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From Growth to Sustainability: Supporting the Development of the Creative Economy in Europe’s Northern Periphery

Dr. Patrick Collins, Dr. James Cunningham, Aisling Murtagh and Dr. Jenny Dagg
Acknowledgements

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CULTURE AND CREATIVITY ARE HIGH-VALUE GROWTH AREAS, AND A VIBRANT RELATIONSHIP BETWEEN CULTURE AND CREATIVITY ENHANCES THE COMPETITIVENESS OF COUNTRIES, CITIES, REGIONS AND BUSINESSES, AND IS INCREASINGLY SIGNIFICANT IN PERSONAL AND SOCIAL DEVELOPMENT.

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Executive Summary

THE CONCEPT of the creative economy first emerged in the mid-1980s in response to a crisis brought about by the decline in manufacturing in many of the world's most developed economies. The idea suggests a productive convergence between culture, creativity and technology that has the potential to transform the productive relationships held between economy and society. Culture and creativity are high-value growth areas, and a vibrant relationship between culture and creativity enhances the competitiveness of countries, cities, regions and businesses, and is increasingly significant in personal and social development.

Research as part of the Creative Edge project has identified four unassailable facts about the contemporary creative economy:

- The creative economy is growing at an unprecedented rate internationally.
- The creative economy is diffuse and reaches across traditional sectoral boundaries, but at its core are the industries and individuals that exploit creativity for the production of their goods and services.
- The creative economy is not the sole preserve of urban areas; rural, indeed peripheral, regions show evidence of vibrant creative production.
- The creative economy is relatively undervalued and under-appreciated from a policy standpoint. Policy-makers need to realise the potential that vibrant creative economies offer, not just in economic terms but in social, cultural and psychological terms as well.

The primary aim of the Creative Edge project is to provide much needed support for the creative economy in our four peripheral regions. To set about this task, work package 2 sought to highlight the extent of the creative economy in our member regions. Part inspired by international analysis that has been skewed towards the urban, and part based on previous work carried at the Whitaker Institute in NUI Galway, this work package has been dedicated to mapping creative industries across Europe’s northern periphery.

What follows is an analysis and reflection on the Creative Edge database. It tells the story of a thriving creative sector active throughout all four of our regions. Made up of close to 6,000 creative companies, our database is the first step in understanding the economic and social potential offered by this growing industrial sector in a peripheral context.

It situates the development of the creative economy in the theoretical context of academic and policy literature. It highlights the current and future trends in a markedly different consumer market. It seeks to understand the sustainability in terms of how we educate young people to enter into and succeed in the sector. But ultimately this is a policy guide; it is an attempt to match the needs of those in the creative sector with those concerned with the economic and social viability of their regions.

The creative economy is something of an elusive concept. Appendix 1 elucidates what we consider as the creative sector. This is built on previous analysis of the creative sector, allied with an analysis of international policy and academic literature. What combines these disparate industries is the cultural content of their offerings. Though their product offerings range from pottery to App development, and their modes of delivery switch between the physical and non-tangible, the creative sector is bound together by a number of important traits:

- **Markets** for final outputs are extremely uncertain and highly competitive.
- **New technologies** are changing the end products and offer massive potential to producers in terms of lessening the barriers to entry while also carrying the threat of replicability. This is leading to a new market set-up, one that sees the copyright industries leading the way.
EXEClUTIVE SUMMARY

• While production of symbolic goods tends to be dependent on both large inputs of human labour, these goods also involve a high degree of intellectual labour.
• The process of authenticating symbolic forms invariably draws on, for example, cultural associations and social traditions - therefore Authenticity and Place are fundamental.

The Creative Edge project has offered us the opportunity to further explore what binds these industries across their vast geography. In doing this we have come to understand that, what offers creative industries operating out of rural areas a competitive edge is their ability to exploit Place and Authenticity. These two elements are intimately bound in the creative produce of the 6,000 companies in the Creative Edge region.

In an increasingly globalised world, our peripheral regions are increasingly singled out as the most authentic - they are the places of tradition of language and of culture. In an increasingly globalised world, the demand for authentic and place-based produce is insatiable. This reality is retold throughout many of the different aspects of the Creative Edge project. This fact also needs to be recognised by the producers and policymakers of the creative economy. For too long goods from the periphery have been thought of as inferior; in an increasingly homogenised world, the stories and narratives ingrained in produce 'from the edge' demand more attention and the value-add of authentic goods and services is to be noted.

What follows is a guide to what can be done to better support the industries that produce these goods and services and what can enable the creative sector to flourish in peripheral areas across Europe. This is proof of a dynamic growth sector using its place for competitive advantage. While oftentimes, peripherality acts as a barrier to the growth of an industry in certain places, we have identified a set of industries that use their place as an advantage. This alone warrants further investigation. This report can help policy-makers recognise this unique industry and help it achieve its growth potential in the future. The targeted audience is those interested in regional development but, while this document is concerned with the creative and cultural industries, the recommendations apply beyond this sector.

Chapter 1 introduces the Creative Edge project, the member regions and the broader aims of the initiative.

Chapter 2 presents an overview of the structure of creative and cultural industries in the countries in which the Creative Edge partner regions are located. It takes an in-depth look at the nature of creativity, the cultural infrastructure, and creative industries in each of the partner regions, as represented by the Creative Edge database. This is the first time any such attempt has been made to map the cultural infrastructure of peripheral regions – it helps highlight the immutable fact that culture and the creative industries thrive in places where infrastructural support is provided.

Chapter 3 has a review of creative and cultural policy in the countries in which the Creative Edge partner regions are located. Each national context reflects a differing perspective on the attention given to creative and cultural industries on the national policy agenda. With growing recognition of the importance of cultural industries, policy has moved to a greater focus on the economic aspects of culture. The value of the arts is understood more broadly, not just in its cultural and social value, but its economic value feeding into creativity, which in turn drives innovation. From this perspective, cultural policy is very important in modern economies, and according to some writers, has been catapulted to the forefront of a new and more forward-looking policy agenda.
Chapter 4 sets out a general overview of policy strategies for creative and cultural industries. A number of challenges for creative and cultural industry policy making are identified. One example we see again and again is the urban bias of theoretical and policy writings on the creative economy. Also, policy must not just consider broad policy issues, but also focus on addressing issues that arise in different contexts. In this chapter, the peripheral perspective is considered in detail, with challenges and issues first outlined, and some areas of potential future policy direction then presented. The discussion also presents policy approaches and examples of policy initiatives that have addressed similar challenges.

Chapter 5 provides an analysis of demand for culture and creative economy produce. This views patterns of cultural consumption from the global level down to household patterns in Europe and member state countries. It sheds light on the previously uncovered area of business-to-business cultural consumption by reference to dedicated studies and initiatives carried out as part of the Creative Edge project. Tourism and participation are also analysed as non-traditional facets of consumption. The chapter concludes with a set of policy recommendations, many of which are linked to the uniqueness of the demand side for creative produce.
Chapter 6 outlines the higher education infrastructure, education attainment, and general educational drive for the creative industries in each of the partner regions. The chapter then explores the preparedness of the higher education infrastructure on the island of Ireland to exploit creative economy growth. Lastly, the chapter explores a specific programme undertaken in the Northern Periphery region by the Creative Edge Project - Creative Steps - as an example of fostering creative talent.

This toolkit is distilled in the concluding section, which sets out general recommendations, as well as specific proposals for peripheral contexts:

**General Recommendations**

**Evidence-based policy**

The diverse nature of the creative and cultural industries makes it vital that policy-making is informed by real world patterns of development. There is a need for regular, systematic data collection and analysis to better inform decision-making. Evidence can reveal critical challenges, which means policy initiatives can then be designed around overcoming these. National and regional commitments should be made by public authorities and regional agencies to measure the economic and societal worth of the creative economy. Compilation of vital statistics at national and regional levels should also be carried out to enable tracking of changes over time. Particularly relevant to this sector is the ‘extra’ economic impact. Such is the social and cultural nature of work in this area, a more comprehensive social understanding needs to be place.

**Coordinated policy process**

Responsibility for policy-making in the creative economy can be unclear. Because of its economic, social, cultural, technological and environmental linkages, it needs input from a range of actors. There must be cross-ministerial cooperation in creative economy policy development, as well as engagement with stakeholder groups. Policy must be national, and the need for regional and local policy, coordinated with national policy, must also be assessed.

**Longer-term focused development strategies**

Each region and nation should have a development strategy for the creative economy. Strategies over a five to 10-year horizon, rather than two- and three-year plans, would demonstrate regional and national commitment to creative economy development. Economic, cultural and societal milestones and progress towards interim objectives is essential in any development strategy.

**Supporting creativity and culture by creating an enabling environment and providing infrastructure**

A society that supports culture and creativity is a society that supports the development of its creative economy. The development of an environment for creativity to flourish in society must underpin the development of the creative economy. Related to this is the provision of a cultural infrastructure that enables the creative economy to grow from the production and consumption sides.

**Business skills training for creative industries**

A strong theme emerging from our policy consultation (see Appendix 3) is the need for business skills development among creative entrepreneurs, including management and marketing skills, and broader business skills, including writing business plans, identifying target markets, website development, marketing using social media and online selling.

**Greater awareness of the wider benefits of the creative economy**

The benefit of a strong creative economy goes beyond its economic impact. Creativity and innovation are thought to be inherently linked and a more creative economy will be a more innovative economy. Developing the creative economy also has wider social and cultural benefits.

**Stronger linkages between industry, creative business and higher education**

Industry links need to be encouraged and strengthened between creative businesses and higher education institutions, particularly in Ireland, as exemplified with the National Skills Academy for Creative and Cultural Sector in Northern Ireland. This is important for ensuring the transfer of technical skills, identifying industry requirements for creative courses, and providing information and advice on creative careers.
Sectoral Innovation Hubs

Incubator or innovation hubs focusing on specific creative sectors need to be developed by individual higher education institutions, as exemplified by Umeå University, Uminova Innovation, for the games sector. National incubator networks such as Swedish Game Incubator Network or the Helsinki School of Creative Entrepreneurship should be encouraged in order to provide transitional ground for graduate spin-off activity and start-ups, and further increase dialogue between industry and academia. The Bio-innovate programme, led by NUI Galway, in the medical devices sector in the West of Ireland provides a template for the creative sector there to follow.

Fostering of entrepreneurial ability

Work simulation programmes, such as Creative Steps, are to be encouraged as an approach to fostering entrepreneurial ability in creative industry graduates, as they are more likely to set up their own business.

Recommendations for Peripheral Contexts

Increasing awareness of the periphery as a creative place

Peripheral regions are creative places, but an increased awareness of this is needed. The image of peripheral places should be rejuvenated to reflect their distinctive, vibrant creative economies and culture. Marketing of creative products from peripheral regions can also leverage positive images of place.

Catalysts to support emerging creative industries

Peripheral regions should be developed as environments that foster creative entrepreneurship. Support for emerging creative industries, through business hubs and providing work spaces at low cost for example, are vital in peripheral places. Other kinds of catalysts based on local need should also be introduced, such as rent subsidies to support emerging creative businesses to obtain premises.

International cooperation between peripheral regions

Peripheral regions share similar challenges and can learn from each other’s strengths. International cooperation between peripheral regions should be encouraged to facilitate the development of their creative economies and societies.

Better use of online social networks to enable networking and business collaboration

Networking and collaboration between businesses is important in the creative economy. Peripheral creative business can be isolated from a wider business community of creative professionals. Enabling creative businesses to connect in the virtual environment could help them overcome their physical separation.

Better market access to negate the challenges of marginality and market access

Market access is a critical issue for peripheral creative businesses. Local markets are often too small to sustain specialist creative businesses. Facilitating creative businesses to access international markets from their peripheral location is needed, and e-commerce is one possible approach.

Better understanding of, and policy instruments tailored to, the needs of peripheral regions

Successful policy measures in urban contexts are not necessarily the appropriate measures for peripheral regions. Research on the creative economy has focused on urban contexts. Better understanding of the dynamics of creative and cultural industries in rural, smaller urban and peripheral places is needed. Identifying if particular sub-sectors of creative industries have more potential in peripheral places can guide more strategic policy initiatives. Research into piloting (and evaluating) new business models that facilitate greater cooperation between creative industries, and which support ease of internationalisation and adoption of the organisational forms best suited to the digital age, is needed. Investigating the best types of e-commerce and how to really effectively network in a virtual environment would also help understanding how to address particular needs of peripheral creative economies.

Harness the spillover effects of creative industries

Synergies between cultural and creative industries and other sectors of peripheral economies should be exploited to their full potential. Artisan/local food and tourism sectors are identified as sectors where there is potential to harness spillover effects.
Recommendations for Policy

1. Increasing awareness and academic research: The creative economy is a relatively new topic of academic investigation. Analysis has focused on the production side with little work carried out on the consumption side.

2. Understanding market unpredictability: The market for creative produce is unique in being unpredictable and differentiated. How crucial these factors are in defining the industrial and organisational make-up of the economy needs to be better understood. Product differentiation and the infinite demand for variety helps explain the abundance of small firms in this economy.

3. Exploiting culture content: Unique products, high in symbolic and cultural content, are in increased demand. This has obvious ramifications for creative producers, but is also important to those supplying more traditional goods. The peripheral areas of Europe are regions of cultural depth, their narratives are in demand far beyond their regions' borders.

4. Developing an online market to increase market research: The Internet has heralded massive transformations in how culture is produced and consumed. Technology and digitisation are helping producers reach greater numbers of consumers. Correct provision of infrastructure to both is critical.

5. Understanding user content market dynamics: New technology is also helping blur the lines between production and consumption. Nowhere is this more evident than in the creative economy. User-generated content and the democratisation of production and consumption of creative produce offers a wealth of benefits as well as bringing innate threats. How the cultural industries have adapted to this new marketplace can act as a roadmap for all other industries.

6. Pursuing creative consumption growth opportunities: Creative consumption is growing at a significant rate. The growth of the creative economy is unequal, sectorally and geographically. Policy-makers need to be aware of those trends highlighted here to better deal with future developments. Design and new media sub-sectors are leading these growth trends but more traditional arts sectors have proved demand-elastic through the most recent economic turmoil.

7. Addressing the threats from mass-produced creative goods: At the EU level, Europe is becoming a net importer of creative goods. This has been highlighted in UNCTAD’s most recent analysis of the creative economy. There are inherent dangers in becoming a site for production with regards to the growth of the creative economy. The threat of mass-produced creative goods from the global South is obvious. At a member state level, countries do - and need to - specialise in particular areas of creative production and consumption.
PERIPHERAL REGIONS ARE CREATIVE PLACES, BUT AN INCREASED AWARENESS OF THIS IS NEEDED. THE IMAGE OF PERIPHERAL PLACES SHOULD BE REJUVENATED TO REFLECT THEIR DISTINCTIVE, VIBRANT CREATIVE ECONOMIES AND CULTURE.
Chapter 1: Introduction

“CREATIVITY IS FOUND EVERYWHERE IN THE WORLD AND IS AN INEXHAUSTIBLE RESOURCE” (UNCTAD, 2010)

1.1 Introduction

A GROWING sector, an untapped resource and a major part of a region’s attractiveness, this is how cultural and creative industries have been described by policy-makers at the EU level. Creative and cultural industries, and the broader creative economy, have also been identified as a business sector not suffering as much as others during the financial crisis (United Nations, 2010; OMC-EWG-CCIs, 2010). Enhancing the creative economy can also contribute to social and cultural goals, making this a sector with multifaceted benefits, contributing towards a more sustainable, holistic form of development.

The creative economy is more concentrated in highly urbanised areas, with the creative and cultural industries of major cities promoted through initiatives like Creative London. However, peripheral regions, their rural places and smaller cities, have their own authentic breed of creative economy. Peripheral creative economies are embedded in a different socio-economic ecosystem. They embody an urban experience focused around small cities and towns, a varied countryside with a range of natural amenities, and a different pace of life. In spatial terms, cultural and creative industries are dispersed and clustered in peripheral regions. There are also disparities within the peripheral regions of Europe in how creative economies have developed and the extent to which their nation states support their further growth. A fuller appreciation of the many geographies of the creative economy is called for, to raise awareness of the distinctiveness and importance of the peripheral creative economy. This is one goal of the Creative Edge project. It recognises that the creative economy is increasingly seen as a major growth area in the coming decades for rural peripheral regions. The project addresses three pillars of the creative economy: People, Production and Place. People generate and develop ideas that evolve into production of creative goods and services; and the interaction of creative talents in such places enhances creativity and innovation. Through this project, the Whitaker Institute at the National University of Ireland, Galway advances understanding of the nature and structure of creative and cultural industries in the partner regions. It reviews and analyses policy in order to propose a development framework for creative economies in peripheral regions of Europe. These new insights suggest ways in which the potential of peripheral creative economies can be best realised, which is a central objective of the Creative Edge Policy Toolkit.

The Creative Edge project is funded by the Northern Periphery Programme 2007-2013 (NPP), part of the European Commission’s Territorial Cooperation Objective. Two priorities of the NPP are promoting innovation and competitiveness in remote and peripheral areas, and the sustainable development of natural and community resources. The NPP area is vast, including the EU Member States of Finland, Ireland, Sweden and the United Kingdom (Scotland and Northern Ireland), and non-EU Member States the Faroe Islands, Greenland, Iceland and Norway. While diverse, these regions share common features such as harsh climate conditions, sparseness of population and remoteness. Transnational cooperation provides opportunities to find new ways to address shared challenges and explore new opportunities. Aiming to help peripheral and remote communities on the northern margins of Europe to develop their economic, social and environmental potential, the NPP’s success is built on joint projects creating innovative products and services for the benefit of partner countries and Europe as a whole (NPP, 2013).
1.2 The Creative Edge Project

Bringing together universities, development agencies and industry bodies from Ireland, Northern Ireland, Finland and Sweden, the Creative Edge project has five partners: the Whitaker Institute at National University of Ireland, Galway and the Western Development Commission in the west of Ireland; Craigavon Borough Council, a member of South East Economic Development in Northern Ireland; Kemi-Tornio University of Applied Sciences in northern Finland; and Film i Västerbotten in northern Sweden.

The project grew from direct consultations with the creative industries across a variety of sectors in the NPP region and complemented other work the project partners had been engaged in on the creative economy. Evidence pointed to the potential growth of the sector and the very positive spillovers to other sectors of the economy. Of particular policy relevance were the constraints faced by new and established creative industries in the NPP region. An inability to access international markets and share information and learn from contemporaries at home and abroad were the central challenges and starting point for the Creative Edge project. An initial partnership of the Western Development Commission, Craigavon Borough Council, and National University of Ireland, Galway was formed. This broadened to include Nordic partners and collaboration extended to include Film i Västerbotten in Sweden and Kemi-Tornio University of Applied Sciences in Finland. The Nordic experience recognised the massive growth potential, but was more concerned on matching creative talents to creative industries.

The Creative Edge project has aimed for active participation of local creative organisations and businesses in global markets, while also aiding them in attracting and utilising local emerging creative talent in these markets. Its activities aimed to enable further commercialisation and support sustainable development of the creative economy. Over the lifetime of the project, Creative Edge has put in place measures to promote creative industries in peripheral regions. It addresses three pillars of the creative economy: people, production and place. Supports for creative talents have been aimed at increasing employability of young creative talents through skills development, access to capital supports and network development, though initiatives like mentoring, a talent voucher scheme and the MyCreativeEdge website (www.mycreativeedge.eu). The production pillar has focused on assisting creative businesses to network and access international markets. The website is also intrinsic to the production pillar. Linked to production, the place aspect has focused on bringing life back to vacant buildings and developing them as work spaces for creative businesses. The place pillar has also mapped the creative economy in the partner regions.

The Creative Edge project has designed a practical toolkit to inform policy development for the creative and cultural industries. This brings the three pillars together and builds on the diversity of each member region’s experience. Review of best practice initiatives and analysis of local, regional and national policies in participating regions, in relation to development, stimulation and support of creative businesses, has been conducted. An online consultation with stakeholders has helped incorporate the insights of industry and policy-makers in our recommendations for supporting the creative economy in peripheral regions.

1.3 The Creative Edge Policy Toolkit

The toolkit identifies deficiencies in policy, and recommends best practice and innovative policy initiatives. It informs policymakers and rural and regional development bodies on better strategies for creative industry take-up and rural business development. It quantifies the nature and extent of the sector across participating regions. It assists regions to judge their policy approach relative to other NPP partner regions and countries. It can be used as an advocacy tool by creative industries in peripheral places to show the presence and value of the creative economy and to lobby for increased policy support.
THE CREATIVE EDGE DATABASE CONTAINS ALMOST 6,000 CREATIVE BUSINESSES ACROSS THE CREATIVE EDGE REGION. THESE INCLUDE CORE CREATIVE COMPANIES, SUCH AS ADVERTISING, ARCHITECTURE, ENGINEERING, CRAFT, DESIGN, PUBLISHING, FILM, TELEVISION, RADIO, SOFTWARE, COMPUTER SERVICES, CREATIVE ARTS, AND CULTURAL RECREATION ACTIVITIES, AS WELL AS BUSINESSES THAT SUPPORT CREATIVE INDUSTRIES SUCH AS RETAILING AND PRINTING COMPANIES.
Chapter 2: A Creative and Cultural Infrastructure on the Periphery

2.1 Introduction

This chapter presents an overview of the structure of creative and cultural industries in the Creative Partner regions. It takes an in-depth look at the nature of creativity, the cultural infrastructure, and creative industries in each region, as represented by the Creative Edge database (see Appendix 1 for more information on the database). The cultural infrastructure focuses on festivals, cultural spaces, and organisations, all of which tell a story about the culture of place. Part of this cultural infrastructure includes museums, which offer a window on the cultural heritage of places. Artefacts of general cultural heritage can be the focus of museums, but also the specific, distinct cultural heritage found in peripheral places is identified through the presence of different types of museums. The existence of theatres and art galleries highlight the presence of visual and performing arts in the partner regions. Cinemas, sound recording studios, film and TV studios show the production and consumption of the products of the audio-visual industry. Festivals offer a window on traditions, but also contemporary cultures developing in places as festivals celebrate their presence. Some festivals are distinct to their regions, more closely rooted within the specific culture of place. Each region has a diversity of festivals, yet common patterns also exist. Arts, music, film, and local festivals are found across all the partner regions. The greatest diversity of festivals is among music festivals, with a range of musical genres celebrated through festivals in each region. Different kinds of festivals are important in the regions with smaller scale festivals important spaces for emerging creative talent, such as for musicians to perform, or for craftspeople and artists to promote their work. Some festivals aim to attract people to peripheral places, but some are also celebrations for the local community.

These more general festivals are tied to specific places and are important across all regions. Community-focused festivals often showcase the general culture of the locality, such as through music, arts, markets with local produce, displays of local produce and livestock; they may also see national traditions celebrated at the local level.

While creative industries concentrate in major cities, the Creative Edge database shows a strong presence of creative industries in the Creative Edge region. Creative industries are therefore important outside of major cities in smaller urban and rural areas in peripheral places. The Creative Edge database contains almost 6,000 creative businesses across the Creative Edge region. These include core creative companies, such as advertising, architecture, engineering, craft, design, publishing, film, television, radio, software, computer services, creative arts, and cultural recreation activities, as well as businesses that support creative industries such as retailing and printing companies. One general pattern to observe is that creative industries concentrate around areas of higher population in each region. However, creative industries are dispersed across the rural areas of the Creative Edge regions. It is also important to distinguish that creative industries are more concentrated around centres of population in the Kemi-Tornio region of northern Finland and Västerbotten county in Sweden than in the western region of Ireland and South East Economic Development (SEED) area in Northern Ireland. The database also identified a presence of creative industry organisations of different types: networks, non-profit associations, and state-funded bodies, exist to different degrees within the regions, and also display a tendency to concentrate in the largest cities and towns in the Creative Edge partner regions.
2.2 The Creative Edge

Partner Regions

The Creative Edge partner regions are located in Ireland, Northern Ireland, Finland and Sweden. In Ireland, the partner region is in the west of Ireland and covers the areas under the remit of the regional development agency, the Western Development Commission, and includes seven counties in the western region. The partner area in Northern Ireland is in the south-east, and covers most of counties Down and Armagh, or the six council areas that form SEEd. The partner area in Sweden is Västerbotten county in the north of the country and the partner organisation is Film i Västerbotten. The Kemi-Tornio sub region of Lapland and its five municipalities in the north west of the Finland make up this partner region, with Kemi-Tornio University of Applied Sciences the partner organisation. Table 2.1 describes the partner regions in more detail.

Nomenclature of Territorial Units for Statistics (NUTS) provides a uniform breakdown of economic territorial units in the European Union. It is a hierarchical classification system where each member state is divided into NUTS 1 regions, which are then subdivided into NUTS 2 regions, and subdivided again into NUTS 3 regions. The Creative Edge partner regions are all classed as NUTS 3 regions. NUTS regions classified at the same level are intended to be comparable and population is a key indicator used to identify comparable regions. But NUTS regions also differ in other respects, such as land area and economic characteristics. The largest NUTS regions are in Sweden and in Finland. The NUTS classification has a number of purposes, such as for the harmonisation of EU regional statistics collection, socioeconomic analysis of the regions and the development of EU policy. NUTS applicable from January 2012 subdivides the economic territory of the EU into 97 regions at NUTS 1 level, 270 regions at NUTS 2 level and 1,294 regions at NUTS 3 level. Analysis conducted at the NUTS 1 and NUTS 2 are seen to be appropriate levels for analysing regional and national problems. NUTS 3 are seen to be too small for complex economic analyses, but used for specific analysis or to pinpoint where regional measures need to be taken (Eurostat, 2011).

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>PARTNER ORGANISATIONS</th>
<th>PARTNER AREA</th>
<th>NUTS 3 AREAS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ireland</td>
<td>National University of Ireland, Galway</td>
<td>Counties Donegal, Sligo, Leitrim, Roscommon, Mayo, Galway and Clare</td>
<td>Parts of border (IE011) and west (IE013) and mid-west (IE023) areas</td>
</tr>
<tr>
<td></td>
<td>Western Development Commission</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>South East Economic Development</td>
<td>Council areas of Ards, Armagh, Banbridge, Craigavon, Down and Newry &amp; Mourne</td>
<td>Parts of east of northern Ireland (UKN03), west and south of Northern Ireland (UKN05) and outer Belfast (UKN02) areas</td>
</tr>
<tr>
<td>Sweden</td>
<td>Film i Västerbotten</td>
<td>Västerbotten county</td>
<td>Västerbotten county (SE331)</td>
</tr>
<tr>
<td>Finland</td>
<td>Kemi-Tornio University of Applied Sciences</td>
<td>Kemi-Tornio sub region of the Lapland province. Municipalities of Kemi, Tornio, Keminaa, Simo and Tervola.</td>
<td>Part of Lapland province (FI1D7)</td>
</tr>
</tbody>
</table>
The countries and Creative Edge partner regions are different in many ways, such as total population, population change and population density (see Table 2.2). For example, Sweden’s population is almost twice that of Ireland’s. However, because of differences in physical size, Sweden has a lower population density, and the population is almost one third less concentrated than in Ireland. The partner regions themselves are also different in many ways and not comparable in terms of economy, culture and society. Table 2.3 for example highlights differences in population and population density. The Creative Edge project presents an analysis of a diversity of cultural activities and creative industries on the periphery of Europe.

Table 2.2: Partner Countries Population Patterns

<table>
<thead>
<tr>
<th>Country</th>
<th>Population</th>
<th>Population change</th>
<th>Population density (per km²)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ireland</td>
<td>4.6 million</td>
<td>2.60%</td>
<td>65</td>
</tr>
<tr>
<td>Finland</td>
<td>5.4 million</td>
<td>4.80%</td>
<td>18</td>
</tr>
<tr>
<td>Sweden</td>
<td>9.5 million</td>
<td>7.10%</td>
<td>23</td>
</tr>
<tr>
<td>UK</td>
<td>6.3 million</td>
<td>7.60%</td>
<td>254</td>
</tr>
</tbody>
</table>

Source: Compendium of cultural policies and trends in Europe, 14th edition, 2013

Table 2.3: Population of the Partner Regions

<table>
<thead>
<tr>
<th>Region</th>
<th>Population</th>
<th>Population Density</th>
</tr>
</thead>
<tbody>
<tr>
<td>Western region (Ireland)</td>
<td>820,880</td>
<td>31.51</td>
</tr>
<tr>
<td>South East Economic Development area (Northern Ireland)</td>
<td>453,322</td>
<td>161.23</td>
</tr>
<tr>
<td>Västerbotten county (Sweden)</td>
<td>260,501</td>
<td>4.7</td>
</tr>
<tr>
<td>Kemi-Tornio region (Finland)</td>
<td>59,847</td>
<td>9.32</td>
</tr>
</tbody>
</table>

and support), firm activities (firm investments, linkages and entrepreneurship, intellectual assets) and outputs (innovators, economic effects). Sweden and Finland are among the four top ranked countries and are classed innovation leaders. Ireland and the UK are ranked as innovation followers. However within the UK, the east and south east of England is ranked as an innovation leader, whereas Northern Ireland is ranked as a moderate innovator, with the rest of the UK falling into the innovation follower category (European commission Enterprise and industry, 2013).

Held up as a measure of sustainable prosperity, the global creativity index measures social, cultural and economic factors, or what is described as the three Ts of economic development: Technology, Talent and Tolerance. The measure was applied across 82 nations and the countries in which the creative Edge partner regions are located all rank highly (see Table 2.4). Sweden is ranked 1st on the global creativity index and Finland 3rd. Ireland and the UK are in comparable positions, ranked 12th and 13th (Martin Prosperity Institute, 2011).

The countries show differences when other measures are considered. Creativity and innovation are said to be inherently linked, which makes measures such as the Global Innovation Index and the Innovation Union Scorecard important in assessing creative prospects of nations. The Global Innovation Index is a ranking of an economy’s innovation capabilities and results, with indices under six pillars: institutions, human capital and research, infrastructure, market sophistication, business sophistication, creative outputs, and knowledge and technology outputs (Global Innovation Index, 2013). Rankings for each of the countries in which the partner regions are located are outlined in Table 2.4. Ireland is ranked lowest among the four countries. However, this is a ranking of 142 countries in which they all rank highly. Another useful measure is the EU Innovation Union Scorecard, which ranks countries in four performance groups: innovation leaders, innovation followers, moderate innovators and modest innovators. It ranks the performance of the research and innovation systems based on three main indicator categories: enablers (human resources, open, excellent, attractive research systems, finance and support), firm activities (firm investments, linkages and entrepreneurship, intellectual assets) and outputs (innovators, economic effects). Sweden and Finland are among the four top ranked countries and are classed innovation leaders. Ireland and the UK are ranked as innovation followers. However within the UK, the east and south east of England is ranked as an innovation leader, whereas Northern Ireland is ranked as a moderate innovator, with the rest of the UK falling into the innovation follower category (European Commission Enterprise and Industry, 2013).

