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Creative Industry in South Baltic Area Region

1. Introduction

The article comprises an analysis that extends the results and findings about creative industry into a regional and company context. The analysis itself details the current status and development trends in different regions of the South Baltic area (SBA: regions in Germany, Denmark, Lithuania, Poland and Sweden neighbouring the Baltic Sea) but principally those areas of Poland and Germany. This study also analyses some of the key impacts of the relevant factors at a regional level and gives an indication of development opportunities for regions following the transformation trend from traditional industries into a knowledge based and information society. The main goal is to compare the development of the creative sector on the very diversified economic territory of the Baltic Sea regions. The triangulation of research methods was used, and desk research was combined with individual in-depth interviews.

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2. The methodological approach

To collect data primary research and desk research were conducted. Primary data was gathered directly from companies and experts

drawn from the NUTS III regions in Germany and Poland. The companies were mainly contacted directly and asked a number of questions about their business as regards its effects and impacts in relation to “Creative Sector”/ “Creative Industry” (used interchangeably in this report) as well as more general information about the size of the company. Similar interviews were conducted with experts across these regions. Experts included industry specialists and who had significant insight and understanding of the economic conditions specifically as regards CI/CS in these regions.

The research and analysis of secondary data were collected, if and where this was available. In some cases data at a NUTS III level was not available and therefore more general regional and sometimes national data was utilised with relevant conclusions only be drawn where this was practicable and to do so. For example, statistical information was often not available at a NUTS III level and therefore by providing national or regional data an impression of what could be conceivable on a NUTS III could be justified to an extent.

The analysis of secondary data covered reports and other relevant publications as well as general economic papers and reports that provided information about the structure of the region, including not only data on the “Creative Sector”/“Creative Industry” (used interchangeably in this report) but also the impact of how important this sector was to the regions. To deepen information individual in-depth interviews with experts was conducted.

3. Creative Industry in South Baltic Area

The term “creative sector” (or Creative Industry) is a new phenomenon in the global economy, but it is increasingly being used, although knowledge about it is still relatively limited (European Commission, 2010). Research on creative industries has been carried out quite recently, but there has not yet been a single, universally valid definition.

The creative sector in Europe and worldwide is defined differently, this is largely because of the scope of what it covers. In the United States this sector is called “information industries” while in Germany it is referred to as the economy of culture - the German model developed for the German Conference of Ministers of Foreign Affairs, within the framework of this approach: “creative industries are widely understood as a creative enterprise, which is specifically oriented to the market, and deal with the creation, production, distribution and/ or dissemination of creative goods and services through the media”. In France, it is considered that the set of industries belonging to creative industries combine

the features of the conceptualisation and creation of industrial activity and a broad distribution of goods and services that are most frequently subject to copyright (Nowak 2009, pp. 2-5).

In the UK, this definition is extended to the concept of the creative industries. The term "creative industries" first appeared in Britain in the 90s, but became popular only in 1997, when it appointed a cross-sectoral team, the Creative Industries Taskforce (Newbigin 2010, pp. 9-23). Its first report contained a definition of creative industries, which is used in the UK today: "actions that stem from individual creativity and talent, and which are both potential wealth and employment creation through the generation and exploitation of intellectual property rights" (UK Government, Department of Culture, Media and Sport, p. 4). In Poland, there has not yet been the adoption of a clear translation of the English term "creative industries", which is usually translated as "przemysły kreatywne», «sektor kreatywny». The British definition is the most common in Poland, the definition in the literature (Koszarek 2011, p.11).

The factors influencing the development of the creative sector are divided into hard and soft factors. The hard factors include objective and easily measurable factors, i.e. the size of the centre, communication accessibility and the level of wages in the region (Flew 2002, p.32). On the other hand, soft factors are those that are subjectively identifiable and difficult to measure: accessibility and quality of housing, attractiveness of the natural environment, safety, atmosphere of tolerance). Personal factors may also be taken into account, related to the dependency on the path of life of particular individuals (path dependency.)

According to the Hidden Innovation report, the creative sector is one of the most innovative sectors of the economy. According to a survey conducted in the UK, as many as 32% of creative sector companies have declared product innovations, compared to 21% in other sectors of the economy. 16% of entities declared to implement process innovations, while entities from other sectors - 11%. The gap is highlighted when taking into account breakthrough innovations called "at market level" (KEA European Affairs). This type of innovation was declared by 14% of companies from the creative sector, while other companies declared 7%.

