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Contents

Mapping of the Competitive Advanced Models and Services in Cultural and Creative Industries

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Abstract
The main research objective of this work is to compare and map the Cultural and Creative Industries (CCI) in Europe and worldwide in order to establish a roadmap for building a new Creative Centre in a specific context. Based on a previous research, this study has been developed through integrating both qualitative and quantitative research methods and tools. A plan of activities has been proposed, as following: 1) identifying criteria to build an assessment tool, 2) collecting data through the case study, 3) clustering through applying the assessment tool to analysing data and, 4) Interpreting the analysis results and presenting conclusions.

From benchmark research, some findings and conclusions have been identified as inspirations for building the Creative Centre. In particular, Service Centre has been shown as a promising organisational typology in CCI. And integrating services to companies and services to final users has been identified as an emerging trend as well. It’s important to mention that organisational typology should not limit the development of a Cultural and Creative centre covering different sectors. Finally, it is crucial to build a unique value proposition and transform it into a strong brand identity.

Keywords
Cultural and Creative Industries, case study, territorialisation, service centre.

1. Introduction

In recent decades, new technologies and increased globalisation are pushing a shift from traditional manufacturing to new service offerings and innovative way of making. The traditional factories and industries are increasingly being replaced by creative groups and communities that are using their capabilities to create new options of social and economical relations and experiences. This growing area – **Cultural and Creative Industries (CCI)** – is promising to create a huge number of job opportunities that doesn't exist before, or much more competitive than the traditional ones. The study on the economy of culture in Europe, conducted by KEA for the European Commission (2006) has shown that the cultural and creative industries are the most dynamic sectors that contributing around 2.6 % to the EU GDP, and the companies in this sector are presenting high potential in innovation and growth. They provide around to around 5 million people job opportunities (European Commission, 2010). Beside, CCI are also crucial drivers for social innovation.

This research is a part of an EU financed project that aims at creating a *Centre of Excellence* in a specific context. As the first step of this project, the research focus on **a mapping activity** of presenting different Cultural and Creative centres (structures, clusters and initiatives) all over the world. Afterwards, a **comparative analysis** of their development strategies has been carried out. The mapping activity enables us to explore and understand the international scenario and the differences among different situations in CCI. And in order to create the framework and indicators to collect international cases, a literature review has been conducted with two main focus explained below.

1.1. Hard factors and soft factors

The theoretical arguments about creative industries and companies have their own basis on the *localisation theories*. Places, and especially towns, play a major role in privileging attraction and development of these specific economic sectors. So a town can be considered "creative" if it pays attention to many characterizing factors, promoting the creation and development of some market niches. Charles Landry proposed a functionalist approach taking into account not only the so-called **hard factors**, which he called "concrete factors" (2000:105), but also the *soft* ones, called "intangible factors" (2000:105). On one hand, the "hard location factors" refer to the presence on the territory of important resources including man power, available spaces, accessibility, taxation and tax incentives, proximity of some services connecting the central business areas to the global economy network, such as airports, financial centres and telecommunication networks; on the other hand, the "soft location factors" refer to more intangible available elements, such as life style, the presence of a vital social community, diffusion of different ways of thinking, composition of population, workplaces, entertainments, etc., the authentic nature of the place, the quality of life in general (Florida, 2002; Musterd, *et al.,* 2007; Anzoise and Sedini, 2011).

According to Landry (2000), towns look more like organisms than machines and it involves the construction of elements going beyond infrastructures and aiming at satisfying the citizens completely. This goal can be achieved through a certain values system, lifestyle, and identification with the town. The so-called "creative strategies" can be characterized by six main intervention actions:

- Strategies for ownership and offices;
- Development of business, consultancy and network creation;
- Direct financing and loans to the creative companies and entrepreneurs working in this industry;
- Fiscal initiatives;
- IT and physical infrastructures;
- "Soft" infrastructures.

1.2. The importance of localization

The concept of *cluster* has been proposed in '90 by Michael Porter in order to theorise the nations competitive advantages, in specific industries, deriving from the economic and industrial activities localization in general. In his concept of cluster, Porter took into account other famous theories denoting the environment and the spatial collocation as one of the basic elements of a specific business sector development, suffice it to think about the *industrial atmosphere* treated by Marshall (1890), the *localization theory* by Weber (1909), the *districts* theorized by Giacomo Becattini (1970).