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A favourable environment for, and positive attitudes towards, entrepreneurship are also important among nations aspiring to develop their creative economies. The Global Entrepreneurship Monitor provides insight on attitudes to entrepreneurship, and findings of the 2012 monitor are outlined in Table 2.5. Sweden and Finland have better attitudes towards perceived opportunities for entrepreneurship than Ireland and the UK. Positive perceptions among people that they have the capabilities to start a business varied from 34% to 47%. A fear of failure when starting a business is similar across the countries. Favourable perceptions towards starting a business are lowest in Ireland and highest in Sweden (Xavier et al., 2013).

### Table 2.6: Selected Cultural Statistics

<table>
<thead>
<tr>
<th></th>
<th>EU-27</th>
<th>IRELAND</th>
<th>FINLAND</th>
<th>SWEDEN</th>
<th>UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number employed in selected cultural sectors* as % of total employment</td>
<td>1.70%</td>
<td>1.50%</td>
<td>2.30%</td>
<td>2.30%</td>
<td>2.10%</td>
</tr>
<tr>
<td>Average number of persons employed per enterprise</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average number of persons employed per book publishing enterprise (2007)</td>
<td>6.3</td>
<td>14.2</td>
<td>6.9</td>
<td>2.5</td>
<td>10.8</td>
</tr>
<tr>
<td>Average number of persons employed per newspaper enterprise</td>
<td>33.6</td>
<td>48.9</td>
<td>30.8</td>
<td>31</td>
<td>105.6</td>
</tr>
<tr>
<td>Average number of persons employed per journal and periodical enterprise</td>
<td>14.2</td>
<td>20.4</td>
<td>16.7</td>
<td>8</td>
<td>27.5</td>
</tr>
<tr>
<td>Average number of persons employed by manufacturing enterprise</td>
<td>14.9</td>
<td>42.4</td>
<td>16.1</td>
<td>13.2</td>
<td>20.6</td>
</tr>
<tr>
<td>Cultural occupations by employment characteristics</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Writers and creative artists who are non-employees</td>
<td>42.20%</td>
<td>36.20%</td>
<td>34.80%</td>
<td>34.90%</td>
<td>51.60%</td>
</tr>
<tr>
<td>Share of total employment who are non-employees</td>
<td>16.50%</td>
<td>17.60%</td>
<td>13.60%</td>
<td>10.70%</td>
<td>13.60%</td>
</tr>
<tr>
<td>Writers and creative artists – part-time job</td>
<td>26.2</td>
<td>26.9</td>
<td>24.4</td>
<td>25.9</td>
<td>25.3</td>
</tr>
<tr>
<td>Share of total employment – part-time job</td>
<td>18.8</td>
<td>21.2</td>
<td>14</td>
<td>27</td>
<td>26</td>
</tr>
<tr>
<td>Writers and creative artists working at home</td>
<td>45.9</td>
<td>u</td>
<td>48.6</td>
<td>54.6</td>
<td>62.2</td>
</tr>
<tr>
<td>Share of total employment working at home</td>
<td>12.6</td>
<td>13.1</td>
<td>21.1</td>
<td>21.5</td>
<td>23.1</td>
</tr>
<tr>
<td>Writers and creative artists with second job</td>
<td>9.4</td>
<td>u</td>
<td>8.8</td>
<td>12.8</td>
<td>6</td>
</tr>
<tr>
<td>Share of total employment with second job</td>
<td>3.8</td>
<td>2.3</td>
<td>4.4</td>
<td>8.2</td>
<td>3.9</td>
</tr>
<tr>
<td>External trade in musical instruments (million euro) - exports</td>
<td>394</td>
<td>2</td>
<td>1</td>
<td>26</td>
<td>52</td>
</tr>
<tr>
<td>External trade in musical instruments (million euro) - imports</td>
<td>917</td>
<td>12</td>
<td>19</td>
<td>42</td>
<td>224</td>
</tr>
<tr>
<td>Number of inhabitants per cinema screen (2007) (1000s)</td>
<td>17</td>
<td>10</td>
<td>17</td>
<td>9</td>
<td>17</td>
</tr>
</tbody>
</table>

Source: Eurostat Cultural Statistics Pocketbook 2011 (Data is from 2009 unless stated otherwise)
Notes: *selected cultural sectors reflect NACE codes 58, 59, 60, 90, 91. u data unreliable.
The European Commission’s Cultural Statistics Pocketbook (2007, 2011) sets out the main cultural statistics that can be compared at the EU level. Some of these statistics are tabulated for the partner countries in Table 2.6. These statistics help identify differences and similarities in the place of culture and creativity in each of these national economies. Finland, Sweden and the UK are above the EU average for the number employed in cultural sectors relative to total employment, while Ireland is below the EU average. The statistics also highlight the differences in the average number of employees in creative enterprises, which vary across the examples cited.

Employment characteristics among writers and creative artists shows self-employment and working from home to be significant trends across all partner countries. Also across all countries, for roughly a quarter of writers and creative artists this occupation is as a part-time job. The statistics show trade in musical instruments differs between the countries. The final statistic compared is the number of inhabitants per cinema screen, which is lower in Ireland and Sweden, than Finland and the UK, signalling differences in consumption of film.

Attention next turns to provide an overview of creative and cultural industries in each of the national contexts. Cultural and creative industries can be measured differently, which makes cross-national comparisons difficult, but available data does provide a broad overview of the economic scale and structure of creative and cultural industries in each national setting. Focus then narrows to provide an assessment of each partner region’s creative industries in terms of geographic distribution, scale and structure, as well as detailing the distinct cultural infrastructure evident in each of the regions, as represented by the Creative Edge database.

2.3 Ireland’s Creative Industries and Culture

With the arts sector and creative industries in Ireland now beginning to gain recognition as a major sector of the economy, efforts have been made to measure their worth. Arts and creative industries were estimated to directly contribute to 2% of GNP in 2008. When non-direct and direct contribution are combined, the figure rises to 7.6% of GNP in 2008. In employment terms, as a percentage of the total workforce, arts and creative industries account for 2.5% in direct employment, and when non-direct employment is included it amounts to 8.7%. Arts, culture and creative sectors are also highlighted as a growth area that can support Ireland’s economic recovery (DKM Economic Consultants, 2009). The economic contribution of Ireland’s craft sector is also significant. It is a growing sector with a 13% increase in the number of enterprises - a total of 1,696 in 2009. Students of craft are an important skills base for future growth, with 1,787 students of craft identified. The GVA of the sector is estimated at €178 million and the most conservative estimate of employment in craft in Ireland is 5,771. More broadly defined employment of up to 11,415 people is estimated. The industry is largely composed of micro enterprises with up to 10 employees, but a large proportion employs less than five people. It is a geographically dispersed industry, with the greatest proportion (68%) in villages, small towns and rural areas (Indecon, 2010).

An Assessment of the Economic Impact of the Arts in Ireland in 2011 finds creative industries contributing €4.6 billion to GVA, or in other terms, composing approximately 2.8% of GDP. Creative industries have been defined in this report broadly on the UK definition, including the following sectors: film and video; publishing; advertising; software; radio & television and other creative industries. Software is the largest single sector, making up more than half of overall GVA. Other sectors contributing large proportions of the GVA are literature and publishing, valued at €319.7 million, radio and television valued at €296.5 million and advertising valued at €302.7 million. Employment directly created by creative industries is 48,308 and all employment (direct, indirect and induced) 76,862 people. This report also measures the arts sector, and notes the much greater economic contribution of ‘creative industries’ than if the narrower arts sector is measured. The arts sector is valued at €713.3 million in GVA and employs 20,755 people (direct, indirect and induced) (Indecon, 2012).

While creative workers concentrate in Ireland’s capital city, DKM Economic Consultants (2009) finds that creative workers are also spread across the regions. Based on 2006 population data, 46% of Ireland’s creative workers lived in the Dublin area.
Arts and culture in the western region of Ireland are strong. For example, counties Donegal, Galway and Mayo have extensive Gaeltacht areas, where Irish is the main language spoken by large numbers in the community. The largest Gaeltacht area in Ireland is in County Galway. It is concentrated in the west of the county, and is particularly strong in An Spidéal and An Cheathrú Rua (Udarás na Gaeltachta, 2013). Ireland is well known for its strong literary tradition. A number of highly acclaimed writers including John McGahern are associated with the western region, and playwrights Brian Friel and Tom Murphy are from the region. The landscape of County Sligo is closely associated with the poetry of William Butler Yeats. Internationally renowned and award-winning theatre companies such as Macnas and Druid are based in Galway. Traditional Irish music is also strong in the west of Ireland – there are vibrant musical traditions for example in Counties Clare, Donegal and Sligo (Bayliss, 2004).

The western region’s landscape is composed of a diverse mix of agricultural lands, mountains, bogs, lakes, rivers and coastline. Cultural heritage is embedded in the natural landscape, observed in distinctive cultural landscapes such as the Burren in County Clare, Neolithic sites such as the Céide Fields in County Mayo, as well as ancient sites such as Rathcroghan in County Roscommon. The region boasts four of Ireland’s six national parks - Glenveagh in County Donegal, Connemara in County Galway, and the Burren and Ballycroy in County Clare. Despite its peripheral location, the region is a popular tourist destination. Much of the region’s tourism is driven by its strong culture. Two of Ireland’s top ten tourist attractions are located in the region in County Clare: the Cliffs of Moher Visitor Experience and Bunratty Castle and Folk Park (Fáilte Ireland, 2012). Galway, one of Ireland’s main cities, is located in Ireland’s western region. With its wealth of cultural activities, Galway city has been referred to as the ‘city of festivals’.

A number of research reports have demonstrated the economic importance of the creative sector to the western region. Two reports, the Baseline Research on the Creative Industries Sector in the Western Region of Ireland (2008) and Creative West (2009), focused attention on social and cultural factors, and the economic value of the sector. In 2008, the GVA was estimated at €270 million and the sector contributed...
exists on the outskirts of the city, in which the Irish language channel TG4 has been an important factor anchoring its development there (Collins and Fahy, 2011).

Future growth prospects for the western region’s creative industries are potentially strong, especially with the introduction of specific supports for the sector. The Centre for Innovation and Structural Change (2011) conducted an economic impact assessment of the sector in 2010. The report examined a number of growth scenarios, finding that if the ‘high growth’ scenario was implemented, which would include support for networking, formal networks for specific sub-sectors and the implementation of an export promotion strategy, by 2020 the sector could generate €648,720,000 in direct sales and directly employ 29,720 people. In this context, where projections see the creative sector emerge as having high economic significance, attention needs to focus on the costs of not investing in the sector.

A geographical breakdown of craft enterprises in Ireland shows 22% located in the western region, a total of 374 enterprises (Indecon, 2009). At local level, the value of cultural and creative industries has also been highlighted. For example, a survey of just 10 organisations participating in Sligo’s Culture Night in 2009 found they have a combined annual turnover of €3.5 million, and employ 46 full-time and 20 part-time and seasonal staff (National Campaign for the Arts, 2009). Creative industry clusters have been identified around Galway city, which has a strong technology-based business cluster. Another creative business cluster in digital media...
Distinct festivals include celebrations of film and television associated with the region. Two festivals celebrating Father Ted are identified. Father Ted is a comedy series based around three priests and their housekeeper living on an island off the Irish west coast, which was made in the mid-1990s by Hat Trick Productions and first broadcast on the British television station Channel 4. The 1950s film directed by John Ford, the Quiet Man, was filmed in the western region. Some filming was carried out in Cong, county Mayo, and the Quiet Man features in the Cong annual festival. Parts of the west coast of Ireland have become popular surfing destinations, and this wider attraction of place is represented in festivals, with surfing festivals identified in counties Clare and Sligo. Long established festivals are also found, which have become iconic and closely associated with the place they originate. For example, Lisdoonvarna in county Clare and matchmaking are closely associated, the annual matchmaking festival reputed to be the largest of its kind in Europe. Halloween festivals are also common in the west of Ireland, reflecting the strong tradition in Ireland of holding bonfires on the Celtic festival of Samhain. Halloween festivals sometimes focus on particular themes, such as a Halloween festival in Donegal focusing on Dracula and marking the death of Bram Stoker.

A diverse range of cultural spaces exist in the western region, such as libraries, heritage centres, tour companies, art galleries, museums and theatres. Museums and heritage centres can reflect the general culture and traditions of the region, but also its distinct nature. This can be industrial and agricultural traditions, such as the wool industry that once thrived around Leenane in county Galway. The tradition of the Connemara pony in the county is preserved by the presence of a heritage centre in the county. Historical figures and events of significance are also represented through these cultural spaces. For example, there are museums and heritage centres marking important 19th century political figures such as Michael Cusack, a founder of the Gaelic Athletic Association who was born in county Clare, Michael Davitt, founder of the Land League who was born in county Mayo, and Isaac Butt, who was born in county Donegal and prominent in the Home Rule movement. The Irish famine of the 1840s and the Battle of Aughrim of 1691 are two significant events in Ireland’s history marked by the presence of cultural spaces based around them.

At the level of community cultural organisations, local writers’ groups, amateur theatre groups, film clubs, local historical societies, and local genealogical societies are observed across the western region, showing the existence of cultural production and consumption at the grassroots, voluntary level within communities in the western region. Community arts organisations with a broad focus, and organisations focusing on engaging children or people with disabilities with the arts are also identified.

There is a web of theatres, arts centres, and community centres in the western region for the production and consumption of performing arts. Pubs are also identified as an important space for ‘live’ music performances. Art galleries and design studios are identified for the presence and consumption of visual arts. Cinemas, sound recording studios, film and TV studios are also found, again showing the diversity in the cultural products and consumption of culture in the region.

Broad creative industry organisations are not found in the western region, however a number of organisations in sub-sectors of creative industries focusing their activities in specific counties are identified, such as the audio visual, craft, visual art and information technology sectors. For example, the Film Commission is a division within the Irish Film Board (Ireland’s national development agency for film, television and animation) and a network of film commissions at local county level support filmmaking. Non-profit organisations support the audio-visual sector in county Galway, such as the Galway Film Centre, which acts as a resource centre for film in the west of Ireland. The Galway Film Centre operates Screenwest, which supports the production of audio-visual content in the west of Ireland. There is a network organisation, the Galway Film Partnership, for film organisations in Galway, and operates in conjunction with Galway County Council. In the craft sector, the presence of local, county level, business networks of craft entrepreneurs working together is identified. These networks are often members of the national umbrella body supporting craft in Ireland, the Craft Council of Ireland.
Northern Ireland holds the smallest concentration of creative businesses, with 1.4% of all UK creative businesses located here. One-third of all firms in the UK creative industries are located in London.

Comparing all businesses in Northern Ireland, creative industries are a small sector, at 1.7% of all firms.

Most of these businesses are found to have between one and five employees, with 33% employing one or no employees, and 42% between two and five employees (DCAL, 2012). The sector contracted by 0.91% from 2008 to 2010, but when compared with other industries, not as severely. For example, the construction sector contracted the most in Northern Ireland from 2008-10, by 10.94% The number of creative industry firms in Northern Ireland fell over the study period, but by just under 1%. Growth in the rest of the UK varied between just under 1.98% and 8.32%. In Northern Ireland, creative industries turnover was 0.9% of the total turnover of UK creative industries. However, comparing growth in turnover with other regions in the UK, Northern Ireland had a rate of 12.09%, above the overall UK rate of growth of 9.85% (DCAL, 2012).

Employment in creative industries in Northern Ireland is 1.6% of total employment in creative industries in the UK. London accounts for 40.4%, while regions with similar employment levels as Northern Ireland were Wales (1.7%) and the North East (1.4%). Creative industries account for 1.1% of overall employment in Northern Ireland. However, from 2008 to 2010 there was an increase in overall employment in the creative sector year-on-year, and was one of the few UK regions to experience growth each year. It had the second highest employment growth rate (12.3%) in the UK, with Wales (13.4%) having the highest (DCAL, 2012).

Overall DCAL (2012) shows the scale of the creative industries in Northern Ireland as small when compared to other industries, however trends in creative industries employment and turnover show growth when compared to other parts of the economy, making it a well performing sector in the broader economic context. DCAL (2012) identifies scope for further analysis, such as if creative businesses have performed better in areas where clustering has occurred, or if particular sub-sectors...
of creative industries have performed better than others. UK Trade and investment describe creative industries as an increasingly important sector for Northern Ireland, citing film, television, digital content, music and performing arts as strong areas. Northern Ireland has also been the location for film and TV productions, such as Game of Thrones (UKTI, 2013a).

DCAL (2013b) statistics show the experience of the arts by adults in Northern Ireland and found 31% of adults participated in arts activities, with textile crafts such as embroidery, crocheting and knitting and playing a musical instrument the two arts activities adults most frequently participated in. 78% of adults attended arts events, with attending a film at a cinema the most frequently attended arts event, and attending a museum, a play or drama the next two most frequently attended events. Adults living in the most deprived areas were less likely to participate in arts activities or attend arts events than those living in the least deprived areas.

2.4.1 SEED’s Culture and Creative Industries

Formed in the 1990s, SEED is a group of local authorities that work together to promote economic development in south-eastern Northern Ireland. The South East Economic Development Economic Development strategy highlights how the economy of the SEEd area differs depending on the local authority area of focus. For example, agriculture is particularly important in Armagh and Banbridge, fishing in Ards and Down, and Craigavon has an important industrial base. Retail is also an important sector identified across the local authority areas. The SEED area has a growing population, forecast as growing at a faster rate than the Northern Ireland average. The SEED member councils face diverse economic and social challenges. However significant overlap exists and the SEED consortium works across areas where collaborative work can be undertaken, specifically business development, education and skills development, and rural development. The SEED development strategy outlines common issues for action to realise its vision of creating a skilled and flexible workforce supporting a diverse and competitive economy. The SEED area has been affected by the decline in manufacturing in Northern Ireland, with a loss of around 8,000 jobs in the area over the last decade, with further job losses predicted, however at a declining rate. Other vulnerable sectors identified in the action plan are agriculture and fishing. One of the business objectives of the action plan is to develop regionally significant business sectors, with craft one of the sectors identified (FGS McClure Watters and Regional Forecasts, 2008). SEED’s work has also focused specifically on creative industries e.g. through its Craft Development Programme and Creative Industries Programme (Newry and Mourne District Council, 2013).

SEED local authority members have also focused on creative industry development through various initiatives. The Northern Ireland Department of Culture, Arts and Leisure is important in providing grant support for creative industry projects in the SEED area. For example, Ards Borough Council supports ‘Ards Creates’ that aims to promote the wealth of creative talent in the area and operates an online directory featuring a range of creative businesses including advertising, craft, design, film and TV (Ards Creates, 2013). Now in its thirteenth year, the Creative Peninsula event is another important initiative in the area, focusing on promoting visual arts and crafts in the Ards area and runs exhibitions, workshops and open studios (Creative Peninsula, 2013).

In an effort to increase awareness locally of the innovation and diversity of the creative industries, Banbridge District Council was involved in the pilot project ‘Creative Industries Show Reel’ which involved production of a number of short films focusing on particular creative businesses, intending to inspire further creative entrepreneurship (Banbridge District Online, 2012). Local authorities are also important in providing broader support for the arts in the SEED area. For example, the initiative supported by Craigavon Borough Council, Craigavon Arts in Motion, is a voluntary forum operating a grant scheme to support local arts and also promotes the arts, for example through its website C-Aim and its arts database (C-Aim, 2013).

The Creative Edge database also provides insight on the broad nature of culture and creative industries in the SEED area. A diversity of festivals occur in the SEED area, including local fairs, music, arts, theatre, craft, food and film festivals.
The presence of culture and the arts in broader society and community is found in the SEEd area. Community arts organisations are identified, along with organisations that promote engagement with the arts among children and people with disabilities. Broader community level organisations demonstrate the diversity of local people’s cultural interests. Writers groups, amateur drama groups, film clubs and local history societies exist at the local community level highlighting the importance of voluntary efforts in communities in local cultural production and consumption. Distinctive features of community level organisations are choral societies and bands of musicians playing a range of brass, silver and percussion instruments. Also linked to the presence of automotive festivals, a number of automotive societies, such as car clubs, are also evident at the community level.

Long established festivals exist alongside newer festivals. Music festivals most often focus on traditional Irish music, but also celebrate modern reinventions of traditional Irish music, such as Celtic fusion, as well as other types of music and musical performance, such as guitar music and busking. Local fairs are rooted in agriculture, such as livestock shows, but are also of a more general nature, as a celebration for the community. One distinct pattern is that a number of festivals in the SEEd area had an automotive theme, and displayed vintage cars or tractors. Other festivals are clearly rooted in cultural heritage, preserving and continuing traditions, such as the Apple Blossom Fair in Armagh that celebrates the heritage of the apple in county Armagh, which is known as the Orchard County. Longer running festivals have also become admired and valued, such as the Bard of Armagh Festival of Humorous Verse.

A diverse range of cultural spaces exist in the SEEd area, such as libraries, theatres, music venues, tour companies and heritage centres. A network of performance spaces exist, such as theatres, art centres and multipurpose buildings such as town halls and community centres. Public houses are also performance spaces and are important as music venues. The cultural heritage displayed at museums could be of general interest, and associated with a local area, but also focused on particular artefacts and aspects of history. For example, the Royal Irish Fusiliers Museum displays militaria from the Armagh, Cavan and Monaghan militias; and the Ballywalter Mini Collection is a private museum collection of 30 Minis. Heritage and cultural centres are also important cultural spaces that preserve locally rooted traditions, such as the Brontë Homeland Interpretive Centre in county Down that focuses on the heritage surrounding the homeplace of Patrick Brontë, father of the Brontë sisters of literary fame. Another example is Navan Fort in county Armagh - in Irish mythology, the seat of the ancient Kings of Ulster.

Turning attention to creative industries, broad creative industry organisations are not identified in the SEEd area, however sub-sector organisations such as in visual art, craft and design are identified. A number of collectives are identified, of artists, craftspeople and designers. There is also a visible presence of art and craft found in the SEEd area, evidenced through the presence of a number of small art galleries and craft studios displaying local creative production.
Attention began to focus on creative and cultural industries in Sweden in the late 1990s (Skantzze & Pihlgren, 2012). These industries underwent great transformation in the first decade of the 2000s, with a good general awareness of the concept of creative industries now well embedded at all levels of Swedish society (Generator Sverige, 2011).

Power (2002) assesses the place of cultural industries in Sweden’s economy, based on data from the mid to late 1990s, and found it to be a significant, fast growing part of Sweden’s economy with domestic and international success. Power (2002) observes that Sweden’s cultural industries tend to concentrate in large urban areas, with Stockholm’s cultural industry dominating. Sectoral clusters are an important pattern identified, and the smaller the firm, the more likely it is to cluster. However, Power (2002) notes that cultural industries are still significant and play an important role in less urbanised areas, with concentrations also existing in rural areas. National level employment figures can hide how important employment in cultural industries can be in less urbanised areas. The example of Älmhult is cited, a mostly rural area greatly influenced by cultural industries, and where IKEA was founded in 1947. Particular sectors within cultural industries were found to be concentrated outside of cities, such as furniture, glass, ceramics, cutlery and crafts. Growth in firms at this time was concentrated with small firms employing between one and four people.

Recent figures suggest creative industries continue to flourish in Sweden. In 2010, creative and cultural industries contributed 3.3% of Sweden’s GDP and had a turnover of SEK 285 billion. The number of creative and cultural businesses is rising and increased by an average of 5.4% each year between 2008 and 2010. However, its growth rate of 1.3% per year is less than average business sector growth between 2008 and 2010, which was 2.1%. The 117,000 creative and cultural businesses in Sweden tend to have a small number of employees, with 98% employing between zero and nine people and only 0.1% of these companies employing more than 200 people. Self-employment makes up a large proportion of those working in creative and cultural industries at 83% of total employment. These patterns are not uncommon in Swedish businesses, however the rates

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Creative Edge identifies a total of 838 creative businesses in the SEED area of Northern Ireland. The top three creative business categories are computer programming and consultancy, architectural and engineering activities, and cultural recreation activities. Other creative industry business sectors also of significance in the SEED area are craft, advertising, film and TV; publishing and creative arts.

In terms of geographic concentration, creative industries are most concentrated in the Newry & Mourne local authority area, with 26% of all creative businesses. This is also the most populated local authority area with 100,858 people. The Craigavon local authority area has 21% of creative businesses and is the next most populated area with a population of 94,597. The remaining four local authority areas each have between 10% and 15% of creative industries identified (Ards 15%, Down 14%, Armagh 13%, Banbridge 10%).

### 2.5 Sweden’s Culture and Creative Industries

Sweden is a leader in how it has developed its creative and cultural industries. It ranks 1st on the Martin Prosperity Institute’s 2011 Global Creativity Index, and is regarded as the world’s most creative country (Innovation Pioneers, 2012).
of self-employment, and companies employing nine or less people, is higher in creative and cultural companies. More people are employed in cultural and creative industries - approximately 146,000, than are employed in the automotive industry in Sweden, which has around 120,000 people (Sternö & Nielsén, 2012).

A society with high levels of tolerance and openness, widespread use of technology, and a skilled workforce supports Sweden's creative industries (Skantze & Pihlgren, 2012). Sweden's creative industries are viewed as well placed for further development and growth. Technological development is strong, with good access to computers and broadband. Sweden is a highly developed country with experience of trading in international markets. There is also a high level of engagement with cultural activities in Sweden, supported by public funding for the arts (Nielsén, 2008).

### 2.5.1 Västerbotten’s Culture and Creative Industries

Covering one eighth of the total land area of Sweden, Västerbotten county is vast. It is the second largest county in Sweden and described as a region of diversity and contrasts. A distinguishing characteristic of Västerbotten is its level of afforestation. Over half of the county, 56%, is either forested or subalpine woodland. Just 1% is agricultural land and 1% covered by built-up areas (County Administrative Board of Västerbotten & Region Västerbotten, 2010). The three most densely populated municipalities in Västerbotten county are Umeå (117,524), Skellefteå (71,831) and Lycksele (12,348), with the remaining municipalities having populations of less than 10,000. Its total population is just over 260,000 and it has a low population density of 4.7 per km² (Statistics Sweden, 2013).

Important industries in the county are mining, forestry and hydropower. Mining has been carried out since the 1920s, focused in an area called the Skellefteå field. Forestry is very important in the county, as well as being a nationally important industry. The county produces 20% of Sweden’s hydroelectric power and there are hydropower plants on the Skellefteå, Ume and Ångerman rivers. Biofuels and wind power are also sources of energy generation. The nature and landscape of the county are an important resource for Västerbotten. The largest nature reserve in Europe, Vindelfjällen, is located in the north-west of Västerbotten county and there are 236 nature reserves in the county.

Reindeer herding occurs throughout Västerbotten county in reindeer herding districts or ‘čearrus’, of which there are seven (County Administrative Board of Västerbotten & Region Västerbotten, 2010).

Västerbotten also has a rich and diverse culture and heritage. Mining towns, church towns and mountain homesteads form an important part of the cultural heritage landscape. Known as the ‘land of storytelling’, Västerbotten has a tradition of storytelling that exists to the present. Umeå, the largest city in the region, is an important cultural hub, and has become known as the art capital of Northern Sweden, because of, for example, the good population of artists and art galleries in the city. Umeå is the 2014 European Capital of Culture (County Administrative Board of Västerbotten & Region Västerbotten, 2010).

Creative industries are important in the region, particularly in the areas of digital production, design and game development. Universities in the county provide important educational supports for creative industry development. Umeå University, founded in 1956, has been important in the city’s overall development, but also to creative industries. The Umeå Arts Campus focuses on architecture, design, fine art and culture. The University has been a factor in Umeå becoming known as the art capital of Northern Sweden, and is the site for Bildmuseet, Umeå University’s museum (County Administrative Board of Västerbotten & Region Västerbotten, 2010). Umeå University incubator, Uminova Innovation, is also part of the Swedish Game Incubator Network, a national network of incubators and science parks that host game industry start-ups to assist new game developers (The Game Incubator Network, 2013). Gscept, based on campus Skellefteå and part of Luleå University of Technology has courses in computer game development that are highly respected and a close working relationship with the games industry (Gscept, 2013; Västerbotten Investment Agency, 2013).
The Creative Edge database can offer insight on the broad nature of culture and creative industries in Västerbotten county. From fashion to film and dance to arts, a diversity of festivals are evident. Looking at different types of festival, there is variety among each type. For example, different types of music festivals include jazz, country, metal, folk, and sixties music. Across Västerbotten county, a common theme among local festivals is the celebration of Midsummer. Festivities traditionally take place on Midsummer’s Eve, which occurs each year between June 21st and 25th, and includes feasting on herring, the season’s first potatoes, and dancing around a maypole decorated with flowers. Film festivals in Västerbotten county often display themes, such as focusing on short film or documentaries. Film festivals can target particular groups. For example, the School Cinema Festival ‘Tjugo5’ takes place alongside the MOVE film festival in Umeå, focusing on education and film, and is targeted towards school children of all ages, from kindergarten to high school.

Distinct aspects of Swedish culture are identified through the presence of festivals. Festivals celebrating Sami culture are one example, where traditions around food, craft, music, and art of the Sami people, indigenous to northern parts of Scandinavia, are celebrated. Other multicultural celebrations are identified, such as Chinese culture day. Cultural organisations display a multicultural theme, with a Russian-Swedish Culture Association in Umeå that promotes Russian-Swedish culture, the Bangladeshi Society based in Umeå and the Sweden-Asia Association located in Wilhelmina.

Cultural spaces offer insights on Västerbotten county’s cultural infrastructure. Museums offer a window on traditions relating to industrial and economic heritage. The Masonite Museum in Rundvik focuses on the history of masonite (a hardboard made from wood fibres) production in the area, and displays a variety of artefacts. The Forestry Museum showcases the history and heritage of forestry activities in Sweden, such as manual logging and the introduction of machines. Museums also display artefacts reflecting Sweden’s climate, and people’s attempts to deal with the sometimes harsh conditions, such as the Snowmobile museum in Storuman.

Strong cultural participation and consumption is also evident in Västerbotten county, because of the presence of different kinds of spaces for culture. Theoreums, libraries, galleries and community centres exist alongside local clubs focusing on special interests such as art, dance, photography and amateur drama. Different types of musical organisations are identified, such as folk, rock, jazz and choir groups. Local historical societies also exist, showing efforts at community level to preserve heritage and culture.

Cultural spaces also reflect the strong audio-visual industry in Västerbotten county, with production spaces such as film and television studios and sound recording studios.
existing alongside cinemas and local film clubs. A distinctive organisation identified is the People’s Cinema, a non-commercial film distribution organisation that supports a network of locally-based cinemas operating on a non-commercial basis. A local branch of the People’s Cinema is based in Umeå. A number of local ‘Film Studios’ or film clubs are also identified, which are affiliated to the national non-profit organisation, the Swedish Federation of Film Studios, that distributes film to its local member groups.

