CREATIVE GROWTH

QUALITATIVE SUMMARY

CREATIVE GROWTH - developing businesses for the future

European Union
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INTERREG IVC
INNOVATION & ENVIRONMENT
REGIONS OF EUROPE SHARING SOLUTIONS

Comparisons between regional features in the Creative Growth Qualitative Mapping Exercise

(with executive summary)

March 2010

Executive summary

The Creative Growth project gathers 11 regional partners from 9 EU-countries and is co-financed by the INTERREG IV C program. Project tasks comprise mapping creative industries, comparing business support to the sector, finding good practices and partners learning from each other. On top of that, suggestions for new growth policies to be implemented on all levels are expected as well as recommendations of new development programs in years to come. The mapping phase has achieved some conclusions pointing forward in two fields: a quantitative, statistical analysis of size, employment, workplaces and start-ups and a qualitative survey of knowledge base, lighthouses, clusters and business networks, education and research activities and support to entrepreneurs.

The creative sector constitutes an important part of the economy and it continues to expand. In most of the regions analysed the creative sector is growing more rapidly than the whole economy. There is especially a high growth rate in number of ongoing businesses, and many new companies are starting in the creative industry sector every year. 5-10 percent of the regional economics, and sometimes even more, can be related to creative industries, depending on what variables and what region is analysed. Branches such as Fashion & Design and Architecture are among the largest sectors in all the regions.[2] Companies in the creative sector are generally smaller according to number of employees than the average of companies in the regions. Ongoing businesses of 1-4 employees are the rule although traditional creative industries such as Newspapers & Magazines, Television & Radio, Toys, Amusement Parks & Visiting Places and Literature can be seen to have a lot of employees. Startups are very often freelancers or single proprietor firms. Many of them are rather short-lived. A generally acknowledged definition of the creative sector on a European level is lacking although a number of national definitions exist. If a definition of the creative sector is to fulfil its explanatory purpose and be trustworthy, a harmonization of statistics on a detailed level in EU-27 must be made.

Regional differences are obvious when looking at them in the perspective of cultural heritage, specialisation, education systems and business support structures. Size it is an important factor as the partnership range stretches from Scotland (4.6 million.) to Södra Småland (0.2 million). Most regions, though, have their own international or national attractions – lighthouses that brand the creative sector. Festivals in Scotland, furniture by IKEA in Södra Småland, LEGOLAND amusement park in Syddanmark, movie-auteurs in Emilia-Romagna. All regions are working hard and ambitiously on the development of creative clusters and business networks. A number of emerging clusters can be found especially in regions with stronghold industries. All regions present higher education and a few of them even research labs related to the creative sector. The larger regions cover most of the picture, while the smaller regions operate mostly according to regional specialisation. All regions take part in national business support structures or systems. In certain regions in the EU-12 (CEE) these structures are to some degree financed by the EU. A number of regions – i.e. Scotland, Emilia Romagna, South Denmark, Östergötland and Södra Småland – already have or are developing dedicated business support mechanisms, programmes and incubators aimed at the creative sector.

[1]Box: Creative Growth is carried out between Östsam Regional Development Agency as the lead partner and the ten project partners: Regional Council of Södra Småland, Edinburgh Napier University, Észak-Alföld Regional Development Agency, Kaunas County Governor's Administration, Aster S. cons. p.a., Business and Innovation Centre of Asturias and South Denmark European Office and BIZ-ART - Centre for Culture and Business. As observers: Timis County Council, Regional Association of Municipalities of Central Staria Planina.
[2]Differences in national statistic grouping may have caused some partners use broader definitions.

Content

Introduction

The European concept of 'region' is very broad, perhaps even so broad that it may seem difficult to draw comparisons between regions in a project such as Creative Growth. Is it at all possible to compare Scotland (a self-governing region in the UK) with the size of a small nation and a population of 4.6 million inhabitants, with Södra Småland (a tiny county in Sweden) with a population of 0.2 million inhabitants? It proves to be possible to make comparisons – on a structural level. The large regions contain almost all aspects of the creative industries, education and commercially supportive functions. The smaller regions contain subsets thereof – with their regional specialisation and method of functioning as a point of origin.

In the qualitative mapping report you notice that all regions contain special or unique assets that are important in order that regions can make themselves visible. For any region that wants to be known as an attractive place to live or to develop a business it can be helpful to use assets that allow them to power the image of the region.

