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Creative Sector Supports in North East Iceland: Entrepreneur Perspectives on Future Needs

OÉ Gaillimh NUI Galway

Whitaker Institute

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About *a creative momentum project*

A three year (2015-2018), transnational project co-funded by the EU Interreg Northern Periphery and Arctic Programme, *a creative momentum project* focused on the development of the creative industries sector in regions across Europe's Northern Edge. This report emerged from the 'Intelligence and Influence' aspect of *a creative momentum project.* For information more visit: https://mycreativeedge.eu/

Disclaimer: This report is prepared on behalf of a creative momentum project partnership. Every effort has been made to ensure the information it contains is correct. We cannot assume responsibility or have liability to third parties arising out of or in connection with this information being inaccurate, incomplete or misleading.

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1. Introduction & overview

This report presents an assessment of the creative sector support needs in the North East Iceland region. The findings are based on the perspective of creative practitioners and entrepreneurs. The creative sector environment in the region has a number of strengths, but also challenges limiting creative business development. The key findings inform a number of recommendations to support the future development of the creative sector in the North East Iceland region. We also discuss strengths of the region and outline good practice examples of innovative initiatives, projects and supports. This part of the analysis can provide insights for other peripheral regions to inform approaches to creative sector development.

The report is underpinned by evidence from an online survey of the creative sector and seven research interviews[1]. Data collected aimed to gain understanding of the general attributes of the region, such as communications infrastructure, natural and broader business environment. It also focused on supports received and current needs, as well as challenges facing future development.

Our core findings highlight the *multidimensional nature of the creative sector and an effective support structure can be likened to a jigsaw puzzle of interlocking parts*. A range of creative enterprise support needs emerge to facilitate future development. Our evidence suggests a *strong foundation exists* in the North East Iceland region *for further creative sector development*. Existing *cultural funding and infrastructure are vitally important resources* to this, including the well-networked, cooperative creative community. However *funding remains a key challenge* and supports in the areas of *new market access* and for *commercial creative projects* emerge as important. Within the creative sector, *business skills appear important to develop among creative entrepreneurs*. Measures to stimulate *new business models* that facilitate creative businesses to work together also appear important for small scale entrepreneurs to gain critical mass, as well as *intermediaries that support and facilitate creative businesses to access existing and emerging opportunities*. Building *creative human capital* in the region is also important for future creative sector development.

[1] The survey was carried out in 2017, primarily to inform an economic and social impact assessment of the creative sector (see Collins et al. 2018b), but also contained questions to gather information on existing supports and future challenges. The greatest number of observations to any question was 61, but respondent numbers vary across the survey. Low response rates are not unusual in surveys of this nature requiring detailed information. They tend to be low because of this burden on respondents (Bryan et al., 2000) Interviews were conducted from mid-2016 to mid-2017 and included creative professionals from design, film, photography, visual and performing arts creative sub-sectors.

2. Creative sector support needs

2.1 Creative enterprises

Access to business supports emerged as a weakness in the North East Iceland region's business environment. Half of survey respondents said access to business supports was either very poor or poor. Other areas assessed in relation to the business environment were: co-working infrastructure, availability of skilled staff, opportunities to collaborate, access to knowledge/up-skilling and networking opportunities (see Figure 1 and 2, access to finance discussed in 2.1.2). Poor ratings did emerge in these areas, but are of lesser concern compared to access to business supports. Overall across these five areas an average of 22% of respondents ranked them either poor or very poor. Interviews with creative entrepreneurs and open ended survey questions help to identify areas where specific supports appear needed, as well as strengths of the region important to be sustained or further developed. We discuss the key areas of need and emerging issues in the remaining sections of this report.