Creative industry organisations are identified in Västerbotten county, such as the Umeå Creative Industries Association and the Lodge, a network of film, gaming and Internet companies based around Skellefteå. Alongside this are support organisations for the development of particular skills, such as Media Centre, a multimedia education centre, and creative industry sub sectors, such as the regional film resource centre Film i Västerbotten. Craft and design non-profit organisations are also identified. The Swedish Society of Craft and Design and the National Association of Handicraft Societies, both non-profit umbrella organisations, each have regional organisations based in Västerbotten county. To be affiliated with the National Association of Handicraft Societies, members must meet a set of standards. The Västerbotten group operate a retail outlet selling members’ handicrafts in Umeå. At the municipality and local levels, craft producer associations, for specific crafts or sometimes with a variety of different types of craftspeople, are also identified.

Creative industries have a very significant presence in Västerbotten county. Creative industries are defined more narrowly in Västerbotten county, with creative manufacturing, retailing, and scientific research and development excluded from the data collected. Despite this, the Creative Edge database contains 2,154 creative businesses for Västerbotten county. The top three categories of creative business in the county are creative arts, computer programming and consultancy, and design and photography. Other significant creative industry business sectors in the county indicated by the database are advertising, film and TV, publishing and cultural recreation.

The geographic distribution of creative industries in Västerbotten county shows a high degree of concentration in two most populated municipalities. Umeå (117, 524) is the most populated municipality in Västerbotten county and 61% of creative industries are found to be concentrated here. Skellefteå (71, 831) is the second most populated municipality and 21% of creative industries are found to be concentrated here. Lycksele, the next most populated municipality (12,348) is found to have 2.6% of creative industries. Vännäs, the next most populated municipality with a population of 8,513 is found to have 2.7% of creative industries. The remaining eleven municipalities (Åsele, Bjurholm, Dorotea, Malå, Nordmaling, Norsjö, Robertsfors, Sorström, Vilhelmina and Vindeln) each have between 0.5% and 2% of creative industries identified in the database.

2.6 Finland’s Culture and Creative Industries

Creative industries contributed to 3.2% of GDP in Finland in 2008 and employed 4.3% of the Finnish workforce, approximately 108,000 people (Creative Industries Finland, 2013a). Creative Industries Finland (2009) breaks creative industries into two areas. The first is core copyright industries that includes, for example, press, literature, music, theatre,
video, radio, television and software sectors. A number of interdependent copyright industries, such as the sale of musical instruments, TV and game equipment are also part of the copyright industry. The second is cultural industries, and includes artistic activities, libraries, art shops, advertising, architecture, photography and printing. Copyright-based creative industries contributed to 4.5% of GDP and their turnover was €21.7 billion in 2005. The core copyright industries that contributed most to economic worth are in the software, press and literature sectors. Cultural industries contributed to 3.2% of GVA in 2005 and employed 85,259 people, accounting for 3.8% of the total workforce. Identified areas of growth in cultural industries from 2004 to 2005 were architecture, industrial design, art and antique shops and the production and distribution of music.

According to Statistics Finland, employment in cultural industries decreased by over 5% from 2010 to 2012. However not all included sectors decreased, with employment in creative arts and literary creation increasing as well as in libraries, archives and museums. Publishing, advertising and other industries decreased over the period. However Statistics Finland points out that while total employment decreased, development of employment in cultural occupations reflects positively, with graphic, art and craft designers increasing by 30% from 2005 to 2012, artists occupations increased by 8%, however the number of journalists decreased by 5% (Statistics Finland, 2013a).

### 2.6.1 Kemi-Tornio’s Culture and Creative Industries

Located in Lapland province in northern Finland, Kemi-Tornio is a small region made up of five municipalities: Tornio, Kemi, Tervola, Keminmaa and Simo. The Lapland Regional Council describes the province as having rich natural landscape, distinct culture and strong creativity. The province has a population of 195,000, and 59,847 of the total population is located in the Kemi-Tornio region (Regional Council of Lapland, 2012; Statistics Finland, 2013b). The Kemi-Tornio region accounts for the second largest number of people employed in the Lapland province, with the highest number employed in the Rovaniemi region (Regional Council of Lapland, 2012). The region is classed as a regional centre in Lapland province and is served by Kemi-Tornio airport. The area is also known as Sea Lapland and has developed a tourism experience around its climate of ice, snow and frozen seas in wintertime. Industry in the region includes forestry, mining and agriculture.

Located on the Bothnian Arc, Kemi and Tornio are two cities in the region and Tornio is twined with the Swedish city Haparanda. Tervola is a mainly rural area and important industries are agriculture, forestry, and the mining of rock and metal. Based in Bothnian Bay, Keminmaa is located on the mouth of the Kemijoki River. Processing of wood and plastics are important industries in Keminmaa. Simo is known for salmon fishing, which is a long tradition because of rich stocks along the coast and in the Simojoki river. Fishing tourism is important to the area, as well as forestry and agriculture (Regional Council of Lapland, 2013).

The Lapland Regional Council is important in developing regional policy to support creative industries in the overall Lapland region, and its sub-regions, such as Kemi-Tornio. A theme of the Regional Strategic Programme for Lapland is promoting creativity. Among a number of strategies of the Lapland Regional Council is the Strategy for Creative Industries 2008-2013. This strategy highlights the importance of design in enhancing competitiveness and adding value to products, but also as a critical area for overall creative industry development in the region. The Lapland Design Programme 2011-2015 has been developed, coordinated by the University of Lapland and developed in consultation with stakeholders, and aims to promote and develop the design sector across Lapland through a variety of initiatives. Design is a theme integrated in Kemi-Tornio’s regional development programme for creative Industries 2009-2013 and high-tech and industrial production companies in the region now have a greater focus on design (University of Lapland, 2011). Regional and sub-regional development in Lapland focuses on collaboration across industry sectors, such as between tourism and creative industries (Regional Council of Lapland, 2012, 2013). Supporting education in creative industries, the Culture and Media Arts Department of Kemi-Tornio University of Applied Sciences provides practically focused education programmes in fine arts and media (KTUAS, 2013).
The Creative Edge database can offer some insight on the broad nature of cultural and creative industries in the Kemi-Tornio region. A broad scope of festivals exists with music, dance, arts, film, food and comedy festivals among those identified in the Creative Edge database. Jazz, blues, rock, country and sixties are among the music festivals in Kemi-Tornio. Two themes are identified as distinct among sports events in Kemi-Tornio. One is motoring events, reflecting the popularity of motorsports in Finland. The second is skiing, reflecting the climate and landscape. Traditions also emerge through festival celebrations, such as the annual whitefish festival that is celebrated in July of each year in Kukkolankoski, a place where whitefish have long been caught.

A range of cultural spaces exist in Kemi-Tornio. Museums, galleries, theatres, libraries, cinemas and music venues are among those identified in the database. Distinct aspects of Finnish culture showcased through museums include the heritage of hairdressing at the Finnish Hairdressers’ Museum that displays artefacts of hairdressing from the 1850s onwards. Ways of life are preserved at the Kemi Workers’ Museum, where living conditions of different classes of workers who worked in sawmills and other industries around Kemi are displayed. The Kemi Snowcastle, built from snow each year, and which houses a snow chapel, show hotel and snow restaurant, shows how cultural spaces are connected with specific aspects of place, such as climate. Community cultural organisations also exist in the region, such as amateur drama groups, local history societies and book clubs.

This small sub-region of Lapland in northern Finland is found to have 476 creative businesses. The top three creative business categories are architectural and engineering activities, advertising and market research, and computer programming and consultancy. Other significant creative business sectors are design and photographic activities, film and TV, publishing and creative arts. The region has a population of 59,847, with just over 44,000 living in the Kemi and Tornio municipalities combined. It is in these two municipalities that the creative industries are concentrated, with 40% concentrated in Kemi and 49% in Tornio. Keminaa, with a population of just over 8,500, is found to have 8% of creative industries.
2.7 Conclusion

Our national level analysis has shown the presence of strong creative and cultural industries across the countries of the Creative Edge partner regions. Common patterns between these countries’ respective creative industries have been identified, with self-employment and small companies having few employees a notable trend. Structurally, creative businesses in peripheral places in Europe share similarities. Economic data shows some creative sectors are more economically profitable, while the social and cultural value of others is stronger. National level reports recognise the creative and cultural industries as an important growth area. However, what national level reports can overlook is the regional diversity of creativity and culture.

A vibrant culture and significant creative industries exist in the Creative Edge partner regions located on the periphery of Europe. While not disputing the centrality of creative and cultural industries in major cities, attention to peripheral creativity is also deserved. Our analysis of evidence in the Creative Edge database has shown the presence of a distinct arts and culture scene in these peripheral places. Being remote and on the margins adds a unique flavour to the nature of this creativity. Creativity is constantly being developed in peripheral places through, for example, festivals, performing and visual arts. These preserve and celebrate existing culture, but also reinvent traditions and expand culture by contributing to new forms. We need to know more about creative industries in peripheral places.

The Creative Edge database proves the existence of the creative economy in the European Periphery. In doing this it also highlights the differences between our member regions. These differences hail from the unique make up of each of these regions, from geography to national policy. The vibrant and diverse nature of the creative economy across these four region highlights the challenge in providing specific supports for the sector.

The creative economy is growing, with the periphery being part of this growth. Policy measures can help it realise its potential. In the next two chapters of this toolkit, this is where we next focus attention.
WITH GROWING RECOGNITION OF THE IMPORTANCE OF CULTURAL INDUSTRIES, POLICY HAS MOVED TO HAVE A GREATER FOCUS ON THE ECONOMIC ASPECTS OF CULTURE.
Chapter 3: Cultural and Creative Industry Governance and Policy

3.1 Introduction

**THE FOCUS** of cultural policy has changed in recent decades. Throsby (2010) outlines how in the 1970s and 1980s the focus was on the creative arts and heritage, with little attention to the economics of culture. In more recent decades the emphasis has shifted. With growing recognition of the importance of cultural industries, policy has moved to have a greater focus on the economic aspects of culture. The value of the arts is understood more broadly, not just in its cultural and social value, but its economic value through feeding into creativity, which in turn drives innovation. From this perspective, cultural policy is very important in modern economies, and according to Throsby (2007:7) is “rescued from its primordial past and catapulted to the forefront of the modern forward-looking policy agenda, an essential component in any respectable economic policy-maker’s development strategy”.

In this chapter, we review creative and cultural policy in the countries in which the Creative Edge partner regions are located. Each national context reflects a differing perspective on the attention given to creative and cultural industries on the national policy agenda.

3.2 Increasing Recognition of the Importance of Cultural and Creative Industries

3.2.1 The European and Wider Policy Context

At European level, the importance of cultural and creative industries is gaining recognition. The European Commission has described cultural and creative industries as a largely untapped resource, with potential for economic growth and job creation in the EU (European Commission, 2012). The European Commission ran a consultation in 2013 to understand more about the ‘experience economy’ as an emerging industry, the relevance of setting up policy initiatives and supports, and the link between ‘cultural’ and ‘creative’ industries (European Commission, 2013). A new EU programme of investment for the cultural and creative sector for 2014-2020, Creative Europe, is described as building on the success of previous programmes such as the MEDIA and Culture Programmes. Creative Europe’s proposed budget represents a 34% increase on current spend levels (European Commission, 2011).

The United Nations Conference on Trade and Development (UNCTAD) also recognises the importance of the creative economy, focusing on its role in developing countries. UNCTAD’s first Creative Economy report in 2008 recognised it as one of the most dynamic sectors of the world economy with growth opportunities for developing countries. UNCTAD’s 2010 Creative Economy report reflects again on the creative economy in the context of economic crisis. One of its key messages is the resilience of the creative economy. In 2008, at a time when international trade was contracting, exports of creative goods and services continued to grow.
3.3 The Policy Context in the Partner Countries and Regions

This section outlines and compares the policy contexts in each of the countries in which the Creative Edge partner regions are located. This comparative approach provides the basis for understanding how the development of cultural and creative industries in the periphery can learn from each of the separate national level experiences.

3.3.1 The Policy Context in Ireland

Culture and creative industry policy comes under a number of government departments, authorities and agencies. The Department of Arts, Heritage and the Gaeltacht is responsible for the arts, culture, film, music, heritage, the Irish language, and oversight of cultural institutions. The Department of Communications, Energy and Natural Resources is responsible for policy on broadcasting. The Department of Jobs, Enterprise and Innovation is responsible for business development. The Department of Environment, Community and Local Government is responsible for local government policy, which has a focus on culture and heritage. Recognition exists of the need for interdepartmental cooperation on arts and culture policy, but little cooperation through formal mechanisms exists (Fitzgibbon, 2012). Cooperation through specific measures does occur, however this does appear to occur on a case-by-case basis. For example, the Department of the Arts, Heritage and the Gaeltacht and the Department of Environment, Community and Local Government cooperate to fund local heritage projects through the Rural Development Programme. The Department of the Arts, Heritage and the Gaeltacht and the Department of Social Protection also cooperate to develop arts sector internships in conjunction with local authority arts offices (DAHG, 2013b; DAHG, 2013c).

A number of national cultural institutions are important to Ireland’s cultural and creative industries. For example, the Irish Film Board is the national agency responsible for the development of the film industry in Ireland and has a network of regional film offices that act as local contacts for filmmakers in these regions. The Crafts Council of Ireland is an umbrella body for craft sector organisations in Ireland and the major body that supports craft in Ireland. The Arts Council is responsible for funding, developing and promoting the arts in Ireland.

It is considered important that cultural institutions have a degree of autonomy from the state. Bayliss (2004a) notes that state funding for the cultural sector is mainly channelled through the Arts Council, a method of keeping support and development of the sector at arm’s length from politics. The Arts Act 2003 legislates for the arm’s length principle. However, there are threats to maintaining the arm’s length structure that exists. Ongoing public service reform means the Department of Arts, Heritage and the Gaeltacht could potentially take more control over arts and culture governance in future, which is an issue of debate. In light of this, a national campaign against this has surfaced, the National Campaign for the Arts (Fitzgibbon, 2012). However, in the case of the Craft Council of Ireland, the national development body for craft in Ireland, distance between government and culture agencies extends to greater than arm’s length. The Department of Jobs, Enterprise and Innovation is responsible for business development in Ireland and funds Enterprise Ireland, which in turn supports the Crafts Council of Ireland.

Over the last decade, funding available via government under EU structural funds has increased Ireland’s cultural infrastructure. Funding cuts, however, are a key issue for cultural policy in Ireland. Economic downturn has threatened arts funding, but alongside this arts bodies have stressed the importance of investment in the arts as part of Ireland’s economic recovery (Fitzgibbon, 2012). Private investment in the arts has also been shown to be important. In 2008, Business to Arts, an organisation that provides support and advice on partnerships between business and the arts, commissioned a survey on the extent of private investment in arts and culture in Ireland (Deloitte, 2008). A range of arts and cultural organisations, including national cultural institutions were surveyed and the research found that 76% had some form of private investment, such
as from business or private donations. Business was the largest contributor to private investment in arts and culture, and sponsorship the most dominant form of investment. Private investment was also very important, with two thirds of this investment contributing to core programme and overhead costs. The instability of private investment is also noted, and that arts and culture organisations need to build relationships with private investors and further develop fundraising skills to make this type of investment more sustainable (Deloitte, 2008).

Cultural policy is also evident at regional level, predominantly at county level through local authorities. Bayliss (2004a) argues that culture plays a major part in local development strategies, but is not emphasised in the same way in national policy. Under the Arts Act 2003, local authorities are required to have arts development plans and specialist arts personnel. However the participation of local government in arts planning is still lower than other EU countries. A network of 28 county heritage officers exist in local authorities, working locally on heritage issues in conjunction with the national body, the Heritage Council (Fitzgibbon, 2012). Bayliss (2004b) acknowledges cultural plans implemented through local authorities and investments in infrastructure have seen the arts flourishing in many local areas with social benefits. Alongside this an increasing recognition of the importance of cultural policies as part of strategies for social and economic development is found, but the extent of this change, using culture as a tool of economic development, is said to be limited.

While there is still no single national cultural policy, or creative industries policy in Ireland, the importance of culture and creative industries has been recognised in the 2008 model for building Ireland’s economy, Building Ireland’s Smart Economy – A Framework for Sustainable Economic Renewal. The framework recognises arts, culture and creative industries as important economic contributors and highlights the need to pursue an integrated policy framework to maximise their economic, social and cultural return. The plan lists a number of action points for developing arts, culture and creative sectors, such as improving access to finance, credit and business support services for export-ready firms and artists, improved human resource capabilities, and continuance of investment in art, culture and creative industry infrastructure.

The need for increased support of the arts in Irish education is recognised and highlighted as a critical issue in arts development in Ireland (Fitzgibbon, 2013). A recent initiative highlights some change. In 2013, the Department of Arts, Heritage and the Gaeltacht launched the Arts in Education Charter, which places new responsibilities on government departments, agencies, cultural institutions and arts organisations to provide and promote arts education to children and young people. The Charter includes a number of commitments, such as the arts-rich schools scheme that incentivises schools to become more involved in the arts. It also introduces a new public service dividend where artists and arts organisations in receipt of taxpayer funding will be required to donate time each year to a local education initiative (DAHG, 2013a).

Tax incentives to support cultural and creative industries exist in certain instances. In creative industries, for example, a tax incentive scheme for film, television and animation industry for EU talent exists, and was extended to non-EU talent working in Ireland in 2013 (IFB, 2013b). Relating to culture, a pilot tax incentive scheme, the Living City Initiative, was introduced in 2013. This pilot scheme promotes the regeneration of urban historic areas by encouraging people back into Irish city centres to live in historic buildings, through providing tax incentives for refurbishments or improvements. This initiative is targeted at owner/occupiers and is being legislated for in the Finance Bill, 2013 (DAHG, 2013d).

A number of reports driven by the Western Development Commission are important for having highlighted the importance of the creative economy in the west of Ireland and the need for policy to assist its further development. Creative West made a series of recommendations, listed in order of expected impact. The Economic Impact Assessment of the Creative Sector in the Western Region highlighted a number of key policy issues (see Figure 3.1):
CHAPTER 3: CULTURAL AND CREATIVE INDUSTRY GOVERNANCE AND POLICY

Figure 3.1 Recommendations from Creative West: The Creative Sector in the Western Region

1. ‘FIRST TIER’ RECOMMENDATIONS

- ENABLE more effective production and development of creative goods and services through establishing networks of practice.
- FACILITATE export growth and domestic sales by effectively promoting ‘Creative West’.
- FACILITATE the transfer of creative capabilities into the wider business environment.
- NURTURE and develop future creative talent in the region through education.
- DEVELOP creative connectors and hubs in the region to facilitate businesses and operators to work in suitable cost-effective environments.
- ACCELERATE growth of creative businesses through enhanced broadband capacity (particularly the high productivity creative technology sector).
- ESTABLISH a national policy for the creative sector as a whole to provide a coherent structure for developing the sector.

2. ‘SECOND TIER’ RECOMMENDATIONS

- ENHANCE the quality of the built environment.
- CREATE an information website for the creative sector in the Western Region.
- TRY to ensure that funding schemes available to creative businesses meet the needs of the sector.
- PROVIDE training in business skills of relevance to the creative sector.
- ENHANCE the role of research and development in the creative sector.
- CONDUCT a skills matching study for the sector.
- PREPARE a tourist guide for the ‘creative West’.
- ImPROVE the transport network.

FINDINGS AND RECOMMENDATIONS FROM ECONOMIC IMPACT ASSESSMENT OF THE CREATIVE SECTOR IN THE WESTERN REGION

- LITTLE EVIDENCE NATIONALLY OF JOINED UP THINKING on how to develop the creative sector.
- LACK OF CLARITY ON THE ROLE OF AGENCIES with regard to development and support of creative businesses. Need to review the role of agencies in supporting creative business development across the spectrum of creative economy sub-sectors.
- NEED TO EXPLORE THE SPECIAL POSITION OF THE CREATIVE ECONOMY in relation to the smart economy.
- POLICY SHOULD TAKE ACCOUNT OF THE DIVERSITY OF THE CREATIVE SECTOR, while also being open and adaptable so as to be capable of also addressing the needs of sub-sectors.
- BETTER FACILITATION OF THE DEVELOPMENT OF MICRO CREATIVE BUSINESSES in their initial start-up phase to help overcome the issue of micro and small businesses dominating the sector. This should be focused on the needs of creative economy sub-sectors.
- DEVELOPMENT OF AN INTEGRATED POLICY for the creative sector on the national scale.
- WIDER GOVERNMENT POLICY should also support the creative sector as a purchaser of creative products, such as through public procurement decisions.

(Western Development Commission, 2009; Centre for Innovation and Societal Change, 2010)
The policy contexts in Ireland and Northern Ireland share a number of similarities, such as local authorities playing a key part, as well as the principle of keeping government at ‘arm’s length’ from spending on culture. They are similar in how they support cultural and creative workers, by funding schemes available through state cultural institutions.

### 3.3.2 The Northern Ireland Policy Context

The Department of Culture, Arts and Leisure (DCAL) is the government department responsible for creative and cultural industries in Northern Ireland. It launched the *Strategic Action Plan for the Creative Industries* in 2008 outlining issues and opportunities for creative and cultural industries growth in the Northern Ireland region. The priorities for action first administered under the Creative Industries Innovation Fund emerged from the 2008 DCAL Strategic Action Plan. This is a fund supporting creative industries in Northern Ireland and is administered by the Arts Council of Northern Ireland, with the support of the Northern Ireland Screen Commission and the Digital Circle. It was launched in 2008, and the second programme of funding runs until 2015. It aims to support the innovative development of commercially-viable content, products, services and experiences capable of competing in global markets (Fisher and Figueira, 2012). The 2011-2015 Northern Ireland Programme for Government extends support for the Creative Industries Innovation Fund and commits to supporting 200 projects through this fund (Northern Ireland Executive, 2012). This will result in the DCAL investing £4 million in the Creative Industries Innovation Fund from 2011 to 2015 (DCAL, 2013a).

The principle of maintaining an ‘arm’s length’ between government and spending on culture forms part of the structure of governance in the Northern Ireland policy context. The DCAL supports a number of non-departmental public bodies, the Arts Council of Northern Ireland, the National Museums and Galleries of Northern Ireland, the Northern Ireland Museums Council and the Northern Ireland Screen Commission. The DCAL has suffered reductions in its budget in recent years, which has also impacted on the budget of its non-departmental public bodies (Fisher and Figueira, 2012). The Libraries Act 2008 governs libraries in Northern Ireland and Libraries NI is the body responsible for libraries in Northern Ireland.

Support for cultural and creative workers in Northern Ireland mainly comes through the non-departmental public bodies. While a number of different directories in specific sectors exist, no one source of information exists on the cultural institutions in receipt of public funding (Fisher and Figueira, 2012). The UK National Lottery Distribution Fund is also an important source of funding arts, heritage and culture community and charities (Department of Culture Media and Sport, 2013). Local authorities have responsibility for funding local arts initiatives, while wider initiatives are supported by the Arts Council (Fisher and Figueira, 2012).

UK Trade and Investment (UKTI) is the government department responsible for assisting UK companies to trade in the global economy, as well as non-UK companies to trade in the UK. UKTI works to support creative industries, such as through its creative industries team. Its role is to raise the profile and reputation of UK creative industries internationally and to help UK companies make the best of international opportunities, in association with trade associations, industry advisory groups, as well as other government initiatives, such as the UKTI catalyst and business ambassador programme and the cross-sector creative industries marketing strategy board (UKTI, 2012). It also has an initiative called ‘GREAT weeks’, which gives UK businesses the opportunity to join with UK trade missions and this also focuses on creative industries (UKTI, 2013b).

Achieving greater social cohesion is also an important part of cultural policy in Northern Ireland. The Community Relations Council was established to promote better relations between Catholics and Protestants in Northern Ireland, while also recognising cultural diversity. The Arts Council of Northern Ireland has worked with communities to replace sectarian images with art in communities through the Re-imaging Communities Programme (Fisher and Figueira, 2012). Another example of a scheme supporting greater social cohesion through cultural policy is the £900,000 funding scheme to be administered over three years for community and cultural groups by the Arts Council of Northern Ireland and Belfast City Council (ACNI, 2013).
The UK City of Culture programme was launched in 2013, with Derry the first UK City of Culture. Derry City Council established the Culture Company in 2012 to deliver the City of Culture programme of events and activities. Expected outcomes of the City of Culture initiative include changed perceptions of Derry raising its profile as a cultural hub, as well as job creation, economic growth and increased visitor attraction. Derry’s UK City of Culture year ends in December 2013, with the next UK City of Culture year in 2017 (DCAL, 2013a).

Fisher and Figueria (2012) note that regional cooperation is increasing in the UK between different public and private cultural agencies, and wider agencies such as in tourism, enterprise and regional economic development. For example, the Arts Council of Northern Ireland has a close relationship with local authorities and has been involved in assisting the development of local council arts strategies. A formal relationship for consultation exists through the Forum for Local Government and the Arts.

A number of more specific policies are also important to note. The Music Industry Strategy for Northern Ireland was produced by the DCAL and Invest Northern Ireland in 2011 outlining priority areas to encourage the growth of a sustainable music industry, highlighting key strategic issues and priorities. The 2011 Museums Policy for Northern Ireland outlines a 10-year framework for the development of national and local museums. A policy on architecture and the built environment in Northern Ireland was published in 2006, aimed at improving standards and driving best practice, such as through public projects that represent best practice. To practice as an architect in the UK, an individual must be registered with the Architects Registration Board, which is responsible for the regulation of the profession in the UK, and also operates a code of conduct.

### 3.3.3 The Policy Context in Sweden

Creative industry policy is well advanced in Sweden. For example, the Knowledge Foundation’s (2008) ‘FUNK’ policy model promotes collaboration between research (F), education (U), private sector (N) and culture (K), which focused on development of the entertainment industry. The Knowledge Foundation, an organisation supporting research in Sweden, was instrumental in bringing the concept of creative and cultural industries to the fore in Sweden (Generator Sverige, 2011a). It worked on ‘the experience industry’ concept, and supported the establishment of eight regional hubs between 2002 and 2004 promoting development and growth through projects within education, research and business collaboration.

Another important aspect of Swedish governance is a direct focus on cooperation between agencies and government departments. Cooperation has also occurred at the ministerial level (Harding, 2012). For example, the Ministry of Enterprise, Energy and Communications and the Ministry of Culture collaborated to produce the national Action Plan for Culture and Creative Industries, which was launched in 2009. The Council for Cultural and Creative Industries was formed to support cooperation between the Ministry of Culture and the Ministry of Enterprise. At this time, Sweden moved away from the experience industry concept, and towards creative and cultural industries. The principle of an arm’s length relationship between the state and its cultural institutions was discussed in earlier sections. In Sweden, its cultural policy model works at a double arm’s length from government (Harding, 2012).

In 2009, the Knowledge Foundation’s 10-year funding scheme for the industry came to an end. Generator Sverige, a non-profit association for the development of the cultural and creative industries, was established by a number of regions in Sweden and made up of regional and local organisations (Generator Sverige 2011b). The government agency Kulturanalys was established in 2011 and is responsible for cultural policy analysis.

The National Action Plan for Creative and Cultural Industries aims to create the right conditions for new and existing creative entrepreneurs to flourish. The action plan focuses on a number of activities such as counselling for business, incubators for business, the development of networks and
models of cooperation, encouragement of entrepreneurship in higher education in culture and the arts, research on finance needs, and development of better statistics. Lead responsibility for the action plan lies with the Swedish Agency for Economic and Regional Growth and the Swedish Agency for Innovation Systems with other national actors and authorities also having responsibility for specific aspects of the action plan (Swedish Ministry of Enterprise, Energy and Communications, 2010). Generator Sverige (2011) comment that the Swedish government’s action plan is not aimed at just directly supporting cultural and creative entrepreneurs, but towards improving structures and supports at the regional and state level, and improving cooperation between these bodies.

The regional level of governance is gaining greater focus as part of the cultural policy model in Sweden. Harding (2012) notes that a suspicion toward market and private sponsorship of cultural activities exists in Sweden, however this attitude is beginning to change, especially at regional and local levels. Regional bodies are increasingly given more control over their culture policy development and spend on culture (Harding, 2012; Generator Sverige, 2011). Moves towards regional government allocation of grants, in conjunction with the Swedish Arts Council, is observed. These measures are all driven by the Cultural Cooperation Model that forms part of the Swedish cultural policy model (Harding, 2012). However, this approach is not without criticism. Generator Sverige (2011) comment that Sweden needs to keep in mind what might be lost from a move away from the national focus. It is observed that the regional control of creative and cultural policy can leave regions focusing on it to a greater or lesser extent, with support for creative and cultural industries varying from region to region in the absence of a state policy framework (Lekkav, 2013). While regional governance is important, this is also combined with a focus on international cooperation. For example, the International Artists Studio Programme supports international artist’s residences in Sweden, and Swedish artists to take up international residencies (Harding, 2012).

3.3.4 The Policy Context in Finland

Traditionally, the main role of cultural policy in Finland was related to affirmation of national identity and promotion of artistic creativity. However, in recent years, the role of creativity, arts and culture in economic growth has been recognised. Traditional and economic objectives are reflected in the 2015 and 2020 strategies of the Finnish Ministry of Education and Culture. The 2020 strategy stresses the link between culture and the economy in shaping Finland’s competitive edge and in regional development (Mitchell & Kanerva, 2012).

Mitchell and Kanerva (2012) describe the Finnish cultural policy system as both highly centralised and decentralised. Government departments at the core of Finnish cultural policy are those under the Ministry of Education and Culture, the Department of Culture, Sports and Youth Policy and the Department for Education and Science Policy. Other ministries also play important parts, such as the Ministry of Employment and the Economy, which has responsibility for providing support for cultural and creative industries. A range of state bodies are important in cultural policy, such as the National Board of Antiquities, the Finnish Film Foundation and the Arts Council of Finland. Regional governance is important with municipalities and regional councils of municipalities playing a part, however their role is described as marginal, with the state holding primary control. Municipalities are responsible for investment and maintenance of cultural and arts infrastructure in their areas. The Arts Council of Finland has 13 regional arts councils, which have similar functions, such as grant provision and support for artistic work, as the national body. Profits from the state-owned lotto organisation Veikkaus Ltd. are used to finance culture and arts activities (Mitchell & Kanerva, 2012).

