a creative momentum project

Creative Sector Supports in South East Northern Ireland: Entrepreneur Perspectives on Future Needs

OÉ Gaillimh
NUI Galway

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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/

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1. Introduction & overview

This report presents an assessment of the creative sector support needs in the South East Northern Ireland region. The findings are based on the perspective of creative practitioners and entrepreneurs, underpinned by evidence from an online survey of the creative sector, as well as a series of interviews with creative professionals[1]. Data collected aimed to gain an 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. The key findings inform a number of recommendations made in the final section to support the future development of the creative sector in the South East Northern Ireland region. We also discuss strengths of the region and outline good practice examples of innovative initiatives and supports. This part of the analysis can provide insights for other peripheral regions to inform approaches to creative sector 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.* To assist the burgeoning creative sector in the South East Northern Ireland region to reach its full potential, a *range of creative enterprise support needs emerge* to facilitate future development. Our findings point towards the need for a number of new support schemes in the region. To facilitate better access to finance we recommend assessment of the potential for a *creative enterprise low-cost loan fund*. To support creative enterprise sustainability accessing wider markets is important and we suggest a number of strategies to facilitate this. One is supports to build networks in international markets to *assist with export development*. Another is an examination of the unharnessed potential to develop *cross-sector synergies* and grant supports to catalyse projects. We also suggest there is a need for *knowledge intermediaries* to scope out and provide information to the creative sector on industry trends and new market opportunities. Better retention and up-skilling of *creative talent* and attraction of new creative talent to the region is also important so the sector has a strong base of human capital. For existing creative entrepreneurs we argue for *the importance of building entrepreneurship skills a*nd identify a range of areas where gaps appear from our evidence. The region also has *strengths that can be built upon*. Its location between Dublin and Belfast means that creative entrepreneurs in the region can enjoy local quality of life benefits, but also remain connected to cities where markets and creative sector professionals are more concentrated. We argue however that the sector could be supported to become *better networked and more visible within the South East Northern Ireland region itself*. We identify the need for assessment of the potential and feasibility of a *network of new shared creative spaces*, such as dedicated creative enterprise co-working hubs or business incubators. In addition, *place promotion* celebrating the creative sector's presence in South East Northern Ireland, such as, for example, through festivals, would also help to raise the profile of the sector and the attractiveness of the region to creative sector entrepreneurs.

[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. 2018), but also contained questions to gather information on existing supports, as well as future needs and challenges. The greatest number of observations to any survey question was 40, 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 May 2017 to February 2018 with six creative professionals from audiovisual, arts, craft and design sub-sectors.

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2. Creative sector development needs

2.1 Creative enterprises and the business environment

Across seven areas examined in relation to the business environment in South East Northern Ireland, **access to finance emerged** as the **most significant issue** among those assessed. 45% of respondents indicated access to finance was poor/very poor, and a low 13% said this was good/very good. In the other areas, assessed results were more mixed. Access to business supports emerged as a weakness for 39% of respondents who indicated this was poor/very poor, but 27% stated this was good/very good. Just over two-thirds rated access to co-working infrastructure as very poor/poor but just over a quarter said this was good/very good. Two-thirds of survey respondents said access to knowledge was very poor/poor, but 39% said this was good/very good. For the remaining three areas assessed (availability of skilled staff, opportunities to collaborate and networking opportunities) between 24% and 29% said they were poor/very poor but between 21% and 29% said they were good/very good (see Figure 1 and 2).

Figure 1: Poor ranking of aspects of the business environment

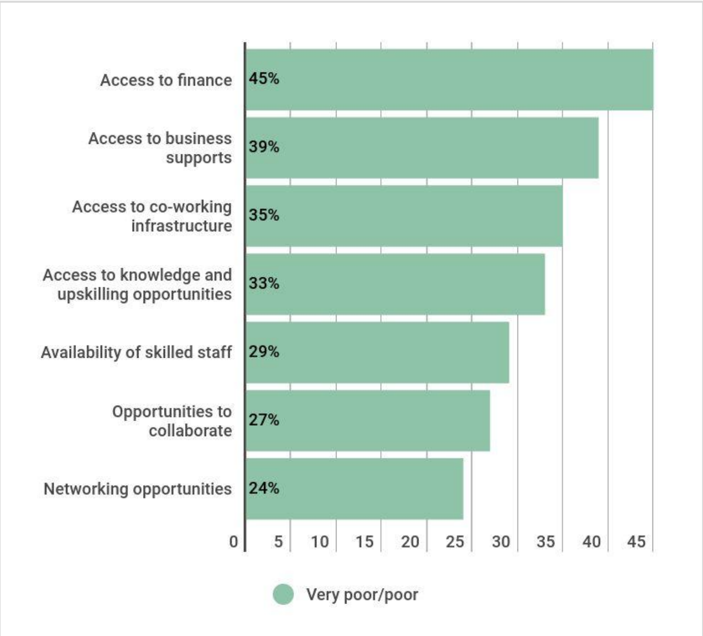
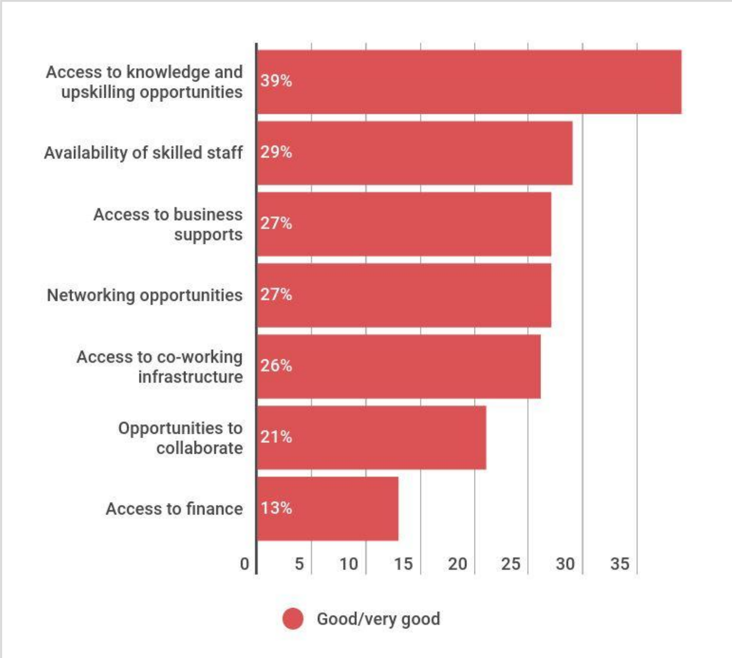