Figure 1: Poor ranking of aspects of business environment

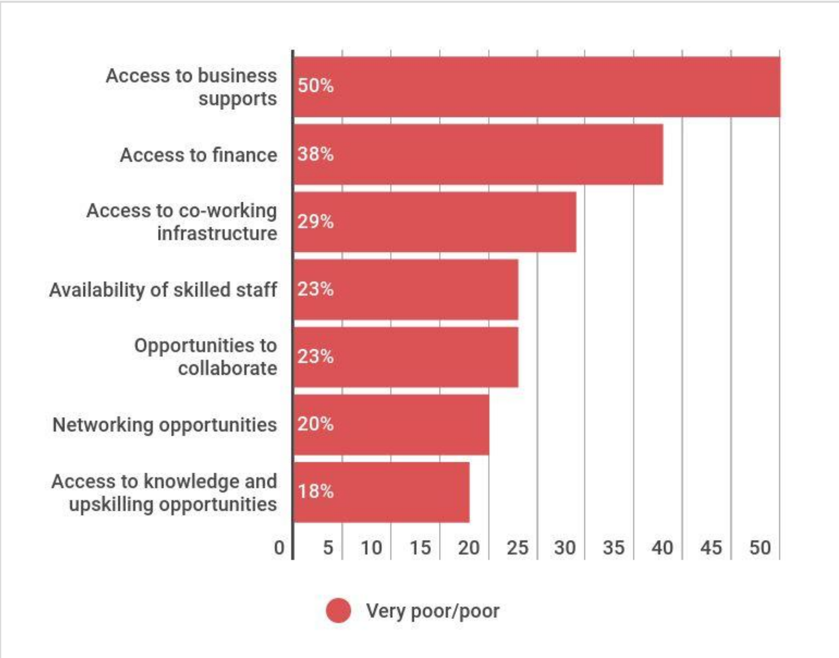
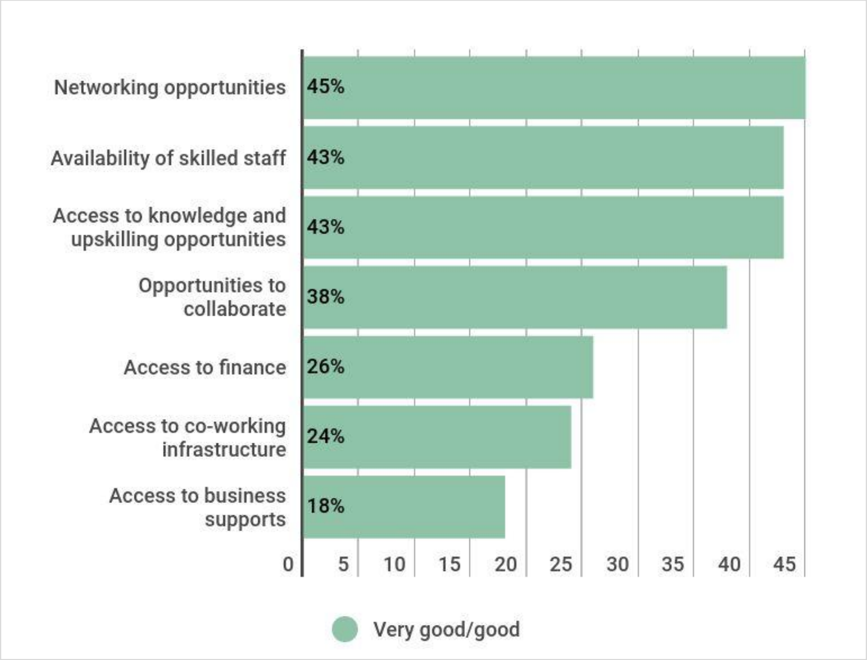


Figure 2: Good ranking of aspects of business environment



2.1.1 Creative business skills

Development of the **business skills of creative professionals and access to tailored creative business advice** would provide a valuable support to facilitate creative sector development in the region. Key areas of need we identified were:

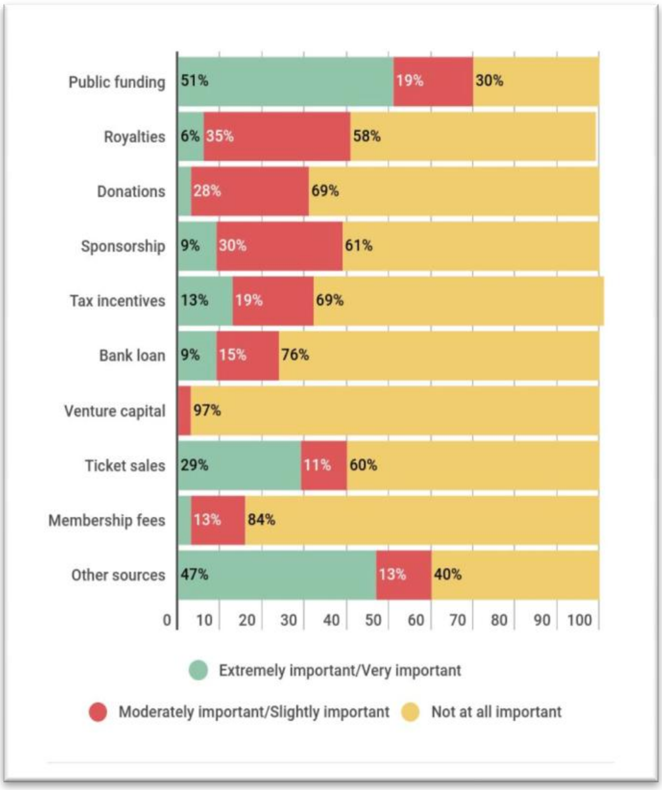
- Assessment of market demand
- Identifying and exploiting new opportunities
- Strategic planning to manage uncertainty around work flow and future projects
- Influencing and sales skills
- Exporting
- Accessing alternative funding sources (e.g. corporate, crowdfunding)