The 2007 National Creativity Strategy was an important step in terms of increasing focus on creative industries in Finland. It was prepared by a range of actors, from different ministries, business sectors and universities and resulted in the implementation of a development programme for cultural exports (Mitchell & Kanerva, 2012). Important national strategies include the Development Strategy for the Creative
Economy 2008-2011 and the Development Programme for Business Growth and Internationalisation of Creative Industries 2007-2013. Cross-ministerial cooperation has been important in this increased focus on creative industries, especially between the Ministry of Education and Culture and the Ministry of Employment and the Economy. The Government Programme 2010 – 2015 includes a number of measures to support creative industries, either implemented by the Ministry of Employment and the Economy, or also in conjunction with the Ministry of Education and Culture including revision of the national design programme, support for cultural entrepreneurship, promotion of cultural exports and the creative economy at work project to enhance employment of those working in creative industries (Ministry of Employment and the Economy, 2013).

Developing culture and creative industries through regional development has also received attention in Finland. The Regional Cohesion and Competitiveness Programme 2010-2013 focuses on developing regional competitiveness by supporting local development work and promoting interaction between regional development actors. Dealing with issues in creative industries is one of its focus areas (Creative Industries Finland, 2011). Cooperation between the Ministry of Education and Culture and the Finnish Regional Councils has occurred through the formation of a cooperation group for the creative economy in 2009. As a result of this year-long cooperation, a series of development measures was formulated and the Ministry of Education and Culture (2010) has produced the report ‘Regional Development Measures for the Creative Economy and Culture 2010-2020’. According to this report, the creative economy was part of 94.1% of regional councils’ programmes. In addition, Finland’s ‘Regional Strategy 2020’ report highlights creative industries as a regional competency with development potential (Ministry of Employment and the Economy, 2010). Ministries with responsibility for rural development have begun to highlight the importance of culture and creative industries (Creative Industries Finland, 2011). The importance of the preservation and development of rural culture has been highlighted in the report of the Rural Policy Committee ‘Countryside of Creative Contrasts’, which outlines a cultural programme for rural areas for 2010 to 2014. It identifies a range of actions for non-governmental countryside organisations. Underpinning these actions is developing a rural culture underpinned by creative contrasts: the countryside should be a quite a peaceful space, but at the same time vibrant, diverse and tolerant (Cultural Theme Group of Rural Policy Committee, 2011).

### 3.3.5 Cross-Border Connections in Cultural and Creative Industries Policy Arena

#### 3.3.5.1 Ireland and Northern Ireland

Organisations in culture and creative industries can have an all-Ireland focus. For example, interest groups and representative organisations, such as the Amateur Drama Council of Ireland, Artists Studio Network Ireland, Screen Producers Ireland and Visual Artists Ireland are all-island bodies. Voluntary Arts is a UK and Republic of Ireland body that promotes participation in amateur arts and crafts and cultural activities.

Since 1978, a programme of cooperation between the Arts Council of Ireland and the Arts Council of Northern Ireland has existed (Fitzgibbon, 2012). The DCAL conducted a scoping exercise across its non-departmental bodies and found high levels of cross-border cooperation between Ireland’s and Northern Ireland’s arts and culture bodies. It plans to publish an all-Ireland action plan for cross-border cooperation before the end of 2014 to enhance cooperation (DCAL, 2013a). Examples of such cross-border connections include the Heritage Sub group between the Department of the Environment in Ireland and the Northern Ireland Department of Culture, Arts and Leisure. The Arts council of Ireland and the Northern Ireland Arts Council work collaboratively on research, co-founding and sharing best practice (Fisher and Figueira, 2012). For example, the two bodies work together on a Touring and Dissemination of Work Scheme that supports touring exhibitions and performances between Ireland and Northern Ireland that show a working engagement between producers and venues (Arts Council, 2013). In minority languages, there is cross-border cooperation on policy through the North South Language Body comprised of the Irish Language Agency, Foras na Gaeilge, and the Ulster-Scots Agency. One area of
work of the British Irish Council that aims to promote positive relationships and provide a forum for cooperation between the region’s governments, is indigenous, minority and lesser used languages (Fisher and Figueira, 2012).

3.3.5.2 Nordic Region

The Economist (2013) outlines how a cultural revolution and renaissance has occurred in the Nordic region over the last 20 years in areas such as crime fiction and game development, saying “one of the world’s blandest regions has become one of its most creative”. The key to this change is a combination of reinventing the old and inventing the new. At the heart of this, is a regional pride, and a re-embracement and celebration of the regions’ culture, be it to inspire new writing, or through cuisine.

A tradition of international cooperation on culture exists in the Nordic region. For example, in Sweden, this has occurred between cultural institutions, government agencies and NGOs, on national, regional and local levels (Harding, 2012).

The benefit of this transnational approach is recognised. Sweden, Finland, Norway, Denmark and Iceland are considered in Flemming’s (2007:13) Creative Economy Green Paper for the Nordic Region which highlights the importance of strategic policy development at different scales. For example:

“An approach that identifies pan-Nordic solutions is not to be developed as a means of devaluing local and sub-sectoral approaches. On the contrary: it is local and sub-sectoral approaches that most effectively reach creative businesses and are most pertinent to business development and growth. In addition, state investment is relatively devolved in the Nordic Region, firmly establishing local policy as a critical driver. A carefully planned and selective pan-Nordic approach is designed to add value to the local and sub-sectoral by maximising impact on a global scale”.

The KreaNord programme is an important arena for cooperation between Nordic countries to support development of the creative economy to a position of world leadership.

3.4 Conclusion

Creative and cultural industry policies can take a number of forms. They can be local, regional or national, focusing on creative industries or the broad creative and cultural sector. Policies can also be sectoral, focusing on a specific aspect of culture or a particular creative industry at local, regional or national level. The state of development of creative and cultural industry policy approaches differs between the nations of the Creative Edge partnership. Ireland and Northern Ireland share commonalities in their approach, with little formal cooperation across ministries, and local authorities playing an important part in promoting arts and culture. Sweden and Finland also share similarities, having well developed policies on creative and cultural industries, cross-ministerial cooperation playing an important part in policy development, and regional governance mechanisms in place to support these industries. In the report of the Open Method of Coordination Expert Working Group on Cultural and Creative Industries (OMC-EWG-CCI), it is noted that some EU countries have well developed cultural and creative industry policies, while others are in the preliminary stages of developing policy. It is also stated that others still focus very little on cultural and creative industry policies, and the importance of developing a political awareness and sensibility towards this policy area is recommended (OMC-EWG-CCI, 2010).

In the next chapter, discussion moves away from the general policy context at each national level, to focus on reports, research and evidence that offer insight on how future creative and cultural industry policy should develop. This discussion focuses particularly on the peripheral context, to tease out what can be learned from existing research in the field for future policy design.
THE NEED FOR A SHIFT IN THE SCALE OF POLICY-MAKING IN CREATIVE AND CULTURAL INDUSTRIES IS A KEY THEME IN CULTURAL POLICY RESEARCH. CITIES HAVE RECEIVED MUCH ATTENTION, AND THERE IS A NEED FOR A SHIFT IN FOCUS. THE CREATIVE EDGE PROJECT IS CONCERNED WITH THE PERIPHERAL PERSPECTIVE, WHICH ALSO ENCOMPASSES THE SMALL CITY AND RURAL AGENDAS.
Chapter 4: The Policy Making Challenge

4.1 Introduction

A variety of policy approaches exist to support creative and cultural industries. However, this does not make devising policy a straightforward process. One of the key messages of UNCTAD's 2010 Creative Economy report is that:

"Each country is different, each market is special and each creative product has its specific touch and splendour. Nonetheless, every country might be able to identify key creative industries that have not yet been exploited to their full potential so as to reap developmental benefits. There is no one-size-fits-all prescription; each country should formulate a feasible strategy to foster its creative economy, based on its own strengths, weaknesses and realities" (UNCTAD, 2010).

The policy-making challenge for creative and cultural industries exists everywhere because all places have resources that can be capitalised on. However, at the country level, developing creative industries would also benefit from attention to their different contexts, such as large cities, small cities, and rural areas. The need for a shift in the scale of policy-making in creative and cultural industries is a key theme in cultural policy research. Cities have received much attention, and there is a need for a shift in focus. The Creative Edge project is concerned with the peripheral perspective, which also encompasses the small city and rural agendas.

In this chapter, a broad general overview of policy strategies for creative and cultural industries is outlined. A number of key challenges for creative and cultural industry policy making are identified. However, policy must not just consider broad policy issues, but also be focused on addressing issues that arise in different contexts. Therefore, in this chapter the peripheral perspective is considered in detail, with challenges and issues first outlined, before then moving on to present some areas of potential future policy direction. The discussion also presents policy initiative examples and policy approaches that have addressed similar challenges.

4.2 Policy-Making Instruments, Frameworks and Challenges

Policy is a package of instruments. Throsby (2010) outlines the types of instruments typically contained in cultural development strategies, in combinations of one or more, such as:

- The provision of infrastructure
- Finance and investment providing access to start-up or working capital
- Capacity-building at local level encouraging people’s active participation in arts and culture
- Inter-jurisdictional cooperation with cross-departmental and agency cooperation in different areas
- Support for the core of creative arts which also supports the broader cultural and creative industries underpinning cultural production

Policy areas that can support the creative economy, identified by the UNCTAD (2010: 260) are:

- Mapping of inventories of cultural assets and creative industries
- SME business development and finance (e.g. microfinance)
- Promote creative clusters to stimulate collaboration, innovation and linkages
- Copyright awareness and legislation
- Support for artists and the arts, both direct (e.g. taxation, social security) and indirect (e.g. private sector support, training, professional associations, laws)
- Conservation of tangible and intangible cultural heritage
- Expansion of digital capacity and know-how
- Domestic and export market development (e.g. quality, brands, trade facilitation)
- Better articulation between creative industries and tourism objectives
- Education, vocational training and business skills development
- Industry assistance (e.g. investment incentives, tax concessions, bilateral agreements, co-production contract negotiation etc.)
However, effective policy development that facilitates creative and cultural industries reaching their growth potential is more complex than just selecting a range of policy instruments. The need for a more holistic, multifaceted and strategic approach is identified. A set of broad challenges face policy-makers when devising creative and cultural industry policy to ensure it best serves the contexts in which it is applied. In the next part of this chapter some of the broader policy issues are outlined and discussed, which are relevant to all contexts.

4.2.1 General Policy-Making Challenges

The 2010 European Commission Green paper ‘Unlocking the potential of cultural and creative industries’ identifies a number of challenges for the further development of cultural and creative industries. The first challenge is that the correct enablers are put in place so entrepreneurs can experiment and innovate, and have access to funding and the correct mix of skills. Enablers that provide new spaces for experimentation might be in the form of collaborations between institutions, the arts and academia, or through meeting places and laboratories where creative and cultural entrepreneurs can experiment and innovate. Clusters are also identified as an ideal organisational structure to facilitate cooperation between businesses. The need for innovative financial instruments and better access to funding is also identified as an important enabler. Matching creative industries skills needs and education provision is another enabler for growth. The question of education and skills needs is addressed in detail in chapter five. These enablers should foster the correct kind of environment so that cultural and creative industries can flourish towards their potential.

The second major challenge listed by the 2010 European Commission Green paper is that the local and regional creative and cultural industry environment should be developed as a launch pad for the global success of these industries. The role of cultural and creative industries in regional development should be taken into account in the design of policies at the local level, and not seen as a luxury policy option, but a part of social and economic development. Cross-European knowledge-sharing is also highlighted as important in regional development of cultural and creative industries. Mobility of cultural and creative entrepreneurs and facilitation of cultural exchanges is another factor highlighted as important from this respect. The third challenge highlighted is to catalyse the spillover effects of creative and cultural industries in wider social and economic contexts. For example, these industries can contribute to an innovation-friendly economic environment. In addition, strong cultural resources improve a place’s attractiveness for living and working.

The challenges highlighted in this green paper are reflected to a large extent in the EU Open Method of Coordination Expert Working Group on Cultural and Creative Industry’s (OMC-EWG-CCI) framework for development of creative and cultural industries. This framework is based around three aims, which can be summarised as:

- Creating the correct preconditions
- Supporting existing and emerging businesses
- Harnessing the spillover effects for wider society and economy

The first part of the framework, creating the preconditions and a favourable environment for developing creative and cultural industries, may take the form of raising awareness, developing strategic alliances and better understanding of creative and cultural industries through mapping studies. The second part, strengthening creative and cultural industries, can be through measures such as developing networks and clusters, increasing access to finance and introducing measures supporting business incubation. The final part, harnessing the spillover effects of creative and cultural industries for society and the economy, can be implemented through tourism, regional development, lifelong learning, social and business innovation (OMC-EWG-CCI, 2012).

This assessment of policy instruments and frameworks has shown that to fully capitalise on creative and cultural industries, policy must engage with creative and cultural industries in a number of ways. Policy should focus on existing creative and cultural industries, but it should also focus on creating the correct environment for creativity to flourish, while also capturing the additional benefits of the existence of creative and cultural industries, beyond their primary effects. This approach is even more fundamental in the context of sustainably and effectively developing rural and peripheral creative and cultural industries. Because creative and cultural industries are less concentrated in peripheral places, to most effectively develop their full
potential, this three pillar approach - creating the best preconditions, supporting existing industries, and harnessing the spillover effects - is important.

In the next part of this chapter we focus on some more specific aspects of creative and cultural industry policy-making. We begin by focusing on some general issues not linked to all contexts, but also consider policy issues from the peripheral and rural creative industry perspective.

4.2.2 The Policy-Making Process

One central issue in policy-making is the diverse nature of creative and cultural industries. This trait adds a fundamental challenge for policy making. What is important is an awareness of what Gibson and Kong (2005) term the ‘polyvalency’ of the sector i.e. it has many facets and forms, and policy design approaches should begin with a strong awareness of this fact. Also because of the diverse nature of creative industries, responsibility for policy development can be unclear. Nielsén (2008) highlights how the needs of creative industries can fall between areas of responsibility, and primarily between the areas of industry, culture and education. UNCTAD’s 2010 Creative Economy report states that policy must recognise the multidisciplinary nature of the creative economy, which has economic, social, cultural, technological and environmental linkages, requiring inter-ministerial action at the national level. It is recommended that the nature of policies themselves should be specific, and not generic, and neither top-down nor bottom-up but a mixture of both, with a range of stakeholders, such as the public sector, private sector and civil society involved in the process. Policies also must aim to achieve multifaceted aims, and not just focus on economic needs, but also the impact of creative economies on local communities, in areas such as education and cultural identity. UNCTAD’s 2010 Creative Economy report also recommends that action at one particular level should not be prioritised, but community, municipality and national level targeted plans of action are all important. The message for policy-making here is that devising policy must take into account the diverse nature of the creative and cultural industries.

There should also be cross-ministerial cooperation in policy development, and engagement with stakeholder groups.

4.2.3 Evidence-Based and Data-Driven Policy and Organisations

One way to account for the diversity of creative and cultural industries in policy development is to better understand the sector. The need for policy to be driven by data on cultural and creative industries is increasingly highlighted (UNCTAD, 2010; Lilly and Moore, 2013). Sub-sectors of creative industries have specific needs and understanding these can inform more strategic policy (Generator Sverige, 2011). Analysis of data on cultural and creative industries allows for policy-making to be informed by real world patterns of development. For example, cultural mapping of data can identify cultural hotspots. These hotspots or ‘event enclaves’ were identified by Currid and Williams (2009) where clusters of industries are found in similar locations. Evidence like this can also help inform the extent to which particular sectors of creative industries should be the focus of policy.

Creative and cultural industries in rural and peripheral places are not well understood, but some particular traits have been identified. Characteristics of rural creative business highlighted by Bell and Jayne (2010) include that working from home is a dominant trend. The arts, crafts and antiques sectors are found to have a strong connection with the tourist economy. Cross-sector working within creative industry sectors is more important in some sectors than others, and found to be important in advertising, publishing and architecture. In the Italian context, creative industries are not just found concentrated in urban locations, but for some creative industry sectors, a more complex geography is found. Bertacchini and Borrione (2013) find content and service-based creative industries (e.g. audio-visual, advertising, publishing) are found to concentrate in urban areas, while industrial design and craft-based industries had a more complex geographic distribution pattern, showing a strong presence in traditional centres of craft production, especially in municipalities of the ‘Third Italy’. It is noted that craft and artisan production is present in many rural European regions, and the challenge for many European countries is to revitalise these rural traditions in the context of creative economy development. Bell and Jayne (2010) also highlight different roles for creative industry sectors in rural areas.
Some creative sectors have higher economic value than others, such as advertising, architecture, publishing, TV and radio, while others, such as craft, arts and antiques, are of greater importance symbolically, based in local traditions and culture. Policy-makers also face the challenge of balancing social, cultural and economic goals in developing rural and peripheral places, and developing the correct balance of creative industries should then contribute to more sustainable development. Evidence can help guide the direction of creative and cultural industry policy in rural and peripheral places. However, much more work in this area is needed.

There is also more than one role for cultural and creative industry data. It can be used to inform policy, but it can also be used by creative industries and culture organisations themselves as a tool that proves their importance definitively. Lilley and Moore (2013) highlight how ‘big data’ can improve the accountability of how public funds are used in the arts, showing that funding for the arts is not a subsidy without return, but is an investment. In creative and cultural organisations, better use of data can bring a number of benefits, such as financial, operational, and increasing in social impact. Lilley and Moore (2013) call for ‘data-driven decision-making’, and argue that arts and culture organisations should make being a data-driven organisation a strategic objective of their organisation. It is also argued that data driven decision-making does not replace human wisdom and experience but enables better decision-making. Using data alongside stakeholder insights can improve human decision-making.

In recent years, the importance of evidence is increasingly recognised. In England, for example, Regional Development Agencies have invested in research to identify clusters and sectors of significance (Taylor, 2006). DACL (2012) conducted an analysis of creative industries in Northern Ireland to better understand the dynamics and performance of the sector and to inform policy-making and make informed policy decisions. The UK Department for Culture Media and Sport set up the Creative Industries Task Force and it produced the Creative Industries Mapping Document in 1998 that mapped creative industries around 13 sub-sectors of creative industries. This was the first attempt to map creative industries at the national scale (British Council, 2010). This mapping exercise is seen as important in the value of the creative sector becoming recognised in the UK. It progressed understanding of the sector and informed policy. It was particularly useful to creative industries for advocacy as an authoritative statement about the value of creative industries (Taylor, 2006). Other countries, for example Australia, have published culture statistics, showing the contribution of culture to the economy (Australian Bureau of Statistics, 2013a). Also in 2013, the Australian Bureau of Statistics published a feasibility study on producing cultural and creative satellite accounts for Australia, to find that a reasonable level and quality of statistics are available to make this possible. The paper also considers how to measure the contribution of culture and creative activity, which would comprise measuring economic activity in industry supply chains, activity in selected occupations outside those supply chains, volunteer services, and output supported by charitable contributions. It is also suggested that ‘culture’ and ‘creative’ activity should be measured separately (Australian Bureau of Statistics, 2013b).

Putting this policy-making tool into practice is easier said than done. It needs collaboration between policy-makers, research institutes and industry, as well as programmes of support for such work (Taylor, 2006).

Developing an evidence base to inform policy is not a simple process. Resources are needed to support work that can produce well-informed research, and accurate and reliable statistics. For example, the German Federal Ministry of Economics and Technology has established the Cultural and Creative Industries Initiative of the Federal Government which has as a monitoring mechanism for reporting on current economic data of the culture and creative industries (German Federal Ministry of Economics and Technology, 2012). There is also a need for a comprehensive approach and for consistency in how data is gathered (Lilley and Moore, 2013).

This point has significance in national contexts, that an agreed definition of creative and cultural industries is applied by different research institutes involved in producing key evidence and statistics. Internationally agreed definitions, such as at the EU level, would facilitate more cross-national comparison. Also, in the context of UK regional development, Taylor (2006) raises the issue that definitions must meet a range of perspectives on the role of creative industries as an economic development tool.
Taylor (2006) argues that more clarity is needed in regional development policy objectives on the relationship between arts and culture and the creative industries, and believes cultural and economic development objectives have become muddled, with potentially creative industries being overly idealised and an over-valuing of the economic value of the arts.

Efforts are increasing to develop common frameworks for culture statistics. UNESCO published its revised framework for cultural statistics in 2009. This is also a concern receiving attention at EU level. The European Statistical System Network on Culture (ESSnet-Culture) working group has been established to revise the existing European framework for culture statistics, to improve on methods currently used to collect culture statistics, and to better encompass the complexity of the cultural sector. Its final report in 2012 makes recommendations and provides practical tools for EU member states. This includes the definition of a list of cultural NACE codes and a ranking of their cultural link and is composed of a list of 29 4-digit classes of the NACE Rev.2. Of these, 22 are entirely cultural in content while 7 are mainly cultural. NACE or Nomenclature des Activités Économiques dans la Communauté Européenne is a pan-European classification system that groups organisations according to their business activities.

4.2.4 Considering Rural and Peripheral Needs for Context-Based Policy

Where creative and cultural industries are located should be considered in policy. Attention to creative and cultural industries has had an urban bias, which has left definitions too narrow and not capturing the complexity and diversity that exists in other contexts (Jayne et al., 2010). For example, research has examined the creativity embedded in rural festivals, suggesting it is less commercially-driven and a more socially-embedded type of creativity. Rural festivals are found to be small, quirky, organised by charities or local committees working with limited resources and relying on volunteers (Gibson, Brennan-Horley and Walsmsley, 2010). Experts have warned against the application of the same policy measures in rural and peripheral contexts, calling for greater understanding of creative and cultural industries in these contexts (Bell & Jayne, 2010; Ström & Nelson, 2010).

Gibson and Kong (2005) argue that interpretations of the cultural economy have become normative and script-like. This ‘script’ reads as follows:

“Contemporary capitalism is characterised by more recently dominant forms of accumulation, based on flexible production, the commodification of culture and the injection of symbolic ‘content’ into all commodity production. Some places do better than others from this: those that have highly skilled, creative, innovative, adaptive workforces, sophisticated telecommunications infrastructures, interesting and diverse populations, and relatively low levels of government interference in regulating access to markets, as well as lifestyle attractions, restaurants and arts institutions to attract the new ‘creative class’. In order to compete in the new cultural economy, places should seek to implement particular policy initiatives: encourage cultural industry clusters, incubate learning and knowledge economies, maximize networks with other successful places and companies, value and reward innovation, and aggressively campaign to attract the ‘creative class’ as residents” (Gibson & Kong, 2005: 550).

Gibson and Kong (2005: 552) warn that there is a danger that can emerge from this, that the complexities of place, and the knowledge of local actors is not integrated in policy development: “An obvious danger in the emerging model of academic-knowledge to policy traffic is one of assuming singular ‘recipes’ for success in transforming places, based on the advice of experts and advisors not well enough grounded in places to account for the more complex and contested geographies they contain”. More holistic models of policy development are needed to design policy in tune with the needs of peripheral rural places. Collaborative policy-making, such as demonstrated by the ERIBA model (discussed further in section 4.3.1 below), is one potentially fruitful approach. Fuller appreciation of the assets available in peripheral places is also needed. For example, in the urban context, Throsby (2010:133) argues that cities can be understood as a collection of capital assets, physical assets (buildings, economic infrastructure), natural capital (natural
resources and ecosystems), human capital (skills, capacities of inhabitants) and cultural capital (tangible and intangible cultural assets). In this context, urban development projects can make a number of interventions in these categories, to create new assets, to improve efficiency of existing assets or to restore, recycle or re-use old assets. Understanding rural and peripheral places in this way could also help devise policy that works from available resources. While there is potential for developing creative and cultural industries in peripheral places, they also face challenges. Identifying these, and ways to reduce their impact, is an important issue for better policy development for creative and cultural industries.

One issue for creative and cultural industries in peripheral places is that their culture and creativity is not well understood and is perhaps blemished by stereotypes, while many cities have a more positive creative image. The distinctiveness of creative and cultural industries in cities has been described as being made up of a diversity of culturally-rich districts and clusters of creative industries that exude a buzz and energy. This all makes for more attractive cities. Strong arts and culture in cities is said to improve their attractiveness, making them more inviting places to live or visit. Festivals, cultural events, and cultural facilities, such as a significant museum or cultural symbols including significant buildings or structures, can contribute to making places more attractive. Creative and cultural industries in peripheral and rural places also have their own distinctive traits, but have not received as much focus as the urban creative and cultural tale. Rural creative economies also have a story to tell, but this can be overshadowed by stereotypes of rurality. A 2005 Arts Council of England report highlights the need to move beyond outdated impressions of what is rural, to acknowledge the diversity of the arts in rural areas, and also to recognise this by building policy that specifically supports rural needs (Matarasso, 2005). Rural creativity has been characterised as diverse, quirky, specialist and authentic.

Cultural policy recommendations for rural areas in Finland recommend developing rural areas on the basis of diversity, and as a ‘countryside of creative contrasts’ (Cultural Theme Group of Rural Policy Committee, 2011).

Therefore an important part of developing cultural and creative industries in rural and peripheral places is to work to change perceptions of these places (Bell & Jayne, 2010). The strong creative image of urban places, and negative associations with peripheral places can draw creative talents away from the periphery and towards the city. Part of the challenge for peripheral places is to recreate themselves. Festivals can be one tool to contribute to this.

In Gibson, Brennan-Horley and Walmsley’s (2010) assessment of the nature of rural creativity, they argue rural festivals should gain more attention from regional development policy-makers. They observe the breadth and diversity of festivals in rural areas, including sporting, agricultural, music and arts festivals. Festivals can be part of coordinated regional development strategies, but were most often non-commercial and rooted in the community, and not about producing material goods. While non-commercial, they still generate significant income for rural places. An important point observed is that this form of creativity differs from creative industry policy research that can focus on attracting creative industries to places, but this form of creativity is said to focus on producing an authentic cultural experience. Festivals are touted as an example of a potential joined-up policy initiative for rural areas, where connections between the food, tourism and creative industries can be jointly promoted (Bell & Jayne, 2010). They also increase the visibility of creativity, which is an important factor in the perception of the vibrancy of places (Bennett, 2010). Constructed correctly, their value can extend beyond festival days (Curtis, 2010).

Peripheral places also face a number of other specific challenges to overcome to develop their creative and cultural industries (Andersen, 2010; Bennett, 2010; McGranahan & Wojan, 2007).

They need to retain and attract creative talents to live and work in them.

High youth out-migration is a challenge as young people move away to gain education or employment, and creative workers can be lured to big cities because of the vibe they emulate. Remoteness itself is also an issue and the physical distance from cities and events. The time and cost of travelling to the periphery also adds a difficulty in attracting people, and selling products and services from the periphery. Other disadvantages include a lack of funding sources, low consumer spending power in local markets, a lack of critical mass of skilled professional people to network with in the
locality, and limited paid work opportunities to sustain a living (Andersen, 2010; Gibson, 2010). These are a diverse range of issues and some more challenging to overcome than others. However, some of the attributes of peripheral places that can be a disadvantage, such as remoteness, can be reconstructed as an attractive attribute of peripheral places. Creative workers can be lured to peripheral places, their rural areas, small towns and cities because of their attributes, such as offering a quieter, slower pace of life, where there is a sense of peace, tranquility, solitude and freedom. This different pace of life is described as offering a better quality of life, where its slower pace brings fewer stresses and accessibility to natural landscapes for recreation and inspiration. Marginality can be negotiated and overcome to some degree, and remoteness and marginality can become part of the attractiveness of place. Peripheral places have been described as offering a distinct, quirky experience, and an alternative to the fast-changing fashions and trends that can be a factor in more urbanised creativity. Creative and cultural industries in rural and marginal areas are identified as less commercially-driven, with greater connections to community and a greater focus on social goals. Locating in the periphery can also bring economic benefits such as cheaper office and studio rents and, general, a lower cost of living (Gibson, 2010; Andersen, 2010; McGranahan & Wojan, 2007).

Evidence also suggests that care is needed not to over-value the potential of developing strong creative and cultural industries in peripheral areas (Petridou and Ioannides, 2012). They are not a panacea for economic development issues in peripheral places and strategies aiming to develop strong creative and cultural industries may not be suited to all parts of peripheral places. Argent et al. (2013) caution that rural development strategies may over-emphasise the role of creative workers in economic development, but do acknowledge they are an important component of rural revitalisation, in that their presence is important as innovative, entrepreneurial people, creating less tangible social and cultural benefits. Their research finds that the presence of creative workers does impact on business growth, however it does not have a substantial effect, and is comparable to other sectors. However places differ, and research in rural US by McGranahan and Wojan (2007) shows that the presence of the creative class did have a positive effect on employment growth. Importantly, however this research also makes other important distinctions. It is also suggested that not all rural areas will be attractive to creative workers. Attractive rural places should have particular traits, such as adequate services, natural amenities, attractive landscapes, and outdoor recreation opportunities. Other attributes particular to this area of study highlighted are a rich cultural heritage, an active arts community and local norms that do not impose conformity and restrict creativity.

The research also makes other useful observations. The rural creative class is attracted to more densely populated rural counties. Compared to the urban creative class, this rural creative class is found to be older and, more often, to be married (McGranahan & Wojan, 2007). Argent et al. (2013) also argue a certain critical mass of economic, social and cultural activity is needed to attract the creative worker. They are drawn to the more attractive rural places, and not just any rural place. Peripheral places focusing development around culture and creativity should have specific natural, physical, and cultural capital, or make increasing this capital a central part of the development strategy for peripheral places.

4.3 Policy Approaches

Approaches to creative and cultural industry policy development and policy initiatives that work to overcome challenges and issues raised are the focus of this section. We aim to provide a set of tools for policy development geared towards addressing the general deficiencies in policy, as well as being focused on the particular needs of peripheral places. A number of useful wider resources is provided in Appendix 2.

4.3.1 Working to Overcome the Challenges of a Diverse Industry – Policy Process

The need for collaboration between policy-makers and stakeholders in culture, industry, and education to develop effective policy is a central consideration highlighted earlier in this chapter. This makes policy-making challenging, with different agendas to consider. However, the design of the policy process can help address these issues for effective policy development. Collaboration is an important part of the policy development process, but can also inform industry development (see Box 4.1).
Emerging from the Knowledge Foundation in Sweden, the FUNK policy model is designed around collaboration to address the diversity of agendas raised by creative and cultural industries. The ‘FUNK’ policy model promotes collaboration between research (F), education (U), private sector (N) and culture (K). The aim is that collaboration occurs between these actors, applied in sectors of the ‘experience economy’ to facilitate their growth. The policy model is designed to be applicable at both national and local levels, to the experience economy as a whole, or specific sectors. The process of collaboration between the FUNK players is intended to develop strategies help overcome some of the challenges faced by the diverse creative industries, that is composed of micro businesses and multinationals, new and established businesses, and the need to internationalise for growth. Collaboration as part of the FUNK model involves both developing policy strategies and also more concrete collaboration (Knowledge Foundation, 2008).

