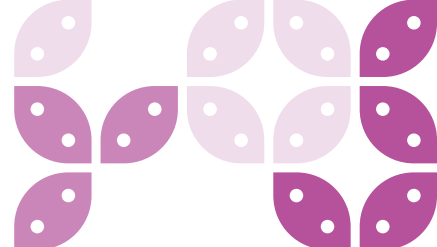


Our interviews suggest that many, especially community-based enterprises (such as associations or co-operatives), prefer not to seek finance from third parties due to their faith or religious beliefs around interest payments (or *riba*). Other creative and social enterprises want to keep their independence, believing that investors ‘interfere too much’ and can compromise the purpose and values of an enterprise.

8.2 Business support

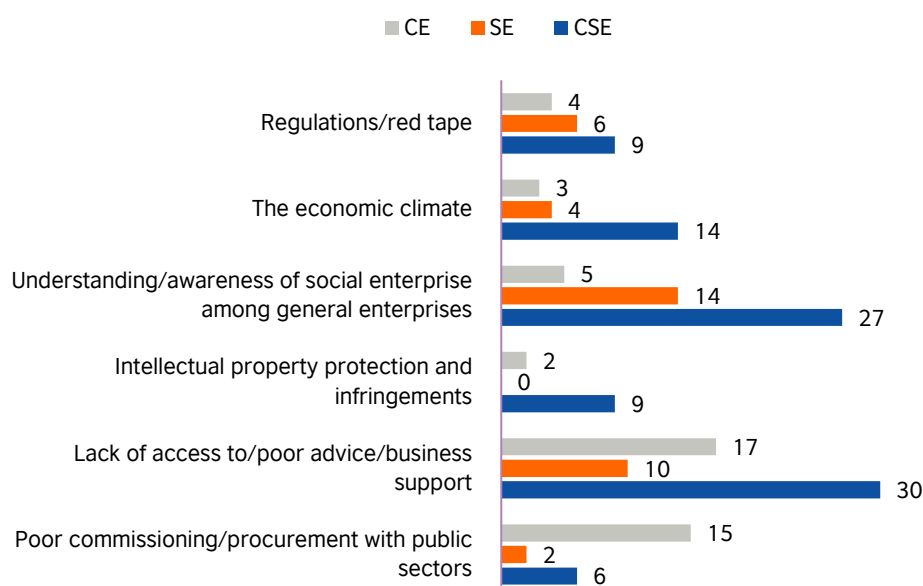
Non-financial support as well as financial support can help develop sustainable creative and social enterprises. Creative and social enterprises reported a range of barriers they face.





CSEs and CEs report that the lack of access to business support is the top barrier they face, while for SEs it is understanding and awareness of social enterprises, also found by CSEs. CSEs also report barriers such as poor procurement, intellectual property rights, regulation and red tape, and the economic climate. Previous research into social enterprise in Indonesia suggested that access to funding and finance were more significant obstacles to growth, although did also report a low understanding or awareness of social enterprise among the general public as a significant barrier for 23 per cent.²⁴

The most frequently reported type of support which social and creative enterprises felt was more necessary was 'support to reach new customers or markets'. A significant proportion of these enterprises also believed they could benefit from more government support and technical support or consultancy.