Development of a **creative entrepreneurship training programme**, **underpinned by peer to peer learning**, would provide valuable additional business support in the North East Iceland region. This could be tailored to specific creative sub-sectors that are of strategic focus in the region because of local strengths or wider creative sector development goals. The supports assessment report assessing the west of Ireland *a creative momentum project* partner region provides an example of a similar training programme (see Murtagh and Collins, 2018a).

2.1.2 Funding sources and needs

Financial sustainability is another key challenge for creative businesses in the region. A beneficial support structure exists, with national and regional public funding accessed and valued by the creative sector. Examples emerging from our evidence were grants through the Innovation Centre Iceland (Nýsköpunarmiðstöð Íslands) and the local cultural council, Menningarráð Eyþing. However funding is still a key challenge. In relation to the business environment, access to finance was assessed and more than a third of survey respondents said this was very poor or poor (see Figure 1). Maintaining adequate turnover to sustain a living and simply staying in business were issues emerging from interviews and open ended survey questions. While the sector does have some reliance on public funding, this is part of a mix of funding sources, such as sales. Based on our survey findings, public funding was extremely or very important as a source of revenue for just over half (51%) of survey respondents. Almost half (47%) also said other sources, most notably sales, were extremely or very important. The lack of importance placed on venture capital is also notable, with 97% saying it was not an important source of revenue (see Figure 3). This could also be a symptom of the sample surveyed (27% were in business five years or less and 53% were self-employed) as well as that the traditional arts creative sub-sectors appear to dominate the sector in the region, as opposed to more commercially oriented sectors such as technology.

Figure 3: Importance of different revenue streams to creative enterprises



Existing cultural funding appears more focused on supporting artistic creation rather than developing commercial value from creative content generation. However this type of **cultural funding is vital to creative sector development in the region. Cultural investment generates new cultural resources.** For example, national grants supporting salaries give creative professionals time to focus on their practice enabling generation of new ideas and content (see Case 1 - Artist Salary Fund, opposite). Project grants provide a springboard for creatives to develop ideas, which can take on further life beyond this, reinvented as new projects.

CASE 1: ARTIST SALARY FUND

THE Artist Salary Fund IS A NATIONAL FUNDING SCHEME IN ICELAND PROVIDING SALARIES TO ARTISTS. IT IS MANAGED BY RANNÍS, AN ORGANISATION THAT ADMINISTERS A RANGE OF NATIONAL FUNDS TO SUPPORT ART AND CULTURE. THE ARTIST SALARY FUND FACILITATES ARTISTS TO FOCUS ON THEIR CREATIVE PRACTICE AND NEW ARTISTIC CREATION. IT SUPPORTS THOSE WORKING IN A RANGE OF ARTISTIC FIELDS, SUCH AS MUSIC, DESIGN, VISUAL ART AND WRITING. IT IS AVAILABLE TO BOTH INDIVIDUALS AND GROUPS. IN 2018, SALARIES WERE AWARDED TO 369 RECIPIENTS QUALIFYING FOR A SALARY OF ISK 377,402 (€3,000 APPROX.) PER MONTH (DAÐASON, 2018). SALARIES ARE AWARDED FOR DIFFERENT PERIODS OF UP TO 12 MONTHS. APPLICANTS MUST OUTLINE THE PROJECT(S) THEY INTEND TO WORK ON DURING THE PERIOD OF RECEIPT AND RECIPIENTS MUST SUBMIT A REPORT ON THEIR WORK. RECIPIENTS ARE ALSO PERMITTED TAKE ON OTHER WORK, BUT THIS MUST NOT EXCEED A THIRD OF THE VALUE OF THE ARTISTS SALARY OR INHIBIT THE PROJECT (S) FUNDED UNDER THE ARTIST SALARY FUND (MINISTRY OF JUSTICE, 2009).