This summary illustrates similarities and differences extracted from the qualitative mapping of creative industries in eight regions as concerns size, tradition used as basis for industry and innovation, regional lighthouses as drivers for the creative sector, creative clusters and networks, higher education and research along with business development and entrepreneurial support.

After listing the different affiliations of the partners to European cultural spheres, the regions are outlined. As a next step an account of size and structure follows (number of inhabitants, category, institutional and business developmental coverage). The comparisons between the regions are made in the main chapters. They are based on parameters which the participants have chosen to describe themselves by: Traditions as background for the creative sector, Light-houses, Creative clusters and creative networks, Higher education and research activities, Entrepreneurial support.

The circle of partners

Creative Growth is a cooperation project between 11 partners from 9 regions in Europe. 8 partners have performed a limited mapping of the creative sector in their region: Östsam Regional Development Council (S), Regional Council of Södra Småland (S), Edinburgh Napier University (GB), Észak-Alföld Regional Development Agency (H), Kaunas County Governor's Administration (LT), Aster S. cons. p.a. (I), Business and Innovation Centre of Asturias (E), and BIZ-ART - Centre for Culture and Business (DK). 2 regions participate as observers: Timis County Council, Regional Association of Municipalities of Central Staria Planina. The project was made possible by the INTERREG IVC programme and co-financed by the European Regional Development Fund.

Magnitude and administrative status may influence ripeness of industries and range of business support mechanisms. A characterisation by magnitude and administrative status shows a picture as represented in the table below.

Characterisation by magnitude and administrative units[3]

Region represented	Inhabitants	National administrative units
Scotland (GB)	4.6 mio.	Nation with partial self-government with in the United Kingdom
Emilia-Romagna (I)	4.3 mio.	Region
Észak-Alföld (H)	1.6 mio.	Region
Syddanmark (DK)	1.2 mio.	Region
Asturias (E)	1.1 mio.	Region
Kaunas (LT)	0.7 mio.	Region
Ôstergötland (S)	0.4 mio.	Region
Södra Småland (S)	0.2 mio.	Association of municipalities and county

[3] *The categorisation by units is based on the web-sites of the regional authorities*

Cultural traits

The concept of the 'Europe of nations' is reflected by the diversity of determinative cultural traits of the partners. Traits of longer duration such as language, family origin and prevailing religion have been chosen as indicators.

Region	Language family origin	Prevailing religion
Scotland (GB)	Scots (English, Nordic, French), Gaelic (Celtic)	Protestant
Emilia-Romagna (I)	Roman latin	Roman catholic
Észak-Alföld (H)	Ural	Roman catholic
Syddanmark (DK)	Nordic	Protestant
Asturias (E)	Roman latin	Roman catholic
Kaunas (LT)	Indo-european language group	Roman catholic
Östergötland (S)	Nordic	Protestant
Södra Småland (S)	Nordic	Protestant

These cultural traits are to various extents mirrored by the traditions that are claimed to be points of origin for the unique expressions of cultural life and creative industries of the respective regions.

Qualitative mapping results – A transverse view on the findings

The partners submitted – on the basis of a very open content template – their preferred regional data relating to the following parameters for qualitative mapping:

- Traditions as background for the creative sector
- Lighthouses
- Creative clusters and creative networks
- Higher and further education, together with research activities
- Entrepreneurial support

In the following paragraphs, comparisons are made between the participating regions based on the qualitative parameters listed above. The listings contain examples brought forward by the partners and may be far from covering the whole picture. The last item is of special interest, though, as it is focussing on entrepreneurship in the creative industries.

Traditions

All contributing regions can refer to 'tradition' as being one of the determining foundations for the creative sector. Tradition may stem from local natural resources, cultural heritage, from industrial cultures or from political, cultural-historical and religious conditions as well as monuments with varying weight and importance in the history of the region.