The essence of the creative sector is to create new ideas that fall into the category of innovation. However, innovation in the sector is not understood in the same way as in traditional sectors of the economy. We cannot talk about investment in research and development or in patents, which is a measure of the innovativeness of traditional enterprises. The creative industries are made up of

mobile and dynamic businesses, often online, producing goods that are original or even unique.

For creative industries, the understanding of the term innovation includes newer forms of expression and new values than aesthetic or new improved products. Innovation can be described as a factor in the development of the creative sector, which acts as a stimulus for development, leading to the creation of new products and services (Ministerstwo Gospodarki, p.13). The creative sectors are focused on activities coming from innovation and ideas. Consumer behaviour is increasingly individual and insightful, necessitating the endless development and diversification of products and services.

The cultural and creative sectors are some of Europe's most dynamic sectors; they are estimated to generate about 4.2 % of total EU GDP (EY 2014, p.10). According to the figures published by Eurostat in June 2015 (Eurostat, 2018), employment in the CCS at EU level increased from 2.5 % in 2008 to 2.9 % in 2014, as compared to total EU employment. Despite the beginning of the financial increased, suggesting not only a certain resiliency crisis in 2008, the proportion of cultural employment in total employment has risen of the sector, but additional job creation within it. Available evidence confirms that the cultural and creative industries are highly attractive for young people and absorb them easily: on average, the CCS employed more 15-29-year-olds than any other economic sector (19.1 % of total employment in CCS versus 18.6 % in the rest of the economy).

According to a study carried out for the European Patent Office (EPO) and the Office for Harmonisation in the Internal Market (OHIM), Intellectual Property Rights (IPR)-intensive industries generate more than a quarter of employment and more than a third of economic activity in the EU (European Commission, 2013). Overall, almost 39 % of EU GDP is generated in IPR-intensive industries, with trade-mark-intensive industries accounting for 34 %, design-intensive industries for 13%, patent-intensive industries for 14 % and copyright for 4.2 %. Interestingly, copyright-related industries have a significant trade surplus (EUR 15.3 billion), which highlights their export potential.

Germany - Mecklenburg Vorpommern

The local government responsible for Mecklenburg-Vorpommern defines the core areas of the cultural and creative industries in accordance with the model of the Arbeitskreises Kulturstatistik e. V. Thus cultural and creative are deemed to be those that are mainly profit enterprises/profit-making and that are concerned with the creation, production, distribution and/or the media dispersion of cultural/creative goods and services.

The cultural industries (“Kulturwirtschaft”) themselves include the following nine core sectors in accordance with the definition detailed above: music industries, book market, art market, film industries, broadcasting industries, performing arts, design industries, architecture market, and press market/print media market; The Creative industries “Kreativwirtschaft” include the core sectors of the cultural industries with the addition of the subsectors of the advertising market and software/games industries. Moreover, the Creative Industry often has project specific development and the production of creative goods. Almost all companies in the cultural and creative industries use modern technologies, particularly information and communication technologies, and especially in these industries, modern media is not only used, but media and communication technologies are developed or developers and producers of technologies get new impulses for new varieties of technologies to be used (Fietz 2016, pp. 2-4).

Small and medium sized enterprises are most prevalent in the South Baltic Area (SBA) and these SMEs are one of the key driving forces behind the regional economies. Yet, in order for the SBA to compete on the global market in the future, and to compete on a level playing field with other regions it needs to ensure it has the technological capacity in place and this is most certainly currently lacking. Moreover, this also links in with other requirements such as the availability of a qualified labour force and having access to good and robust research and development activities in the region. This further links with the under-utilisation of knowledge and research industries in the South Baltic area. The region has comparatively good educational infrastructure in place and this includes quite a high number of universities and vocational educational establishments which provide access to rich curricula related to the humanities and sciences. This is an as of yet relatively underused source of labour and know-how. There are also many Research and Technology Development centres that are located across the South Baltic area. In general there is some quite good accessibility to the institutions dealing with R&D, and this is not only restricted to the main urban areas in the region but also applies to many of the smaller towns too. Nevertheless, these institutions appear to largely be focused on the research element and therefore there is room for improvement in terms of connecting within a regional context (Krzysztofek 2016, pp.1-5).

As regards the Creative Industry/Sector within the South Baltic, it is evident that this is quite a strong industry as well as a fast growing. There is high innovation performance of the regional economies in the north-western part and in populated

urban areas, while at the same time it would appear that many of these SMEs do not have such a good rate of survival or expansion and, furthermore, a rather low innovation capacity which is borne out through the number of patents. Under-developed business support and financing arrangement in some areas of the South Baltic, especially in the eastern South Baltic regions have impeded development of innovative products and services, particularly in the blue and green sector. Likewise, gaps in innovation performance are evident between the region's rural and urban areas.