More broadly, research assessing the finance needs of the creative and cultural sector has identified **the need for tailor-made finance programmes to support businesses in this sector. Finance needs of creative enterprises vary depending on the sub-sector and stage of development.** Finance obtained by creative businesses can be concentrated around support for specific projects and not for broader business development (KEA European Affairs, 2010). As businesses become more established **supports for more commercial creative projects such as new product development** or **investment in key resources**, such as equipment or facilities, appear lacking. Our evidence suggests that creative entrepreneurs are proactive in seeking funding to address this need, for example through crowdfunding campaigns or donations from private business. Amounts raised however can be small and access is uncertain. **A new jointly managed creative enterprise development fund, by local organisations with economic and cultural development functions, would help to address this gap**.

Better understanding of the distribution of funding supporting creative and cultural industries on a regional level would assist development bodies assess if core urban and peripheral regions of Iceland are accessing proportionate shares. Data from Rannís, the organisation responsible for administration of a number of national arts and culture funds, suggests that from 2013 to 2016 creative professionals in the North East region received funding from its Music Fund, but not from its Artists Salary or Performance Art Fund. A measure to improve transparency around regional access to funding introduced by the Arts Council of Ireland is its map of funding decisions.

2.1.3 Support wider market access and connections

Our assessment points to the **importance of supports for networking building in new markets**. The need for greater international trade and export support measures is also highlighted in the wider Europeam policy context (e.g. OMC-EWG-CCI, 2012; 2014). A small local market emerged as a major limiting factor for creative sector development in North East Iceland. This also appears exacerbated by the dominance of Reykjavik as the creative and economic centre of Iceland. **Greater focus on creative business development into export markets would support creative sector growth**. A high 71% of survey respondents said they did not currently export. Companies citied varied reasons for not exporting. Some felt it did not fit their approach to business or they had enough business from the Icelandic market. This indicates that exporting is perhaps not a development strategy for all types of creative businesses. However some expressed interest in exporting and felt they were currently not ready, but hoped to do so in the future.

To support future growth potential, our evidence suggests it is important to address barriers to exports and lack of contacts in international markets. **Attendance at trade fairs and industry events or touring exhibitions** would provide a vehicle for creative professionals to build networks so they can tap into new revenue streams. The Trade Fair and Creative Hotspot support models developed by *a creative momentum project* provide examples of how such supports can be implemented (see Western Development Commission, 2018a; 2018b).

Increased tourism in the region has supported creative sector growth, in particular for craft and design enterprises. Other creative sub-sectors have also benefited from this, such as photography or television. In the face of a small local market, **examination of the unharnessed potential to develop further synergies with tourism or other industry sectors could also assist creative sector development.** That said, appetite among creative entrepreneurs for this type and direction of development is uncertain from our findings. Overall, survey respondents did identify future potential to expand their business into other creative or wider business sectors. Of 18 creative sub-sectors *a creative momentum project* asked survey respondents about the future potential to expand their business into, the five sectors that emerged of greatest significance were cultural facilities (13%), design (13%), publishing (11%), visual arts (11%) and craft (8%). However this potential is impacted by personal and wider creative goals. For example, work with other sectors can be viewed as a potential threat to creative integrity. Alternatively, it can complement personal and creative goals, opening new creative potential that would not be possible alone, such as collaborations between music and film or art and architecture.

2.2 Regional creativity

2.2.1 Maintain and build cooperative culture for growth and development

The **cultural infrastructure and environment** appears an important factor that has **facilitated the development**

of the creative sector in North East Iceland. From our survey findings, networking opportunities appear well developed – almost half (45%) of respondents indicated that they were good or very good (see Figure 2). Interviews and open ended survey questions provide evidence around how this plays out. Local and national groups, spaces and institutions emerged as valuable in relation to networking. They can have a social role, supporting wellbeing among creatives who often work alone by providing space to connect with others and share common concerns, as well as important peer support building creative confidence. They also have a role in supporting broader development and growth through knowledge sharing, development of collaborative projects and inspiration through exposure to new ideas. Emerging examples included the Women in Music Network, the North Iceland Symphony Orchestra, the Alþýðuhúsið Cultural Centre, Populus Tremula Cultural Workshop and Myndlistarfélagið Visual Artists Organisation. However the evidence also suggests rural, remotely located creatives in the region experience challenges to effectively **access these networks on an ongoing basis**. Akureyri, the region's capital, is also a centre for North East Iceland's cultural and creative infrastructure. **Supporting existing groups to utilise digital technology to facilitate engagement of remote rural peripheral creatives** could help to address this issue.