The utilization of natural resources for agriculture, fishing industry, and mining, including access to unique resources, all form part of a local or regional tradition. The natural resources may consist of assets such as access to the ocean, to lakes, islands, mountains, valleys and plains. Local cultural values are all embedded within those resources. In all regards we build on foundations laid by our predecessors. With the creative sector, regions are given the opportunity to utilize such platforms in order to make the surrounding world aware of unique traits of history or of origin. These traits can be used as inspiration for commercial production of tangible as well as immaterial products with unique design. They may form a comparative advantage to the region; a necessary one that does not stand alone as an economic driver. They are marketable since both types are accessible on-site and distributable via marketplaces, and this is even more valid in an age of e-marketing – on the condition that regions have resources to market themselves. Outputs can also be utilized for tourism purposes as unique experiences, consumed on-site, often producing a broader range of events based on cultural tourism. The cultural tourist travels with an aim of taking part in unique experiences; during which he needs such services as bus transportation, an overnight stay at a hotel and having a meal at a good, local restaurant.

When examining the creative sector in the sense of economic development, the survey captures the regional partners' unique, traditional positions and thereby the gradual innovations that occur simultaneously when utilizing the traditional positions commercially. The survey does not inquire further into the matter of latent radical innovations at play. It does, however, include examples of global brands such as LEGO in South Denmark and IKEA in Södra Småland: creative companies producing unique products that build upon local traditional heritage; products that these entrepreneurial companies have been successful in distributing world-wide.

Four of the partner regions have monuments and memorials on the UNESCO's World Cultural Heritage list (Emilia-Romagna, Észak-Alföld, South Denmark and Asturias). Two of the regional capitals are EU cultural cities (Edinburgh and Bologna). Most affluent when it comes to cultural-historical attractions appear to be Emilia-Romagna and Asturias, as they both originate in the pre-Roman age with Etruscan and Celtic traits respectively. Several attractions with international distinction are to be found within topics such as valuable natural areas and music.

The regions all mention all sorts of festival activities as a means to display to the world the living cultural heritage and its innovative forms. Scotland is in first place with twelve international festivals in Edinburgh alone – ranging from the famous Tattoo through the Fringe music festival to the great International Book Festival.

Lighthouses

The term 'Lighthouse' is very close to 'attraction', 'destination' or 'main industrial driver' and it implies in regional business development a feature that 1) is very easy to identify because of its signal or brand and 2) constitutes a sign-post that may guide other business travellers safely past dangerous rocks and maybe even 3) points to 'blue oceans' by its example. Lighthouses may fall into three categories: 1) Private sector; 2) Public sector and 3) Public-Private-Operations (PPO). The majority of contributing regions can point out lighthouses, as defined above, with international and/or national power of attraction.

Scotland can call attention to its many festivals but extra emphasis is put on the music festivals. Emilia-Romagna considers its strong point to be based on film, other visual products and ICT alongside with the digital distribution of products. Észak Alföld points out printing and computer games as regional positions of strength. South Denmark is strongly represented within the area of learning though play, especially with LEGO as the leading player in the regional landscape. Asturias intently ventures on innovation and research and development within Information- & Communications Tecnlology (ICT) but has a parallel focus on the synergy between art and industry. In Östgöterland the aim is on the digital future, with a centre which from 2011 will facilitate research, development and cooperation between all regional business development players. Södra Småland is home of the registered office of IKEA which represent the pinnacle of designed furniture for the mass audience.

Scotland (GB)	12 international festivals per year in Edinburgh alone. Highlights: Edinburgh Fringe Festival, Glasgow UNESCO City of Music, Hebridean Celtic Festival, St. Magnus Festival (Orkney). Glasgow: (EU capital of culture City Strategy for Culture & Creativity.
Emilia-Romagna (I)	University of Bologna (oldest university in the western world). Cineteca of Bologna (collections/archives of films and books, labs for film restoration and two cinemas). Lepida SpA (planning, developing and managing telecommunication infrastructure, telematic services, interactive TV, hosting of public services and archives, digital audiovisual library, e-learning). Ravenna, Ferrara, Modena (UNESCO World Cultural Heritage).
Észak-Alföld (H)	Private sector: Inform Média Kft. newspaper publishing; Invictus-Games Kft. Computer games. Public sector: MODEM, Főnix, Art Gallery, Móricz Zsigmond Theater. Natural resources: Hortobagy (UNESCO World Cultural Heritage)
Syddanmark (DK)	Private sector: LEGO/LEGOLAND complex; Brandts klædefabrik (formerly a weaving industrial site). Public sector: H.C. Andersen Museum, Jelling Monuments (UNESCO World Cultural Heritage). Private-public: Danfoss Universe.
Asturias (E)	The City of culture ; The LABoral Centre of Art and Industrial Creation, The Oscar Niemeyer International Cultural Center. Technology Centres (PRODINTEC, ECSC, CTIC with CREATIC Research Labs). Santa Maria del Naranco and San Miguel de Lillo (UNESCO World Cultural Heritage) .
Ôstergötland (S)	Centre for Visualizations and New Media (to open 2011). Forum for Culture (plan for culture district).
Södra Småland (S)	IKEA headquarters is situated in the region. Kingdom of Furniture, Kingdom of Glass.