The ERiBA model emerged from adaptation of the FUNK model. It was applied in Hultsfred in Sweden to develop business activities around an annual rock festival, and found to be successful in this case. Based on the Hultsfred case study, the ERiBA or E (Education and training), R (Research), I (Industry), B (Business), A (Arts/Culture), model emerged, with focus on creative industries, rather than the experience economy. The central emphasis again is on collaboration between these key elements to identify needs, pinpoint measures to address them, and implement the measures in collaboration between all players. Measures developed are focused on each of the ERiBA areas in order to stimulate economic growth. It is also noted that this is not a completely new concept, but is likened to the ‘quadro helix’ concept where there is interaction between industry, the public sector, academia and the arts in policy development (Nielsén, 2008).

In 2007, the ERiBA model was applied in seven Swedish locations, focusing on places where a particular industry had the strongest supports. The result was seven industry-specific growth proposals. While each sector had its differences, there were also similarities, and the proposals were merged to form a national strategic plan summarised in ten focus areas that form a common foundation for collaboration in creative industries (Nielsén, 2008).

**Box 4.1: Collaboration Between Creative Industries**

**DinoLab**

Collaboration between groups such as industry and academia can also go beyond the policy formulation process. DinoLab or Digitala Idéplatser Norr is a Swedish initiative that aims to strengthen the audio-visual industry in northern Sweden. It aims to increase opportunities for creative entrepreneurship and businesses, develop new knowledge and high-level competences, support academic research, and develop of new technology as well as new combinations of technology. A number of academic researchers work on the project from Umeå University and the Skellefteå Campus of the Luleå University of Technology. DinoLab operates an ‘ideas forum’ where the public are invited to submit ideas for DinoLab to consider developing as projects. It supports workshops for the audio-visual industry and has implemented a number of projects to support the industry in northern Sweden. Among these is the piloting of a prototype called ‘The Creature’, an experimental concept for gaining instant feedback from audiences, and increasing engagement between the speaker and audiences at events, through screen-based devices, such as smartphones and tablets.

[www.dinoprojektet.se](http://www.dinoprojektet.se)
4.3.2 Supporting Creativity and Culture by Creating an Enabling Environment

One theme among the general policy needs identified earlier in this chapter is the appropriateness of environmental conditions for creativity to flourish. This includes facilitating entrepreneurship, innovation, and creativity. There is a danger in developing creative industries that too much focus is placed on the commercial, enterprise side of creative industries, at the expense of culture (Generator Sverige, 2011). Pratt (2004) also identifies a tension between the broad cultural sector and creative industries. The cultural sector is described as traditionally having a not-for-profit focus, placing cultural products before profit. However, creative industries have a different starting point: they aim to profit from their creativity, and profit and creativity go hand in hand. There is a debate that if there is too much of a focus on commodities, assets, and profit in cultural and creative industries, this will have a negative impact on the arts from the perspective of artistic creation and authenticity. The challenge is for the cultural and creative industries to innovate and retain authenticity, without overcapitalising on creativity at the expense of authenticity (Pratt, 2004; Oakley, 2009). What is termed ‘culture-based creativity’, to think imaginatively and laterally, to challenge and break conventions, has been described as an essential feature of the post-industrial economy. And for it to emerge, the correct environment must be created (European Commission, 2009). Initiatives such as Arts in Action at the National University of Ireland, Galway, that help to promote arts and culture among students, can contribute to this. Another initiative that supports a creative society and economy is Fab Labs, which promote creativity with a focus on innovation and entrepreneurship (see Box 4.2). Creativity underpins the creative industries, and retaining a central focus on harnessing and promoting culture and creativity in wider society is also an important focus for creative and cultural industry policy. And while challenging to maintain, it is the strength on which the industry rests.

4.3.3 Working Together Nationally and Cross-Nationally

An important part of support for creative businesses is facilitating their networking and cooperation. In the context of peripheral areas and creative and cultural industries, this has been highlighted as particularly important. For example, Petridou and Ioannides (2012) argue that fostering culture and creativity are valuable regional development tools, but also that in peripheral contexts, limited resources make cooperation a necessity to effectively capitalise on the potential of creative and cultural industries. Cooperation can occur between individuals from the same sector, for example artist’s cooperatives. Bottom-up, creative and cultural industry-led cooperation is said to be especially important in peripheral areas. Cooperation at different levels across different creative and cultural industry sectors and between regional and local governance bodies is also important.

Examples of such cooperation in peripheral places include the Lodge, a network of internet, film and game companies based in the northern Swedish city of Skellefteå in Västerbotten county. The network includes companies such as North Kingdom, Hello Future, Dreamfield and Arrowhead Game Studio. The companies have worked together on international projects with big name companies such as Adidas, Disney and Toyota. The Lodge does not just collaborate commercially, but also acts as a representative organisation for creative industries in the area (Västerbotten Investment Agency, 2013).

International cooperation not only opens up the potential for development of new knowledge and business collaboration networks, but also potentially greater access to export markets, as cross-national cooperation between Nordic counties has demonstrated. Internationalisation and export strategies of cultural and creative industries in EU member states differ in their levels of engagement with export and internationalisation. The engagement of Nordic agencies with each other to create a regional Nordic ‘brand’ to promote the growth of cultural and creative industries and move into international export markets, is cited as an example of a good regional policy and the benefits of working across national boundaries (Mercer and Staines, 2013). Different examples of international collaboration in creative industries are discussed in Box 4.3.

Research has pointed to the need for new business models to facilitate different kinds of relationships between creative businesses (European Commission, 2010, ENCATC, 2013).
Box 4.2: Initiatives supporting creativity and culture

Arts in Action

Arts in Action is a creative arts programme run by the College of Arts, Social Sciences and Celtic Studies at the National University of Ireland, Galway (NUIG). The programme aims to promote a greater awareness of the performing arts among students and increase their engagement with them. It includes a practice-based class, ‘Exploring the Indigenous Arts’, for US visiting students to NUIG exploring Irish music, song and dance. Arts in Action also organises a series of performances throughout the academic year featuring music, dance, drama and poetry readings. This includes a free lunchtime concert series open to all members of the NUIG community. This removes the cost barrier to arts engagement. The programme also helps to promote the rich arts and cultural heritage in the west of Ireland. The 2013-2014 Arts in Action performance programme focuses on young, emerging performers and legends of traditional Irish music. The focus is also on performers from the west of Ireland, such as from counties Sligo, Donegal, Leitrim, Mayo and Galway.

www.nuigalway.ie/artsinaction

Fab Labs

A Fab Lab or fabrication laboratory is a community space that helps people turn creative ideas into real products. Professor Neil Gershenfeld at Massachusetts Institute of Technology first developed the idea. Fab Labs aim to provide the environment, skills and technology to enable people to experiment and innovate, thereby encouraging entrepreneurship and creativity. They also have an educational role by providing training. Innovative products that have emerged with the help of Fab Labs include a tracking system for sheep with the use of mobile phones in Norway, and a truck refrigeration system powered by the vehicles exhaust in Ghana. There is a global network of 150 Fab Labs, two of which are in Northern Ireland, in Belfast’s Ashton Centre and Derry’s Nerve Centre. Equipment includes open-source design software and a selection of computer-controlled machines, such as 3D printers, laser cutters and milling machines. Commercial projects can also make used of Fab Labs, but eventually move beyond the Fab Lab space (Fab Labs NI, 2013). Fab Labs don’t just benefit creativity in the community, but are also a resource for creative industries. Craft Northern Ireland has collaborated with Northern Ireland Fab Labs to offer craft businesses a digital design and fabrication training programme (Craft Northern Ireland, 2013).

www.fabfoundation.org
http://fab.cba.mit.edu/
www.fablabni.com
Cooperatives and social enterprises can play a part, but newer and more dynamic business models are also important. In the context of culture organisations, the European Network on Arts-Cultural Management and Cultural Policy Education (ENCATC) (2013) point to models such as the cellular model where an organisation is governed by series of ‘cells’ or task forces, and the network model where there is cross-organisational collaboration, both public and private. Business models that involve creative businesses in different parts of the production chain also could enable creative industries to capture more of the economic value created by their products (European Commission, 2010). In the context of technological evolution and digitisation, new business models are needed in many creative industries most affected by the digital world (Skantze & Pihlgren, 2012). E-commerce and online social media communities also offer an opportunity for peripheral creative businesses as marginality is less of a challenge in building networks and connecting with distant markets online.

### 4.3.4 Promoting the Periphery as an Attractive Place

Challenges identified as inhibiting the development of creative and cultural industries in peripheral places are the image and associations made with the periphery, and the migration of creative workers to cities. However, working directly on these issues as policy concerns could help overcome problems they create. Some policy initiatives are identified in Box 4.4.

The rise of cultural and creative industries in rural areas has been linked with a broader trend towards a desire for a counter-urban lifestyle. The periphery also has its advantages, and it can be directly promoted as an attractive place.

For example, Gibson and Kong (2005) link the growth of visual arts in Broken Hill, a remote part of Australia, to its landscape and cheap housing rents that artists with unstable incomes could afford to rent. In developing the creative economy, a central challenge for the peripheral place is to retain a greater proportion of its creative talent, and also attract creative talent (Bennett, 2010, Argent et al., 2013). Bennett (2010) identifies that migration of creative artists (focusing on music, visual arts and film) is driven by push and pull factors. Push factors include lack of opportunity to sustain a full-time career, and isolation in their profession. Pull factors attracting creative artists away from peripheral places include more established industries and clusters in other places. However, migration also has its drawbacks. It is financially risky if employment is not secured before moving, and networks must be built up, which are vitally important to securing work as a creative artist. Networks, both personal and professional, are also left behind. Migration can be an option taken out of necessity and not choice. Push factors can be also be negated to a certain extent. For example, Bennett (2010) highlights how smaller markets can provide a means for early career creative entrepreneurs to connect with their professional fields. It is also argued that those who have migrated should be facilitated to stay connected with where they migrated from, as their success can contribute to how their home-place is perceived. The use of virtual networks can connect creative talents in a local area with national and international networks of creative talents who have migrated. This can re-frame such migration more positively and facilitate those people to remain involved as ‘active agents in the cultural life and image of our cities and regions’ (Bennett, 2010: 126).

Focusing on place can play more than one role in development strategies for creative industries. Aspects of place can also be used as a promotional tool for creative products.

For example, Andersen (2010) highlights how creative artists from Sweden, Australia and the US use aspects of place, landscape, culture, tradition and their marginality, that are all rooted in place to inform their products, and market them to consumers.

### 4.3.5 Capturing the Spillover Potential of Creative and Cultural Industries

Cultural industries are systematically related, and growth in one sector within this industry can lead to growth in others, for example furniture production and design (Power, 2002). In the Swedish rural context, and based on the experience of the furniture industry, a growth pattern has been observed, where growth occurs around a single large firm or a cluster of firms. Diversity in rural cultural industries is also observed, and this is seen as a positive part of how cultural industries should be structured in rural areas: “Diversity and small scale may not produce global brand names like IKEA, a more generalised spread of activities and organisational forms may be beneficial to rural/remote areas by supporting a healthy tourist industry” (Power 2002: 119).
Box 4.3: Initiatives to Promote Working Together Nationally and Cross Nationally

**Kilkenny Design Workshops**

To reflect on a historical example, Kilkenny Design Workshops Ltd (KDW) helped develop the Irish craft and design industry. KDW was an Irish government-owned industrial design consultancy, and the first organisation of this type set up by a government. It was established in 1963 and abolished in 1988. Set up in response to the findings of the 1961 Scandinavian report on Irish design, it also shows the value of international expertise to offer insight on national problems. The legacy of the KDW is considered to exist to the present day, with its influence still felt in Irish craft practice and design culture. Deliberate emphasis was placed on craft-based industries during the formative years of KDW, seen to be where innovation starts, with traditional craft products where the cultural characteristics of a country can emerge. Reviving traditional craft skills, increasing awareness of the importance of design and designers were aims of the consultancy. The focus was on craft, which was considered the area where public engagement with design and designers could most easily occur, thereby increasing public awareness. It focused on education, upholding good standards and innovation in design and promoted international export development (Marchant and Addis, 1985).

**FilmArc**

An international network across parts of northern Finland, Norway and Sweden, FilmArc works to strengthen the audio-visual sector in these regions. The network has built up a considerable base, with over 300 businesses and 400 freelancers now part of the network. The key goal of the FilmArc network is to help audio-visual creative businesses to develop and internationalise. It directly supports businesses by providing funding for up to half of the costs of, for example, contracting an expert consultant, developing marketing materials, translating a script, running a pilot project, or attending a conference, festival or professional training course. It runs a series of educational workshops and master-classes, which have been led by some of the most successful and talented people in the Scandinavian and European film and TV business. The network is made possible by the cooperation of film organisations in the regions, such as FilmCamp in Norway, the POEM Foundation in Finland, Filmpool Nord and Film i Västerbotten in Sweden (FilmArc, 2013).

http://filmarc.net/
KreaNord

Coordinated by the Nordic Council of Ministers, KreaNord is an example of an international cooperative effort across the Nordic region. It aims to support the Nordic region to become one of the leading regions of the global creative economy through engaging government, industry and experts in developing the creative economy. Countries collaborating in KreaNord are Sweden, Norway, Iceland, Finland, Denmark and the Faroe Islands. Among its initiatives is a grants programme that supports projects with an international focus, commercial potential, thereby aiming to increase the competitiveness of the Nordic creative industries. It funds specific projects such as the Nordic Game Programme that facilitates children and young people access Nordic computer games and the Creative Business Cup, a global competition for creative business entrepreneurs. KreaNord also operates an investor network that assists creative industries to access capital (KreaNord, 2011).

www.kreanord.org
www.kreanordinvestors.org

MyCreativeEdge

MyCreativeEdge is a website developed through the Creative Edge project that provides creative industry businesses, freelancers and jobseekers, in all the Creative Edge partner regions the opportunity to showcase their work at no cost. MyCreativeEdge also provides an avenue for consumers and businesses to explore creative products and creative suppliers from across Europe's northern edge. The sectors showcased on the site include advertising and publishing, architecture, arts, crafts, design, digital media, fashion and jewellery, film and video, music and theatre, photography, software and gaming, and TV and radio. Creative business and freelancer members of MyCreativeEdge each have their own profile page in the 'Creative Showcase' section of the site. The 'Employ a Creative' section allows young creative talents to promote their skills to potential employers. There is also a members’ area, the MyCreativeEdge Forum, providing networking opportunities, opening national and international links between creative businesses.

www.mycreativeedge.eu
www.creative-edge.eu
Box 4.4: Initiatives To Promote The Periphery As An Attractive Place

**Snow Castle of Kemi**

A strong cultural infrastructure, such as culturally iconic buildings, museums and theatres add to the attractiveness of place. One innovative building that is climatically and culturally linked to place is the Snow Castle of Kemi in the Kemi-Tornio region of northern Finland. It also features a Snow Chapel where events such as weddings and christenings can be held. It represents architectural skill in how it uses snow as a building material. Creativity and imagination like this can increase the attractiveness of peripheral places.


**goNORTH**

Festivals can positively impact the cultural perception of a place, such as arts, music and literary festivals. But creative industry-focused festivals also have potential in peripheral places. goNORTH is Scotland’s creative industry festival, held in its most northerly city, Inverness, and free to attend. The festival runs workshops for creative industry professionals, film screenings and a creative industry showcase. Other peripheral places also have the potential to showcase and celebrate their creative industries in a similar way.

[http://gonorthfestival.co.uk/](http://gonorthfestival.co.uk/)

**Creative Hubs**

Vacant buildings in towns and villages can be turned into a resource when innovative thinking is applied. The Creative Hub concept puts life back into vacant buildings by facilitating creative businesses to access unused commercial premises on a non-profit basis. This provides businesses with access to premises at a low cost and also enriches towns and villages putting life back into their streets. Craigavon Borough Council, member of South East Economic Development in Northern Ireland developed a number of Creative Hubs in Northern Ireland through the Creative Edge project. To facilitate the development of Creative Hubs, public meetings were held in Northern Ireland to engage with interested stakeholders, such as potential landlords and creative business tenants. The first of the Creative Hubs to launch was the Lurgan Creative Hub that began in March 2013. Three more Creative Hubs at Armagh, Banbridge and Newry have also been developed through the Creative Edge project. A model to facilitate replication of the Creative Hub concept in other places is also being developed by Craigavon Borough Council, available through the Creative Edge website.

[www.creative-edge.eu](http://www.creative-edge.eu)
Look West

Place promotion is not a novel idea and an initiative of the Western Development Commission in Ireland, Look West, promotes the western region of Ireland as a place to live, work and do business. Less stress, lower cost of living, a better quality of life, a wealth of leisure activities and low pupil to teacher ratios are highlighted as benefits of living in the west of Ireland. As a place to set up a business or develop a career, the west is touted as being easily accessible, having a variety of business supports and strong business sectors such as life sciences, engineering and green energy. Look West operates a company directory of businesses in the western region and a skills register, collecting information on the skills and education of people interested in moving west. The initiative launched in 2004 and interest is growing with traffic on its website increasing year-on-year (Western Development Commission, 2013). Similar initiatives have potential to focus on the periphery as a creative place to live and set up a creative business.

www.lookwest.ie

The Donegal Diaspora project

Reaching out to a global community with a connection, or interest in, county Donegal in the western region of Ireland is the aim of the Donegal Diaspora project. The project also has development goals, aiming to encourage inward investment. The network of people is also viewed as a resource that can be tapped into to develop skills and knowledge in the county to support its social, economic and cultural development. Similar initiatives linking creative talents who have migrated, back to their home-place could also benefit the cultural and creative image attached to the periphery.

www.donegaldiaspora.ie
Box 4.5: Capturing The Connection Between Craft And Tourism

Économusée

Économusée can facilitate capturing the tourism potential from the presence of craftspeople in peripheral places. It supports rural enterprise development by facilitating artisan craft businesses to develop infrastructure allowing them to serve the tourist market, offering direct experience of local culture and produce (Heanue, McIntyre & Heneghan). The Économusée concept was first developed in Québec, Canada to help artisan businesses capitalise on their cultural tourism potential. Artisan businesses use traditional techniques and therefore can be understood as a living, working museum. Économusée have an exhibition and gallery space where artefacts and information on the history and contemporary application of the artisan craft are displayed. Central to the Économusée concept is that the artisan craft maker can be observed at work in the workshop space where demonstrations of craft in practice are carried out. The term Économusée is protected by copyright and businesses must meet eligibility criteria and go through a four-stage approval process before they can use the term to promote their business (Économusée Northern Europe, 2012).

www.economusee.eu

The presence of creative industries in less urbanised and rural areas is therefore potentially more important than their actual presence immediately represents. It can lead to spin-off developments in other sub-sectors of creative industries, and wider industry sectors.

Box 4.5 outlines one example of how wider economic benefits can be captured from integrating artisan craft and tourism.

4.4 Conclusion

Creative and cultural industry policy is a diverse area, and responsibility for action can be unclear. But this is not an optional policy agenda, it is one that all places can benefit from developing.

One message for policy-makers is that devising policy must take into account the diverse nature of the creative and cultural industries and engage cross-ministerial cooperation and stakeholder engagement throughout the policy process. In addition, the need for a shift in the scale of policy-making in creative and cultural industries is a theme emerging from research.

Cities have received much attention, and there is a need for shift in focus towards developing other perspectives, such as rural and peripheral agendas.

The Creative Edge project has focused on the peripheral perspective, and found that creative and cultural industry policies can help support the development of the creative economy in peripheral places in a number of ways. The wider policy context on national levels sets up the broad framework for how the creative economy is supported in peripheral places. A three pillar framework has been identified for structuring national-level approaches. This approach should create the correct preconditions, enable culture and creativity to develop, support existing and emerging businesses, and harness the spillover effects for the wider society and economy. In addition, from the peripheral perspective, working together nationally and cross-nationally, as well as promoting the periphery as an attractive place, are important considerations for policy. Creative Edge has identified suggestions for the direction of policy. However, central to future policy development should remain that local actors and local knowledge is utilised in the policy development process at regional and local levels.
ONE MESSAGE FOR POLICY-MAKERS IS THAT DEVISING POLICY MUST TAKE INTO ACCOUNT THE DIVERSE NATURE OF THE CREATIVE AND CULTURAL INDUSTRIES AND ENGAGE CROSS-MINISTERIAL COOPERATION AND STAKEHOLDER ENGAGEMENT THROUGHOUT THE POLICY PROCESS.

- Harness the attractiveness of the periphery
- Shift the focus from the urban to the rural in promoting the creative economy
- Exploit local actors knowledge in policy development
- Creating frameworks at the national level to:
  - enable culture and creativity to develop
  - support existing and emerging businesses
  - capture the positive spillover effects of creative production

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Chapter 5: Cultural Consumption

5.1 Introduction

While our understanding of cultural production in the form of industry analysis is in its infancy, it is considerably more mature than our understanding of cultural consumption. In part due to the complex nature of the markets for creative produce, the proliferation of trends, the short shelf life, the commoditisation of produce, among other factors, the most popular adage in the creative market is that ‘nobody knows anything’ (work foundation). The lineage is far from clear, but cultural consumption dates back to the dawn of civilisation. Potters and metalworkers were part of the largest workforces in Greco-Roman times. The convergence of rising standards of living and increased technological proficiency is responsible for the birth of cultural consumption as we recognise it.

For some, the modern forms of consuming culture through the auspices of a capitalist mode of production is antithetical to artistic creation: “The system was thus endemically committed to the production of undifferentiated and desemioticised outputs”, leading to the charges of ‘eternal sameness’ (Adorno and Horkheimer, 1972). Others highlight the fact that consumption has been the primary means through which individuals have participated in culture and transformed it (Flew, 2012). Regardless of the side taken in the theoretical debate, the reality is that cultural consumption is on the increase. Judged in terms of global exports and imports, the last decade has seen an average rise for creative goods of over 10% per annum, while creative services have seen a global year-on-year rise of over 13% for the 10 years to 2011. These trends are investigated in this chapter.

This analysis takes place in the context of a highly differentiated form of consumption. As far back as the 18th century, Karl Marx drew an important distinction between the use value and exchange value of goods. The fact that goods and services could accrue a greater price in exchange than the sum of their parts is a vital demarcation of cultural consumption. Baudillard brought this further by drawing attention to the complex manner in which commodities function “as signs and symbols on the sphere of consumption, as well as their potential as regulating agents in the domain of culture” (Lee in Flew, 2012).

The nature of the products and services created and sold by creative industries are therefore unique and subject to different laws. This requires a greater focus on the demand side of creative industries. The work of Bourdieu (1984) draws the distinction between economic capital and cultural capital.

Economic capital is associated with wealth and status while cultural capital is associated with taste and aesthetics. In this market, taste is a more important factor in the demand function for their goods.

Market demand for creative produce shapes the industry spatially and organisationally. The uncertainty and product differentiation alongside the demand for infinite variety helps explain the abundance of small, specialised firms catering for niche tastes that can be seen in the creative economy. At the same time, many sub-sectors in the creative economy are dominated by a small number of vertically integrated large companies that intermediate between production and consumption.

“Electronic Arts is responsible for a quarter of the top 20 video games. More than 80 per cent of music sales in Europe are controlled by the four major labels. The eight largest book retailers have just under two-thirds of the UK’s overall book market. Six film distributors account for 87 per cent of the UK’s box office share” (NESTA, 2007: 167)

The following analysis of demand for culture and creative economy produce views patterns of cultural consumption from the global level down to the household level in Europe and member state countries. Recognition is given to the as yet uncovered area of business-to-business cultural consumption by reference to dedicated studies and initiatives carried out as part of the Creative Edge project. Tourism and participation are also analysed as non-traditional facets of consumption.
5.1.1 Increasing demand for cultural produce

The main driver behind the growth of the creative economy is the increase in demand for goods and services imbued with cultural content. The coincidence of rising income levels over the past two decades with the technological advances enabling increased access have placed upward pressure on demand. Both have also come together to put downward pressure on prices. Price indices for many of the entry points to cultural consumption (price of mp3 players, gaming consoles, DVD players etc) have shown how the past 10 years underlie that their price has dropped considerably, thus helping fuel consumption of the cultural produce we are concerned with here.

The most transformative innovation with regards to the creative economy over the past 20 years has been the advent of the internet. Consumers across the globe are using the internet and digital media to not only expand their cultural experiences, but to blur the lines between consumer and producer by becoming cultural creators online.

The phenomenon of user-generated content has massive implications for the creative economy and beyond. Acting as both a threat to and enabler of cultural production, exciting times are on the horizon.

The emergence of consumers as creators or co-creators of creative products has stimulated an enormous amount of cultural interaction and interchange. Examples of firms that have been able to involve consumers in the co-production of their good or service are those in the fields of open-source software and peer-produced information (UNCTAD 2013). The term perpetual Beta has recently been coined to describe the continuing relationship between producer and consumer after the point of sale. The capacity for upgrading and newer versions of creative content can fundamentally alter traditional business patterns. Innovations in this area are truly disruptive.

Judged in terms of global exports and imports, the last decade has seen an average annual rise for creative goods of over 10%, while creative services have seen a global year-on-year rise of over 13% for the 10 years to 2011. These trends reflect an obvious pattern of increased trade, production and demand. Examples of individual industries within the creative economy are fashion and gaming. In global terms, the fashion industry has a total merchandise export over five times the 1990 figures, while the gaming industry has doubled its sales over the past 10 years.

The developed world is spending nine times more on culture and recreation than it did in the 1970s.

While cultural products have existed since the dawn of humankind, it is only as a result of the recent mix of technological progress, rising living standards and globalisation that the creative economy has reached its current growth trajectory. The products of the creative economy are much different to those on offer four decades ago, consumption is highly democratised and no longer the pursuit of a rich elite, while technological reproduction has blurred the line between producers and consumers as the internet heralds an era of user-generated content.

5.2 Global Trade of Creative Produce

In absolute terms, let us consider how demand for creative economy products is reflected in the growth of international exports of Creative Goods as defined by UNCTAD. While the economic recession in the form of global credit crunch is reflected in the figure below, the decrease in exports from 2008 – 2009 is countered by the largest annual growth in the year 2010 – 2011 equivalent to 15%. Export figures provide the most concrete macroeconomic proxy for the health of the global market for creative economy goods. On this scale taking the economy as a whole the outlook is very positive. As has already been pointed out, the creative economy is a broad concept that has been subject to redefinition. This figure relating to the growth of creative goods exports by no means offers total coverage but does give us the most comprehensive worldview of performance in the creative economy (UNCTAD, 2013).
In 2002, the level of world exports of creative goods equated to $198 billion, which rose to $450 billion less than 10 years later. The 2011 figures when compared to those for 2002 tell an interesting story of the evolution of the creative economy. Such is the nature of the goods being traded on the international markets, evolution occurs quickly with a significant percentage of the trade taking place in industries and sub-sectors that did not even exist in 2002. A brief analysis of the headline figures for the respective years points to the dynamic nature of production and consumption in the creative economy.

For this reason the relative contribution of different sub-sectors in the creative economy has changed over the nine-year period. An example is the publishing industry. While publishing exports rose from $29 billion dollars in 2002 to $43 billion in 2011, the relative share of the total creative economy decreased from 15.1% to 9.5% over the period. This will come as little surprise when note is taken of the fact that the publishing sector comprises of physical books and newspapers, two industries that have faced enormous restructuring over the decade as more and more of their content is delivered in digital formats.

All sub-sectors of the creative economy have seen their absolute shares increase, but the rates of increase have differed considerably.

Exports of created goods more than doubled over the period, and this is the case for all sub-sectors, except publishing and audio-visual (which has also been subject to digitisation and, in many countries, has changed from being considered a good to being categorised as a service). The more traditional arts sectors such as Art Crafts and Visual Arts doubled their output over the period and kept in line with the economy as a whole (the figures for performing arts were last gathered in 2005). While the sub-sectors of design and new media recorded the biggest absolute and relative increases. For the latter, Video Gaming and recorded media (software) account for the increase, while the former, accounts for the fashion industry and other ancillary industries which have all increased their share as well as industries in interior design and jewellery.

For creative goods imports, the trend is broadly similar. Again as a proxy of demand we note an increase in the same time period from $220 billion to $420 billion worth of goods imported globally. Again the Design sector increases its relative share with a near threefold increase in the nine years (boosted by fashion and interior design). The relative fall off in publishing is less marked in the case of imports, though a decrease in the rate of increase is noted for the past five years. At the same time goods imports that were most susceptible to recession were those in the traditional arts sectors, with both visual arts and art crafts seeing the most notable effects of the global credit crunch since 2007. The demand elasticities of these goods and their considered luxuriant qualities goes some way to explaining why this is the case.

The data for the international trade in creative services is much less comprehensive than that for creative goods. That said, it is again useful for providing a proxy of patterns in cultural consumption. This data is not available at the global level as the rate of coverage renders it unreliable. Below we will look at the geographic breakdown of cultural consumption.
5.2.1  Trade in Creative Produce Across the EU and Member Countries

European (EU 27) exports of creative goods reached $158 billion in 2011, accounting for just over one-third of the global output of creative goods. This is up from just over $86 billion in 2002. The rate of increase, while noteworthy, is considerably less than the global growth rate which has seen the European share of global exports decrease over the nine-year period to account for one-third of all exports in 2011. UNCTAD's most recent report (2013) has shown how developing economies are increasing their relative share of global trade in creative goods, which helps to account for these trends. In terms of imports, the EU has conversely increased its share of creative goods imports over the period, a trait that reflects the maturing developed economy the EU has become.

In terms of the breakdown by sub-sector, the EU creative economy exports differ slightly from the global breakdown.

The above graphic points to the fact that the EU offers a slightly different contribution to trade in creative goods. In relation to the global position, the EU offers more in terms of media outputs. Both traditional media (publishing) and new media make a relatively higher contribution. In terms of imports, the EU 27 shows a higher degree of conformity to global norms.
CHAPTER 5: CULTURAL CONSUMPTION

Figure 5.4: Creative Economy Sizes of Creative Edge Nation States

2011 Relative Trade Economies

- CE Goods Exports
- CE Goods Imports

Figure 5.5: Exports Versus Imports

Exports Of Creative Goods ($M)

Creative Goods Imports ($M)
Bringing the scale of analysis down to the national level we see from the chart below the relative contribution of the member countries to the creative economies of Europe. Of the four, the UK is the most dominant. The contributions of Ireland and Finland reflect the relative size of their economies, but in the case of Ireland we see it contributing more in terms of exports. We will explore this further below.

Production and consumption have increased across all economies to varying degrees. The figures below demonstrate the rate of change over the nine-year period. The inclusion of the UK, skews the rate of change in the smaller economies but the general pattern is in line with global rates of change if somewhat less dynamic. Notable across all four countries is the impact of economic recession, though the rates of growth seem to have returned in the final two years recorded here.