The adoption of the clusterisation approach in urban policies is dealing more with the facilitation of the interaction between potential and existing companies, the possible cultural consumption and the inspirations of the local politic regime, then with Porter's theories. At a local level, the strategies to create creative clusters have always been associated with **special sectors**, such as cinema or fashion, or had dealt with putting together **physically working cultural activities**.

With reference to the “creative hubs” in London (till 2008 they were 10), the integrated strategy was a kind of mix of these two elements.

From the knowledge generated by the previous research, the definition of *Centre of Excellence* is a point of issue, because there is no existing definition. But it is possible to define properly through reflecting on other similar concepts: ***hub***, which has its roots in the concept of cluster surely, but differentiates from it for some fundamental important elements. Furthermore, the word “hub” often is used as a synonym of incubator. However, there is not only one shared definition of hub. Particularly, we talked about the hub in the industries of the creative economy and knowledge, identifying the towns themselves as the so-called creative class. The core issue of a *hub* is the **physic localization in a place dedicated to the working activities development**. The hub allows its clients to access to information about a specific business, industrial and cultural field and to any relevant market opportunities. According to its literal definition, a hub is the central business area of a group of activities, the pivot from which many bodies sort out, which can stand on their own two feet thanks to the support of the hub. Usually, an entity as a hub is identified with specific activities put into the large creative economy and knowledge panorama. There are many reasons, but maybe the most noteworthy is the need to interface with different experiences and to answer to questions to which it is difficult to find an answer because of the relative youth of the businesses, ascribable to the knowledge and creative field.

2. Methodology

In this research, case studies analysis is identified as the main research method. Therefore, it’s necessary to create a framework to select, collect and analyse the data from cases. As discussed before, the concept of *hub* is highly relevant and useful to guide this process. Case study analysis of different *centres and structures* that dedicated to supporting Culture and Creative Industries could provide a general view of strategies and offered services. Besides, case study analysis will also act as an assessment tool to reflect on different typologies of these structures, then the results will provide references and guide to the creation of the *Centre of Excellence*.

The aim of case studies analysis is to answer to the questions emerged during the process for the creation of a *Centre of Excellence*:

- Are there some very interesting and promising organisational modalities/structures in CCIs?
- How much important is the presence of strong relationships with the territory?
- What are the most widespread services in CCIs? And are there some very innovative ones?
- How could these cases contribute to the creation of “*Centre of Excellence*”?

And based on the context needs and the local reality of development in CCIs, the research has mainly considered, in phase of case studies, the following five sectors to select successful cases:

- *Architecture*
- *Music*
- *Performative arts*
- *Games and software development*
- *Visual arts*

2.1. Generating research indicators

As stated in previous part, successful cases crossover the worlds will be mapped taking into account different criteria from the literatures and our previous research experiences. Five essential analysis categories are identified as:

a) **Organisation typology**
b) **Access to finance:** relation between public and private sectors
c) **Territorialisation:** relation with local ecosystem
d) **Activities and services**
e) **Development strategy:** resources and performance

The first criterion corresponds to **organisation typology**. This element tries to answer the question *"What does a Centre of Excellence look like?".* We have identified 7 typologies of *structures* which could provide references to build up a *Centre of Excellence*.

- **Incubator**: An incubator is an organisation which accelerates and makes systematic the process of creation of new companies giving them a large range of integrated support services including incubator physical spaces, the services supporting the development of business and the opportunities of integration and networking (definition by the European Community).

- **Services Centre** (B2B/B2C): Public or private structures, often subsidiaries, supporting the technological innovation and the know-how transfer at a local level, through training courses, consulting services, marketing, support for export and internationalization, etc.

- **Virtual Platform**: It is an online place (usually a website or a blog) where you can find information, answers to specific questions, concerning your own sector and eventually you can have a space to present your company and the relevant activities.

- **Development Agency**: It is the union of many private and public bodies, whose aim is to promote the territory development where it is created and working.

- **Co-working Centre**: It is a physical space providing shared tools where people go to work for the time they need. The members can use the facilities and the technological equipment (desk, internet, etc.) and are not concerned with the management of expenses (bills) or the office cleaning.

- **Maker space**: It is a physical space for collaboratively working, making, exploring and sharing. This space is often filled with both high tech and low tech equipment and tools (e.g. 3D printers and laser cutters). It facilitates and supports makers (could be anyone) to create something with their own interests and capabilities.

- **Cluster**: It is a group of companies/individuals, connected economic agents, and institutions near one another, which became able to develop surveys, services, resources, providers and specialized know-how.