Lighthouses may play a crucial role as key-drivers for the development of the economic life in a region. They themselves create jobs, networks and competence development as well as second-line in their subcontractor environments. In third-line activity, they are producing a derived turnover relating to tourism and branding of the region.

Creative clusters and creative networks

Clusters can be categorized as mature, upcoming or potential. The upcoming and the potential often assume the character of networks with varying degree of organisation.

The partners have agreed on distinguishing between clusters and networks. A mature cluster is: A geographically defined agglomeration of companies who are interconnected and interrelated within an open and shared value-chain system. A network is casual. Not necessarily connected by simply business dealings, the members tend to share personal rather than business relations. In some networks, business relations may occur; if such business relations tend to be firm, the network may be seen as a cluster. Successful clusters tend to evolve within the triple helix matrix, which contains companies, R&D environments and public business development authorities. A cluster is internally characterised by competent companies, knowledge sharing, strong R&D environments, proximity to demanding customers and strong competition. In the Creative Growth project a 'quadruple helix' [4] is discussed. Indeed this model will include micro-businesses (entrepreneurs, freelancers and free agents as sub-contractors to mainstream businesses). Clusters may be self-organizing, but often cluster initiatives are launched by regional authorities.

Almost all regions claim to have creative clusters. In the reports given by the regions very few – if any – creative clusters are fully documented following the strict definition given above. The subsequent benchmarking of the business development mechanisms may possibly demonstrate if these are indeed mature. On the other hand many creative networks are mentioned with formal or informal organisations – networks that may prove to be upcoming clusters or potential clusters.

Scotland (GB)	Clusters: Dundee for Digital Media. Edinburgh (Leith, old port revitalization): Hub for advertising and design.
Emilia-Romagna (I)	Clusters: Known worldwide for its fashion and ceramics industrial districts that have developed in the second half of the 20th century. Dynamics now stem from High Technology Networks moving into more formalized organizations in order to end up as a number of 'Technopoles'. A technopole to come in Bologna for multimedia, digital technologies and design with a development program. Cultural districts: City of Bologna carried on an ambitious infrastructural project consisting of a district for arts in the so-called "Manifatture delle arti' (Arts Manufacture).
Észak-Alföld (H)	Clusters and/or networks: A lot of initiatives in Creative industries: Észak-Alföld Thermal Cluster (well-ness), Észak-Alföld Informatics, Cluster Silicon Field Regional Informatics Cluster, Észak-Alföld Audio-Visual Media and Creative Industrial Cluster, Handicraft Supplier Cluster, Innovative Tourism Cluster, PRIZMATECH Instrument Producer and Developer Cluster.
Syddanmark (DK)	Clusters: A private cluster in tourism is the LEGOLAND/Lalandia complex. Emerging clusters: FilmFyn, a complex cluster initiative around movie production. Cluster initiatives may be found with BIZ-ART and the Ge9 network. BIZ-ART represent a joint effort at municipal/regional level with its incubator, development programme and projects in design and innovation together with public cultural institutions and private cultural associations. Cultural districts: Brandts Klædefabrik, Alsion, Kulturstrøget incl. Spinderihallerne.
Asturias (E)	Knowledge Cluster, lead by ICT associations and Tecnology Centre set-up and recognised as excellent by the national Ministry. Audiovisual cluster currently emerging.

[4] *Michael Porter invented the so-called triple-helix model implying that co-operation between enterprises, education & research and public authorities is the basis of cluster development. In the case of creative growth the inclusion of creative micro-businesses is an add-on the model. Hence the term 'quadruple helix'.*

Kaunas (LT)	Ideas of potential clusters: Kaunas Art Incubator. Cultural districts: Kaunas Old town (with Castle) is an informal creative centre, Laives Avenue (institutions).
Ôstergötland (S)	Ideas of potential clusters: Center for Visualizations and New Media will be a hub for cluster initiatives, Networks: Forum for Culture: A creative network for institutions, associations, shops and artists, Culture, Nature & Health. Cultural districts: Hemslöjdgården.
Södra Småland (S)	Networks: The Kingdom of Glass, The Kingdom of Furniture. The networks consist of businesses within tourism, hotels, restaurants, glassmaking, furniture making and shops that sell glass and furniture. However, their main focus is tourism.