More broadly a cooperative cultural environment appears to exist in the region. For example, the wider business community also appears supportive of creative entrepreneurship in North East Iceland. Businesses can provide sponsorship for cultural projects or discounts on supplies purchased. Creative entrepreneurs are also conscious to stay connected to their communities and produce cultural content that is valued by them. Overall, our evidence suggests the presence of interacting forces in the North East Iceland creative sector, which resonate with the idea of a creative ecosystem. This sees creative sub-sectors having close connections and interdependencies, while it is the relationships and patterns within the overall system that enable it to function (Crossick and Kaszynska, 2016). When seeking to effectively support creative sector development it is important to understand this structural dynamic within the sector. **No single support measure will assist its development, it is a complex system**. Direct supports to creative entrepreneurs are important, but so is the wider cultural infrastructure and environment. In terms of the **wider supportive environment, North East Iceland appears to have developed this well. Its continuance is also vital and this provides a strong foundation for future growth**.

2.2.2 Increasing the visibility of peripheral creativity

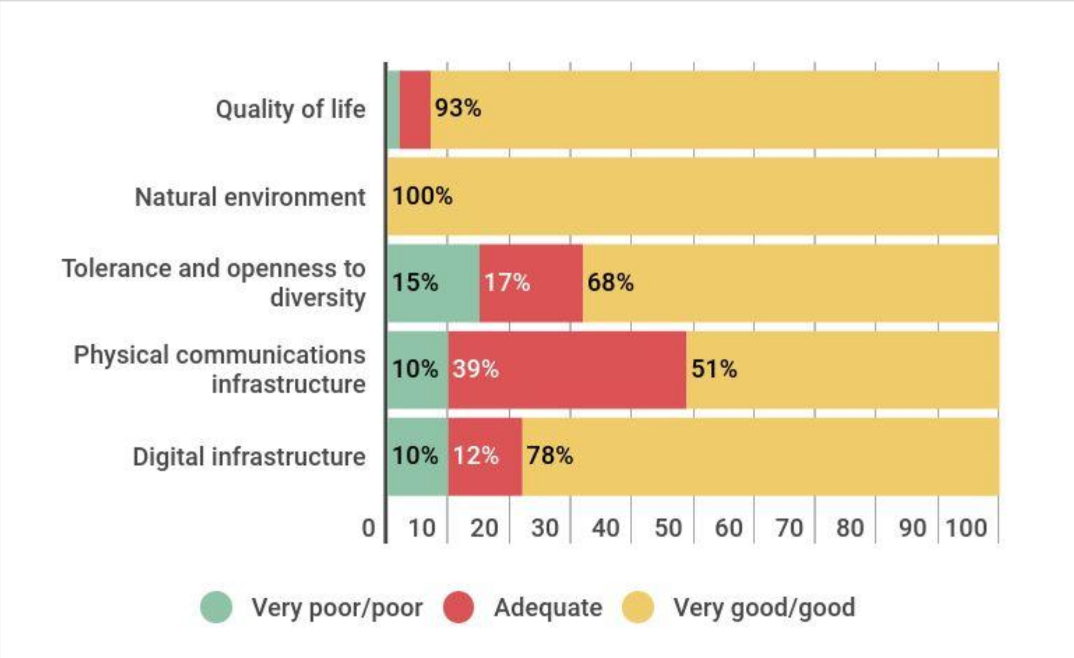
While North East Iceland appears to have a broadly strong and supportive environment for the creative sector, nevertheless the **small local market means making a living as a creative entrepreneur here is challenging. Opportunities for a more sustainable living elsewhere can draw creatives away from peripheral regions such as this**. Opportunities outside the region are a double-edged sword. They can lead to a loss of local creative talent, however if attracted back to the region the experience and skills developed elsewhere can strengthen the creative capital pool in the home region. The support scheme 'Back Home' (see Case 2, opposite) provides a good example of how to incentivise creatives to return to their roots.