Figure 2: Good ranking of aspects of the business environment



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 to be sustained or further developed. We discuss the key areas of need and emerging issues in the remaining sections of this report.

2.1.1 Develop local creative hubs

Research interviews indicate that the relatively small population and the consequent small local market is a disadvantage for the financial sustainability of creative enterprises, but an advantage when it comes to getting to know the local creative enterprise community. To facilitate networking places where creative professionals can access, build and maintain connections with other local creative professionals are important. Examples emerging from our evidence were local events such as festivals, workshops and broader networking events for the entrepreneur or arts community. Physical spaces, such as arts centres and collective studios, are also important places to host these types of events, also acting as a more permanent showcase of local creative activities. A broader observation we make is that rather than networks being dense and predominantly formed locally, they appear to stem from and link to Belfast. For example, connections to places such as Fab Labs, Space Craft, Blick Studios and Ulster University emerge from interviews. The ability to build networks both locally and in the region's capital city is a strength of South East Northern Ireland's creative sector.

While spaces and places to network do emerge, some of our interview and open-ended survey question evidence suggests the region would benefit from greater networking opportunities for creative sector professionals. Our survey showed mixed results in relation to networking opportunities with 24% indicating they were poor/very poor and 27% good/very good. We recommend that to further embed and build local networks dedicated places where creative professionals can access and maintain connections with other local creative professionals are important. Therefore **emerging from our evidence is the need for assessment of the potential and feasibility of a network of new shared creative spaces, such as dedicated creative enterprise co-working hubs or business incubators in the region. This appears of particular importance in the south of the region more distant from Belfast.** While the results of our survey on access to co-working infrastructure were mixed, still more than two thirds (35%) said this was a poor/very poor aspect of the business environment. Supporting and providing assistance to incubators and incubation services has also been recommended elsewhere in the EU context (Creative Growth, 2011). Broader research has found business incubators have positive impacts on supporting creative enterprise development. For example, co-working spaces where facilitators support relationship building among young, start-up entrepreneurs have positive outcomes for their development (Fuzi, 2015). Alternatively, incubators can be used to bring together existing niche clusters of creative enterprises (Chambers and Serup, 2011). For example, in the Northern Finland region, the Oulu Games Campus shows how the development of these spaces can focus on niche areas that complement wider local resources, such as the existing talent base (see Murtagh and Collins 2018c). Working in a more visible space, such as co-working hubs, can have wider benefits for businesses, such as reducing isolation and facilitating peer to peer learning. These spaces can also be effectively integrated into existing infrastructures such as arts centres or serviced offices (Fuzi, 2015).

2.1.2 Retain and develop creative talent

Concerning access to knowledge and up-skilling opportunities, survey results were mixed - 39% indicated they felt these opportunities were good/very good. However, a significant 33% also rated them as poor/very poor. Interviews are important to identify areas of strength and potential need. Some creative sector entrepreneurs interviewed refer to the influence of aspects of their third level education and the emphasis placed on different forms of entrepreneurship, such as working as a freelancer or establishing a social enterprise. Teaching staff with a creative entrepreneurial background are also described as influencing their decision to start a business. Training courses taken are described, such as short courses developing specific skills or longer entrepreneurship training and skills development programmes. One drawback emerging is that the entrepreneurship training accessed is targeted at all types of entrepreneurs and not tailored creative sector needs.