Within efforts to develop the business community it has been traditional to view Emilia-Romagna and parts of the UK as role models. Therefore they should be able to share knowledge about mature clusters. The mapping exercise does not in itself, however, prove that such clusters exist within the creative sector in Emilia-Romagna and Scotland. Észak-Alföld supports cluster development, but not in this sector alone. South Denmark, Östgöterland and Södra Småland seem to have upcoming clusters in a number of areas. Asturias and Emilia-Romagna are focusing the effort around high technology areas, ICT in particular.

Former industrial buildings and entire districts are in some instances functioning as homes for new creative industries (especially in Edinburgh and in South Denmark).

Higher education and research

Education and research represent massive societal investments in future growth and prosperity. For the individual citizen energy invested in developing qualifications and competencies is the safest way to ensure livelihood and a professional career. Human resources are of the utmost importance for the creative sector, therefore to this sector, higher education and research may represent the most important economic structure for developing creative industries.

Additionally studies[5] indicate that if a region has higher educational and/or research institutions with a special focus in the field of the creative sector, the region is more likely to develop organisations and businesses within that sector.

All of the participating regions have links to and are part of national educational structures. Systems exist founded on a dense grid of higher education supply (academic or profession-oriented), in-service training and masters-degree courses. Most regions also have specialised training aiming at the creative sector and the competencies necessary here. A few have specialised research institutions, as displayed in the table below. The spread goes from entire universities, schools and academies over faculties, departments and institutions to interdisciplinary centres.

[5] *See fx analysis from EBST (Danish Business and Construction Agency): Vækst via oplevelser. EBST, 2008.*

Scotland (GB)	Higher education: Edinburgh Napier University - School of Arts & Creative Industries; University of the West of Scotland - School of Media, Language and Music; University of Abertay Dundee - School of Computing and Creative Technologies; Glasgow Caledonian University - Centre for Creative Industries (The CCI network). Professional: The Ian Tomlin Academy of Music, Skillset Screen and Media Academy. Research: The Institute for Capitalising on Creativity.
Emilia-Romagna (I)	Higher education: University of Bologna houses depts. of Visual Arts, Music, Live Performances, Film-making (including cross-disciplinary acitivities), Architecture and Cultural Heritage conservation; Bologna Fine Arts Academy: visual arts, communication and arts education, applied arts; ISIA – Higher Institute for industrial design in Faenza; University of Modena and Reggio Emilia: Communication Sciences with advertising, publishing and enterprise creativity. Research: Cineteca Labs; CINECA (Interuniversity Consortium for Automatic Computing of North-Eastern Italy); Opera: research centre to study organizational and managerial aspects of creative enterprises and creative processes inside traditional sectors; Design Centre of Bologna; Laboratorio Centro Ceramico supports ceramics district.
Észak-Alföld (H)	Higher education: University of Debrecen: Faculty of Music, Department of Ethnography, Department of Communication and Media Science. Professional: College of Nyíregyháza, Institute of Visual Culture; College of Szolnok, Specialised advertising manager. Research: The ”Baross-Gabor” and ”Innocsekk”. Programs mainly finance R+D activities
Syddanmark (DK)v	Higher education: University of Syddanmark (USD)-Odense (computer science and technology and IKT, integrated product design, media science and dissemination in literature and culture); USD- Esbjerg (tourism and leisure management and hotel management; USD- Kolding (information science); USD-Sonderburg (interactive design, IT product development and language/cultural understanding). Professional: Two Musical Conservatories and an Actors School are merging (two institutions in Odense and one in Esbjerg); Design school of Kolding is a division of the national school for design and offers three lines: industrial design, communications and arts & crafts. Research: Centre for Arts and Science (CAS at USD-Odense). Explore new ways of expression and dissemination by creating a democratic dialogue between researchers and the public. Centre for Tourism, Innovation and Culture (TIC at USD-Esbjerg).
Asturias (E)	Higher education: University of Oviedo: Polytechnics – Engineering (Master in Design Management, Industry (Industrial Design, in collaboration with the Technology Centre of PRODINTEC - with MOTIVA (most important event in graphics design) and University of Expertise in Writing and Production of Programs for Television Professional: High Studies of Image and Sound, Audiovisuals Production, Radio and Entertainment, Performing and Audiovisual Performances, by centre of Langreo and The Image and Sound of School in Noreña; Arts College of Oviedo: High studies of Photography, Advertising Graphic, Illustration, Architecture, Applied Arts to the Stone, Engraving and Publishing Techniques and Arts Edition; The High School of Dramatic Art, Gijón; High Studies of Editorial Design and Production Conservatories of Music in Avilés, Oviedo and Gijón.
Kaunas (LT)	Higher education: Vytautas Magnus University (fx social sciences); Kaunas University of technology (fx engineers, IT); International School of Management and Economics (branch); Vilnius University (Human Arts Faculty) (Branch) cultural management etc.). Professional: Vilnius Art Academy. Kaunas Inst. of Art, Music and Theatre;. J. Vienozinskis Art Faculty of Kaunas Art College