Case 2: Aftur Heim (Back Home)

'Aftur Heim' or Back Home is a grant scheme to encourage creative professionals aged between 20 and 35 to return to the North East Iceland region to participate in cultural projects. The scheme has focused on peripheral areas of the North East region across six municipalities (Langanesbyggð, Norðurþing, Skútustaðahrepp, Svalbarðshrepp, Tjörneshrepp, Þingeyjarsveit). The scheme is a cooperation between three local agencies, the North East Iceland Cultural Council, Þingeyinga Development Company and Þingeyinga Cultural Centre. Travel and project grants were provided to successful applicants (Eything, 2013a). The project had a budget of 7 to 8 million ISK (€57,000 to €65,000) (Eything, 2013b). Grants awarded included support for projects and travel in theatre, film and music (Hreiðarsson, 2013). One recipient of the fund was Jenný Lára Arnórsdóttir, founder of the Artik Theatre Company who grew up in North East Iceland region. After graduating from the Kogan Academy of Dramatic Arts in London in 2012, she returned to Iceland but was based in Reykjavik. It was the Aftur Heim grant scheme that first brought Jenný Lára back north to work on theatre projects. She was awarded funding under the scheme for the Love Stories project. This involved the development of a theatre production based on interviews with locals around their own love stories. Jenný Lára used the material to inspire 'Elska' or Loving, a solo performance featuring six characters. It has been performed in communities across the Þingeyinga region as well as in Reykjavik. After this she wrote and produced the Hidden People based on local elf folklore, supported by The Mývatn Cultural Centre. The Aftur Heim scheme has also led to international co-productions for Jenný Lára. Culture Bus in an Icelandic-Norwegian production involving a grant scheme similar to Aftur Heim in Norway. The Aftur Heim grant scheme was important to help Jenný Lára build connections in the North East region, opening doors towards new projects and roles. The Artik Theatre Company is now based in Akureyri. Productions developed as part of the scheme also continue. A bigger production of Love Stories ran at the Hof Culture House in Akureyri in 2016.

Another broader issue for development of the North East's creative sector is to make its **creativity and creative entrepreneurs more visible**. In the wider Icelandic context, rural and peripheral creativity appears overshadowed by the capital area. The need for greater recognition of the creative sector's value has also emerged in other contexts. For example, among the key findings of a report on competitiveness in creative and cultural industries prepared for European Commission is the need for greater recognition of, and political backing for, the sector (Austrian Institute for SME Research and VVA Consulting, 2016). Attracting creative professionals to visit the region is challenging for local creatives. Retaining and building creative capital could be supported through implementation of **strategic place promotion measures**. Festivals and residencies, in conjunction with place branding, would raise awareness of the professional standard of creative content produced locally. The North East environment itself is also an asset that could be used to attract creative talent to the region, positioning itself with focus on its positive traits, such as the quality of life and work environment it offers. Our survey found that creatives who live in the North East region rank its characteristics positively (see Figure 4).

Figure 4: Ranking of the North East Iceland region



Central to operating a successful peripherally-based creative business is to remain locally rooted, yet globally connected. The quality of the digital communications infrastructure in the region should facilitate this, which 78% of our survey respondents ranked as very good or good. Given its peripheral location, physical accessibility is often challenging but this infrastructure also ranked relatively highly. Quality of life indicators are also strong, in particular the natural environment which all survey respondents indicated was good or very good.

2.2.3 Cooperation for greater critical mass

Creative businesses focus on development of new content, products and/or services. The process of creation is central to business activities. In creative sectors such as film, TV, music and publishing, owners of infrastructure can retain a significant portion of revenues generated. Traditionally these could be record labels or production studios, now digital platforms strongly occupy this space (Collinson, 2015). It has been argued that intermediaries, controlled and run collectively by creative entrepreneurs are increasingly important, particularly relevant in the arts where creative professionals are more focused on value creation than capture (Fuller et al., 2010). In a report prepared for the European Commission 'Mapping the Creative Value Chains' it is recommended to develop the enabling environment for creative industries the sector should be stimulated to find new co-operation models to increase scale and bargaining power (De Voldere et al., 2017). Interviews with creative entrepreneurs revealed they lack resources to stay closely in tune with market opportunities. Some entrepreneurs interviewed cite potential opportunities, such as tapping into tourist markets, but lack the time, skills and networks to tap into this. In light of these issues, **agents or intermediaries that support and facilitate creative businesses to access existing and emerging opportunities appear increasingly important in the creative sector**. Examples for example might be local independent digital content publishing platforms, such as Tremolo Songs in Ireland (discussed in Murtagh et al. 2018). **Measures to stimulate this new type of creative business, focused on accessing new markets for existing creative products, rather than content creation, could also assist building of greater economic sustainability in the sector.** Wider market intermediary support schemes are also important to assist market access, such as the 'Design Cooperation' programme between small businesses in Rovaniemi, Finland and Sapporo, Japan (see case in Murtagh and Collins, 2018b). More broadly, **new business models that facilitate creative businesses to work together to gain critical mass** are also important. Cooperative retail outlets, such as Made in Medelpad in the craft and design sector in Sweden (also discussed in Collins et al. 2018a and Murtagh et al. 2018) provide one example of how this can happen.