To strengthen the up-skilling opportunities in the region, a tailored creative entrepreneurship training programme, underpinned by peer to peer learning, would provide valuable creative business support. The west of Ireland supports assessment provides an example of a similar training programme (see Creative Donegal case in Murtagh and Collins, 2018b). Peer to peer learning is important because successful, experienced creative entrepreneurs have context-specific knowledge and experience to pass on to emerging entrepreneurs. But when businesses are small and run by individuals, this presents a barrier to more organic knowledge transfer because of the time pressures of project management and erratic work schedules. A desire is also found among established creative professionals and growing businesses to pass their skills on, promote and support creative careers. More broadly, from open-ended survey questions and interview evidence, areas of particular need for creative entrepreneur skills development included:

- Business/product branding and marketing
- Effectively accessing niche markets
- Identifying and accessing export opportunities
- Adapting to new industry trends and technologies
- Strategic planning to manage uncertainty around workflow and future projects
- Accounting and legal skills: e.g. bookkeeping, taxation, contracts
- Understanding of employment legislation and obligations

In particular, continuing to develop the skills of emerging creative talent in the South East Northern Ireland region is also important to assist the development of the creative sector. More established entrepreneurs highlight the importance of the continued development of the skills of emerging creative professionals to increase the potential of the sector to produce high quality, authentic creative content, products and services. In addition to focusing on developing entrepreneurship skills, **a formal structure for wider creative skills development among emerging creative talent would also**

CASE 1: CREATIVE EMPLOYMENT PROGRAMME

SUPPORTING THE NEXT GENERATION OF ARTS AND CULTURAL PROFESSIONALS, THE NORTHERN IRELAND CREATIVE EMPLOYMENT PROGRAMME HAS SUPPORTED 89 NEW ENTRY LEVEL JOBS IN THE CREATIVE INDUSTRIES FOR YOUNG PEOPLE IN THE ARTS AND CULTURAL SECTOR. RUNNING FROM 2015 TO 2018, THE PROGRAMME WAS OPEN TO YOUNG PEOPLE AGED 16 TO 24, BOTH GRADUATES (FROM ANY BACKGROUND) AND THOSE WITHOUT THIRD LEVEL QUALIFICATIONS. AMONG THE AIMS OF THE PROGRAMME WERE TO ENABLE THE GROWTH OF THE SECTOR BY DIRECTLY ADDRESSING SKILLS GAPS AND SHORTAGES, PROMOTE RESPONSIBLE AND SUSTAINABLE RECRUITMENT PRACTICES WHILE ALSO GENERATING LONGER TERM COMMITMENT TO SUSTAINING NEW JOB OPPORTUNITIES BEYOND THE LIFE OF THE PROGRAMME (CREATIVE AND CULTURAL SKILLS, 2018). OPEN TO BOTH COMMERCIAL AND CHARITABLE ORGANISATIONS, THE SCHEME PROVIDED WAGE INCENTIVES OF UP TO £5,000 TO SUPPORT DEVELOPMENT OF APPRENTICESHIPS FOR A MINIMUM OF 2 YEARS AND UP TO £2,500 TO SUPPORT INTERNSHIPS FOR A MINIMUM OF 6 MONTHS. THE SCHEME WAS ALREADY RUNNING IN ENGLAND AND EXTENDED TO NORTHERN IRELAND IN 2015, SUPPORTED BY THE ARTS COUNCIL OF NORTHERN IRELAND NATIONAL LOTTERY FUNDING AND MANAGED BY CREATIVE & CULTURAL SKILLS. THE PROGRAMME'S FUNDING CLOSED IN JUNE 2017 HAVING COMMITTED £275,000 TOWARDS THE WAGE COSTS OF 89 JOBS. PARTICIPATING EMPLOYERS CAME FROM ACROSS NORTHERN IRELAND AND RANGED FROM ESTABLISHED ARTS VENUES TO MICRO-BUSINESSES. THESE EMPLOYERS COMMITTED A FURTHER INVESTMENT OF £500,000 TO WAGES, DEMONSTRATING THEIR COMMITMENT TO THE SECTOR AND SUPPORTING YOUNG TALENT. THIS INVESTMENT HAS GIVEN A WIDE RANGE OF YOUNG PEOPLE THEIR FIRST BREAK IN BUILDING A CAREER IN THE CREATIVE INDUSTRIES. IN RETURN, EMPLOYERS HAVE GAINED ENTHUSIASTIC NEW MEMBERS OF STAFF WHO ARE BRINGING FRESH IDEAS AND ENERGY TO THEIR BUSINESS. THE PROGRAMME HAS HELPED TO ESTABLISH A PILOT CREATIVE APPRENTICESHIP SCHEME IN COLLABORATION WITH BELFAST MET AND THE DEPARTMENT FOR THE ECONOMY. BUSINESSES THAT HAVE SIGNED UP TO BE INVOLVED IN THE SCHEME INCLUDE CAHOOTS NI, BLACK BOX, YOUNG AT ART, PRODUCTION SERVICES IRELAND, OH YEAH MUSIC CENTRE, ARTSEKTA, THE GRAND OPERA HOUSE, NERVE CENTRE, EASTSIDE ARTS AND VERBAL ARTS CENTRE.

facilitate the process of knowledge exchange, such as internship and apprenticeship programmes. A good practice example in this regard is the Creative Employment Programme in Northern Ireland which provided funding support for creative businesses to provide paid internships (see Case 1). In light of our findings, we recommend assessment of the potential for its continued existence and expansion.

2.1.3 Supporting sustainable growth: Building international networks

Creative business sustainability is threatened by a dependency on a narrow client base and/or funding streams. Open-ended survey questions present evidence that some creative enterprises struggle to build a sustainable business. Building a balance of revenue streams is important to creative enterprise success. Interview evidence reveals that creative entrepreneurs are aware of this. They actively work to build a diverse client base and a strong reputation so as to better retain existing clients and generate return business. Depending on business goals, this can lead entrepreneurs to expand beyond local and national markets into international markets to support creative business sustainability.