Secondly, we underlined the **access to finance** of these structures. We would like to look at the relations between them and public & private sectors, to understand where the financial supports come. The criteria to categorise can be:

- **Public funding**
- Funding from **private companies** or **non-profit organisations (NPOs)**
- A **mixed financial support** among different identities

The third element, according to which the cases have been classified, was the **territorialisation** level. So, we will analyse how much strong are the considered structures rooted in the local territory. Two different categories have been identified:

- Integrated closely with **local ecosystem for developing local economy** of a specific area (region, province, town, district)

- Possessing a **broader perspective** and identity towards national and international dimension and is not strictly linked to the local territory development

Afterwards, ten typologies of **activities and services** have been identified. Each analysed case has been classified into these groups according to the presence of activities and services. This element shows what are offered to clients, consumers and also the public:

- **Physical Space**: Co-working space, supplied with offices, conference and exhibition rooms.

- **Virtual Space**: Website where the companies/individuals have a dedicated space where information can be found.

- **Promotion/Visibility**: Promotion through marketing activities for companies/individuals forming part of the project.

- **Tutoring/Training**: Lifelong learning, lessons, workshops

- **Networking**: Creation of events, the supply of a large contacts network, at an international level too.

- **Prototyping/Technologies**: Available quick prototyping technologies, 3D printing, analysis and tests, shared production technologies.

- **Information**: About invitations to tender, conferences and initiatives which are interesting for the companies/individuals forming part of the project (providing useful information).

- **Know-how**: Guidance desk, business consulting (investors, patents, protection of intellectual property, etc.), supply of data and best practices.

- **R&D**: Research activities into the centre (or hub, or incubator, or agency, etc.), involvement in research and results publishing projects.

- **Special Services & Activities**: Special distinctive features of projects that don’t belong to the previous categories. Service and activities are unique in this structure.

Finally, the last element is dedicated to **development strategy**, focusing on understanding the main resources involved and the market performance. There are three types of models we have identified for this research:

- Taking local resources and developing in local markets
- Taking international resources and transforming them into local contributions
- Taking both local resources and international resources to develop local economy

2.2. Research plan

The main activities planned to develop a set of assessment tools and to apply these tools to generate insights:

1. Collect and select successful case studies worldwide in CCI in the five sectors listed before. Finally, 50 international cases have been selected.

2. Map and cluster different cases by analysing the five categories identified in previous step: organisational typology, financial access, territorialisation level, activities and services and development strategy.

3. Select 10 most promising and relevant cases (among the 50), conduct deep analysis on each case and assign a degree for each activity and service in order to show the different focuses and advantages.

4. Milan has been considered as a good example of fostering CCI, therefore, a series of cases corresponding to analysing the ecosystem of CCI in Milan will be shown as a focus study. This activity aims to show the development strategy of CCI from a city's perspective rather than individual cases.

The goal of this activity is to study and analyse the existing scenario concerning the structure typologies which manage and provide services, give space and supports to cultural and creative industries. The attention is paid on both the "offered services and activities" and the "business model" that could economically accelerate and support cultural and creative industries. The case study analysis will be useful to better understand the characteristics (advantages and weakness) of each typology and the activities the structures carry out, moreover, it could courage the conception of similar tools and methods to integrate diverse successful experiences and activities in the *Centre of Excellence*.

2.3. Development of research tools

Case card 1.0 for presenting and archiving 50 cases. All the cases have been mapped and classified *visually* by using this card.

NAME			
Where			
Site			
Sector			
Organisation Typology			
Access to Finance	Public	Private & NGO	Mixed
Level of Territorialisation	Focus on Territory	Focus on Brand Identity	
Service / Activities			
Physical Space	Yes	None	
Virtual Space	Yes	None	
Promotion and Visibility	Yes	None	
Tutoring and Training	Yes	None	
Network	Yes	None	
Prototyping	Yes	None	
Information	Yes	None	
Know how	Yes	None	
R&D	Yes	None	
Special S&A			
Development Strategy	Local for Local	Global for local	Both

Figure. 1. Case card (designed by authors)

The 50 selected case are mapped and clustered basing on their activities and services, using the tool -case study matrix- shown in the following table. This tool will allow to find out possible commonalities among all the cases.