Östergötland (S)	Higher education: University of Linköping, Norrköping campus: Master in culture production (Culture, Society and creation). Research: Room for 100 researchers at planned Center for Visualizations and New media.
Södra Småland (S)	Higher education and professional: The University of Växjö and Kalmar College will merge into the new Linnaeus University by 2010. (Design, Music Management, Library and Information Management, Computer Science, Interactive Digital Media, Coaching and Sport Management, Music and Sound Design). Research: Centre for Design with a specialization towards lighting, visual identity, design process and methodology; Centre for Cultural Economy with focus on tourism, cultural heritage and copyrigh industries.

A political debate concerning market orientation and responsiveness to the demands of the labour market is ongoing. A similar debate is taking place within the field of research regarding the balance between basic research, applied research and industrial research. [6]

Entrepreneurial Support (Business Support Structures)

As illustrated in the table of education and research above, all participating regions likewise tale part in national or regional programmes for supporting local businesses, with the aim of servicing and developing new businesses on the local and regional level. For the last decade, players on all levels have focused on promoting growth in small and medium sized enterprises (SME) and among micro-businesses with entrepreneurial potential. The tools deployed in support include innovation programmes, incubators and venture capital. A particular challenge regarding entrepreneurship within the creative sectors is the amount of one-proprietor/employee firms and freelancers or free agents. The lack of a traditional business agenda characterizes a lot of people in this group, who often may not even want to become employers. Traditional ways of approaching business development are in general not attractive to this group, for which reason new tools must be invented.

The table below shows the particular regional efforts concerning the creative sector.

Scotland (GB)	National: New Deal for Musicians (whole UK). Regional: Scottish Arts Council. Several support programmes, where business development are included; Scottish Enterprise – special support scheme: Cultural Enterprise offer; Business Gateway – 'one stop shop'.
Emilia-Romagna (I)	Regional programmes: Technopoles, PRITT, Bloomapp. Regional services: ASTER (Tech transfer, I Tech Off incubator, We Tech Off professional services) Municipal services: (Cultural) in Ferrara, Modena, Ravenna, Bologna (UPGA and Iceberg initiative); (Business dev.) Support new businesses in creative sectors Private services: Entrepreneurs Assoc., LegaCoop, CAN
Észak-Alföld (H)	EU level: New Hungary Rural Development Program (UMVP) might be the most important fund for the creative entrepreneurs located in rural areas. National level: "Mecenatura" and "Filmalap" fund creative and innovative activities (e.g. radio and television program making, professional newspaper production, exhibition-organising for research and development companies, etc.). National Cultural Fund ("NKA") finances programs that have additional effects on culture – e.g. theatres, photo galleries, archives.
Asturias (E)	Regional Development Agency – IDEPA - promotes and co-funds some business programmes for innovation, design and ICT implementation. There is also a Technology Centre for Design& Manufacturing-PRODINTEC-. On the area of support of entrepreneurship it should be stressed the role of CEEI/BIC Asturias which provides specialized support to high-tech and innovative companies that includes advising and access to finance planning.