3. Conclusion & recommendations

The creative sector is made up of a diverse range of sub-sectors from arts and architecture to photography and publishing. Research carried out for *a creative momentum project* assessing the economic and social impact of the creative sector in North East Iceland has highlighted its strong contribution to more sustainable regional economic development, as well as its wider social and cultural value (see Collins et al., 2018b). Other research has also identified how development of the dynamic creative and cultural sector can support a diverse range of policy objectives (for example see Crossick and Kaszynska, 2016; Tafel-Viia et al. 2014).

Given the multi-dimensional regional development value of the creative sector, effective support frameworks are important to facilitate its sustained value and potential for increasing impact. Also linked to the multidimensional nature of the creative sector and its impacts, an effective support structure is also complex, almost like a jigsaw puzzle of interlocking parts. Our findings point towards strengths within the North East Iceland region, but also a range of creative enterprise support needs to facilitate future development. Based on our analysis a number of recommendations emerge:

- Development of business skills and access to tailored creative business advice would provide a valuable support to the creative sector in the North East Iceland region. This could include development of a creative entrepreneurship business skills training programme.
- Existing cultural funding is a vital support and generates new cultural resources. While a beneficial support structure exists, funding is still a key challenge. More work is need to best understand priority needs. However, our evidence suggests a creative enterprise development fund would help to address the need for better support for more commercial creative projects such as new product development.
- Supports for networking building in new markets, such as funding to attend trade fairs or industry events, targeted at creative enterprises seeking to grow would facilitate tapping into new revenue streams beyond local markets.
- In the face of a small local market, examination of the unharnessed potential to develop further synergies with tourism or other industry sectors would also assist creative sector development.
- The broader cultural infrastructure (e.g. local organisations, education institutions) and environment also appears an important factor that has facilitated the development of the creative sector in North East Iceland. Its continuance is also vital and it provides a strong foundation for future growth. This highlights the multifaceted needs underpinning a strong supportive environment for creative sector development.
- A broader issue for the development of North East's creative sector is to make its creativity and creative entrepreneurs more visible. In the wider Icelandic context, rural and peripheral creativity appears overshadowed by the capital area. Greater recognition of the creative sector's social and economic value in peripheral contexts appears needed, as well as assessment of regional access to national level arts and cultural funding.