Table 1. Case study matrix – list of selected cases and offered activities&services

Cases / Activities& services	***Physical Space***	***Virtual Space***	***Promotion /Visibility***	***Tutoring/ Training***	***Network-ing***	***Prototyping /Technologies***	***Information***	***Know -how***	***R&D***	***Originality***
Case 1										
Case 2										
…										
Case 50										

Case study canvas: this tool will visually show the detailed information of the most promising cases providing references for building the Centre of Excellence. This activity will concentrate on 10 selected cases among all the 50.

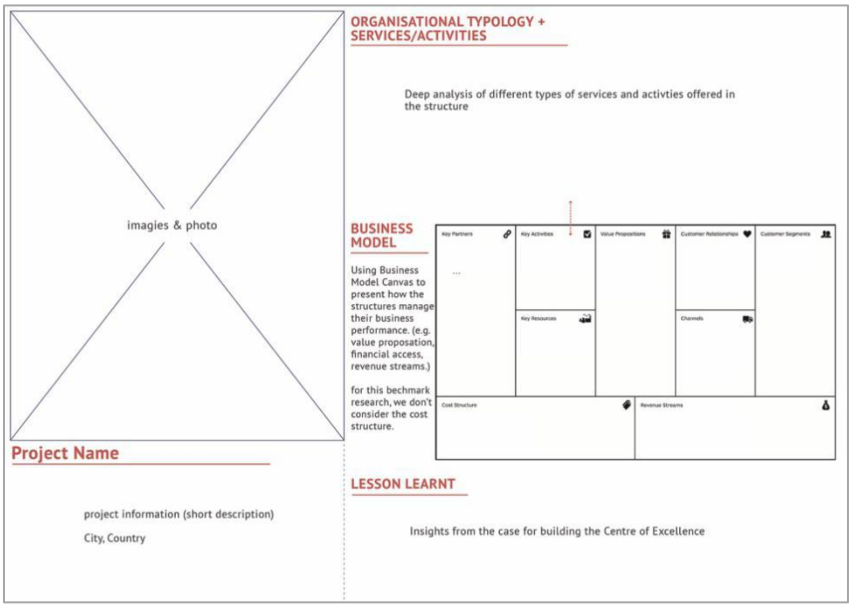

Figure. 2. Card study canvas (designed by authors)

Radar chart: furthermore, these 10 selected cases and the cases in the city of Milano are also assigned a degree for each activity and service previously defined. The degree was identified from 0 – 3 and the criteria for each type of service/activity are explained below:

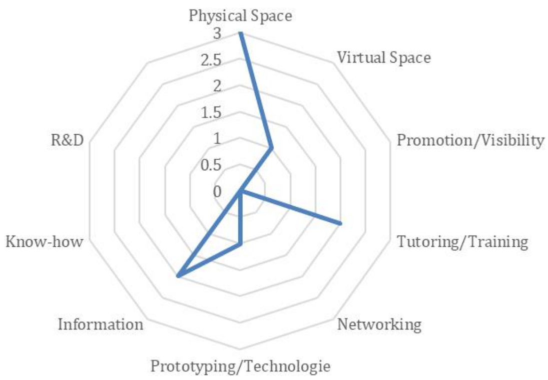

Figure. 3. One example of using radar chart

<u>Physical Space</u>:

1 - providing only administrative offices

2 - offering spaces for clients to conduct their function-oriented activities

3 - spaces to present the works of clients (individuals & companies). E.g. exhibitions.

<u>Virtual Space:</u>

1 - there's a website on which there's the list of members (clients) and dedicated pages to introduce each of them.

2 - interactive & active online-community

3 - individuals and companies could publish their own works and receive feedbacks from the community and others

<u>Promotion/Visibility:</u> (marketing approach)

1 - basic information to present members (clients) on the website

2 - organising events to show the growth and results of the members (clients).

3 - connecting/creating opportunities with other structures to promote the members (clients).

Tutoring training:
1 - basic course and training activities
2 - practical and engaging workshops
3 - personalised/customised courses & workshops for members (clients)

Networking:
1 - creating relationships within members of the structure
2 - connecting members in the structure with external companies
3 - creating networking activities crossing different sectors and at international level

Prototyping:
1 - there are basic tools/equipment supporting prototyping – samples
2 - for companies / start-up to produce their “projects” supported by tutors
3 - spaces where people sharing and co-producing with other members (cross-innovation)

Information:
1 - publishing updated information
2 - general information that could be useful for members (clients) (e.g. Competitions, funding opportunities with specific topics)
3 - customised information/opportunities provider

Know-how:
1 - basic consultancy activities
2 - providing general guidelines of development to member (clients)
3 - customised supporting along the whole development process (theories + practices)

Research:
1 - conducting basic researches through collecting data
2 - conducting researches on specific topics and customised researches
3 - using researches to support other services and play a role inside a wider research network.