[6] *Examples?*

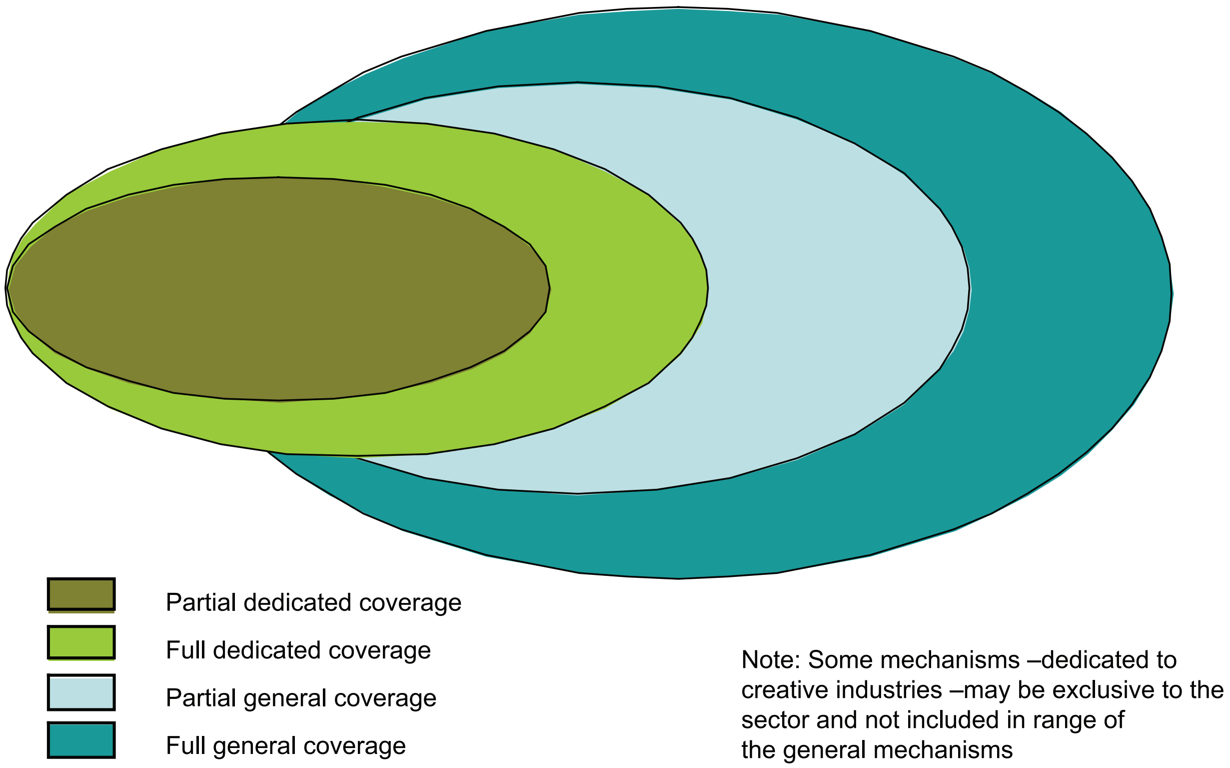
Syddanmark (DK)	National level: Innovation programme with 'experience economy' strand and a programme for 'experience zone' development. IDEA (rooted at the USD) and several initiatives in innovation, entrepreneurship and business development in universities, university schools/colleges and in vocational schools. Regional programme: Region of Syddanmark has four strands for co-funding (with ERDF) and amongst these, experience economy is to be found. The focus of this regional program is a) tourism and b) design and innovation. One criterion for co-financing underlying each strand is the promotion of entrepreneurship. Also on the regional level the Danish state has established a ' Business Link centre' in each region. Their mission are to mentor entrepreneurs with a growth potential. Local level: BIZ-ART opens an incubator at Spinderihallerne for 60 microbusinesses in 2009-10 (formerly an industrial site with spinning mills). It also holds a regional business develop programme; House of Design offer incubation services among other creative entrepreneurs to students from the School of Design.
Kaunas (LT)	Encouragement rather than business support structures. Little attention to creative industries. Kaunas Regional Innovations Centre might come close to specialized service.
Ôstergötland (S)	National level: ALMI Företagspartner AB: National corporation for supporting growth in SMEs. Regional affiliates. Financed partly by ERDF goal 2. Regional level: Norrköping (to come 2011): Center for Visualizations and New Media. Will contain a public venue for visualizations, a theatre for traditional film, space for up to 100 researchers, a centre for film- and media pedagogy and an incubator for young film-producers.
Södra Småland (S)	National level: ALMI Företagspartner AB: National corporation for supporting growth in SMEs. Regional affiliates. Financed partly by ERDF goal 2. Regional level: The ALMI branch in Södra Småland works with the creative sector. Private: Swedish headquarters SIP. Network for changing society in practice.