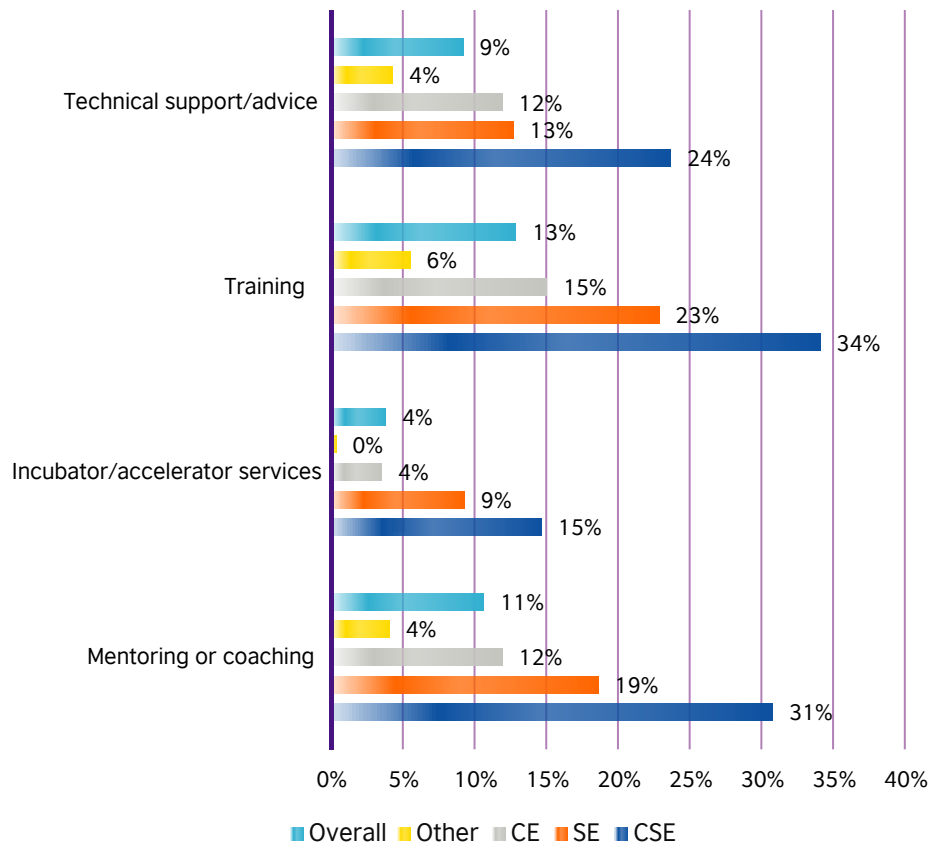
8.3 Ecosystem strengths and gaps

The emergence of social enterprises in Indonesia is not a linear process. It depends not only on sustained citizen support and participation but also on shifting political winds. Some social enterprises enjoy the support of international donors and some others have received financial support from the Government. Support in the ecosystem varies from training, workshops, technical support or access to information. There are many ecosystem stakeholders in the supporting ecosystem.

The figure overleaf shows the support received by all types of enterprises between 2018 and 2019 in terms of training, mentoring, incubation or technical support. CSEs report the most frequent access to all these types of supports. Thirty-four per cent of CSEs have received training and 31 per cent mentoring or coaching. This is much higher than enterprises more widely, which received minimum support. 23 per cent of social enterprises have received training and 19 per cent mentoring or coaching. Lack of access to business support remains a key barrier.

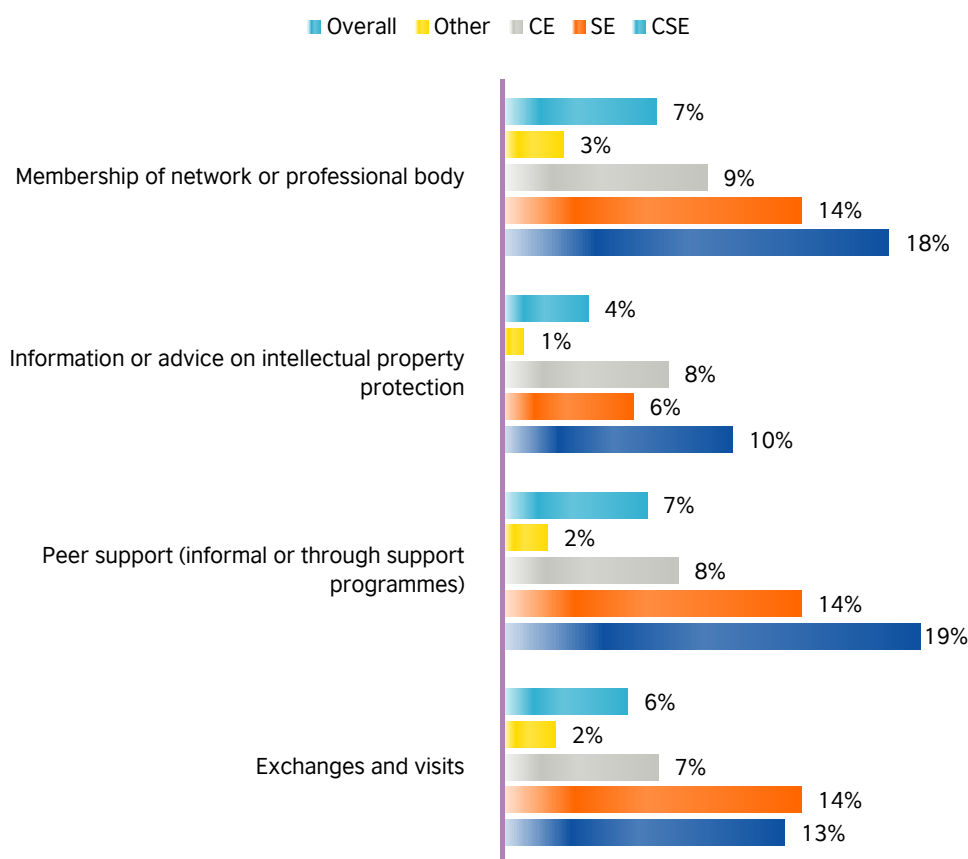
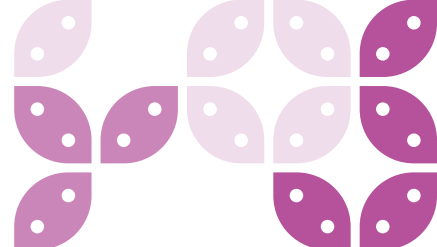
²⁴ https://www.britishcouncil.org/sites/default/files/the_state_of_social_enterprise_in_indonesia_british_coun- cil_web_final_0.pdf