Our survey results found 33% of respondents did not currently export, and open-ended survey questions reveal that those who aim to develop into export markets lack the necessary contacts. Interview evidence shows that for creative entrepreneurs who have developed into export markets building international relationships and contacts have been important to facilitate this. Attending networking events, trade fairs and industry conferences emerge as important spaces to establish relationships with new clients and potential collaborators. **Increased supports for network building in new markets** through support for **attendance at trade fairs and industry events or touring exhibitions** would provide a vehicle for creative professionals to extend their networks. The cost of attendance at these types of events can be prohibitive, particularly for more peripherally located entrepreneurs travelling and shipping products over long distances. 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). The need for greater international trade and export support measures are also highlighted in the EU policy context (e.g. OMC-EWG-CCI, 2012; 2014). Supporting international cultural exchange and trade is identified as an important enabler of creative sector development (European Commission, 2010).

2.1.4 Support interconnections to catalyse growth

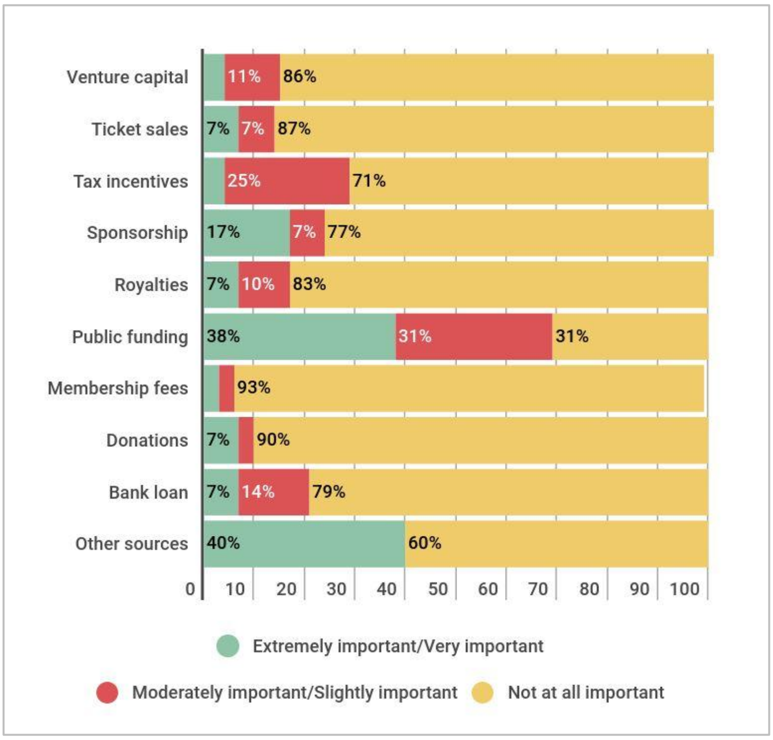
As discussed in the previous section, building a balance of revenue streams is important to creative enterprise success. Export markets provide one avenue to support business sustainability when local markets are small. However not all creative sector entrepreneurs aim or have the capacity to export. Another route to help build more sustainable creative enterprises is working with and developing activities that cross over into creative industry sub-sectors outside their primary area of work, as well as other industry sectors. Wider European creative sector policy research also recommends enabling cross-sector collaboration to stimulate innovation and growth (European Creative Industries Alliance, 2014). While evidence exists of some cross-sector working, **to assist creative sector development, unharnessed potential to develop greater synergies between creative sub-sectors, as well as wider industry sectors should be examined. The development of grant supports to catalyse**

projects would also be essential to facilitate development. Of 18 creative sub-sectors, *a creative momentum project* asked survey respondents about the future potential to expand their business into potential was identified in all sectors. Design (13%), craft (8%), games (7%), visual arts (7%), and marketing (7%) emerged as the top five sectors of greatest significance. This suggests appetite exists for cross-sector collaboration within creative industry sub-sectors. Interview evidence from South East Northern Ireland also provides examples of how creative sector professionals develop short and long-term projects that cross-over into the education and tourism sectors. Open-ended survey questions suggest that to further exploit these broader opportunities skills development around marketing and branding are also important.

2.1.5 Access to funding and finance

The South East Northern Ireland creative sector does appear to have some reliance on public funding, but this is part of a mix of revenue sources (see Figure 3). Based on our survey findings, public funding was extremely or very important as a source of revenue for 38% of survey respondents, while 31% said it was not important. Interviews with arts and cultural organisations reveal a strong drive and consciousness to diversify their revenue streams. Organisations aim to become less reliant on state funding to reduce their vulnerability if cuts are imposed. Other sources of funding, most notably sales and client fees, were extremely or very important for 40% of survey respondents. The lack of importance placed on venture capital is also notable, with 86% saying it was not an important source of revenue. This could also be a symptom of the sample surveyed – 40% were in business five years or less, and 60% were self-employed.