Scotland, Emilia-Romagna, South Denmark & Östergötland and Södra Småland all have regional programmes dedicated to supporting the creative sector. Emilia-Romagna, Asturias and Kaunas concentrate on high technology and innovation on a general level. Észak-Alföld has some focus on visual media through EU and national programmes.

Range of business support mechanisms

Though it may not have been totally comprehensive nor highlighting all aspects, and no formal criteria for measuring range and coverage are applied by the project, the mapping (as illustrated by the table above) gives a good impression of dedicated and/or general mechanisms within the participating regions. Based on the mapping of regional business support structures and mechanisms and pointing to the next project component – the benchmarking of good practices - the figure and the table below tries to capture the range of business support mechanisms and the nature of the coverage. It addresses the questions: are creative industries being offered support by general or by dedicated mechanisms? Is this support covering the whole range of support or is partial?

Regions'coverage of range of Business Support Mechanisms



In the table below the regions are subjected to an assumptive evaluation of their range and coverage by 'Business support mechanisms' to creative industries – general or dedicated.

Region represented	Business support mechanisms
Scotland (GB)	Full general and dedicated coverage
Emilia-Romagna (I)	Full general and dedicated coverage
Észak-Alföld (H)	Partial general coverage
Syddanmark (DK)	Full general and partial dedicated coverage
Asturias (E)	Full general and partial dedicated coverage
Kaunas (LT)	Partial general coverage
Ôstergötland (S)	Full general coverage
Södra Småland (S)	Full general and partial dedicated coverage

Perspectives and megatrends

In the creative economy, which makes up part of the knowledge economy, the players attempt to utilize or capitalize on a cultural heritage, a popular culture and a high culture for business purposes. The aim is to maintain a standard of living or to improve it. In this there is nothing new. A classic example comes from the outlying areas, where populations of fishermen (a group with the ideal of independency who struggle due to economic strain) are absorbed into the tourism sector as service workers (leasing, cleaning and servicing).The qualitative investigation reveals that the creative sector has growing economic importance in the period of comparison.

Maturity of industries

Objectives concerning the entire creative sector have been stated by Scotland, South Denmark, Östergötland and Södra Småland. Emilia-Romagna and Asturias have focused in particular on developing high technology, including ICT. This is an area that has already been within the scope for several years in the Atlantic-Northern countries. This means they now might have attained a level of development, which means they are perceived as mature trades. Conversely the traditions and the history of the economic life in Emilia-Romagna and Asturias lead to the labelling of e.g. artistic production and design being perceived as mature trades. In Észak-Alföld and Kaunas there is an abundance of national/popular culture and cultural heritage, which has not up till now or in large scale been utilized commercially. Accordingly the industries of the creative economy are in the first stages of development.

Large potential, but barriers exist

The main impression from the mapping is:
There is a large potential for business development in creative industries, but strategic knowledge about how to address the field is sparse; how local and regional authorities should create the best possible framework even more so. The discussion of this theme is so far – even in its core sites – characterised by:

- Limited knowledge about creativity and experiences used as strategic tools for business development.
- Ambiguous field definitions and weaknesses in data basis and hence limited knowledge about each business field (size, drivers, development, potential or barriers).
- The lack of strategic and developmental co-operation between important organizations.

Regional specialisation

The partners' choice in presenting their regional specialisation to Europe and the world is quite clear. Scotland has pointed to its musical tradition. Emilia-Romagna has a stronghold in the movie industry together with fashion and ceramics and will progress into telematics and high technology (technopoles). Asturias' stronghold is that of traditional arts and crafts with high-technology, especially ICT as special growth potential. Észak-Alföld has publishing as its basis and computer games as a growth parameter. Syddanmark maintains a position in play-and-learn, and in advertising. Just below the surface, the development path is in design. Kaunas will build on its potential for cultural tourism. Swedish Östergötland will concentrate on visual arts, especially digital and Södra Småland will develop its strongholds in furniture and glass.

CREATIVE GROWTH