Some enterprises have accessed support through the provision of workshops, training or technical support, sometimes provided by peers and other CSEs. Yensen Project, for example, is a social and creative enterprise that, after growing and expanding the business, now supports the local cultural and creative industries.

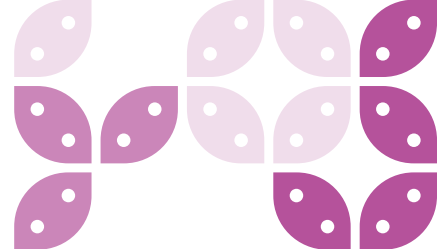
Other support accessed includes access to information, exchanges and peer support. While relatively uncommon this is nevertheless accessed more frequently by CSEs than other businesses. Nineteen per cent of CSEs have accessed peer support compared to seven per cent of all enterprises. Eighteen per cent have membership of a relevant professional body compared to just seven per cent for all businesses.



Peer support has sometimes been developed by government as well as other stakeholders. For example, the Rural Development and Transmigration Ministry (Kemendes PDTT) encourages each village to establish enterprises village-owned enterprises (BUMDES) to manage the village assets. Village co-operatives receive support from the Ministry of Co-operative and Small and Medium Enterprises. In terms of bottom-up initiatives, creative networks also play an indispensable role in promoting the tourism industry, with Indonesia Creative City Networks a prime example. Their vital role as a professional body and network is recognised by local government across the country.

Another challenge in the ecosystem is around intellectual property rights (IPRs). For example, copyright protection can be provided for creative products, such as written, oral, musical, dramatic, choreographic, artistic, architectural, photographic, cinematographic, audio-visual, graphic works and computer software. Artists need to register to prove ownership. But our survey found that only four per cent of all enterprises have access to information about IPRs; ten per cent of CSEs and eight per cent of CEs.





9 Conclusions

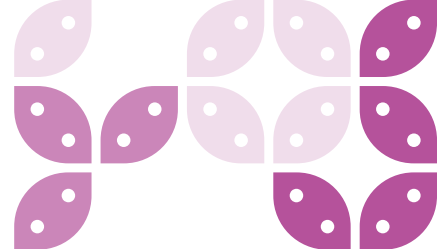
The study confirms previous research that creative and social enterprises are a significant and thriving part of the economy in Indonesia.

CSEs in Indonesia are young, with an average business age of 4.5 years (in 2019). Most CSEs are operating in urban areas and are focused on the local market, although the proportion of CSEs that have access to international markets is much higher than other enterprises (7 per cent).

The study appears to confirm our four hypotheses. The main conclusions from this report include:

- Indonesian CSEs are creating jobs for women and young people. Although less common, CSEs are also providing employment for people with disabilities.
- Most CSEs are micro and small businesses, with different growth expectations. This reflects the diversity of the creative industries as defined by the Indonesian government.
- CSEs are creating jobs for women and young people faster than other enterprises, and SEs even faster for young people.
- CSEs are providing new solutions to social and environmental problems. CSEs are addressing a range of SDGs, encouraging healthy lives and promoting well-being, providing inclusive and quality education, promoting productive employment and decent work for all, and promoting sustainable production and consumption.
- Compared to other enterprises, CSEs have a greater commitment to integrating innovation, creativity and idea generation in their business. Almost all CSEs surveyed believe that innovation and creativity are important, and almost half have design and development activities as part of their core business.
- CSEs in Indonesia are attempting to create and share opportunity. CSEs tend to have more female owners and are more representative of both women and young generation in the ownership of the business.
- CSEs are also more inclusive in reinvesting their profits, cross-subsidising surpluses to non-profitable activities and funding third parties to deliver social and environmental activities.
- CSEs are also paying national and local tax, paying staff (at least) the living wage, and paying suppliers premium prices.
- Social enterprises and CSEs are measuring their impact, with a focus on the benefits to the local community or the community that they serve.
- CSEs are seeking to create community and cultural cohesion by encouraging local cultural preservation and rejuvenating a sense of community identity and bonding.