Regional Innovation Scores indicate that there are considerable variations across the South Baltic area. Most of the sub-regions perform under the national average though some sub regions in Denmark and Sweden are on par with the national average. This is further evident in the performance levels of the knowledge intensive sectors, business innovation, and creative and cultural sectors. A key issue in the South Baltic area is that of accessibility where large swathes of the programme area suffer from limited potential accessibility to population, which is evident through the being below the EU-27, average. This is a direct result of the way in which settlements and the more rural areas are scattered across the landscapes in addition to the significant distance that rural populations have to undergo to reach the more populated metropolitan areas such as Copenhagen-Malmö. Although large infrastructure investments were undertaken in recent years, which specifically sought to reduce disparities in this accessibility, the considerable differences in infrastructure benefits between the programme regions remain somewhat conspicuous. Moreover, the transport system which connects the different parts of the South Baltic with each other requires significant improved region-to- region airborne connections, this is particularly so across the Baltic Sea even though there has been sharp growth in air passenger transport in EU-27. Furthermore, there is also a necessity for more regular railway and ferry connections in order that direct connections can be improved for would be passengers.

In summary, the South Baltic area is diverse in terms of its social structure and its economies at regional and sub-regional levels. There are however, contrasts in earnings and quality of life which normally sees a pattern of being higher in the West and decreasing the further East with the exceptions to this rule normally being the industrial/service sector and urban hotspots.

The majority of companies that participated in the survey of polish companies were from the architecture sector. However, there was many companies that came from the IT industry, dealing with software, computer games and electronic publishing. Relatively few companies were involved in producing music, visual

and performing arts or were engaged in activities connected with the cultural heritage sector.

According to IBS calculations, the share of the product manufactured by creative industries in GDP in 2008 amounted to 2.47% (the product manufactured by cultural industries was estimated at PLN 27.5 billion, of which the cultural sector alone accounted for PLN 17.6 billion). At the same time, creative industries employed 2.68% of all those working in the country (375 000 people in creative industries and 260 000 in the cultural sector) (Economic importance of the cultural sector, 2010, p. 36).

Generally speaking the amount of turnover is linked to the size of companies, which, in turn, is connected to the number of employees that the company has. Companies from the creative sector are normally very small with such entities belonging to the micro company sector - those employing up to 9 staff. This was this size of companies that took part in the survey (100% of the companies surveyed employed less than 9 persons). The number of employees involved in design or product development in companies was, however, more diverse. The results revealed that, in some cases, up to 6 employees could be involved. This means that, in the main, all employees in creative industry companies are involved in design or product development. When respondents indicated the frequency of the market research methods (end user only) that were carried out in the product development process we can see that most of the methods are done occasionally. Most respondents said that they make use of expert knowledge (e.g. engineer, marketer) occasionally such as asking wholesale or trade partners. More often, respondents frequently use internet-platforms to get end user feedback.

Some respondents also said that they interviewed a representative sample of users as a standard procedure which is very important in user - oriented process. Entrepreneurs do not usually create personas to guide the design process. It is more often that they systematically observe and analyse user processes of target groups. Occasionally, respondents use the lead user (an early adopter for a current niche product or service that could be developed into a breakthrough product or service) method. End-users are actively involved in the development of new products and services quite frequently.

Respondents, while indicating the frequency of the implementation of the product development/design, stressed that what is very important in this process is to: define clear design objectives - they do it nearly as a standard procedure, - project plan and key milestones - they do it frequently, - define strategy for design (direction/ idea creation) - they do it frequently, - hold review meetings

on a regular basis - they do it frequently. It is not that common to determine the skill requirements of the project team.

Usually companies that have been involved with product development/design operated on the market for more than a few years. The company that operates the longest in the industry represented by the respondent worked for 8 years in creative industry. Staff employed by creative industry companies is usually educated in other subjects other than design management. It is also that the knowledge about design management is not that common in Poland. This is a growing area of expertise. Companies in creative industry usually operate in services and employ service providers and manufacturers.