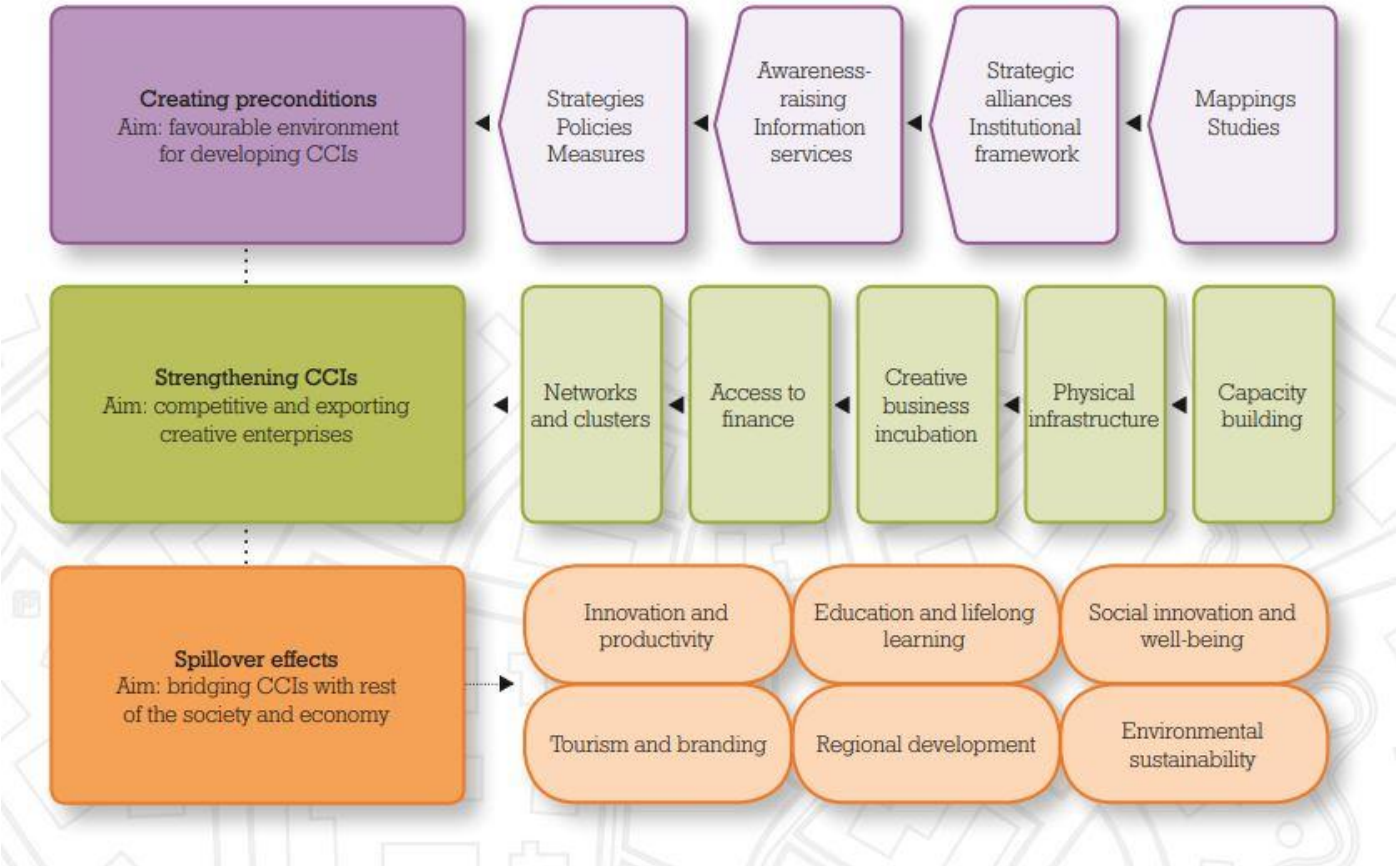
- To grow the creative sector in the region it needs to retain and build creative human capital. Measures to assist this could include the implementation of strategic place promotion, as well as support measures incentivising temporary visits and relocation of creative professionals.
- Measures to stimulate a new type of intermediary-like creative business, focused on assisting existing businesses access new markets could also assist economic development within the creative sector.
- A strong cooperative culture among creative professionals appears to exist in North East Iceland's creative sector. This presents a strong foundation for the development of new business models to facilitate creative businesses to work together to gain critical mass. The introduction of measures to stimulate cooperative business models between creatives would promote their emergence.

Unanswered questions and areas of future investigation are also important to highlight which emerge from our analysis. We present the perspective of creative entrepreneurs on support needs. The analysis identifies a number of support schemes and projects that work to address some of the issues we identify. This raises two questions. The first is if existing supports need greater resourcing so they reach a wider proportion of the creative sector. The second is if an access problem exists within the creative sector to avail of supports in place.

More broadly, our recommendations intersect with a framework for cultural and creative industry development recommending policies and supports at three levels (see OMC-EWG-CCI (2012) and Appendix 1). Because our findings emerge from the perspective of creative entrepreneurs, they most strongly link to support measures that 'Strengthen Cultural and Creative Industries', but also to the two other core areas of this framework which are 'Creating Preconditions' and 'Spillover Effects'. Alongside this framework, our findings and recommendations should provide evidence to assist policy stakeholders effectively shape the future development of creative sector supports.

We also suggest our recommendations are assessed in the context of evidence presented in other policy oriented studies on creative sector development (such as Austrian Institute for SME Research and VVA Consulting, 2016; Collins et al. 2014; European Creative Industries Alliance, 2014; OMC-EWG-CCI, 2012; KEA European Affairs, 2010; Creative Growth 2011). It is also important to note that this report is based on limited evidence and there is still call for more in-depth, comprehensive research. Studies incorporating data from a range of stakeholders, as well as looking at specific creative industry sub-sectors would represent positive next steps.

Appendix 1: Framework for developing cultural and creative industries



Source: OMC-EWG-CCI, 2012

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