5.2.1.1 Finland

Accounting for 0.3% of global trade in creative goods, the Finnish creative economy relies heavily on publishing in terms of its share of creative goods exports. Finland is somewhat unique in exporting less in 2011 than it did in 2002. The fall-off was mainly confined to the publishing sub-sector, which saw the value of exports fall to half their 2002 levels by 2011. The degree to which Finland’s sizeable forestry industry is skewing the statistics is hard to decipher. This visual arts sub-sector also experienced a sizeable decrease in terms of exports over the period, with the figures recorded for 2011 half those of 2002. Here we see one obvious trait of creative consumption i.e. it is highly susceptible to changes in tastes.

The demand for creative produce in Finland is high and growing. The nine-year period saw a doubling of the amount of creative produce imported.

Every sub-sector recorded a significant increase, with the most noteworthy being a 150% increase in design and new media imports (fashion and recorded media registering the highest increases). The traditional art sectors such as visual arts and crafts achieved steady rises year-on-year in the earlier half of the decade. These sub-sectors are more sensitive to economic well-being and consumer sentiment as well as tastes. Growth in the demand for creative services is summarised below in the figures for growth rates of creative services imports. Advertising, architecture and personal cultural services make up the bulk of demand for services in Finland.
5.2.1.2 Ireland

The Irish economy is similar in size to that of Finland in that its share of global trade in creative goods equates to just under 0.5%. Considering the relative weight in terms of impact of the global economic recession, Ireland, increasing its imports and exports over the period is testament to the kind of creative economy there. One thing that becomes immediately obvious in the case of Ireland is the overwhelming reliance that new media has over Irish exports. This sub-sector comprises recorded media and computer games. While the latter has grown significantly in the last decade, the former skews averages by its presence. The growth of recorded media since 2002 is significant but not noteworthy, it has been present in its relative size for the past nine years. Certain factors such as the success of international music artists from Ireland (notably U2) help explain this. Another important factor is the lucrative tax benefits for artistic production, which act as an incentive for non-Irish artists to report their sales from Ireland.

Irish demand for creative produce has fallen from a high in 2007 to account for 1.2% of creative goods imported in the EU 27.

Patterns of demand conform more towards global and European averages. That said, Ireland has a considerably higher than average demand for goods emanating from the new media and publishing sub-sectors. Indeed, near to one-quarter of Irish imports comprise of printed material, books and newspapers while 20% of imports are new media goods, up from 10% in 2002. Architectural services imported into Ireland matched the growth rate in the housing market and also mirror the crash that occurred. Steadier growth rates were recorded in personal and cultural services.

5.2.1.3 Sweden

Swedish trade in creative goods is roughly equal to that of Ireland and Finland combined equating to just over 1% of global trade. Swedish exports of creative goods have returned to growth after a downturn in 2008 – 2010. Sweden in 2011 exported 95% more creative goods than it did in 2002. This increase came on the back of more than doubling the country’s output in the design and new media sub-sectors. The publishing sector in Sweden accounted for one-third of exports, leaving the country somewhat reliant on a subsector that has been subject to contraction.
Swedish demand for cultural goods increased at a steady rate over the decade. This was aided by a near tripling of the importation of new media goods rising from $300 million in 2002 to $885 million by 2011. Increases were recorded across all sub-sectors with the rate of increase in the traditional arts sectors relatively lower than those of the newer sectors. Relative to other countries, design in Sweden accounts for less of their imports, a fact that can be explained by the comparative advantage that the country enjoys in that sub-sector. In terms of creative services the demand for audio-visual services in Sweden is notable, trebling in terms of the size of imports over the decade from 2001.

Culture and recreation services also experienced a high level of growth: it’s noteworthy here that Swedish imports increased 45% between 2007 and 2011. This sector reflects something of a counter-cyclical growth pattern and evidence of the degree to which some services enjoy an upswing in times of economic stagnation.

5.3 Cultural Consumption at the Household Level

National accounts give a macro view of the nature of cultural consumption, but analysis at the household level underlines what it is that people value. Again, the usual data restrictions apply, when we refer to creative consumption below it is a reference to the goods that act as a best fit in terms of national accounting practices (in the case the Household Budget Survey). Figures from Eurostat are collected from national agencies. The most recent comprehensive survey was carried out in 2005 and thus, some of the following figures need to be understood as somewhat dated.

Cultural consumption (and ultimately demand for cultural produce) can be assessed by measuring expenditure on a range of goods and services, including books, newspapers, cinema, theatres, concerts, museums, recording media, TV and radio, and goods used in amateur artistic activities like drawing materials, musical instruments or photographic and cinematographic equipment.

Differences in cultural consumption across households and countries can be the result of a range of factors that have little to do with the goods on offer. Differences may be due to any number of cultural practices across countries and cultural demand is also a factor of income levels, price structures and the availability of cultural facilities. The correlation between income levels and cultural consumption is positive.

Denmark ranks highest of all EU countries with an average share of cultural expenditure equating to 5.5% of total household spending. All nation states of the Creative Edge member regions rank well above the EU 27 average spend of 3.9%. Finland is ranked second in Europe at 5.1%, both Ireland and the UK spend 4.8% on cultural produce while the Swedish dedicate 4.7% of their total spending on cultural goods and services (Eurostat, 2011). Some European member states buck the trend with regards to the correlation of cultural spending and income levels, especially the Czech Republic, Poland and Hungary. All three of these member states show a much higher level of cultural consumption than many of their higher income counterparts.
Differing patterns were observed in the distribution of cultural expenditure by type of good or service across countries. At EU level, 80% of total cultural expenditure was accounted for by 7 categories. For each of our member countries the figure was slightly less. In Europe, TV and radio taxes and hire of equipment accounted for the biggest share in total cultural spending (18%), followed by newspapers (16%), information-processing equipment (12%), books (11%), and televisions sets, video players and recorders (8%). Cinema, theatres and concerts and recording media for pictures and sound each accounted for 7% of total cultural expenditure. Across the four member states linked to the project, national tastes were reflected in the breakdown. Finnish consumers spent near to one-quarter of their cultural budget on newspapers. The Irish spent a larger share than any other State on attending museums. Swedish households spent relatively more than the rest of Europe on information processing equipment while those in the UK showed a higher preference for recording media devices.

Eurostat’s analysis of cultural expenditure per household by income group makes for some interesting reading. Ireland sees the highest disparity between the lowest quintile and the highest across all EU-27 member states. However, the consumption patterns of those on the lowest quintile are relatively more than most EU countries. Sweden’s lowest paid workers spend more than any other countries workers on cultural pursuits. Yet Sweden’s highest paid workers are among the least likely of all of Europe’s highest paid to spend money on culture. High-earning counterparts in Ireland and the UK spent upward of €2,500 (PPS) on culture in 2005. Household income in Finland conforms to the EU average in determining expenditure on cultural goods and services.

Harmonised indices of consumer prices (HICP) for main cultural goods and services provides a clear indication of the pricing of cultural produce which can help identify some very clear patterns. Many of the heavy goods associated with cultural products, such as DVD players, stereos and recording equipment have seen their price drop considerably relative to others. This is evidence of the move to online consumption. Cultural goods from music to film are increasingly digitised thus rendering this type of equipment less of a necessity in accessing the product value. On the whole, the price-index for consumer goods is on the rise.

5.3.1 Cultural Participation

Nearly half of all Europeans aged 25–64 years declared having participated in cultural activities such as going to the cinema, attending live performances and visiting cultural sites at least once in 2006 (Eurostat).

The geography of participation differed across the member states with northern countries showing a higher rate of cultural consumption than their southern counterparts. Statistics for cinema attendance act as an interesting proxy for cultural consumption. There exists a high and positive correlation between infrastructure provision and consumption. Iceland, Sweden, and Ireland have the highest density of cinema screens per capita, these countries also rank the highest in number of cinema trips per person in 2010.
Though somewhat dated, Eurostat figures on cultural consumption online provide some interesting indicators. In 2008, 38% of Internet users in the EU-27 downloaded or listened to music, 29% downloaded or watched films and 33% listened to the radio. Using the Internet for leisure activities mainly concerned young people, students and more men than women. Also in 2009, 32% of European Internet users purchased films, music, books, newspapers, magazines, e-learning material or computer software online. This form of purchase is particularly frequent in the United Kingdom, Luxembourg, Germany, Denmark and Norway. More and more consumers are using the Internet as a mode of access and a mode of delivery of cultural produce.

Perhaps the time of the year that most people are willing to engage in cultural participation are those couple of weeks spent on holidays and thereby usually consuming a different culture. According to the 2009 Eurobarometer survey, cultural attractiveness is the second motivation for Europeans (after value for money) when deciding on a holiday destination. The report highlighted the rate of demand in elasticity in the outlook of Europeans on holiday with regards to cultural activities. While seemingly obvious as an observation, this can have massive effects on the creative economies of particular places, both in their make-up and in their sustainability.

In many ways, the creative economy is a natural test bed for spatial economic development theory.

As a set of industries, it shows a tendency to cluster at a rate rarely seen in other modes of production. It is also extremely flexible in its production processes and methods. As an example, audio-visual (AV) output is generally the result of projects where teams, partnerships and alliances dissolve and re-form constantly (Bilton, 2007). Output in that sector is also contingent on dense flows of information and goods and services that benefit from economies of scale in skills-sourcing and know-how (Kerr and Cawley, 2011). AV clusters tend to involve complex divisions of labour while exploiting new ICT developments that help them transcend space barriers. The demonstrated ability of the AV sector to work across different spatial scales while being tightly clustered makes it an ideal analytic focal point for spatial development.

Examples of film and TV production in Galway (west of Ireland) and Västerbotten in Sweden have been examined in some detail. From this we find that all producers work with other businesses and none deal with customers in the traditional sense. All business (save for broadcasting) is conducted with other businesses. Some 92% of productions in the West of Ireland were co-productions involving two or more businesses. The project-based nature of the work in the AV sector according to one member of the sector in Galway:

“This is the future of work. The traditional lines of we make and you buy are finished. When we look at the amount of relationships we have, we are concerned with businesses that are supplying into us and those we are supplying to. This end customer is different everyday”.

In Sweden a number of networking events have been held as part of the Creative Edge project. Feedback from attendees shows their propensity to share and work with others in the industry is high. For most the emphasis is on idea-sharing rather than protectiveness. The gaming sector proves to be an interesting test case. In terms of production, gaming is not a solitary pursuit, but involves a mix of skills from animation to technical know-how. Those in the games sector are first interested in finding similar businesses to work with before they are interested in finding customers to sell to.
CHAPTER 5: CULTURAL CONSUMPTION

Organisational and work practices differ across the spectrum of creative industries.

The consumer of the produce helps determine these practices. Where one is building a product, be it art or sculpture with the aim of selling to a consumer, the make-up and the company is very different to those involved in selling into businesses. From the Creative Edge database we can see that those involved in B2B selling have different location patterns to those primarily involved in B2C selling. The former tend to be more tightly bound by geographies and have a high tendency to cluster; those more interested in selling to the consumer are less bound by where their customers are and as a result are more dispersed across the four regions.

The lines of delineation become more blurred when we consider how businesses work with each other. On average, 50% of those employed in the design sector in the UK were termed ‘in-house’ designers, i.e. creative talents working in traditional industries. While this does tend to add another layer to deciphering the extent of the creative economy it is no less important. In respect of this, the MyCreativeEdge initiative and the provision of talent vouchers offered us a unique opportunity to understand how creative talents work with businesses to address an identified ‘creativity gap’.

In total six talent vouchers were given to companies that applied, to be used to employ a creative person (registered on MyCreativeEdge) to address that gap. In all cases those in receipt of the vouchers were very happy with the work that was carried out. Each voucher helped address the creative deficit identified by the applicant. One of the most important reflections was how those who applied for the voucher and the creative person employed on the project learned from working together. The initiative was a success with three applicants looking to work with the creative person again in the future.

The Creative Steps programme set out in a similar vein, but matched students of creative courses with companies from a number of different backgrounds. The feedback here again was overwhelmingly positive from the companies with creative deficits and the student members of the initiative. The Creative Steps programme offered those students an opportunity to work as part of an international team (representatives from each Creative Edge region) and address the needs of a company as a client. The project also enabled companies to look at their product and service from a unique perspective and consider their offering in a creative guise.

5.5 Conclusion

This final point has particular resonance beyond what we have defined as the creative economy. For the purposes of analysis we have used the term in reference to a certain set of industries. As previously mentioned the lines are considerably more blurred. All industries are by their nature creative, the increasing commodification of culture is bringing about a new reality for all companies. Cultural capital is of increasing importance. Products and services with strong cultural content, products with a symbolic resonance, services with a particular authentic narrative are in demand. These products and services are not solely the domain of the creative industries and increasingly we see them stretch out to the broader economy. This is done in conjunction with creative talents, be they those with their own business or those hired in-house.

The creative industries are therefore not only important in their own right but crucial in their role as agents of economic and cultural change. This is being played out through an array of complex interchanges between customers, businesses, businesses as customers, and culture and industry. The complexity needs to be better understood in gauging a possible path for future development, especially in peripheral regions which, as proven in this project, stand to gain the most from these emerging trends. Ultimately, this complexity is somewhat contrasted by the simplicity of the inexorable rise in the demand to consume creative content.
ALL INDUSTRIES ARE BY THEIR NATURE CREATIVE, THE INCREASING COMMODIFICATION OF CULTURE IS BRINGING ABOUT A NEW REALITY FOR ALL COMPANIES.
Chapter 6: Creative Education

6.1 Introduction

As has been outlined so far in this report, culture and creativity are high-value growth areas that require the nurturing of creative talent in order to expand. One of the ways of addressing the potential growth of creative economies is through higher education systems. Higher education is recognised as a critical external factor aiding the enhancement of creative assets and the enrichment of cultural activity and culture production, meaning it plays a vital part on a social and an economic level. The first UNESCO Framework for Cultural Statistics (UNESCO FCS, 1986) omitted, or failed to give due attention to, the role of education in cultural production and cultural activity. In the current UNESCO FCS framework (UNESCO, 2009) education and training is included as a transversal domain as it can be applied to all of the cultural and related domains. This chapter outlines the higher education infrastructure, education attainment, and general educational drive for the creative industries in each of the partner regions. In an effort to compare two regions, the chapter explores the preparedness of the higher education infrastructure on the island of Ireland to exploit creative economy growth. Lastly, the chapter explores a specific programme undertaken in the Northern Periphery region by the Creative Edge Project – Creative Steps - as an example of fostering creative talent.

6.2 The European and Wider Education Context

Historically, education and education institutions have been at the forefront in creating, structuring, and managing culture. In terms of cultural contribution, education is not considered in its entirety, but as a means of transmitting cultural values and cultural skills (UNESCO, 2009). According to UNESCO: ‘Learning activities support the development, understanding and reception of culture, including processes of critique (e.g. art and dance schools, literary criticism). Education is the process by which culture is transmitted between generations. It is also the means whereby people learn to appreciate or form value judgements (e.g. a critique) about cultural activities or products. Education is a process of socialisation by which culture is imparted and develops creativity that can challenge existing cultural norms’ (UNESCO, 2009:29).

Higher education has been expanding globally since the 1900s, from 500,000 to 6.3 million in the 1950s (Caledron, 2012). In 1970 there were 28.6 million students compared to 99.5 million in 2000, according to statistics from UNESCO – an increase of 248%. The number of students participating in higher education by 2030 is estimated to increase from 99.5 million in 2000 to 414.2 million in 2030 – an increase of 314% over this 30-year period (Caledron, 2012). In the EU-27, the tertiary education population increased by around 22% during the period of 2000-2009, an annual growth rate of 2.7% (Eurostat, 2012a).

According to Eurostat’s Cultural Statistics (2011), broad comparatives of cultural education can be observed between the four countries in which the Creative Edge partner regions are located. These statistics were collated prior to the revised NACE Rev. 2 and so remain on a general cultural level as indicated in table 6.1.

In the academic year 2007-08, 18 % of tertiary-education students in the EU-27 were studying in a field related to culture, the majority of which were situated in the field of
CHAPTER 6: CREATIVE EDUCATION

THE CREATIVE EDGE: POLICY TOOLKIT

Although the above data is somewhat dated, we can deduce that Sweden and Finland are relatively on a par in the fields of Arts and Architecture and Building, while variation exists in the number undertaking Humanities and Journalism and information. Ireland measures relatively well, although producing significantly low numbers in the field of Journalism and Information. The UK is taken as a whole, although Northern Ireland is covered in greater detail in section 7.3.1.

In 2010, the EU-27 had around 4,000 higher education institutions with almost 20 million students (Eurostat, 2012a). For a variety of reasons, higher educational systems in Europe are at a point of transition: the number of people entering is growing and the profile of students is changing. Unemployment and changing patterns of work bring new urgency and a much greater emphasis on lifelong learning and up-skilling. A high proportion of the skills that are needed now in the workforce are high-order knowledge-based skills, many of which can only be acquired in higher education institutions.

In response to this period of transition, Europe 2020, the EU’s overarching programme focusing on growth and jobs, has a focus upon education and training. The strategy recognises that knowledge, and the innovation it sparks, are the EU’s most valuable assets. It is designed to increase the EU’s growth and aims to bring high levels of employment, productivity and social cohesion. This comprehensive strategy encompasses a wide variety of sectors, such as, employment, research, the climate, education, and poverty.

Table 6.1: Tertiary Students In Fields Of Education Related To Culture, Total And As A % Of All Tertiary Students, 2007/08

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<tr>
<td><strong>EU 27</strong></td>
<td>1 662 981</td>
<td>8.7</td>
<td>724 225</td>
<td>3.8</td>
<td>309 081</td>
<td>1.6</td>
<td>741 564</td>
<td>3.9</td>
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<tr>
<td><strong>IE</strong></td>
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<td>9.1</td>
<td>11 812</td>
<td>6.6</td>
<td>522</td>
<td>0.3</td>
<td>10 121</td>
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<tr>
<td><strong>FI</strong></td>
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<td>3 054</td>
<td>1.0</td>
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<tr>
<td><strong>SE</strong></td>
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<td>158 888</td>
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<td>47 967</td>
<td>2.1</td>
<td>73 924</td>
<td>3.2</td>
</tr>
</tbody>
</table>

Source: Eurostat, UOE data collection (online data code: educ_enrl5)

Tertiary students: ISCED97 levels 5 and 6. ISCED97 fields of education related to culture include:
- **Humanities**: religion, foreign languages, mother tongue, history and archaeology, philosophy and ethics;
- **Arts**: fine arts, music and performing arts, audio-visual techniques and media production, design, craft skills;
- **Journalism and information**: journalism and reporting, library, information, archive;
- **Architecture and building**: architecture and town planning, building and civil engineering. (Eurostat, 2011:54)

Humanities (Eurostat, 2011:48). Although the above data is somewhat dated, we can deduce that Sweden and Finland are relatively on a par in the fields of Arts and Architecture and Building, while variation exists in the number undertaking Humanities and Journalism and Information. Ireland measures relatively well, although producing significantly low numbers in the field of Journalism and Information. The UK is taken as a whole, although Northern Ireland is covered in greater detail in section 7.3.1.
There are two goals within the area of education that are pertinent to national education contexts: 3% of GDP is to be invested in R&D, and the level of educational attainment to be raised (European Commission, 2013). The EU average tertiary education attainment target for 30-34 year olds is set at 40%. Between 1997 and 2010 the proportion of the populations of the OECD countries aged 25-64 years with tertiary qualifications had risen on average from 21% to 30% (Swedish HEA, 2013). This focus on increasing educational attainment together with the Lisbon Strategy’s focus upon innovation and research, aim to ensure that Europe creates high quality graduates that are to some extent entrepreneurial.

The creative economy is a relatively new phenomenon, brought to the fore as technological progress transforms productive relationships globally between economy and society. The idea draws attention to creative assets of rich cultural heritage and resources that exist in all developing countries. ‘Creative people and artists are key because they develop ideas, metaphors and messages which help to drive social networking and experiences’ (European Commission, 2009). For the creative sector, the ability to access, use and develop knowledge is a criterion of social and economic power. The creative industries that use these abstract resources not only enable countries to tell their own stories and to project their own unique cultural identities to themselves and to the world, but they also provide these countries with a source of economic growth, employment creation, and increased participation in the global economy (UNCTAD, 2010). In 2009 creative and cultural industries firms employed a total of 6.4 million people in 30 European countries (Power, 2011:5). The UK, since the 1980s, has been a frontrunner in reflecting its creative industries in its policies and strategies and in identifying the share of GDP, exports and employment generated from various branches in the creative economy. However, different terms and definitions exist of who or what creative industries are and do, making it difficult to statistically mark out their impact, and easier to ignore in educational programmes (Scott, 2006).

Nevertheless there is evidence of a bottom-up approach occurring across Europe in educational initiatives for the creative economy. Universities, university colleges, higher education institutions and private institutions are testing demand by altering existing versions of approved curricula as courses for the creative industries need to be flexible and responsive. As outlined in the report on The Impact of Culture on Creativity (2009):

‘Creativity in learning is about fostering „flexibility, openness for the new, the ability to adapt or to see new ways of doing things and the courage to face the unexpected. Imagination, divergent thinking and intuition need to be considered as important characteristics of progressive arts education – by schools, universities and further education providers’ (European Commission, 2009).

An important factor for nations to develop the potential of their creative industries is also by instilling a favourable environment and positive attitude towards entrepreneurship.

Using the Eurostat (2012b) understanding of entrepreneurship as ‘the mindset and process to create and develop economic activity by blending risk-taking, creativity and/or innovation with sound management, within a new or an existing organisation’ (2012b: 8), we can discern that nurturing creative talent in terms of education for the creative economy has come to be understood as embedding the skills of creativity, entrepreneurship, and technical ability. This entails not only ensuring graduates are equipped with skills such as problem-solving, team-orientation, visionary and daring, but also knowing the various elements to go about setting up a business for their creative practice, to know how to market and brand their product or service through networks, or how to manage a project. The embedding of such skills is imperative for the provision of a dynamic creative workforce with internationally recognised qualifications, to attract creative industries to regions, and encourage and support indigenous creative industries, thus growing the potential of the creative economy. Education for the creative economy has been overshadowed by a coherent, yet necessary, focus upon STEM subjects. However, as the value and
growth of the creative economy continues to increase, greater flexibility and attention is due to the forms by which creativity is fostered and creative graduates produced, primarily through our higher education systems. Most recently, education for the creative economy is emerging in many diverse forms, reflective of the variety of creative processes and practices that such an educational sphere encompasses.

Particular attention is focusing upon the transferability of arts graduates’ skill sets to other sectors; the significance of linking art disciplines with disciplines of the social sciences, business management, technology and the natural sciences.

For instance, interdisciplinary courses are becoming attached to ‘new media’, multidisciplinary innovation initiatives are spiralling out of enterprise and innovation hubs, mentoring schemes are developing in the area of art and crafts, and apprenticeship pathways are being generated to suit creative vocational ambitions. In general, these are programmes and initiatives that move beyond traditional institutional and disciplinary boundaries. Far from these courses lacking challenge, academic stimulation, professional or vocational relevancy, they focus upon integrating critical approaches with practical or vocational education, bridging the traditional and somewhat artificial separation between the ‘academic’ and the ‘practical’. For example, innovation initiatives act as institutional offshoots which fuse the skills of creativity, entrepreneurship, and technical ability. They challenge the graduate to experience work-simulated projects and tasks, and to understand their desired roles and the expectations of future employers. Alternatively, mentoring schemes can inspire and elevate the graduate while also providing crucial dialogue for artists during the creative process and introduce the artist to a wider community of fellow practitioners.

The next two sections focus upon the overall educational infrastructure, education attainment, and educational drive for the creative industries at a national context in Sweden and Finland. The sections then explore the partner regions of Västerbotten and Kemi-Tornio to draw out the multidisciplinary approach to creative education, that is, the creative courses, university incubators, industry engagement, creative networks and showcasing events that interconnect to drive creative industries in their regions.

6.3 The Education Context in the Partner Countries and Regions

6.3.1 Higher Education in Sweden

Overall responsibility for Swedish higher education rests with the Swedish Parliament (Riksdag) and Government. There are over 50 institutions offering higher education opportunities, the majority of which are public authorities subject to the same legislation and regulations as other public authorities in Sweden, as well as the particular statutes, ordinances and regulations relevant to the education sector. For instance, research, adult education and student support are in the remit of the Ministry of Education and Research (the Ministry). On behalf of Parliament, the Ministry oversees the operation of a Higher Education Act (the Act) and associated ordinances. The Act and ordinances outline the level descriptors and learning outcomes required for individual awards. The Swedish National Agency for Higher Education oversees the National Qualification Framework which defines the structure of programmes and qualifications, including levels (‘cycles’), credits, categories of qualifications, and qualification descriptors, among other matters. The Framework is aligned with the provisions of the Bologna process and the European qualifications framework (Swedish Higher Education Authority, 2013).

Higher education in Sweden is based around two activities: teaching and research. Sweden has 14 public sector universities, and 20 public-sector university colleges. Public sector Higher Education Institutions (HEIs) are defined as government agencies. Sweden also has 17 private institutions, some generalist and some of a highly specialist nature. In 2010 there were 321,000 full-time enrolled (FTE) students registered for awards at all levels. Higher education qualifications are categorised in the law as ‘General’; ‘Fine, applied and performing arts’; or ‘Professional’. Arrangements for cycles and credits are in line with arrangements typical in the European Higher Education Authority (EHEA) (Swedish Higher Education Authority, 2013).
Based on 2011 patterns of graduation, 38% of young people in Sweden will graduate from tertiary-type A first-degree programmes, close to the OECD average of 39% (OECD, 2013b). The employment rate in Sweden in 2012 for people with all levels of education was 81.5%, rising to 83% in 2012 (OECD, 2012). This is one of the highest employment rates of the OECD countries. In 2012, some 7.3% of Sweden’s GDP was devoted to spending on education, while the OECD average was 5.8% (OECD, 2012). 42% of the country’s 25-34 year olds have attained a tertiary education. 34% of 25-64 year olds have attained this level of education. Nearly 90% of total expenditure on tertiary education in Sweden, including R&D comes from public sources. In 2012, public spending of USD 19,961 was allocated per tertiary student per year, compared with the OECD average of USD 13,719 (OECD, 2013b).

In 2010, 151,143 persons or 7.3% of the total workers in Sweden were employed in the creative industries (Power, 2011: 19). In 2011, the creative sector had a growth rate of 5.5% (Generator Sverige [online]).

Stockholm is ranked among the top 25 cities in the regions of Europe for cultural and creative industries employment. Since 2007 the Ministry of Culture and the Ministry of Enterprise, Energy and Communications cooperate on issues regarding the cultural and creative industries. Such cooperation led to the launch a National Action Plan for the Cultural and Creative Industries in 2009, which together with the Swedish Council for Cultural and Creative Industries established in 2010, oversee the local, regional, and international development of the cultural and creative industries.

Sweden also has an active network showcasing the development of the creative sector – Generator/Sverige. This network connects regions and municipalities, allows for the ‘sharing of good practices, information and working methods to create the best possible condition for the creative sector to flourish’ (Generator Sverige [online]). This network interlinks with the greater Nordic area. The Nordic Innovation Centre, or Kreena, also supports activities within the creative industries, such as, reports, conferences, projects and development of policy recommendations. For example, it carried out a report on creative industries education in the Nordic region in 2007, finding a blooming bottom-up approach in Sweden to creative education. While formally, Sweden has defined an array of so called ‘creative branches’ as: upplevelseindustrin; the experience industry; it also has a variety of research programmes and projects for the creative industries (Nordic Innovation Centre, 2007:16). As well as these somewhat formal pathways through the vocational and academic routes, Sweden also has a number of interesting offshoot initiatives: The Prosperity Institute, Tralhatten – Film i Vast & Innovatum, Kreatör+, Creative Business Management; and Music Brew House (Nordic Innovation Centre [online]).

6.3.2 Creative Education in Västerbotten

Västerbotten is the second largest province, covering one eighth of the total area of Sweden with a population of 259,286 in 2010. It has 3 universities: Umeå University, Luleå University of Technology and the Swedish University of Agricultural Sciences, with over 36,700 students (Västerbotten Investment Agency [online]). Umeå is the largest city in Västerbotten and one of the fastest growing regions in Sweden with a low average age of 38.2 years. Umeå University has several creative departments: Umeå Academy of Fine Arts and Umeå Institute of Design. Umeå Institute of Design alone has students from 29 different countries.

Västerbotten has a number of research areas of excellence, including Applied Computer Gaming Technology and Computer Graphics at Luleå University of Technology. Umea University incubator, Uminova Innovation (www.uminovainnovation.se), is also part of the Swedish Game Incubator Network, a national network of incubators and science parks that host game industry start-ups to assist new game developers. Gscept, based on campus Skellefteå and part of Luleå University of Technology, has courses in computer game development that are highly respected and has a close working relationship with the games industry. Västerbotten also runs rural learning centres through Akademi Norr. This is a cross-border cooperation among 12 municipalities from four provinces who collaborate to meet the needs of higher education in rural areas (Västerbotten Investment Agency [online]).
Västerbotten is a creative hub with several creative clusters and 11 game developing companies. For instance, “The Lodge” is a tight network of 15 highly specialised companies in Skellefteå within the internet, film and games industries. Umeå Creative is the industry association for companies working within the creative industries in Umeå. There are approximately 60 creative companies in the cities of Umeå and Skellefteå alone, employing more than 360 people in web, game and film production (Västerbotten Investment Agency [online]).

Creative Summit is arranged in Skellefteå every year which is an event that gathers talented and creative talents from the region and brings in icons from all around the world. This creative event showcases creative talent, generates capacity building, while also providing networking opportunities amongst creative talents and industries both within the region and internationally.

6.3.3 Higher Education in Finland

Finland’s higher education system consists of two complementary sectors: universities of applied sciences (UAS) and universities. Finnish education and science policy stresses quality, efficiency, equity and internationalism (Ministry of Education, 2008). There are 10 multi-faculty institutions, three universities of technology, three schools of economics and business administration, and four art academies. Admission to these institutions is based upon a secondary general or vocational diploma and often entrance examinations (CHEPS, 2008). Finland operates a numerous clausus system, which means that the number of entry places is restricted. Frequently, graduates from upper secondary have a break of two to three years before entering universities or UAS (OECD, 2013). The mission of the 16 universities is to conduct scientific research and provide instruction and postgraduate education based upon it. The 25 UAS in Finland train professionals in response to labour market needs and conduct R&D which supports instruction and promotes regional development in particular.

Finnish universities are independent corporations under public law or foundations under private law (Foundations Act). Universities of applied sciences are municipal or private institutions, which are authorised by the government. However, all HEIs get their basic funding from public sources. Finland has maintained efforts to provide sufficient funds for education. In fact, Finland increased its expenditure on education in absolute terms at all levels by 6% between 2008 and 2010 (OECD, 2013a).

In 2010, annual expenditure per student by educational institutions for all services for all levels of education was USD 10,157, above the OECD average of USD 9,308 (OECD, 2013a). Likewise, levels of expenditure in education relative to GDP (7%) were above the OECD average (6%) the same year (OECD, 2013a).