4. Poland – West Pomerania region primary data analyses from Experts

Three experts were contacted and asked a variety of questions about Creative Industry in their regions. These experts were selected from entities supporting entrepreneurship and innovative policy of the West Pomerania region. As regards what branches of CI exist in their regions as well as the structure experts indicate that In the West Pomerania region there are around 3,950 people employed in culture, entertainment and recreation (as at 30.06.2016) with the majority of them (3,650) is working in the private sector with 245 working in the public sector. According to research conducted by Northern Chamber of Commerce there were more than 11,000 people employed in the sector and around 2,000 in Szczecin (Northern Chamber of Commerce, 2018).

According to the Main Statistical Office in 2016 there were 800 entities, mainly in the fields of photography, specialist design (interior design, furniture design, design and art offices, graphic design, music production or advertising) and branches, which contain commercial entities relating to design, culture combining arts and entrepreneurship. The main branches are advertising, publishing and TV and film related. The structure of these companies, according to the size is micro ones, employing up to 9 people. Occasionally in the region medium-sized companies can be found. Sectoral mapping shows that there are mainly advertising companies. The geographical structure is based on a main city within a region and, to a certain extent, around it too (GUS, 2017).

As regards the existence of hotspots and/or hubs of CI there appears to be something of a challenge in Poland in creating hubs. Irrespective of whether it is IT or fashion, it depends on the polish way of working, for example, there are not that many clusters or networks. Thus hubs in Poland are just like companies which are based only in some areas. Experts felt that there needed to be some

further growth in business understanding in order to be able to also create creative places. At the moment, for example, the city council provided abandoned buildings for accountability in the area such as art – e.g. an exhibition.

The main creative spots are in the area of Szczecin are the Academy of Art, Cultural Incubator, Technopark Pomerania where the ICT cluster is located. All of them are situated in Szczecin. There is also the department of Design at the Technical University in Koszalin.

As regards social impact experts indicated that, in theory, CI has a huge impact on a region, both socially and economically speaking. CI companies, for example, adapt old buildings and thereby help to make all parts of the city come alive. For example, the movie productions that have taken place engaged non-creative companies and allowed them to earn money. In 2013 they shot the movie “Obietnica” and there were over a period of 30 days some 150 people involved around and this involved the spending of 2.5 mln PLN Zloty spent. Furthermore, festivals, museums and events attract many tourists to the area and this also impacts the region in a positive way. This includes, for example, the Viking Festival in Wolin, the Festivals of stars in Międzyzdroje, Young and the movie Koszalin.

Therefore, experts see that, in theory, CI does indeed have an enormous impact on a region, both social and economic. Yet, presently experts conceded that they did not have enough knowledge about this issue and the extent of the impacts to really appreciate it in the region. Obviously some had an idea of this but the majority of residents still did not know much about CI. Nevertheless, experts considered that the economic impact of CI can be seen through the service sector which contains a great many CI branches.

In terms of entrepreneurial behaviour and growth experts were of the opinion that companies in their region thought mostly about rate of growth; as the market was not very easy. They further indicated that many companies had large international ambitions and were looking for possibilities to enter the external market. However, as a barrier to this developing further there was, unfortunately, a lack of skills in subjects such as entrepreneurship, management, accountancy or law. In addition, the size of the companies (mainly one-man companies) was a problem in development terms and to deliver more valuable content.

Experts believed that that CI had significant influence on social development; apart from contributing large economical income – CI was seen to influence people’s minds, opinions attitude to others and creates the possibility of meeting and sharing. The creative atmosphere and creative class attracts investors and new inhabitants but this can only function where all other factors are also

fulfilling (such as the provision of other parts of a necessary infrastructure including roads, schools, etc.). As the cost of entrance into the market is relatively low it's not difficult to open and start up a company in CI, but it is however, more difficult is to source funding and find money or investors for new products or services development because there was a greater risk in success in the market.

In relation to the question of there being any development plans, strategic documents or initiatives concerning CI that related to their region, experts stated that, in few last years, as the creative sector became something of a buzzword, also on the strategic level even, there were some strategic documents that underlined the importance of them especially the intelligent specialisation of regional creative sectors which are shown as the key for the region. Proposed courses of action at the local level are thus: - cluster formation and development of the creative sector - identifying the model of cooperation between culture and business - developing effective creative partnerships. In the West Pomerania region experts indicated that Gross Added Value was around 2.5 % to 3%.

Experts indicated that the CI Sector most likely employed around 15-30% of people in region. It was estimated that within the CI sector companies employed that some 60% is self-employed while the rest, approximately 40%.

The non-creative sector employed 70-80% of people in region. Non-CI sector self-employed was approximately a 35% group while the rest (65%), was employed by companies. The traditional sector employs 70-80% of people in region. Non-CI sector self-employed is 20- 30% group rest is employed by companies.