10 Recommendations

Our findings suggest the following recommendations:

Inclusion

- Creative and social enterprises can do more to employ people with disabilities, including invisible disabilities. Funders and financiers could do more to help encourage and incentivise CSEs to be even more inclusive in their employment practices.
- Currently, there are no incentives for businesses which promote inclusive employment. Government policy could encourage employment of marginalised people, such as through subsidies for social security or taxation offset for more inclusive employment.

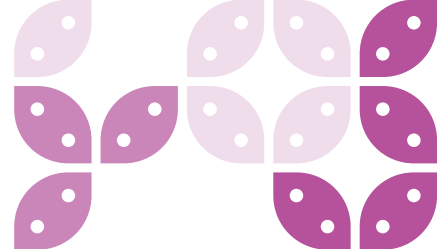
Innovation and intellectual property rights protection

- CSEs are innovative and creative, committed to developing new products and services. However, these businesses have not yet strongly developed their relationship with intellectual property rights (IPRs). Clear information about IPRs and their benefits should be widely publicised by the Directorate General of Intellectual Property of the Ministry of Law and Human Rights in order to encourage adoption.
- Many CSEs are micro or small and they do not yet allocate significant budgets towards innovation. Policy and support for these enterprises to advance their R&D activities, either internally generated or acquired from other parties, should be introduced by relevant ecosystem stakeholders. This should be led by the Ministry of Research and Technology/BRIN, Business Development Services and large corporate partners. There should be a mechanism to promote R&D activities for micro and small enterprises, such as encouraging partnerships with larger enterprises and universities or incentives for CSEs with potential IPRs.

Local culture promotion policies

- Many CSEs focus on activities that promote or preserve local culture, such as creative hubs, museums, performance arts and exhibitions, as well as village hubs. However, local artists and communities may have difficulties in promoting their art product and cultural activities to these CSEs due to their limited access to technology, especially digital technology. There are exemplary practices from mature art enterprises that support local artists, however, bigger support can come from local government, especially from the district office of tourism that is also responsible for creative economy. Some support from creative networks would help the local artists to get networking with wider communities.
- Support for CSEs needs to be conscious of the potential for cultural conflicts, where two or more communities may have different philosophies and ways of living. For example, communities in Bali may consider that local culture is being overwhelmed by the tourism industry while others may promote sustainable tourism. In East Java, some CSEs work to promote artisan products, such as traditional daggers or mask, which may raise potential conflicts with local religious leaders, for instance.





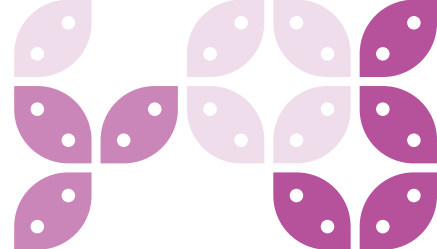
Governance and ecosystem

- CSEs can often face barriers in terms of access to skilled workers or finance. Investors prefer to allocate financial resources to those businesses with already well-developed financial sustainability, while other CSEs still struggle to convert their social innovations into viable business activities. CSEs also face challenges in accessing technical and business support. A strong and supportive ecosystem, which enables CSEs to fulfil their potential can be further developed through better collaboration by stakeholders, including communities, investors, financial institutions, government, policymakers and regulators.
- When it comes to business support, incubator and accelerator programmes to strengthen CSEs can be further improved and replicated. This study identifies co-working spaces in many major cities, including Jakarta, Surabaya, Bandung, Malang, Yogya, Makasar, and Pontianak that play a pivotal role in supporting young creative and art workers. However, these entrepreneurs still lack of access to investors. In particular, accelerator programmes can do more to attract conventional investors. This could include tailor-made programmes of pre-seed funding to accelerate social innovation, such as Research & Development, access to markets and network development.
- When it comes to access to finance, more collective learning within the ecosystem can help build smarter interaction between investors, creative and social enterprise and business accelerators.
- Investors can adapt their investment practices to this market and change their investment criteria to enhance deal flow and drive more investment into creative and social businesses.