Finland has one of the highest levels of educational attainment among OECD countries. In 2011, 84% of 25-64 year-olds had at least completed upper secondary education (against an OECD average of 75%) and 39% held a tertiary degree (OECD average: 32%) (OECD, 2013a). Tertiary attainment in Finland increased by 6 percentage points since 2000, with 39% of its adult population holding a tertiary qualification by 2011, whereas the average for OECD countries was 32% in 2011 (OECD, 2013a). In 2011, more women than men had completed tertiary education, with 46% of women holding a tertiary qualification compared with 33% for men (OECD, 2013a).

In 2011, the employment rate in Finland for people with all levels of education was 75%, slightly above the OECD average of 73%. Among the tertiary educated adults (25-64 year olds), the unemployment rate increased at a much slower pace than in other OECD countries, growing by 0.7 percentage points (OECD average: increase of 1.5 percentage points).

According to a recent Finnish report (Ministry of Education and Culture, 2011), in 2008 the fields of culture and mass media generated €5.1 billion value added and 3.2% of GDP. The employed labour force in the creative industries was 108,000 persons; 4.3% of all employed labour force in the country. There were over 15,500 culture and media companies in 2008 with a turnover of €14 billion.
At a governmental level, the creative economy is embedded and supported in Finland through various policies and initiatives. The National Innovation Strategy aims to develop Finland as a productive and attractive innovation environment. The Ministry of Education and culture and the Ministry for Employment and the Economy form policies and programmes to support the development of the creative industries. For instance, the Ministry of Education and culture has a Development Programme for Business Growth and Internationalisation of Creative Industries 2007-2013, which has specific objectives towards product and service development and innovation activities as well as business skills and entrepreneurship, production and manager skills, and foresight (Creative industries Finland, 2013 [online]).

It also runs programmes with a societal focus, such as, Culture – Future Force 2010, which recognises the role of the creative economy in the entire society, and Art and Culture for Well-being Action Programme 2010-2014 which emphasises the role of art and culture in the promotion of both mental and physical well-being. The Ministry of Employment and the Economy oversees the Development Strategy for the Creative Economy 2008-2011, which aims to improve the standing of creative professionals, to promote entrepreneurship and growth as well as support product development in areas of business that utilise creative know-how. The project also provides forecasts and carries out research. It encourages interaction between different sectors from healthcare and education to security and leisure services, finds new solutions to social challenges, and develops business models for international markets. It also oversees programmes at a regional level, such as, Regional Cohesion and Competitiveness Programme COCO 2010-2013 which supports local-level strategic development work and seeks to promote interaction between key operators in regional development. The programme aims to recognise and solve problems that come up in the creative industries. Lastly, A Countryside of Creative Contrasts – A Cultural Programme for Rural Areas 2010 – 2014 recognises the possibilities of culture and art in diversifying the economic structure of the countryside. The objective is to create growth potential for the creative industries, to support entrepreneurship, clusters of creative companies, and development platforms in the countryside (Creative Industries Finland, 2013 [online]).
6.3.4 Creative Education in Kemi-Tornio

Kemi-Tornio is a small region made up of five municipalities in the province of Lapland in northern Finland. Lapland has a population of 195,000, of which 59,847 reside in the Kemi-Tornio region (Statistics Finland, 2013b). At an educational level, Finland has had regional centres of expertise developing from 1994 in response to its regional innovation policy. This has resulted in 22 centres playing a vital part in regional development, incorporating the educational field. The Lapland Regional Council is thus important in developing regional policy, having a specific focus on creativity and supporting creative industries through its Strategy for Creative Industries 2008-2013 (Regional Council of Lapland, 2013;2013) See box 6.1. This strategy highlights the importance of enhancing design in the region which is coordinated through the Lapland Design Programme 2011-2015.

Design is a theme integrated in Kemi-Tornio's regional development programme for creative Industries 2009-2013 with high-tech and industrial production companies in the region now also having a greater focus on design.

The current Ministry of Education and Culture Strategy 2020 in Finland has as one of its foci: 'the production and use of creative culture, development of new learning and action paradigms, identification of new creativity and talent reserves, promotion of self-motivated action, and development of interaction networks which promote knowledge and creativity' (Ministry of Education and Culture, 2010). Kemi-Tornio University of Applied Sciences (KTUAS) was founded in 1992 as Kemi-Tornio Polytechnic, a merger of several institutes of higher vocational education in the Kemi-Tornio region. Supporting education in creative industries, the Culture and Media Arts Department of Kemi-Tornio University of Applied Sciences provides practically focused education programmes in fine arts and media (KTUAS, 2013).

In 2010, Finland officially launched the merger of three of its major universities in technology, art and design, and economics to form Aalto University in Helsinki. It aims to 'groom graduates for a world transformed by technology, information overload, and global competition' (Microsoft Europe, 2011). The Helsinki School of Creative

Entrepreneurship supports spin-off activity and develops dialogue between industry and academia. Finland also has an active online creative industries network – Creative Industries Finland (CIF) which links in with its Nordic neighbours (Creative Industries Finland, 2013b).

6.4 Education for the Creative Economy on the Island of Ireland

This section examines the education attainment and education infrastructure on the island of Ireland. It then examines the creative education infrastructure on the island of Ireland in terms of its preparedness to exploit the potential growth of the creative economy. Specifically, it looks at the creative education infrastructure on the island of Ireland, the distribution of courses, the average number of places, and the extent of industry links. It then analyses First Destination Survey Data to gain insight on the potential of creative graduates and their career trajectory. Finally, the section outlines some creative education initiatives and events that are emerging on the island.

6.4.1 Education Context

The island of Ireland maintains a diverse tertiary education system with nine universities, 14 Institutes of Technology (IoTs) and several specialist colleges. In the academic year 2011-2012 there were 196,187 enrolments in higher education institutions (HEIs) in Ireland and 51,905 enrolled at Northern Ireland HEIs. Entry to tertiary education is based entirely on a competitive system of grades achieved in the Leaving Certificate or A-level exams. Northern Ireland recently introduced A-level programmes in Photography and in Moving Image Arts, the first digital film-making programme. Degrees can be obtained in Universities and Institutes of Technology, but entry level to the latter is generally at sub-degree level. The National Framework of Qualifications (NFQ), launched in 2003, is a system of 10 levels used to describe the Irish qualifications system. The Framework for Higher Education Qualifications (FHEQ) is the equivalent in Northern Ireland. Each level of both the NFQ and FHEQ is based on nationally agreed standards of knowledge, skill, and competence, and reflects what an individual is expected to know, understand
and be able to do following successful completion of a process of learning. There are 10 award levels in the NFQ and 8 levels on the FHEQ, which range from the most basic to doctoral level. On the NFQ scale sub-degree awards refers to level 6/7, honours bachelor degree awards are at level 8, masters awards level 9, and doctoral awards level 10. On the FHEQ scale, sub-degree and honours bachelor degree awards are at level 6, masters awards at level 7, and doctoral awards at level 8. These national systems of qualifications correspond to the European Qualifications Framework (EQF), allowing for the translation of qualifications for employers across Europe, and thus the mobility of both citizens and learners within Europe.

In 2011/2012 of the 69,590 Northern Ireland students enrolled at UK HEIs, 66% were enrolled at NI HEIs, 27% at a HEI in Great Britain and 7% were studying through the Open University (DEL, 2013:12). Of the 51,905 students enrolled at Northern Ireland HEIs in 2011/12, 83% were from Northern Ireland, 7% from the Republic of Ireland (ROI), 4% from Great Britain (GB), 1% from EU countries, while 6% were from non-EU countries (DEL, 2013). According to the Department of Education and Learning (DEL), in 2011-2012 qualifications gained at Northern Ireland institutions stood at 16,100, an increase of 8% compared to 2010/2011. In the same year, the number of ‘first degree’ qualifications increased by 8% to 8,905, of which, 69% were to FTE students and 31% were part-time (DEL, 2013).

Educational attainment in Ireland has increased significantly since 2000. In 2012, Ireland had the highest proportion of young people who had successfully completed third-level education in the EU, according to Eurostat. This boost in educational attainment in recent years is largely due to a high proportion of young people in the population. In 2011, 38% of 25-34 year olds had an upper secondary education as the highest level of attainment and 47% held a tertiary qualification (OECD, 2013c). This represents not only an important cross-generational change compared with older adults (with attainment rates of 29% and 23% respectively), but placed Ireland above the OECD average of 39% of 25-34 year olds with a tertiary qualification (OECD, 2013c). If 2011 patterns of graduation continue, 89% of young people in Ireland today will obtain an upper secondary qualification. At tertiary level, in 2010, the number of students grew by 9% and expenditure showed an increase of 28% compared with 2005. Ireland has set itself the Europe 2020 target of having 60% of 30-34 year olds completing tertiary or equivalent education (OECD, 2013c). In 2012, this target stood at 51%. Ireland’s investment in R&D as percentage of GDP is less than 2%.

The number of potential undergraduate higher education entrants in Ireland is expected to grow from 41,000 in 2010-2011 to 44,000 in 2019-2020 (7%) and to just over 51,000 by 2029-2030 (ESRI, 2012). The National Strategy for Higher Education 2030 states that policy should support the structures, capacity and relationships that the higher education system will need to meet expanding demand. While promoting a distinct sense of place and identity, Irish higher education should equip students with the skills to play a strong part on the international stage. This is not just in terms of quality and reputation, but as a strategy for innovation that builds a robust future for the Irish society and economy by providing a workforce capable of dealing with the increasingly complex demands of the global economy, including the proliferation of technologies (HEA, 2011). Similarly, Northern Ireland’s higher education strategy, “Graduating to Success”, outlines the importance for higher education to be responsive to the needs of the economy in terms of the supply of skills, flexible in the provision of lifelong learning with greater routes of accessibility, as well as delivering a high-quality learning experience (DEL, 2012).

6.4.2 Economic Context of the Creative Industries

The island of Ireland has long encouraged the development of the arts through specific funding programmes for artists and craftspeople, tax incentives, and educational and training provision. The creative sector has been gaining attention in recent years. One of the key questions at the Global Irish Economic Forum in September 2009 asked, “What role can Ireland’s cultural and artistic capital play in developing our economy?” This signifies the importance of Ireland’s cultural profile and places it in tandem with the objectives of the ‘Smart Economy’ and a move towards developing the creative economy. Likewise, the importance of education, training and
creativity to the ‘Smart Economy’ was affirmed by the National Competitiveness Council in its statement on Education and Training in February 2009: ‘Globalisation and technological advances are continuously changing the business environment and demand for skills in virtually all countries. As knowledge and creativity increasingly become the basis of competition, high skill levels are vitally important to economic performance and living standards’ (Creative Pathways, 2009:12).

The creative industries employ over 96,000 on the island of Ireland and are a big employer of graduates. The Assessment on the Economic Impact of the Arts in Ireland (Indecon, 2012) found that the wider arts sector had a gross value added of over €7 billion in 2011. Similarly, the Creative Industries Economic Estimates for Northern Ireland found that the gross value added of the creative industries was €737 million in 2008 (DCAL, 2011). The Department of Culture, Arts and Leisure in Northern Ireland launched in 2009 the Strategic Action Plan for the Creative Industries which outlined the main issues and opportunities for the growth of the creative industries in the region. This Action Plan guided the priorities for action of the Creative Industries Innovation Fund (CIIF) which, through the Arts Council, provided funding over 2008-2011 to creative enterprises and sectoral development bodies. CIIF 2 was launched in July 2011 and will provide support over 2011-2015 for innovative development of commercially viable content, products, services and experiences capable of competing in global markets. The fund is administered by the Arts Council of Northern Ireland and is supported by NI Screen and Digital Circle. Creative industry specific reports in Ireland such as Creative Capital (2011) indicate that the number of people working full time in the audio-visual content production industry was 5,440, with an annual economic value of over €550 million in 2007. In terms of education for the audio-visual content industry, it reported that although there are a variety of courses available there is an evident proliferation of similar courses which spread resources thinly, rather than developing critical mass or centres of excellence. It also claimed that ‘access routes to the industry were not clear’ (Creative Capital, 2011:12). Similarly, the Crafts Council of Ireland’s strategic plan 2013-2015 indicates that employment in 2010 in the craft sector was 5,771, with the total value of output of craft enterprises as €498 million, exporting value of €124.5 million, and generating domestic sales of €373.5 million (Indecon, 2010). In terms of education for the craft sector at third level, the report Creative Pathways (2009) found that ‘a significant issue for the crafts industry and the third level sector is the development of craft graduate opportunities. These may be in the area of post graduate research but also in the provision of employment opportunities for graduates’ (Creative Pathways, 2009:12). It also recommended that a strategic alliance should develop between the Crafts Council of Ireland and a third-level institution to jointly develop undergraduate and postgraduate programmes and provide opportunities for accredited continued professional development for those working in the crafts industry’ (Creative Pathways, 2009:12). Again, this can be viewed as a call for a specific centre of excellence to be created.

6.4.3 Creative Education Infrastructure on the Island of Ireland

There were over 3,000 undergraduate courses offered to students at level 8 and level 6 equivalent on the island of Ireland in 2011/2012.

In our assessment of the educational infrastructure for the creative economy, we developed a database that identified 385 ‘creative’ courses provided by higher education institutions relevant for the creative economy at NFQ level 8 and FHEQ level 6 in 2011-2012. These courses were identified as creative industry focused courses in relation to the sub-sectors and categories of the creative sector: advertising; architecture; art and antique trade; crafts; design; digital media; fashion; internet and software computing; music, visual and performing arts;
radio and television; publishing; video, film and photography. Non-‘creative’ courses offered by higher education institutions outstrip the creative courses offered at a ratio of 44:1.

In the figure below (6.2) one can see that Connaught (West of Ireland) has 4% of the island’s creative courses, followed by Munster (South) with 12%, Leinster (East) with 30%, and Ulster (North) with a majority at 54%.

In relation to the geography of provision, Northern Ireland in particular and the East of Ireland fare much better in comparison to the provision of creative courses in the West and South of Ireland. This representation of creative courses by province was further broken down to examine the diversity of creative sectors addressed by the creative courses within the regions.

We categorised the creative courses in terms of creative application, expression and technology as represented in figure 6.3. For instance, of the 54% of courses available in the North of Ireland, 33% relate to application (industries that develop products based on meeting market demand), 40% of courses were based around expression (industries where products or services are developed for an audience with an expressive story in mind), and 27% were in relation to technology (industries which rely on technology and digital media, particularly for their core functions) (WDC, 2009:28-29).

From our database of creative courses on offer across the HEs, the category of architecture offers the most places at an average of 45. This is followed by the category of media/audiovisual at 30 places, computer/information technology at 29 places, art and design at 28, and music/drama also at 28. It can be said that this average class size indicates the nature of teaching and learning for these subject areas focusing on the creative industries: small group...
Table 6.2: Number Of Industry Links Attached To Creative Courses

<table>
<thead>
<tr>
<th>PROVIDER SUBDIVISION</th>
<th># OF COURSES WITH INDUSTRY LINKS</th>
</tr>
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<tbody>
<tr>
<td>University of Ulster</td>
<td>79</td>
</tr>
<tr>
<td>Dublin Institute of Technology</td>
<td>7</td>
</tr>
<tr>
<td>Limerick Institute of Technology</td>
<td>6</td>
</tr>
<tr>
<td>Queen’s University Belfast</td>
<td>6</td>
</tr>
<tr>
<td>University of Limerick</td>
<td>6</td>
</tr>
<tr>
<td>Cork Institute of Technology</td>
<td>5</td>
</tr>
<tr>
<td>Dublin City University</td>
<td>5</td>
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<td>Institute of Technology Tralee</td>
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<td>NUI Maynooth</td>
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<td>Dun Laoghaire Inst of Art Design &amp; Technology</td>
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<tr>
<td>Athlone Institute of Technology</td>
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<td>Institute of Technology Carlow - Carlow Campus</td>
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<td>Dublin Business School</td>
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<td>Independent College Dublin</td>
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<td>Institute of Technology Sligo</td>
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<td>Letterkenny Institute of Technology</td>
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<td>National College of Art &amp; Design</td>
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<td>University College Cork</td>
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<td>University College Dublin</td>
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<td>Waterford Institute of Technology</td>
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Teaching in which the critical approaches and hands-on ‘learning-by-doing’ nature of practice-based courses can be effectively co-ordinated. Small, team-based project work, or inter-disciplinary project work focusing on problem-based learning or inquiry-based learning are preferred approaches for creative education.

Of the 385 creative courses available at degree level 8 and level 6, 45% have industry links, the majority of which have been developed in the courses available in Northern Ireland. However, as Northern Ireland, particularly the University of Ulster, delivers the majority of creative education courses on the island, the number of industry links tend to overlap between courses e.g. the industry link used for Photography may also serve as the industry link for Photo imaging. The National Survey of Employers’ Views on Irish Higher Education Outcomes (Forfas/HEA, 2013) found that ‘half of the companies surveyed do not feel there is adequate engagement between industry and higher education’ and that ‘there was significantly less satisfaction with the speed at which course content changes were made to meet changing needs’ (2013:6). Higher education institutions in Northern Ireland are aligned with the National Skills Academy for Creative & Cultural sector (www.ccskills.org.uk). This is a network of education and
industry partners that work together to improve the provision of skills and training for the creative and cultural industries. Creative & Cultural Skills run apprenticeship programmes to ensure greater accessibility and transition from education to industry. They also provide information, advice, and guidance for creative careers through their Creative Choice programme, provide research and analysis into the skills needs of the industry through their Creative Blueprint programme, support the creative sector to set the standards for high-quality work in the industry through their Professional Standards programme, and provide interesting seminars and discussions through Northern Ireland Design Alliance (Creative and Cultural Skills, 2013) See Box 6.2. Moreover, the Creative Skillset Tick was conceived as a kitemark of quality to allow potential employers identify students with the best qualifications.

Ireland’s equivalent of this, Skillnets Ltd., works in collaboration with the Department of Education and Skills and industry to identify and provide up-skilling and training in identified areas. Most recently Skillnets has introduced a pilot scheme called ManagementWorks, a training programme for owner-managers aimed at boosting job creation in small and medium-sized businesses (Skillnets, 2012). Skillnets has also established the Animation Skillnet, an industry-led training network for the animation, games and post-production sectors in Ireland. The network has been established to address the current and future vital skills needs of these industries by running high-end training courses, delivered by industry specialists and through organising professional networking events and conferences (iFB, 2013a [online]). While initiatives like the Animation Skillnet are a positive step towards lifelong learning and improving industry standards and skills in the workplace, it lacks interaction with what is on offer in higher education institutions. In the Creative Capital (2011) report on the audio-visual content industry in Ireland, it is noted that:

“There are no formalised accredited programmes connecting the third level sector with the audio-visual industry. Graduate placement programmes including cross-industry placements have yet to be established on a formal basis. Action is required to address these weaknesses while also examining the match/mis-match of the third level curriculum and the needs of the audio-visual industry’ (Creative Capital, 2011:12).

A report by Forfas (2009) on Skills in Creativity, Design and Innovation, recommended that ‘Skillnets should investigate the potential for virtual networks in creativity, design and innovation, based largely online’ (2009:115). It is this type of network, such as, the National Skills Academy for Creative &
Cultural sector in the UK and Northern Ireland, which works to integrate education and industry partnerships to support and enhance the skills of the creative industries. At present higher education institutions providing creative courses rely on the interaction and practice of their academic staff with industry to develop, design, or alter curricula that are relevant for industries’ needs. As indicated in the UK manifesto, ‘the rapid pace of change in technologies and creative markets calls for a degree of agility in education provision that most universities simply do not have’ (NESTA, 2013:104).

It is somewhat unrealistic to think that SMEs would have the time and manpower to engage in the design of university curricula. However, with the Cultural & Creative Skillset in Northern Ireland and Creativeskillset, engagement comes through a consolidated industry network that can accredit courses, provide information, and identify skills gaps. In terms of the agility of courses, work-based simulation projects such as ‘The Bridge’ or ‘Creative Steps’ (outlined below) have begun to take students’ experiences beyond the disciplinary and institutional lines in which higher education institutions are traditionally structured and organised. Nevertheless, institutions in Ireland, particularly art and design schools such as DIT, NCAD, and IADT are making clear efforts to consolidate ‘the weak connections between institutions, and the need for closer working relations’ (HEA, 2013a). The report by the HEA (2013a) on System Configuration for higher education institutions in Ireland envisages ‘as early as possible a thematic cluster comprising of major creative and performing arts provision of the Dublin Institute of Technology, the Dun Laoghaire Institute of Art, Design and Technology, the National College of Art and Design, University College Dublin, Trinity College Dublin, and the Royal Irish Academy of Music in the higher education sector, together with relevant institutions in the further education sector’ (2013a:27). The consolidation of various DIT campuses on the new Grangegorman campus in 2017 is seen as a significant opportunity for forming inter-institutional connections and initiating collaboration. The National College of Art and Design developed an inter-institutional alliance with UCD in 2010. Such alliances, or even mergers, bring studio-based learning environments together with traditional methods of teaching and learning.

6.4.4 Creative Graduates

In order to examine the trajectory of graduates from creative courses, the First Destination Survey Data (FDR) of students nine months after graduating acted as a proxy for the employment rate of creative graduates. This data was obtained on request from the career centres of individual higher education institutions. FDR data is classified according to the International Standard Classification of Education (ISCED), which is a framework for assembling, compiling, and analysing cross-nationally comparable statistics on education. The creative courses we identified as pertinent for the creative industries were not adequately reflected in HEA reports as education data is categorised according to ISCED codes and aggregated to display highest level, or broad fields for ease of comparability (as illustrated in table 7.1 previously). This representation of broad categories of fields of education means that data on education for the creative economy is subsumed into broader fields and is not accurately reflected at a national level. As highlighted in the recent revision of ISCED codes in 2011: ‘it is likely that countries wishing to adopt this classification for national use will need to adapt or adjust certain groupings of fields to better reflect the incidence and/or range of fields available to study in the country and to meet national needs for reporting education data of this type’ (UNESCO, 2013:7).

Table 6.3 indicates the three levels on which data is obtained and can be aggregated for publication. The movement through the three levels also indicates the data which becomes subsumed. Data accurately reflecting education for the creative economy at a national level is crucial in assessing skills gaps for industry, monitoring graduates preferences and potential, and for developing the credentials of creative education courses as viable career pathways.

The FDR data from the higher education institutions we received was cross-referenced with detailed ISCED field codes and the aggregated Field of Study (ISCED) employability data, as compiled by the HEA. From this data analysis, we extrapolated that creative graduates are being employed at
### Table 6.3: Isced Fields Of Education And Training (Isced-F)

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<thead>
<tr>
<th>BROAD FIELD</th>
<th>NARROW FIELD</th>
<th>DETAILED FIELD</th>
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<tr>
<td>00 GENERIC PROGRAMMES AND QUALIFICATIONS</td>
<td>001 Basic Programmes and Qualifications</td>
<td>0001 Basic Programmes and Qualifications</td>
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<td></td>
<td>002 Literacy and Numeracy</td>
<td>0021 Literacy and Numeracy</td>
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<td>003 Personal Skills and Development</td>
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<td>01 EDUCATION</td>
<td>011 Education</td>
<td>0111 Education Science</td>
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<td>0112 Training for Pre-School Teachers</td>
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<td>0113 Teacher Training without Subject Specialisation</td>
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<td></td>
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<td>0114 Teacher Training with Subject Specialisation</td>
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<td>02 ARTS AND HUMANITIES</td>
<td>021 Arts</td>
<td>0211 Audio-visual Techniques and Media Production</td>
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<td>0212 Fashion, Interior and Industrial Design</td>
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<td>022 Humanities (except Languages)</td>
<td>0221 Religion and Theology</td>
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<td>0222 History and Archaeology</td>
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<td>0223 Philosophy and Ethics</td>
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<td>023 Languages</td>
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<td>0232 Literature and Linguistics</td>
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<td>03 SOCIAL SCIENCES, JOURNALISM AND INFORMATION</td>
<td>031 Social and Behavioural Sciences</td>
<td>0311 Economics</td>
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<td>0312 Political Sciences and Civics</td>
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<td>0314 Sociology and Cultural Studies</td>
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<td></td>
<td>032 Journalism and Information</td>
<td>0321 Journalism and Reporting</td>
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<td>0322 Library, Information and Archival Studies</td>
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<tr>
<td>04 BUSINESS, ADMINISTRATION AND LAW</td>
<td>041 Business and Administration</td>
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<td>042 Law</td>
<td>0421 Law</td>
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### Figure 6.5: Employment Rate Of Creative Graduates

Those trained in creative economy pursuits are less likely to be looking for a job after graduation than others qualified with degrees or the population as a whole as reflected by the unemployment rate.

- Unemployed
- General Qualification
- Creative Qualification
a higher rate than non-creative graduates. Furthermore, that graduates trained in creative economy pursuits are less likely to be looking for a job after graduation than others qualified with degrees, or the population as a whole as reflected by the unemployment rate. Moreover, graduates with creative qualifications are four times more likely to start their own business or find work in traditional industries e.g. engineering or information services.

6.4.5 Other Strategic Reviews for Creative Education

A review of the Apprenticeship scheme is currently ongoing in Ireland in response to a commitment laid out in the Irish Government’s Action Plan for Jobs. The current model of apprenticeship was developed in the 1980s and implemented in the early 1990s. In regards to the creative economy, the current model includes “print media” as the sole creative sector in the designated trades of the apprenticeship scheme. The submission, Developing Apprenticeship (HEA, 2013), to the apprenticeship review group by the HEA recognises the need to improve the current model to ensure that it meets the future needs of the labour market and to develop apprenticeship pathways at all levels of education. It makes a substantial number of recommendations that aim to extend and integrate the apprenticeship mode of education and learning into the structure of education and learning in the State.

In 2004, the Arts Councils, North and South, together with Dublin City Council, commissioned research on developing a mentoring scheme for artists. The Mentoring Development Project (Read and Bistany, 2006) sought to research a best-practice model for mentoring, targeting five art forms. The project ran a pilot mentoring scheme in the five art forms to understand the needs of artists under mentorship, outlining considerations for the future and the role of the third party in facilitating the structure.

6.4.6 Creative Initiatives and Events on the Island of Ireland

Bio-Innovate Ireland Fellowship Programme:
This is a post-graduate programme run in collaboration with four Higher Education Institutions - NUI Galway, University of Limerick, Dublin City University and University College Cork. As a programme for the development of new medical devices, it is an example of an incubator model that can transfer to the creative sector. Led by NUI, Galway, the programme is affiliated to the Stanford Biodesign programme, and brings together teams of clinicians, engineers, bioscientists and business graduates to learn to design and bring to market new medical devices. It is such a model of knowledge transfer, creative thinking, and entrepreneurial activity that can be replicated for the creative sector.

www.bioinnovate.ie

Centre for Design Innovation, Sligo: This initiative of the Institute of Technology, Sligo undertakes research to understand how design can improve company success, to establish best practices for design, creativity and innovation, and to identify skills needs and training provision. The Centre runs workshops and specific programme to engage industry with the facilitation of their design needs. It also runs a rapid-prototyping lab, which enables companies to visualise and prototype their product.

www.designinnovation.ie

Executive MBA: The Executive MBA programme at NUI, Galway enlists the Burren College of Art to provide input on personal innovation and creativity.

www.nuigalway.ie

The Craft Council of Ireland: The Craft Council of Ireland runs training courses and events such as workshops, short courses and seminars all over Ireland. Currently it is running courses on Ceramic Skills and Design Training, and Jewellery and Goldsmithing Skills and Design Training. It also maintains an Education Panel that acts as a resource in assisting the development of educational programmes at all levels.

www.learncraftdesign.com

TCD-UCD Innovation Academy: This is an educational collaboration between University College Dublin and Trinity College Dublin. It is a multidisciplinary space where groups of students and academics interact with mentors
from the public and private sector to develop and nurture creativity, innovation, entrepreneurship, and teamwork. The Academy’s goal is to have a positive impact on individuals’ personal and professional development by nurturing entrepreneurial thinking. Academy modules are taught through activity-based learning experiences using best practices being developed, in-house and internationally, to create innovative and exciting educational experiences.

www.innovationacademy.ie

**Dublin Creative Design Network**: University College Dublin has recently launched ‘Dublin Creative Design Network,’ which draws together the areas of design, innovation and creativity within Architecture, Engineering and Computer Science. With the inclusion of NCAD partners, alongside UCD’s disciplinary strengths, it aims to engage business, industry and the wider community through a programme of activities.

www.ncad.ie
www.ucd.ie

**The Bridge**: This is a new training programme in Ireland, based in Dublin, aimed at nurturing creative talent for the animation and games industry. It is a collaboration between higher education, industry, and innovation and enterprise centres. The idea is to bridge the gap between education and industry by providing students with first-hand knowledge of work-related expectations and requirements of their desired roles.

“For our graduates, a real-world experience in a live setting with real clients working in partnership with world-class creative companies leads to better experiences and more realistic understanding of the demands of the commercial world,” explained Maureen Conway, principal, Ballyfermot College (Business & Leadership, 2013)

**Innovation Voucher Initiative**: Enterprise Ireland runs a cross-border innovation voucher initiative that aims to build links between the island’s higher education institutions and small businesses. A small business with an idea needing a particular skill set or knowledge to bring the product to fruition may apply to Enterprise Ireland for a voucher to the value of €5,000, which is issued to the business to engage the services of the educational institution to explore the problem and assist in a solution.

www.enterprise-Ireland.com

**Culture Tech (Derry)**: This annual event, increasing in size and scope since 2005-2006, showcases the convergence of art, culture and technology, through a week-long programme. The multiplicity of creative sectors are represented in a programme of events that take place throughout the city, drawing graduates, prospective graduates, creative talents, industry representatives, and local, national and international people. Such events develop a residual culture within a region, and push the boundaries of what can be possible through such a heightened intense engagement. They also provide networking opportunities for those within creative industries.