3. Research results

The results obtained by this research are presented both individually and collectively. Each of all the 50 cases is individually presented by using the *case card (figure 1)*. At the same time, data from all the cases has also been analysed by using the *case study matrix (table 1)*, which will give the idea how much diversified and heterogeneous are among the cases we are studying. This is also a mix between qualitative and quantitative analysis methods. Afterwards, the selected 10 cases will be highlighted through presenting by the excellence case study card and radar. The former is to provide visually the promising and comprehensive insights from each case (the horizontal dimension); while the later one will offer how the case has developed each type of the services (the vertical dimension). At the end, the radar tool will also help to provide the ecosystem of CCI in the city of Milan.

3.1. Organisational typology

Among all the 50 cases, 48% of them are *service centre*, which is the main organisational typology presented recently in CCIs. These service centres are acting as an open platform to attract different clients, targets and consumers to stay in the spaces, to meet each other, to experience new service offerings. One change we have witness is that the service centre is moving from the traditional **one-direction** to **multi-engagement**, meaning most of them are providing B2C services rather than acting as B2B consultancy. The secondary common organisational typologies are: virtual platform, development agency and cluster. These three types of structures are also presented in a number of cases.

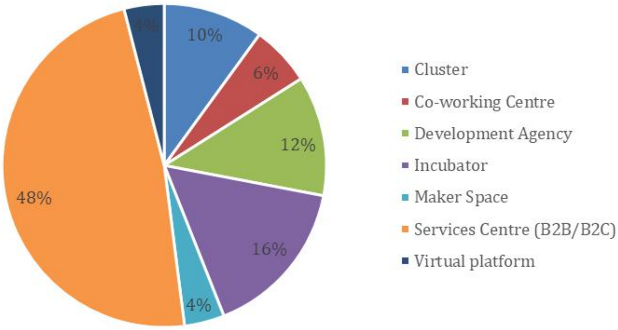

Figure. 4. Proportions of different organisational typology

3.2. Activities and Service

The proportion of different activities and services is presented below (figure 5.). The most common activities and offered services among the structures in all the cases are: promotion (15%); networking (14%); information (14%); virtual & physical spaces (14% & 13%). This result, firstly, recalls the importance of communication and building networking among all members and stakeholders. Secondly, offering digital supports and physical spaces are also crucial to foster the enterprises and individuals to grow and to be ready in the markets. Providing tutoring and training activities (10%) is another key service in CCIs.

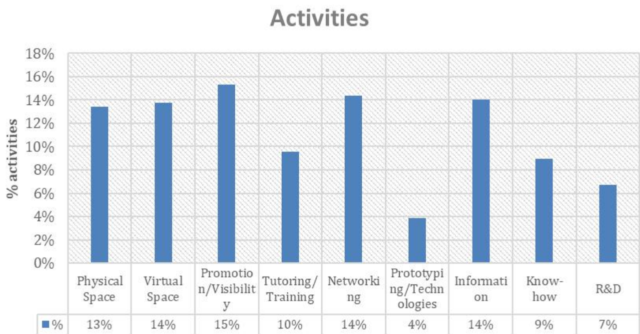

Figure. 5. Proportion of activities and services

Thanks to the case study matrix (table 1.), the research has also generated the proportion of different organisational typologies that offering the same service and in which sectors this service has covered. For example, the following two figures are presenting the detailed data in the service “promotion/visibility”.

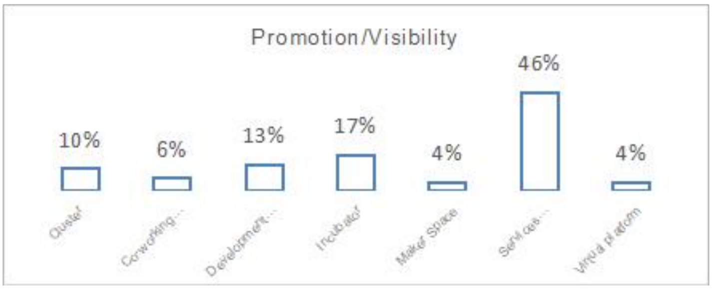

Figure. 6. Proportion of organisational typologies that providing promotion activity