Figure 3: Importance of different revenue streams to creative enterprises in South East Northern Ireland



A beneficial creative sector business support structure is available to creative sector entrepreneurs in South East Northern Ireland. National and regional public funding is accessed and valued by the creative sector. Examples emerging from our evidence were supports available through Northern Ireland Screen, Invest Northern Ireland, the Arts Council of Northern Ireland and local government. Funding schemes facilitate the production of new cultural content, but also support creative professionals in broader ways such as to develop their skills, networks and access broader markets. Interview evidence also suggests that **funding support schemes are particularly important to early-stage creative sector businesses**, such as to develop projects driven by their creative ideas and build their reputation. Spin-off outcomes because of new connections or activities generated through these broader supports are also observed, such as new collaborative projects. **Existing supports for small business and creative sector professionals are a central part of the support structure for creative sector development in the region. Our findings underline the importance of the continued availability of these supports.**

While a beneficial creative business support structure appears to exist in South East Northern Ireland, access to finance still emerges as an issue for creative sector entrepreneurs. Our survey found 45% of respondents indicating access to finance was very poor/poor. Small-scale creative enterprises describe difficulty accessing some types of enterprise finance as they don't have the required turnover levels for eligibility. More broadly, research assessing finance gaps in the creative and cultural sector has identified the need for tailor-made finance programmes. Finance needs of creative enterprises vary depending on the creative 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). From open-ended survey questions, access to finance also emerges strongly as an issue. **The potential for a regional scheme, dedicated to providing low-interest loans to the creative sector, appears an important area for assessment as part of the future support structure underpinning the creative sector in the South East Northern Ireland region.** Developed and managed by the Western Development Commission, the Creative Industries Micro Loan Fund provides an example of a creative sector finance support scheme in another EU peripheral region (also discussed in Murtagh and Collins, 2018b). Also, future research could focus more closely on the **finance needs of creative sector enterprises in South East Northern Ireland to understand how existing supports could be better tailored to creative business needs, or if further new support schemes are warranted.**

From our evidence, another new support scheme we identify potential for is a **regional fund to support leading creative professionals to focus on their creative practice full-time for a period**. Our survey found that 21% of creative sector professionals surveyed were not working in the creative sector as a full-time occupation. All of these respondents engaged in other paid employment. Other employment was in areas such as education, administration, sales and agriculture. If creative professionals are occupied in other jobs rather than concentrated on their creative practice full-time, this can limit their capacity for new content creation. They lack time to invest in experimentation and idea development. A support scheme to help alleviate this issue in Iceland is the Artists Salary Fund which provides a salary of around €3,000 per month to artists for set periods so they can focus on their creative practice (see Artist Salary Fund case in Murtagh and Collins 2018a). **A regional fund to support leading creative professionals to focus on their creative practice full-time would help to build distinctive cultural assets in**

the region. Assessment of existing supports and the potential for such a regional fund supporting a variety of forms of artistic creation would be a worthwhile area of future policy consideration.

2.2 Regional creativity

2.2.1 Support creative human capital growth

Analysis of the economic impact of the creative sector in South East Northern Ireland shows differences in employment trends by sub-sector from 2012 to 2015. Employment in cultural and creative industries experienced growth, while employment declined in craft industries (Collins et al., 2018). However, data focused on numbers employed solely in creative occupations shows an overall 10% decline in the creative workforce in the South East Northern Ireland region, while at the Northern Ireland level employment grew by 6% (see Figure 4).

Figure 4: Numbers in creative occupations[2]

	2011	2012	2013	2014	% CHANGE
SOUTH EAST NORTHERN IRELAND	10000	9000	8000	9000	-10%
NORTHERN IRELAND	31000	30000	34000	33000	+6%

Data source: Northern Ireland Statistics and Research Agency, Labour Force Survey

The issue of declining creative human capital and its impact on creative sector development also emerged in some of our interview data**.** Creative talent can be drawn towards major urban centres in Northern Ireland and further afield. Open-ended survey questions also present evidence indicating that creative enterprises encounter challenges finding skilled and experienced creative employees. In light of this evidence, an **important part of an active support ecosystem in the region includes the integration of measures that aim to retain and build the region's creative talent.** Referred to in section 2.1.2, the Creative Employment Programme not only supports skills development of emerging creative talent but also alongside this helps to retain talent in the region. Given the decline in creative occupations and wider evidence of creative talent deficits in the region, the continuance of this scheme and additional measures appear necessary. Good practice in the North East Iceland *a creative momentum project* region provides an example of a scheme that can support this objective. The Aftur Heim (Back Home) grant scheme supports young creative professionals to return to the North East region to participate in cultural projects (see Back Home case in Murtagh and Collins, 2018a). Provision of similar grant incentives supporting creative projects in the South East Northern Ireland region should help stimulate growth in creative human capital, as well as building the region's distinctive cultural assets.

2.2.2 Build the profile of creative industries

The environment of the South East Northern Ireland region is a positive asset that could support the future development of the creative sector. **Place promotion targeted at creative talent looking for a particular lifestyle, in contrast to that offered in core, urban regions, could also help to reduce the decline in creative capital in the region.** One example of

[2] Employment in creative occupations is defined here by 30 Standard Occupation Classification (SOC) codes in the following areas: PR, advertising, marketing, software, IT, architecture, design, photography, publishing, film, TV, music, radio, arts and craft.