“We see this as a huge opportunity – for innovative arts and cultural organisations who want to stand out, for smart tech companies who want to figure it out and for cities and regions who want to tell their stories to the world”

www.culturetech.com

**Offset (Dublin)**: Similar in some respects to CultureTech in Derry, Offset is three-day intensive showcasing event in Dublin. The focus is primarily on the criss-crossing of media genres with a heavy focus on Design. Subtitled as Dublin’s Creative Festival, Offset similarly aims to develop a residual culture; through the inspiration of the work of others showcased to an interested audience and based around interactive events such as seminars, debates and workshops.

www.iloveoffset.com

**The Irish Times Innovation Project**: The Irish Times Innovation Roadshow, attached to the Irish Times Innovation Project, was hosted by University of Limerick. This event explored alternative methodologies for business start-ups with examples from practitioners. As
well as keynote speakers and practitioners, it also held an interactive workshop and networking event. NUI Galway has hosted two of these one in collaboration with DERI and the other with Whitaker.

www.irishtimes.com/innovationevents

MPhil in Creative and Cultural Entrepreneurship,
Trinity College Dublin: The first postgraduate programme on Creative and Cultural Entrepreneurship began in 2013/2014. This programme is focused on students who have previously undertaken creative study and practice and wish to pursue and transform that creative skill into an entrepreneurial project.

www.tcd.ie

Concept: An initiative developed in response to the lack of agility in higher education institutions, and in operation in Trinity College Dublin, is Concept (TCD, 2013). This initiative is an attempt to bridge the creative industries and the university, to develop greater interconnectivity between practitioner, scholarship, industry and learning within its location. It is building upon the strengths of the university’s core disciplines in the Arts and Sciences, the unique cluster of cultural and performing arts institutions concentrated nearby, and the range of existing and emerging creative industries. Concept operates as a catalyst, as a holistic platform that interlinks Arts and Science disciplines such as Engineering Sciences, Drama & Film, Music, Languages, Cultural Heritage and Art History & Architecture. It further links this network with various centres of excellence associated with the practice of these disciplines such as The Lir or the Oscar Wilde Centre for Irish Writing. In turn, these centres are linked with industry, the idea being that interconnectivity and opportunity are established through a network of interactions from within core academic strengths out to creative industries productivity.

www.tcd.ie

6.4.7 Creative Steps Project
Creative Steps is a Creative Edge initiative coordinated by Kemi-Tornio University of Applied Sciences (KTUAS). The Creative Steps concept works on the basis of cooperation between new creative talents and established businesses. In the world of business, new ideas are vital to innovation, which come from human creativity. The Creative Steps concept matches emerging creative talent with existing business needs and helps creative talents gain much needed experience in the business world. In addition to this, it helps businesses to connect with, and harness the expertise of students and new graduates. The initiative is designed to encourage innovation, where businesses present a problem for students to solve, providing new challenges, but also opportunities for creativity to flourish and grow. The pilot programme was launched in January 2013 in Kemi-Tornio, Finland. It brought young, creative talents from Finland, Sweden, Ireland and Northern Ireland together to work on projects assigned by international businesses and organisations. Projects focused on areas such as improved product design, new product design and communication of concepts through visual mediums. Participants worked on their projects in teams and spent time in both Finland and Northern Ireland. They learned about the field of business and experienced the culture of both countries. Two hands-on, week-long workshops assisted and guided participants with the application of their creative skills in a business environment. Participants also interacted in the virtual environment for two more weeks to complete their projects, which were then finally presented to the businesses involved.

The students and graduates that participated in the Creative Steps initiative worked on real projects assigned by real businesses. But how does such an initiative operate? We walk you through the logistics of the Creative Steps process.

Firstly, a business project had to be selected. A project was chosen from each of countries that the Creative Edge partners are located. Participants were part of workshops, and also had virtual contact. Two week-long workshops took place, one in Finland, and one in Northern Ireland. The workshops combined lectures, brainstorming, interactive sessions and field trips. The remaining work occurred through the virtual environment. Participants worked on their projects in teams, and were also in direct contact with the business or organisation that initiated the idea for the project.
To get the work started, a workshop took place in Kemi-Tornio, Finland. It was here that participants were divided into four international multi-skilled teams. Teams were named ‘Team Ireland’, ‘Team Northern Ireland’, ‘Team Finland’ and ‘Team Sweden’ and each assigned a project. Before teams were assigned their projects, a brainstorming session including all participants gave each team ideas to work with when they began focusing on their assigned projects. Also, as each team progressed with their work, they pitched the ideas developed to the other team members, to get their insights and feedback.

Timo Puukko and Anitra Arkko-Saukkonen from KTUAS led the Creative Steps initiative, coordinated the workshops and provided support and guidance to students throughout the month-long Creative Steps process.

The workshops also focused on helping participants to shape their projects to a correct fit for business. Before teamwork began, KTUAS experts gave presentations on creative thinking and business thinking. Marika Saranne talked about business thinking, market communications, future market trends and consumer trends. Anitra Arkko-Saukkonen presented on creative thinking and different methods to generate creative ideas.

Creative Edge participants had a wide range of talents, and included students and graduates of screen-writing, film production, journalism, graphic design, art, digital media and visual arts. They applied their skills to business projects as part of Creative Steps and two examples are outlined below.

The businesses that assigned the projects for Creative Steps were a very important part of the Creative Steps process. Spinfy, a Finnish company that develops interactive children’s storybook apps, was one such company. These types of children’s storybooks are an exciting reading experience where children can interact with a story and guide it by making it personalised with their own touch.
Spinfy’s project for the Creative Steps participants was to design a new interactive children’s book. This included developing the idea for the story, while also creating and designing the primary characters and background designs. The children’s book was to be both educational and fun. Team Finland was assigned to this project. From the experience of the team, it was felt that a key part of beginning the creative process in this case was to think in a child’s frame of mind. Team Finland developed characters that a children’s story could be based around. They also produced illustrations. Spinfy’s reaction to the outcome of Team Finland’s project work was positive. Spinfy also said it would continue to cooperate with the team members if it decided to develop the concepts into storybook apps.

The Creative Steps initiative highlights the role of creative sector knowledge and skills in wider business sectors. The example of R4 Limited, a tyre recycling company, and the project that Creative Steps participants worked on for this company, demonstrates this.

R4 Limited has been producing tyre bales for several years. Their tyre bales have been used in a number of construction projects throughout Europe and the USA. R4 Limited distributes tyre bales uncovered. The look and bulky nature of tyre bales is a drawback of the product. The main challenge for Creative Steps participants was to make tyre bales look better, helping the company attract new customers. Devising a method of wrapping or disguising the tyre material could make the bales more marketable. In addition to this, this project focused on developing ideas around new places where tyre bales could be utilised, helping R4 Limited to further capitalise on their product.

Team Northern Ireland worked on this assignment and their work generated many new ideas and solutions for how to make tyre bales look more appealing aesthetically. R4 Limited received a package of different kinds of ideas from Team Northern Ireland’s work and was pleased with the outcome. When the Creative Steps programme finished R4 Limited was discussing the continuation of the project.

Throughout the Creative Steps projects the students maintained diaries in order to gain reflective feedback. Some of the extracts from these diaries included:

“The last 4 weeks have been a very busy and also the most fun weeks I have ever had, I have gained so much valuable experience and also knowledge in the creative business world. I learned how to use many new programs for communication and I have gain valuable experience working in teams in different countries, modern technology has been a vital tool throughout this experience.”

“This seminar was a great experience and one that I will always remember; it was very laid back and not too serious. Everyone chatted to each other as equals and didn’t see us as students or anything. It was a great way to make contacts and get to know people.”

“When we were split into teams, the tin foil modelling project was great. I thought it was a great way to break the ice in the team and show how creative we could be. It was a great way to get the team working together instead of jumping straight into projects.”

“Pitching to others made us realize and understand our own project’s state more – we had to set up goals and clarify our plans. It was a self-reflective “reality check”. Others gave perspective to our project”

And finally,

“Only have one word to describe it which is UNBELIEVABLE!!!!!!!!!!”
6.5 Conclusion

The creative economy is a growth economy, doubling in size from 2002-2008 and achieving an annual growth rate of 14% (UNCTAD, 2010). It signifies an important transition as digitisation and technological progress transform the productive relationships globally between economy and society. This shift has focused attention on the high value growth areas of culture and creativity, which in turn are gaining coherent awareness at a European, national, regional, and local level. As one of the focal points of future growth pivots on the production and dissemination of creative assets, crucial to this success is the nurturing of creative talent to meet the demand of such potential growth, educating creative talents through embedding the skills of creativity, entrepreneurship and technical ability.

Education for the creative industries does not take one single form, instead it takes shape through a multidisciplinary and multi-level approach with a variety of inter-institutional engagements. The partner region of Västerbotten, for instance, exemplifies this approach. Research areas of excellence exist in the region, particularly in the area of games development, which connect to university incubation hubs, e.g. Uminova Innovation, which in turn connect to creative courses. This creative education multidisciplinary and multi-level approach is then supported by strong industry networks of creative companies which feed into showcasing and networking events. This is also in evidence in the Kemi-Tornio region with its particular focus upon design, which is supported by a regional development programme, the creative education courses of KTUAS, and the high-tech industry.

On the island of Ireland, Northern Ireland is particularly strong in its provision of creative courses, representing 54% of creative courses on the island. It also maintains strong industry links through an overarching network, the National Skills Academy for Creative & Cultural sector, and a system of accreditation with the creative skillset tick. The region also has an annual showcasing event, CultureTech. In Ireland, we are beginning to see a recognition and move towards the need to improve and consolidate education for the creative industries through various innovation initiatives, industry interaction, and showcasing events. However, detailed data for creative courses remains absent at a national level. Provision of creative courses exists primarily in the capital, with many of the recent initiatives and events emerging in this region also, indicating a need to foster creative education at a regional level. The Creative Edge project has developed a transnational work simulation model through the Creative Steps that fosters creative talent and engages industry in the creative process, as our research has shown that creative graduates are four times more likely to set up their own business. A strong creative industries skills network, incorporating education partners, is recommended for Ireland, to bridge the gap between education and industry, as exemplified in the partner regions.
EDUCATION FOR THE CREATIVE INDUSTRIES DOES NOT TAKE ONE SINGLE FORM, INSTEAD IT TAKES SHAPE THROUGH A MULTIDISCIPLINARY AND MULTI-LEVEL APPROACH WITH A VARIETY OF INTER-INSTITUTIONAL ENGAGEMENTS.
Chapter 7: Conclusion and Policy Recommendations

7.1 Introduction
The Creative Edge policy toolkit has presented an overview of the structure of creative economy in the countries in which the Creative Edge partner regions are located. It assesses the cultural infrastructure and creative industries in each of the partner regions, as represented by the Creative Edge database, showing that the Creative Edge region has a strong and diverse creative economy. It compares and assesses policy in the countries in which the Creative Edge partner regions are located, to find the state of development of creative and cultural industry policy differs between the nations focused on. Broader policy strategies have been outlined and the peripheral perspective considered in detail. A number of challenges for creative and cultural industry policy-making have been identified, and examples of policy initiatives and policy approaches that have addressed similar challenges presented. The toolkit analyses demand for culture and creative economy produce, assessing global and household patterns of cultural consumption, as well as the area of business-to-business cultural consumption. Finally, the toolkit assesses the higher education infrastructure, education attainment, and the creative economy.

7.2 General Recommendations

**Evidence-Based Policy**
The diverse nature of the creative and cultural industries makes it vital that policy-making is informed by real world patterns of development. There is a need for a regular, systematic data collection and analysis for this sector to better inform decision-making. Evidence can reveal key challenges and policy initiatives can then be designed around overcoming these.

**Better Data and More Research**
National and regional commitments should be made by public authorities and regional agencies to measure the economic and societal worth of the creative economy. Compilation of key statistics at national levels should also be carried out to enable tracking of changes over time.

**Coordinated Policy Process**
Responsibility for policy-making can be unclear. Because of its economic, social, cultural, technological and environmental linkages, it needs input from a range of actors. There must be cross-ministerial cooperation in creative economy policy development and engagement with stakeholder groups. Policy must not only exist at the national scale, but the need for regional and local policy, coordinated with national policy, must also be assessed.

**Longer-Term Focused Development Strategies**
each region and nation should have a development strategy for the creative economy. Strategies over a longer term, such as five- and 10-year plans, rather than two- and three-year plans, would demonstrate regional and national commitment to creative economy development. Milestones and progress towards interim objectives is an important part of any development strategy.
Policy Recommendations

and general educational drive for the creative industries in each of the partner regions. Education is a critical external factor aiding the enhancement of creative assets and the enrichment of cultural activity and production.

Informed by this range of evidence, the toolkit now moves to highlight important issues for the development of the creative economy in peripheral regions. It must also be noted that the work of the Creative Edge project just scratches the surface of understanding the creative economy in peripheral regions. Therefore, many of our recommendations centre on developing knowledge to better guide creative economy development. The diverse nature of the creative economy also means that role of research is fundamental to best guide policy. Also, because of the differences in creative economy policy between the partner regions, some of the recommendations are more fitting to particular creative economies. Different levels of attention between the Creative Edge regions and countries in their support and development of the creative economy offers potential for cooperation and cross national learning among peripheral regions.

Supporting Creativity and Culture by Creating an Enabling Environment

A society that supports culture and creativity is a society that will also support the development of its creative economy. The creation of an environment for creativity to flourish in society must underpin the development of the creative economy.

Business Skills Training for Creative Industries

A strong theme emerging from our policy consultation was the need for business skills development among creative entrepreneurs, such as management, marketing and broader business skills (writing business plans, identifying target markets, website development, marketing using social media and online selling).

Greater Awareness of Wider Benefits of the Creative Economy

The benefit of a strong creative economy goes beyond its economic impact. Creativity and innovation are thought to be inherently linked and a more creative economy will be a more innovative economy. Developing the creative economy also has wider social and cultural benefits for society.
increasing Awareness of the Periphery as a Creative Place
Peripheral regions are creative places, but an increased awareness of this fact is needed. The image of peripheral places should be rejuvenated to reflect their distinctive, vibrant creative economies and culture. Marketing of creative products from peripheral regions can also piggyback on positive images of place.

Harness the Spillover Effects of Creative Industries
Synergies between cultural and creative industries and other sectors of peripheral economies should be exploited to their full potential. Artisan/local food and tourism sectors are identified as sectors where there is potential harness spillover effects.

Catalysts to Support Emerging Creative Industries
Peripheral regions should be developed as environments that foster creative entrepreneurship. Support for emerging creative industries, such as through business hubs, providing work spaces a low cost, are vital in peripheral places. Other kinds of catalysts based on local need should also be introduced, such as rent subsidies to support emerging creative businesses to obtain premises.

International Cooperation Between Peripheral Regions
Peripheral regions share similar challenges and can learn from each other’s strengths. International cooperation between peripheral regions should be encouraged to facilitate the development of their creative economies and societies.

Better Use of Online Social Networks to Enable Networking and Business Collaboration
Networking and collaborations between businesses is important in the creative economy. Peripheral creative business can be isolated from a wider creative business community of professionals. Enabling creative businesses to connect in the virtual environment could help them overcome their physical separation.

Better Use of E-commerce to Negate the Challenge of Marginality and Market Access
Market access is a key issue facing peripheral creative businesses. Local markets are often too small to sustain specialist creative businesses. Facilitation of creative businesses to access international markets from their peripheral location is needed, and e-commerce is one possible approach.
Better Understanding of, and Policy Instruments Tailored to, the Needs of Peripheral Regions

Successful policy measures in urban contexts are not necessarily the appropriate measures for peripheral regions. Research on the creative economy has focused on urban contexts. Better understanding of the dynamics of creative and cultural industries in rural, smaller urban and peripheral places is needed. Identifying if particular sub-sectors of creative industries have more potential in peripheral places can guide more strategic policy initiatives. Research piloting and evaluating new business models that facilitate greater cooperation between creative industries, that support an ease of internationalisation and organisational forms best suited to the digital age, is needed. Investigating the best types of e-commerce, and how to effectively network in virtual environment, would also help move towards understanding how to address key needs of peripheral creative economies.
7.4 Cultural Consumption Recommendations

**More Academic Research on Creative Consumption**
The Creative Economy is a relatively new topic of academic investigation. Analysis has focused on the production side of the economy with little work carried out on the consumption side. A greater understanding about how culture is being consumed across (technological) platforms is necessary. The general advance towards value being appropriated in intangible form is under-researched.

**A Greater Understanding of Market Unpredictability**
The market for creative produce is unique in that it is unpredictable and differentiated. How crucial these factors are in defining the industrial and organisational make-up of the economy needs to be better understood. Product differentiation and the infinite demand for variety helps to explain the abundance of small firms in this economy.

**Exploiting Culture Content**
Unique products high in symbolic and cultural content are in increased demand. This has obvious ramifications for creative producers, but is also of importance to those supplying more traditional goods. The peripheral areas of Europe are regions of cultural depth, whose narratives are in demand far beyond their borders.

**Online Market to Increase Market Research**
The Internet has heralded massive transformations in how culture is produced and consumed. Technology and digitisation are helping producers reach greater numbers of consumers. Correct provision of infrastructure to both is vital. This has obvious implications for peripheral regions. The online market lessens the barriers of peripherality.

**User Content Market Dynamics**
New technology is also helping blur the lines between production and consumption. Nowhere is this more in evidence than in the creative economy. User-generated content and the democratisation of production and consumption of creative produce offers a wealth of benefits as well as bringing with it innate threats. How the cultural industries have adapted to this new marketplace can act as a roadmap for all other industries. Such is the nature of industry in peripheral areas, more support is necessary in helping them adapt.

**Creative Consumption Growth Opportunities**
Creative consumption is growing at a significant rate. The growth of the creative economy is unequal sectorally and geographically. Policy-makers need to be aware of trends highlighted here in order to better deal with future developments. The design and new media sub-sectors are leading these growth trends but more traditional arts sectors have proved demand elastic through the most recent period of economic turmoil.
Chapter 7: Conclusion and Policy Recommendations

Evidence-based Policy

The diverse nature of the creative and cultural industries makes it vital that policy-making is informed by real world patterns of development. There is a need for a regular, systematic data collection and analysis for this sector to better inform decision-making. Evidence can reveal key challenges and policy initiatives can then be designed around overcoming these.

Threats from Mass-Produced Creative Goods

At EU level, Europe is becoming a net importer of creative goods. This has been emphasised in UNCTAD’s most recent analysis of the Creative Economy. There are inherent dangers in becoming a site for production with regard to the growth of the creative economy. The threat of mass-produced creative goods from the global South is obvious. At a Member State level, countries do and need to specialise in particular areas of creative production and consumption.

Cultural Infrastructure Provision and Economic Growth

Income and cultural consumption are positively correlated. Evidence here shows that increased cultural infrastructure provision is the most causative factor in increasing cultural consumption. Cultural participation and increased tourism also need to be emphasised as push factors for creative economy growth.

B2B and Clustering Effects

Many creative industrial sectors are unique in the fact that their customers are businesses. Business-to-business selling makes up 90% of sales in the audio-visual sector in the west of Ireland. Business-to-business selling is also a causative factor in the location decisions of many of these types of companies that show a high tendency to cluster.

Industry Networking

Creative businesses class networking is fundamental to their commercial success. Networking is more important to industries located in more remote areas. The obvious benefit range from idea generation to market knowledge and co-production opportunities.
7.5 Education Recommendations

Broader Understanding of Skillsets and Discipline Interconnections
A broader understanding of different skillsets and of how disciplines fit together is necessary to bridge the largely artificial division between STEM subjects and the Arts, Humanities and Social Sciences as new types of courses are emerging across the partner regions. Aalto University in Finland, in merging institutions of Technology, Art and Design, and Economics, is illustrative of a broader understanding of creativity.

More Accurate Data on Creative Education
Higher Education Authorities across the partner regions need to adapt the groupings of International Standard Classification of Education (ISCED) codes to reflect more accurate data on creative education at a national level.

Increase Linkages Between Industry, Creative Business and Higher Education
Industry links need to be encouraged between creative businesses and higher education institutions, particularly in Ireland, as exemplified with the National Skills Academy for Creative and Cultural Sector in Northern Ireland, ensuring the transfer of technical skill, industry requirements for creative courses, and information and advice on creative careers.

Sectoral Innovation Hubs and National Incubator Networks
Incubator or Innovation hubs focusing on specific creative sectors need to be developed by individual higher education institutions as exemplified by Umeå University, Uminova Innovation, for the games sector. National incubator networks such as Swedish Game Incubator Network or the Helsinki School of Creative Entrepreneurship should be encouraged in order to provide transitional ground for graduate spin-off activity and start-ups, and further increase dialogue between industry and academia.

Fostering of Entrepreneurial Ability
Work simulation programmes, such as Creative Steps, are to be encouraged as an approach to fostering entrepreneurial ability in creative graduates, as they are more likely to set up their own business.
7.6 Conclusion

The Creative Edge Policy Toolkit has presented a series of recommendations that would support the development of the creative economy in peripheral regions. Recommendations have been designed around critical areas of need: the need for more focused attention on peripheral creative economies, the need for attention to issues around cultural consumption and the need to develop creative education. Creative Edge has shown the presence of a vibrant, diverse creative economy in Creative Edge peripheral regions that have potential for further development supported by appropriate policy supports. A market for creative products is vital to the creative economy, and greater focus on cultural consumption is the second area in need increased policy attention. Finally, developing creative education would contribute to creating a labour market focused on filling gaps in current skills, and providing workers with the necessary expertise to enter the creative economy as it grows.

Peripheral Europe can capitalise on creativity and foster its further development. Creative and cultural industries have the potential to become an important sector in the economies of peripheral regions. The creative economy is not just a luxury that can attract investment in good times, but a central part of contemporary economic and social development.

Research needs to address:

- **Cultural production, its link to place and real development opportunities.**
- **The phenomenon of the cottage industry model in the creative economy.**
- **The artists as the entrepreneur.**
RECOMMENDATIONS HAVE BEEN DESIGNED AROUND CRITICAL AREAS OF NEED: THE NEED FOR MORE FOCUSED ATTENTION ON PERIPHERAL CREATIVE ECONOMIES, THE NEED FOR ATTENTION TO ISSUES AROUND CULTURAL CONSUMPTION AND THE NEED TO DEVELOP CREATIVE EDUCATION.
Appendix 1:
The Creative Edge Database

The Creative Edge database is the result of an exercise in deciphering the depth and breadth of the creative economy in the European periphery. The creative economy is a diverse domain that crosses between business and culture. There is little agreement on how to define creative industries that are part of the creative economy. Small and micro enterprises are part of creative industries and can be missed by business surveys. Culture is also an important part of the creative economy. Though subject to some debate on the extent of the definition, the database acts as a first attempt in proving the existence of a vibrant set of creative industries across the north Atlantic region of Europe.

The Creative Edge database houses data on creative and cultural industries in the Creative Edge partner regions. This covers seven counties in the West of Ireland (Galway, Mayo, Roscommon, Leitrim, Clare, Donegal and Sligo), and is the area governed by the Creative Edge partner organisation the Western Development Commission. In Northern Ireland, it covers the South East Economic Development area in Northern Ireland, which is a group of six local authorities (Ards, Down, Banbridge, Craigavon, Armagh and Newry & Mourne). In Finland, the partner organisation is Kemi-Tornio University of Applied Sciences, and the Kemi-Tornio sub region of Lapland is the area covered, which is made up of five municipalities (Kemi, Keminaa, Simo, Tervola, Tornio). In Sweden, the partner organisation is Film i Västerbotten in mid to northern Sweden. Västerbotten county, and its 15 municipalities is the focus of data contained in the Creative Edge database.

The database is divided into two sections: creative industries and cultural activities. Creative industries were defined broadly for the Creative Edge project to ensure as comprehensive as possible a dataset was collected. Data collection included the following creative sectors:

- Craft, design, advertising, printing, publishing, digital media, software, gaming, TV, radio, film, architecture, engineering, photography, arts, music, theatre, technology, scientific research and retailing.

The creative industries contained in the database are defined by list of relevant NACE (Nomenclature des Activités Économiques dans la Communauté Européenne) codes. NACE is a pan-European classification system which groups organisations according to their business activities. The database was constructed in 2013 and an outline of data sources are given below:

- For the west of Ireland and Northern Ireland, the FAME database of UK and Irish companies was the main source of creative industries data. Location addresses logged in the database were mainly the company’s place of trade, but in some cases were the company’s registered address.
- In the west of Ireland and Northern Ireland data was also supplemented with the Craft Council of Ireland’s online directory of craftspeople.
- In addition, in the west of Ireland and Northern Ireland searches of the internet for other publicly available information were carried out and permission requested to add data to our database as necessary.
- Data was sourced from AllaBolag.se for Västerbotten county in Sweden.
- Owing to constraints, data was sourced for a shortened list of NACE codes (18, 58, 59, 60, 62, 63, 70, 71, 73, 74, 90, 91, 93) for Västerbotten county in Sweden.
- Data was sourced from Statistics Finland for the Kemi-Tornio sub region of Lapland province in Finland.
The cultural side of the database contains data on a diverse range of cultural industry activities. These include: festivals such as arts, literary and music festivals; cultural spaces such as theatres and museums; creative and cultural education courses; organisations and places of heritage. Collecting a comprehensive dataset for the cultural database involved a wide range of sources and approaches. The overall approach is summarised below:

- Contacting relevant cultural organisations to request data.
- Searches of the internet for publicly available information and permission requested from website owners to add their data to our database as necessary.
- Printed materials such as promotional brochures for tourists and cultural events were utilised.
- Important sources of information for Ireland and Northern Ireland were the register of charities and the tourism website Ireland.com operated by Tourism Ireland.

Mapping the peripheral creative economy was conducted as part of work package 2 of the Creative Edge project. The work was led by the Whitaker Institute at National University of Ireland, Galway. The databases were also where data was sourced for mapping the creative economy. Mapping was carried out for each of the partner regions creative industries and festivals and cultural spaces. The results and online maps are available here:

http://mapping.creative-edge.eu
Appendix 2: Resources List

The FUNK/ERIBA Model


Creative Edge
Publications from the Creative Edge project including information on how to replicate pilot initiatives such as Creative Steps and Creative Hubs. www.creative-edge.eu

How to Grow – Tools for the Creative Industries
Information on gaining knowledge, building networks and gaining finance. www.howtогrow.eu

Running Your Group
Information resource on running a creative local organisation. http://runningyourgroup.org/

The Resource - Trans Europe Halles

International Craft Trade Fairs: A Practical Guide

Culture Action Europe
Political platform for arts and culture. www.cultureactioneurope.org

Lab for Culture
Networking platform for information on European arts. www.labforculture.org

Compendium: Cultural Policies and Trends in Europe
www.culturalpolicies.net

Craft and Design Enterprise (Ireland)
Information on craft business start-up and running a craft business. www.ccoienterprise.ie

Creative Toolkit (UK)
Advice on career development in media and entertainment. www.creativetoolkit.org.uk
Empty Shops Network (UK)
Support group for utilising empty shops.
http://emptyshops.wordpress.com/about/

Uminova Innovation (Se)
University Incubation Hub.
www.uminovainnovation.se/about-uminova-innovation

National Skills Academy for the Creative and Cultural Sector
Overarching network that monitors the creative sector.
www.ccskills.org.uk

Generator Sverige
Network devoted to the development of the creative sector.
www.generatorsverige.se/in-english

Aalto University
University merger exemplifying broader understanding of creativity.
www.aalto.fi/en

CultureTech
Multidisciplinary event for showcasing and networking capabilities.
www.culturetech.com
Appendix 3: Consultation Questions

Developing Creative Industries in Peripheral Places - Consultation on Policy Recommendations

1. What are the main challenges facing creative industries in peripheral places? Please expand:

__________________________________________________________________________________________________________________________

__________________________________________________________________________________________________________________________

__________________________________________________________________________________________________________________________

2. How can creative industries in peripheral places better contribute to employment creation and enterprise development? Please expand:

__________________________________________________________________________________________________________________________

__________________________________________________________________________________________________________________________

__________________________________________________________________________________________________________________________

3. Do you think particular creative industry sub-sectors have more potential for development in peripheral places? (please indicate which)

☐ All
☐ Advertising
☐ Architecture
☐ Art & Antiques
☐ Crafts
☐ Design
☐ Designer Fashion
☐ Film & Video
☐ Interactive Leisure Software;
☐ Music
☐ Performing arts
☐ Publishing
☐ Software and Computer Services
☐ Television & Radio

Please expand by providing reasons for your response:

__________________________________________________________________________________________________________________________

__________________________________________________________________________________________________________________________

__________________________________________________________________________________________________________________________

4. Do you think creative industries in peripheral places could be better supported, such as through:

a) Initiatives to make the culture and creativity of peripheral places more visible?

☐ Yes ☐ No

If you answered yes, please tick beside initiative examples you view positively:
☐ Festivals
☐ Showcase events
☐ Facilities to connect with public (e.g. Creative Hubs)
☐ Other (Please expand by providing examples)

__________________________________________________________________________________________________________________________

__________________________________________________________________________________________________________________________

__________________________________________________________________________________________________________________________

b) Supports for the development of creative industry clusters?

☐ Yes ☐ No

If you answered yes, please expand by providing examples of sectors that would benefit from clusters/ or other insights:

__________________________________________________________________________________________________________________________

__________________________________________________________________________________________________________________________

__________________________________________________________________________________________________________________________

c) Improving existing and future skills?

☐ Yes ☐ No

If you answered yes, please expand by providing examples of specific skills shortages:

__________________________________________________________________________________________________________________________

__________________________________________________________________________________________________________________________

__________________________________________________________________________________________________________________________

d) Other ways creative industries could be better supported?

Please expand by providing examples:

__________________________________________________________________________________________________________________________

__________________________________________________________________________________________________________________________

__________________________________________________________________________________________________________________________
5. Are existing policy supports for creative industries adequate in any areas?
   Yes ☐ No ☐
   Please expand by providing examples:
   ______________________________________________
   ______________________________________________
   ______________________________________________

6. What are the main inadequacies of existing policy supports for creative industries?
   Please expand by providing examples:
   ______________________________________________
   ______________________________________________
   ______________________________________________

7. Does the potential for growth and concept of the creative industries in peripheral places need greater promotion within:
   ☐ Policymaking
   ☐ Creative Industries
   ☐ Communities
   ☐ Education
   ☐ Other
   Please expand as necessary:
   ______________________________________________
   ______________________________________________
   ______________________________________________

8. Do you know of policy initiatives, in your own or other countries, which have been particularly successful?
   Yes ☐ No ☐
   Please expand by providing examples:
   ______________________________________________
   ______________________________________________
   ______________________________________________

9. Please indicate any further suggestions you have for creative industry policy in peripheral places:
   ______________________________________________
   ______________________________________________
   ______________________________________________

10. Please indicate your location:
    ☐ West of Ireland
    ☐ SEED area in Northern Ireland
    ☐ Northern Finland
    ☐ Västerbotten
    ☐ Other

11. Please indicate your background:
    ☐ Creative Industry
    ☐ Creative Practitioner
    ☐ Policymaker
    ☐ Stakeholder organisation
    ☐ Other


REFERENCES


Higher Education Authority (HEA) (2013a) Report to the Minister for Education and Skills on system reconfiguration, inter-institutional collaboration and system governance in Irish Higher Education.


REFERENCES


CREATIVE EDGE

CREATIVE PEOPLE • CREATIVE PRODUCTION • CREATIVE PLACES

Project website: www.creative-edge.eu
Export platform: www.mycreativeedge.eu
The creative showcase for Europe’s Northern Edge

Whitaker Institute, National University of Ireland, Galway, Galway, Ireland