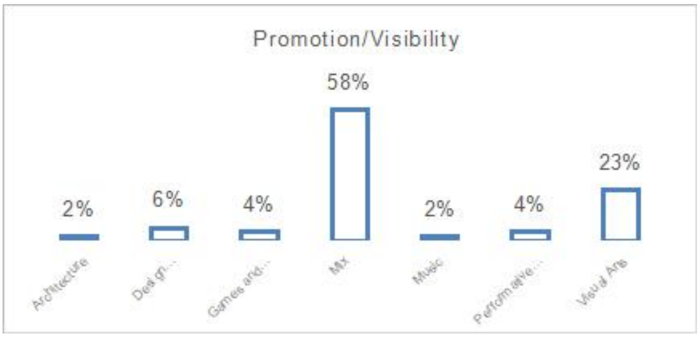

Figure. 7. Proportion of sub-sectors in which promotion activity is provided

3.3. Ecosystem of CCIs in the city of Milan

The selected 10 cases of active and successful cultural and creative centres in Milan are studied and analysed by using radar chart tool. Obviously, the individual charts have shown the different focuses and advantages of each centre, especially about which types of activities and services they are more experienced and how they are different from others. At the same time, we have also overlapped the 10 radar charts to create a collective image of the ecosystem of CCI in Milano. The result has revealed that CCIs in Milano are quite dynamic and competitive. All the service typologies have been covered, so different creative communities and individuals have the possibilities to find the structures (or centres) that fit them most. Beside, the collective chart also confirms the research results from international cases that the most common activities and services are primarily concentrated in communication, promotion and networking.

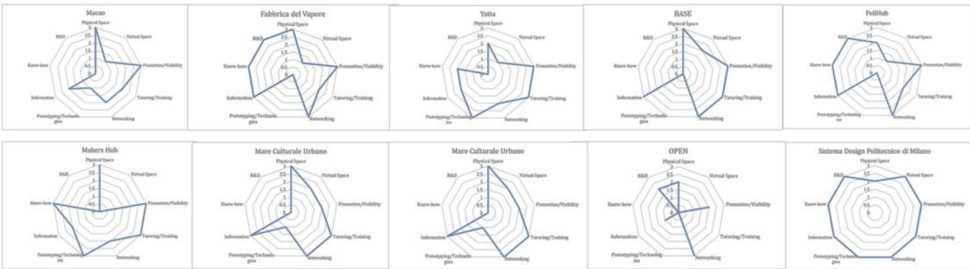

Figure. 8. Radar chart of 10 individual cases in the city of Milan

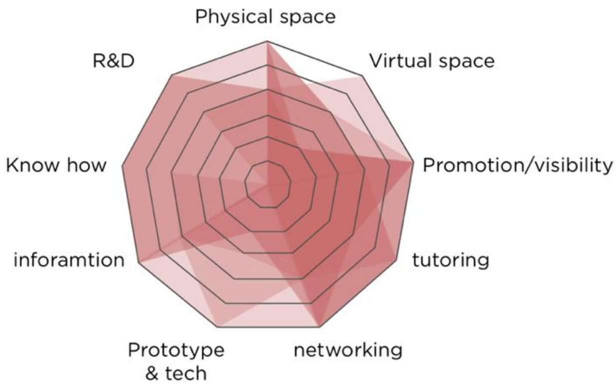

Figure. 9. Collective radar chart of 10 cases of CCIs in the city of Milan

4. Discussions

There are several initiative findings we could like to present as inspirations not only for the creation of "*Centre of Excellence*" in the EU financed project, but also for other relevant researches and projects in CCI.

- **S*ervice Centre*** has been shown as a promising organisational typology in the CCI. And integrating service to companies/individuals and service to the final users, especially to the public, has been identified as an emerging trend as well.

- the **organisational typology should not limit the development** of a Cultural and Creative centre. We have witnessed in some cases that the typology changes along the time and transforms from single one to a more integrated one.

- It is important to build the *centres/structures* **covering different sectors**. From more than half of the cases, we have learnt that many Cultural and Creative centres have worked in more than one sector to set up their business and activities.

it is crucial to build a unique ***value proposition*** and transform it into a strong *brand identity* is also one of the main findings from the research. And organising different activities and events to promote and communicate both the centres and their participants in a shared network is increasingly important to be successful.

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