Final remarks

- The study tells a positive story of creative and social enterprises in Indonesia. CSEs are often sustainable businesses, creating employment opportunities, with more inclusive governance and making a difference to communities.
- But these still represent only a small proportion of all businesses. While the study indicates promising growth, improving and strengthening business practice, improving access to business support and funding is key to ensure long-term sustainability. Supporting stakeholders should work more collaboratively to improve the quality of the ecosystem. We hope this study of creative and social enterprise in Indonesia can help further advance the creative and social economy.

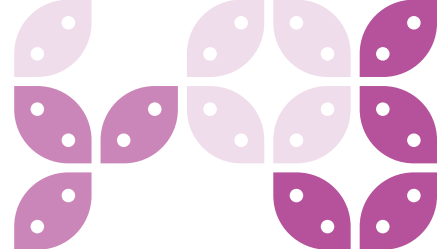




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Appendix 1 – Detailed methodology

Workshop

SEUK led design of the overall methodology, which was validated in Indonesia by Surabaya University and Parahyangan Catholic University and a number of sector stakeholders at a workshop on 28 March 2019. The workshop was attended by 21 participants from different organisations, including the Ministry of National Development Planning/National Development Planning Agency, Bekraf (Creative Economy Agency), Indonesia Creative City Network, Bandung Creative City Forum, and some social enterprises and creative enterprises. This workshop refined details specific to Indonesia, identified any issues specific to the country and fostered support for the work, include data and survey outreach support and the formation of a stakeholder working group to support validation of research findings.

Furthermore, four consultation meetings with government officials were also conducted to refine questions for the survey and interviews/FGDs. The meetings were with Director of Industry, Tourism and Creative Economy, Ministry of National Development Planning/National Development Planning Agency; Director of SME and Cooperative Development, Ministry of National Development Planning/National Development Planning Agency, Expert Staff for Equity and Regional Development, Ministry of National Development Planning/National Development Planning Agency; Deputy of Financing Access, Creative Economy Agency; and Director of Research and Development, Creative Economy Agency.

Estimate of total population

The estimated total population of CSEs in Indonesia is 75,245 enterprises. The estimate is based on the previous study from British Council, UNESCAP and PLUS (2018) that estimates the total social enterprises in Indonesia are 342,025. From this number, 22 per cent can be estimated to be creative social enterprises.

Survey

A survey of creative and social enterprises was conducted during 1 May 2019 – 16 August 2019. The questions are divided into four sections: profiles of respondents, profile of the enterprise, scope of business and barrier of the business.

The survey was conducted in two approaches: face-to-face and online survey.

The face-to-face survey was carried out from 6 June 2019 to 10 June 2019. It is a national wide survey conducted to randomly sampling adults. The respondents were randomly selected from 29 provinces in Indonesia and they are adults between 18 and 64 years old. There were 3,960 respondents, and from these respondents, there are 964 business owner or startups. They then identified whether they are creative enterprises, social enterprises or social and creative enterprises. There were 20 CSEs and 156 creative enterprises and 47 social enterprises obtained from this national-wide face-to-face survey.

The second survey, online survey was conducted between 10 May 2019 and 16 August 2019. There were 2,584 invitations through email, milist, and text message to participate in the survey: <https://www.surveymonkey.com/r/DICEID>.





Stakeholder interviews and Focus Group Discussions

Interviews and Focus Group Discussions were conducted with 120 intermediary organisations and creative and social enterprises, and 26 ecosystem. The interview and FGDs were conducted in 12 cities: Solo, Yogyakarta, Semarang, Surabaya, Malang, Denpasar, Bandung, Makassar, Jakarta, Padang, Medan and Pontianak. Interviews and FGDs were conducted in order to better understand activity in the ecosystem and the detail of organisation-level operations and impact. Interviewees were selected by the support of Indonesia Creative City Network (ICCN) and using a semi-structured interview method were asked a range of questions covering their business model and best practices in leadership and good governance, the identity and cultural preservation examples, opinion about impacts and how to measure impacts in their organisations, the support, challenges and barrier to grow and to survive. Also, the questions related to financial support were also asked.