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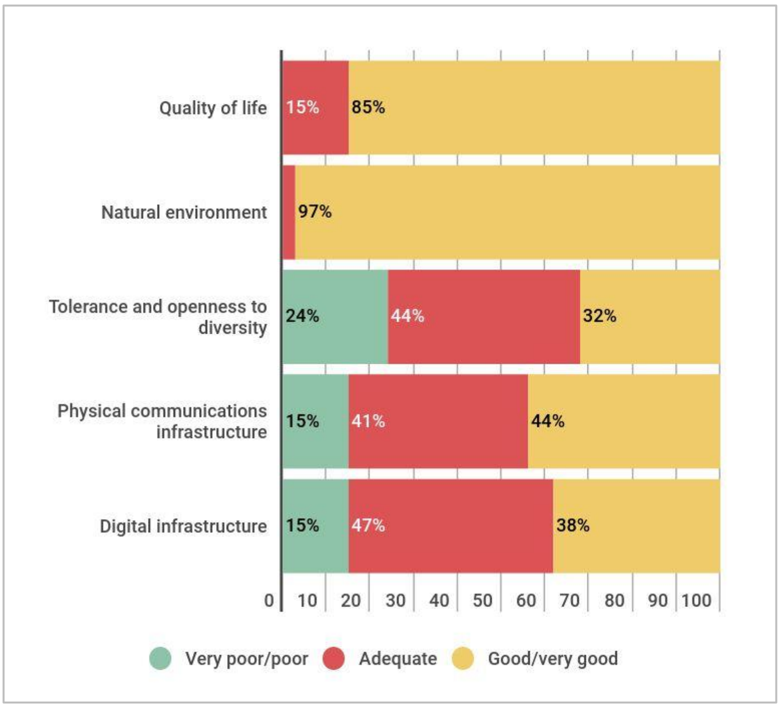
a broader place promotion scheme is Look West, which provides information for individuals setting up a business or looking to relocate to the west of Ireland. Our survey found that creatives who live in South East Northern Ireland rank the quality of life and natural environment very positively (see Figure 5). Creative professionals interviewed expressed that they enjoy relative proximity to Belfast to access markets and services there, but are also far enough away to benefit from the south east's quality of life attributes such as the high quality of their surrounding natural environment.

The quality of the digital communications infrastructure is also ranked reasonably well in our survey which 38% of survey respondents indicated was very good/good and 47% adequate. This infrastructure is essential to effectively operating a creative business in a peripheral region. Interviews highlight how a high-speed internet connection is vital to business operation, in particular for creative enterprises producing digital content. It facilitates creative professionals to connect with clients in external markets, such as in Belfast, Dublin or London. Physical communications infrastructure is also ranked quite well with 44% indicating it is good/very good. Interview evidence highlights good connectivity regarding the region's location between Belfast and Dublin. Both cities have international airports providing connections to places further afield. Good physical and digital communications infrastructure are also complementary resources that facilitate creative sector professionals to build businesses from peripheral regions. For example one interviewee comments on how work can occur remotely with the aid of digital technology, but some physical meetings are also important over the longer term, making ease of physical accessibility also a valuable asset.

Figure 5: Ranking of the South East Northern Ireland region



We also argue that creative entrepreneurs are an important part of the region's contemporary endogenous cultural resources. Our interview evidence suggests local heritage, traditions and nature inspire creative professionals in the region. **Place promotion celebrating the creative sector's presence in South East Northern Ireland would also help to raise the profile of the sector, as well as the region's attractiveness.** Existing events, such as the Creative Peninsula festival in the Ards and North Down Borough Council area, help to celebrate and raise the profile of the arts and craft sector in this part of the region (see Case 2). Similar events in other local government districts, or a collaborative creative sector showcase event across council areas, would help to raise the profile of the sector in other parts of South East Northern Ireland.

2.2.3 Strengthen critical mass through intermediaries

Intermediaries that support and facilitate creative businesses to better access existing and emerging opportunities are important in the future development of the creative sector in peripheral regions. For example, the 'Design Cooperation' programme between small businesses in Rovaniemi, Finland and Sapporo, Japan provides a good example of this type of support initiative. Coordinated by the City of Rovaniemi, the programme capitalises on the Japanese interest in Finnish design and develops connections between local Finnish enterprises and Japanese partners (see Murtagh and Collins, 2018c). Open-ended survey questions highlight the United States as a potential market, specifically through tapping into the population with heritage connections because of its history of migration from Northern Ireland.

While more research is needed to understand areas of opportunity and need, our evidence in the South East Northern Ireland context points to the value of knowledge intermediaries in the creative sector. These would scope out and provide information to the creative sector on industry trends and new market opportunities. Interviews with creative sector professionals in the region show that creative professionals understand the importance of devoting time and resources to finding new opportunities, such as staying informed of changes in their particular sub-sector (e.g. market changes, technology changes, labour force structure changes,