Appendix 2 – Ecosystem actors

No	Organisation Name	Website	Type of organisation supported	Type of support
1	Universitas Brawijaya	www.ub.ac.id	Any SE and CE	Non-financial (mentoring, research)
2	Bina Nusantara Malang	www.binus.ac.id/malang	Any SE and CE	Non-financial (mentoring, research)
3	Dinas Pariwisata dan Kebudayaan - Ekonomi Kreatif, Department of Tourism and Culture, Creative Economy	www.malang-kota.go.id	Any CE	Non-financial (networking, market)
4	Sekolah Menengah Kejuruan Negeri 4 Malang, Vocational High School 4, Malang	www.smkn4malang.sch.id	Any SE and CE	Non-financial (mentoring, research)
5	Institut Seni Indonesia, Yogyakarta	www.isi.ac.id	Any CE	Non-financial (mentoring, research)
6	Universitas Kristen Duta Wacana, Yogyakarta	www.ukdw.ac.id	Any SE and CE	Non-financial (mentoring, research)
7	IBISMA UII (Inkubasi Bisnis & Inovasi Bersama Universitas Islam Indonesia)	www.simpul-tumbuh.uii.ac.id	Any SE and CE	Financial (grants and loans) and Non-financial (mentoring, academics)
8	Sekolah Tinggi Desain, Bali	www.std-bali.ac.id	Any SE and CE	Non-financial (mentoring, research)
9	Badan Ekonomi Kreatif (Bekraf) Denpasar	www.denpasarkreatif.com	Any SE and CE	Non-financial (networking)
10	Dinas Perdagangan dan Perindustrian Bali	www.disdag-perin.baliprov.go.id	Any SE and CE	Non-financial (mentoring, networking)
11	Aliansi Desainer Produk Industri Indonesia Bali (ADPII)	www.adpii.org	Any CE	Non-financial (mentoring, networking)
12	Tim Ahli Bupati Karang Asem	www.karangase-mkab.go.id	Any SE and CE	Non-financial (mentoring, networking)



No	Organisation Name	Website	Type of organisation supported	Type of support
13	Himpunan Ikatan Pengusaha Muda Indonesia (HIPMI) Makassar		Any SE and CE	Non -financial (mentoring, networking)
14	Sekolah Tinggi Ilmu Ekonomi Tri Dharma Nusantara Makassar	https://studn.id/campus/SekolahTinggIlmuEkonomiTriDharmaNusantara	Any SE and CE	Non -financial (mentoring, research)
15	Dinas Perindustrian Prov. Sulawesi Selatan	https://sulselprov.go.id	Any SE and CE	Non -financial (mentoring, networking)
16	Dinas Pariwisata Kota Makassar	disbud-par.sulselprov.go.id	Any CE	Non -financial (mentoring, networking)
17	Desain Komunikasi Visual Fakultas Seni dan Desain Universitas Negeri Makassar	fsd.unm.ac.id	Any CE	Non -financial (mentoring, academics)
18	FKIP UNTAN	https://fkip.untan.ac.id	Any SE and CE	Non -financial (mentoring, research)
19	Dinas Pemuda dan Olahraga Prov. Kalbar	disporapar.kalbarprov.go.id	Any SE and CE	Non -financial (mentoring, networking)
20	Himpunan Ikatan Pengusaha Muda Indonesia (HIPMI) Kalimantan Barat	https://hip-mikalbar.org	Any SE and CE	Non -financial (mentoring, networking)
21	Dinas Pemuda dan Olahraga Prov. Jawa Timur	https://dispورا.jatim-prov.go.id	Any SE and CE	Non -financial (mentoring, networking)
22	Dinas Pengendalian Penduduk, Pemberdayaan Perempuan dan Perlindungan Anak (DP5A) Surabaya	https://surabaya.go.id/id/page/0/23743/dinaspengendalian-kependudukan--pemberdayaan-perempuan-dan-perlindungan-anak	Any SE and CE	Non -financial (mentoring)
23	Dinas Koperasi Prov. Jawa Timur	diskopukm.jatim-prov.go.id	Any SE and CE	financial (grants and loans)
24	Badan Perencanaan Pembangunan Kota (Bappeko) Surabaya	https://bappeko.surabaya.go.id	Any SE and CE	Non -financial (mentoring, networking)
25	Balai Pengembangan Industri Persepatuan Indonesia (BPIPI) Surabaya	bpipi.ke-menperin.go.id	Any SE and CE	Non -financial (mentoring, networking)





No	Organisation Name	Website	Type of organisation supported	Type of support
26	Dinas Perdagangan dan Perindustrian Surabaya	disperdagin.surabaya.go.id	Any SE and CE	Non-financial (mentoring, networking)



Appendix 3 – Consultation workshop participants

No.	Name	Organisation	Role
1	Linus Arya Pradana	Taman Tanpa Batas	Staff
2	Imam	Taman Tanpa Batas	Staff
3	Marishka	Bappenas	Staff
4	Tita	Bandung Creative City Forum (BCCF)	Head
5	Isti Khairani	Bumi Inspirasi LC	Owner
6	Ira Shintia	Eco Ethno Center/ICCN	Owner
7	Dian P	Bekraf	Staff
8	Atikah Nur P	Bekraf	Staff
9	Dini Indra	AVPN	Staff
10	Sonny Rustiadi	SBM ITB	Director of Student Affairs
11	Muh. Ajie S.	Startup Bandung	Owner
12	Purbaningsih Dini Sashanti	MBA CCE 58 ITB/Teman Tanpa Batas	Owner
13	Ricky Adlin	Teman Tanpa Batas	Co-Owner
14	Gerry B K	Yayasan Tanpa Batas	Staff
15	Catharina B. Nawanglupi	UNPAR	Researcher
16	Gandhi Pawitan	UNPAR	Researcher
17	Anggia Valerisha	UNPAR	Researcher
18	Giandi Kartasasmita	UNPAR	Researcher
19	Hery P	UBAYA	Researcher
20	Veny Megawati	UBAYA	Researcher
21	Kumara Sadana Putra	UBAYA	Researcher

Appendix 4 – Key informant interviews: CE/SE Intermediaries

No.	Name	Organisation	Role
1	Arif Rachman	ALUR BAMBOO	Owner
2	Ahmad Suhaib	Asidewi	
3	Ida Bagus Md Juniarta	Bali Creative Industry Center (BCIC)	
4	Dwinita Larasati	BANDUNG CREATIVE CITY FORUM (BCCF)	
5	Reni	BLOCK71	
6	Indra W	BOONPRING SANANKERTO	
7	Waluyohadi	Butawarna Design	
8	Deny Sofian	Canopy Center	
9	Yusuf Habibi	cbr.studio	
10	Cindy Lailani	Clapham Company	Finance
11	Erul	CONFIE INDONESIA COWORKING SPACE	
12	Siti Syahwali	Coral Triangle Center (CTC)	
13	Sagung Alit S.	Cushcush Gallery	
14	Asdar Marsuki	CV. MGM	
15	Fajar Asikin	CV. DWT Malang Creative Fudion (MCF)	
16	Isa Wahyudi	CV. Inspire Consulting	
17	A Noor Arief	DAGADU DJOKDJA	
18	Astarina Ayu Ning-tvas	Dapur Ar -Ryai (Kuliner)	
19	Tenqku Ari	Deail House	
20	M. Arief Siregar	Diaidoy	
21	Indra	Dinas Pemberdayaan Masyarakat, Perempuan dan Perlindungan Anak (DPMPPA)	
22	Naina Bunga O. M. Yuwono	ECO - J	
23	Ira Shinta	Eco Ethno Lead Campsite	Owner
24	RG Perez	ecoBali	
25	Wari AL Kahfi	Enter Pena Studio	
26	Onny Kresnawan	Esefde Films	
27	Deni Prasetyo	Forum Animasi Malang (FAM)	



No.	Name	Organisation	Role
28	Gusti Hendra Lahmuddin	FPWA Kalbar	
29	Arief Maulana	Freelance Copywriter	
30	Dedhy Trunoyudo	Garda Pangan	
31	Taufashwara	Gerdhu	
32	Vania Santoso	heyStartic	
33	M. Rizal Edwin	HIPMI Kalbar	
34	A. Dedy DIIP	ICTLE Sulsel	
35	Listya Dyah Rahayu	IFC Surabaya	
36	Tita Dian W	Impian Studio	
37	Ruliyanto	Indonesia Medika Malang	
38	Atrirsyah Lubis	Inihalal aps	
39	Dikent Jingga	Invita.id	
40	Sukma Smita	Indonesian Visual Art Artist (IVAA)	
41	Ermiwati Jinis	IWAPI SUMBAR	
42	Dias	Jagoan Indonesia	
43	Fitria Anggraini L.	Jarak Arum	
44	Priyono	Kalbar Berkebun	
45	Nurul Hidayah	Kamiku.id	
46	Barry S.	Kampoeng Caping	
47	Sholahuddin	Kampoeng Mataraman	
48	Syukur Htg	Kawan Nonton	
49	Agus Pramono	Kawasan Ekonomi Khusus Singhasari	
50	Budi Agung Kuswara	Ketemu P	
51	Elsi Sastia	Kijang Berantai	
52	Bobi Septian	Kinantan TV	
53	Fahreza Aulia Nst	KOMIK PSMS	
54	Andri	Komunitas Kopi Nusantara	
55	Ainul Yaqin	Komunitas Mengajar Animasi Lintas Masa (KOMALIMA)	
56	Harti Ningsih	Koperasi Wanita IKABOGA	
57	Atik Triningsih	KUB. Mampu Jaya	
58	Ikomang Adiartha	Kulidan Kitchen & Space	
59	Dian Suri	Kunang Jewelry Studio	
60	Suriawati	LagiLagi	