CASE 2: CREATIVE PENINSULA

RUNNING FOR ALMOST TWO DECADES, CREATIVE PENINSULA SPANS OVER TWO WEEKS IN AUGUST EACH YEAR TO SHOWCASE THE WORK OF LOCALLY BASED PROFESSIONAL ARTS AND CRAFTSPEOPLE, AS WELL AS ENGAGE THE WIDER COMMUNITY. THE EVENT ALSO ACTS TO ATTRACT VISITORS TO THE ARDS AND NORTH DOWN AREA. OVER A FORTNIGHT CREATIVE PENINSULA COMBINES A MARKET, EXHIBITIONS, WORKSHOPS, DEMONSTRATIONS, TOURS, OPEN STUDIOS AND SEMINARS. IT PROVIDES ESTABLISHED AND EMERGING MAKERS THE SAME OPPORTUNITY TO SHOWCASE THEIR WORK. IT TAKES PLACE IN VENUES THROUGHOUT THE REGION SUCH AS ARDS ARTS CENTRE, NORTH DOWN MUSEUM AND LOCAL GALLERIES. WORKSHOPS ALSO TAKE PLACE IN THE STUDIOS OF ARTS AND CRAFTSPEOPLE PROVIDING AUTHENTIC EXPERIENCES AND ALLOWING PARTICIPANTS TO GAIN AN INSIDER VIEW. OPEN SPACES SUCH AS NEWTOWNARDS SQUARE AND WALLED GARDENS AT BANGOR CASTLE ALSO BECOME VENUES TO SHOWCASE CREATIVITY AND ENGAGE THE PUBLIC (ARDS ARTS, 2017). THE GEOGRAPHY OF THE EVENT INITIALLY FOCUSED ON THE ARDS PENINSULA AREA, BUT SINCE 2015 HAS EXTENDED TO COVER THE WHOLE ARDS AND NORTH DOWN COUNCIL AREA (ARDS ARTS, 2018). CREATIVE PENINSULA HELPS TO INCREASE THE PROFILE OF THE REGION'S STRONG LOCAL ARTS AND CRAFT INDUSTRY. ITS ANNUAL PRESENCE CONTINUES TO REINFORCE ITS PLACE AND POSITION IN THE REGION.

creative trends/cultural consumption, grant opportunities, training courses, industry conferences) and how changes could impact their business (e.g. project workflow, improve the quality of work, new applications of existing skills, adaptations to existing products). However, balancing this with working on their creative practice is challenging. **This highlights the need for state-supported intermediaries with specific functions, such as accessing new markets for existing creative products or knowledge provision.**

More broadly, research has highlighted the importance of supporting the enabling environment for creative industries through stimulation and development of new co-operation models to increase scale and bargaining power (De Voldere et al., 2017). This is because owners of infrastructure, such as record labels or production studios, and more recently digital platforms can retain a significant portion of revenues generated in the creative industries (Collinson, 2015). Intermediaries, controlled and run collectively by creative entrepreneurs are increasingly important to redress this imbalance (Fuller et al., 2010). **Measures to stimulate new types of collaborative creative businesses acting as intermediaries to build critical mass for the sector are also important.**

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 South East Northern Ireland has highlighted its strong contribution to more sustainable regional economic development, as well as its wider social and cultural value (see Collins et al., 2018). 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 in the South East Northern Ireland region, but also a range of creative enterprise support needs to facilitate future development. Based on our analysis a number of recommendations emerge:

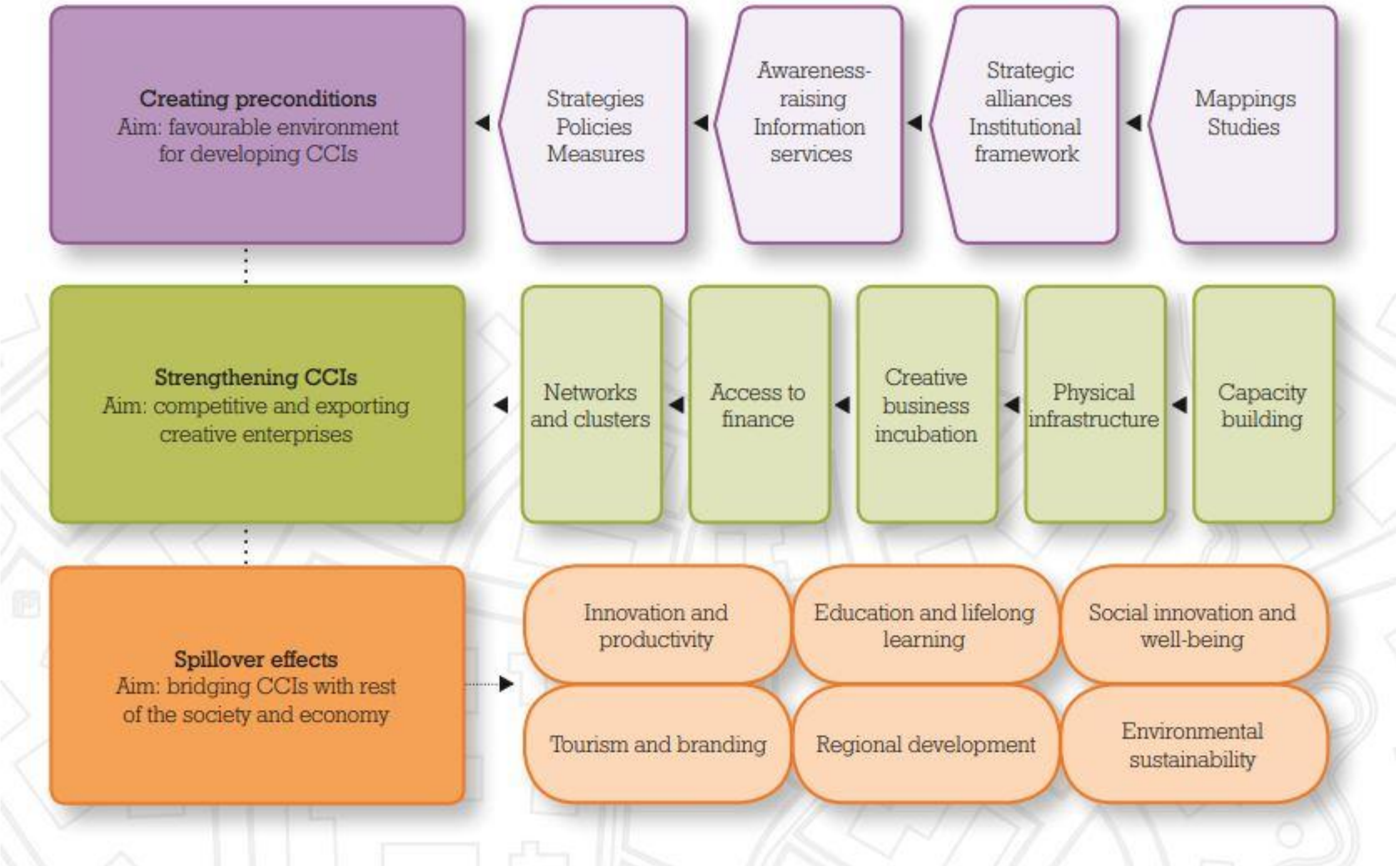
- The ability to build networks both locally and in the region's capital city is a strength of South East Northern Ireland's creative sector. However, our evidence also suggests the region would benefit from greater networking opportunities for creative sector professionals. We identify the need for assessment of the potential and feasibility of a network of new shared creative spaces, such as dedicated creative enterprise co-working hubs or business incubators, in the region.
- Creative sector entrepreneurs access up-skilling opportunities, but they could be further strengthened, particularly around entrepreneurial skills. A number of areas of skill need emerge from our analysis. More broadly, development of a tailored creative entrepreneurship training programme, underpinned by peer to peer learning, would provide a valuable creative business support.
- In addition to focusing on developing entrepreneurship skills, a formal structure for wider creative skills development, particularly for emerging creative talent is important. We recommend assessment of the possibility for the continued existence and expansion of the Creative Employment Programme.
- Some creative enterprises struggle to build a sustainable business in the region. Expanding beyond local and national markets into international markets is one means to support creative business sustainability. Assistance directed towards network building in new markets through support for attendance at trade fairs and industry events or touring exhibitions would provide a vehicle for creative professionals to extend their networks and capacity to access international markets.
- While tapping into export markets provides one avenue to support creative business sustainability, not all creative sector entrepreneurs aim or have the capacity to export. Another route to help build more sustainable creative enterprises is through cross-sector working. To assist creative sector development, unharnessed potential to develop greater synergies between creative sub-sectors, as well as wider industry sectors should be examined. The development of grant supports to catalyse projects would also be important to facilitate development.
- While a beneficial creative sector business support structure is available to creative sector entrepreneurs in South East Northern Ireland, access to finance still emerged as a significant issue. Small-scale creative enterprises describe difficulty accessing some enterprise finance as they do not have the required turnover levels for eligibility. The potential for a

regional scheme, dedicated to providing low-interest loans to the creative sector, appears an important area for assessment as part of the future support structure underpinning the creative sector in the South East Northern Ireland region.

- Another new support scheme we identify potential for is a regional fund to support leading creative professionals to focus on their creative practice full-time. This would help to build distinctive cultural assets in the region.
- The issue of declining creative human capital and its impact on creative sector development emerged from our analysis. Measures that work to retain and build the region's creative talent are important to support future creative sector development.
- South East Northern Ireland's natural environment, good physical and digital connectivity are assets that could support the future development of the creative sector. Place promotion targeted at creative talent looking for a particular lifestyle, in contrast to that offered in core, urban regions, could also help to reduce the decline in creative capital in the region. Place promotion celebrating the creative sector's presence in South East Northern Ireland would also help to raise the profile of the sector, as well as the attractiveness of the region as a place to live and work.
- Intermediaries that support and facilitate creative businesses to better access existing and emerging opportunities are important in the future development of the creative sector in peripheral regions. In particular, we find evidence supporting the need for knowledge intermediaries to scope out and provide information to the creative sector on industry trends and new market opportunities.
- Wider research has highlighted the importance of developing new co-operation models to increase scale and bargaining power of creative enterprises. Measures to stimulate new types of collaborative creative businesses acting as intermediaries to build critical mass for the sector are also important to support creative sector development in peripheral contexts.

Areas of future investigation are also important to highlight. Here we present the perspective of creative entrepreneurs on support needs. 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 in assessing the needs of the peripheral creative sector in South East Northern Ireland. More broadly, our recommendations intersect with a framework for cultural and creative industries development recommending policies and supports at three levels (see OMC-EWG-CCI (2012) and Appendix 1). We also suggest our recommendations are assessed in the context of this framework, as well as 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).

Appendix 1: Framework for developing cultural and creative industries



Source: OMC-EWG-CCI, 2012

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