No.	Name	Organisation	Role
61	Jhon Fawer Siahaan	Literacy Coffee	
62	Rina Noviani	loveusaha.com	
63	Ashari Ramadhan	Makassar Creative Community Network (MCCN)	
64	Nana Ibrahim	Maskerade Indonesia	
65	Abe Rose	Mawar Merah Production	
66	Adhicipta R. W.	Mechanimotion	
67	Ade Ardianta	Medan Talk	
68	Riza Mawarni Lbs	MGJ	
69	Harjono	Miles	
70	Sri Wahyuni	Mitra Statistik	
71	Adithya Yustanto	MOCCA Animation	
72	Delvian Sahputra	Mowiee	
73	Cyntia Handy	Museum Gubug Wayang Malang	
74	Rusrian Yuzaf	OASE Academy	
75	Bintang C. Putra	OHS	
76	Eksa Yoga A	Omah Jaman Now	
77	Novita Anggraini Siregar	Opeeg	
78	Ridho Wirwana	PCCF / Nirwana Clean	
79	Rd. Zaky M. Fasa	Pemuda Peduli Kesejahteraan Sosial (PPKS)	
80	Muhammad Rinaldi	Perwakilan Indische Partij (Makassar Leather Crafter)	
81	Nancy Margried	Piksel Indonesia (Batik Fractal)	Owner
82	Irawan	Pinus Makmur	
83	Kirman Nurdin A	Plastik Bank Bali	
85	Sapto	PLUT / ABDSI Yogyakarta	
86	Edi Suprianto	Pontimarket	
87	Firman Cahyudi	PT. Favorit Kita Indonesia	
88	Cahyadi Joko S	Perkumpulan Untuk Peningkatan Usaha Kecil (PUPUK)	
89	Devy Kurnia Alamiyah	Pusat Kajian Kreatif UNP	
90	A. Latif	Quick Management	
91	Muktadirah	rahid.clo	
92	Lucy K	Rumah Aktif	
93	Darmawan Denassa	Rumah Hijau Denassa	
94	Syafrina	Rumah Kreatif Barbara	
95	M. Rizky Abdili	Rumah Uppo	





No.	Name	Organisation	Role
96	Haniati	Sahawood	
97	Benny PR	SAMPAN Kalimantan	
98	Ayu Idayati	Samsara Living Museum	
99	Tika Y.	SCN	
100	Ria Homma	Sentra UMK	
101	Joni Martono	SETAPAK 9	
102	Heinrico Hardi	She Resto	
103	Nasai	Singhasana Budaya Nusantara	
104	Handaka A.	Singkawang (Koperasi Harapan Baru)	
105	Citra Hasan	SIRKAM	Owner
106	Ardhy Cahyo Dewanwantoro	Social Footwear Academy	
107	Gilda Widitayasa	Sooka! Edu	
108	Ratu	Substitute Makerspace	
109	Satria Liaris	Sumber Kreatif	
110	I Putu Jopan Aristana	Sunaka Jewelry	
111	Listyo HK	Tamansiswa / Sariswora	
112	Annisa Fauziah	Tri Upcycle	
113	Rr. L. Andri S.	UKM Samijali	
114	Diana S.	Uphill Society / Journalist	
115	Gusti M. Hamdan	Urunan Kebaikan	
116	Dadik Wahyu	UTERO Indonesia (Konsultan Kreatif Riset, Branding, Design, Marketing, Advertising)	
117	Jerry Febrialdino	VCO Siti Nurbaya	
118	Lulu Riskiah Harahap	Vectorina Medan	
119	Nasriati Nuthalib	Yayasan KKSP	
120	Yutiknowati (Yayuk)	YHR Kristik	