In describing the average employed experts gave the following feedback: the average CI employee is rather young (20-35 years old), creative, with higher education, likes new fashion trends, as well as technology and ICT. Most of people working in CI have had a higher education (46% - 47%).

Experts stated that the growth of the cultural and creative sector in the European Union during the last decade was around 10% higher than the growth of the overall economy according to European Commission. Turnover of the culture and creative sector in the EU, which comprises television, cinema, music, performing arts and entertainment, contributed around 3% of the European Union's GDP. CI in West Pomerania is not strong enough to be recognised as the key factor that attracts other investors, especially in traditional industries. The main value for investors is roads, taxes, and associated infrastructure. What is key for the region is the location in that it is close to both Scandinavia and Germany, But the fact is that CI delivers entertainment, products and services at a high level quality. It also affects high morale in region and/or city as well as the possibility of engaging with art, design, and visual arts.

Upon being asked questions about whether the social impact of CI/CS could be observed, experts were of the view that CI companies and organisations are more socially orientated than regular non-CI companies. This could be as a result of greater commitment to local society and greater awareness of social innovation. And, as has already been mentioned, the quality of jobs generated in the creative industries may provide higher levels of job satisfaction and give a strong sense of commitment to the sector and involvement in cultural life. They organise events, concerts and meetings. Typically, they are very user oriented and very often they are responsible for social innovation. Working in CI is also very prestigious among young people where very often work is treated with an equal passion as a hobby.

With regards to social impact and specifically the perceived image of the region locally and regionally, experts expressed a view that CI was a very important sector for, for example, investors to have an impression about a region. Moreover, they saw that CI is very important for tourists in terms of visiting experiences as well as the industry itself.

A broader assessment of the economic impact of cultural sectors and products is key to providing a fuller picture of the real impact of culture. For example, the impact of the Great Wall of China. It attracts enormous tourist income as well as investment by national authorities and local people.

West Pomerania region is considered to be a touristic region (with wide access to the sea side areas) and so the creative sector plays a crucial role in creating an experience for visitors and the willingness to return again and again. Festivals, museums, events concerts attract many visitors and influence the lives of residents by firstly, allowing them to earn money and secondly they can be proud that they live in the region and this in turn has the effect of making them feel responsible for the area.

When asked what specific framework conditions were required to attract such companies and whether these factors could be generalised experts indicated that interest in company investments in the region could be created through the creation of special economic zones. In the case of CI it is however, more difficult. For CI micro grants might be helpful, as well as the possibility of sharing offices at discounted prices and incubators, with access to cheaper conferences rooms, experts in law, finances etc. as well as workshops.

Experts commented that Creative industries cannot locate in some regions most likely because they are not interested in investing in region where there is not a good or positive image (in terms of placing a business) (Tomczyk, Bakowska 2014, p.112) nor perhaps is it perceived as an open one. Clearly business rents and

people resources and their availability in an area are also extremely important as is competition and their various levels in a region. Experts also stated that it could simply be that the region has not developed the so-called creative class, which would create a CI in the region. Alternatively, the creative class of the region could move to a more creative cities and other places, and also abroad for example. Lastly, in relation to what could be done better to attract more CI companies to the region Expert feedback indicated that regional authorities should pay more attention to how important creative sectors are, not only for economic reasons but also for a better lifestyle and quality of life as well as for tourists.

Experts suggested that regions should have policies in place that support creative industries, especially funds that could support the development of companies together in their cooperation with the more traditional industries. Moreover, there needed to be an understanding and recognition that any cooperation between creative and traditional industries brings large amounts of added value this in turn brings benefits for both CI and the traditional industries.

5. Conclusion

CI had a huge impact on the region, both economically speaking as well as socially. This was as varied as the effects of shooting films and the renovation of old buildings, which in turn stimulated the local economies, mainly through increasing touristic interests. It was felt that not enough was understood yet about Creative Industry but once it was better understood, this would, in turn lead to more robust regional policies and funding sources that would strengthen, consolidate and grow the CI sector regionally.

In the South Baltic the Sector is largely made up of SMEs and as demonstrated in this analysis these Creative Sector industries, though of a relatively small size, they make up a considerable proportion of local economies collectively which means they are no less important in any way than SMEs belonging to other sectors - something which expert opinion, reflected in this report, support. Furthermore, not only are they providing direct benefits in terms of products, services, employment etc., but there are spinoffs to the wider society, the "valued added" as viewed by experts, in that there are indirect benefits to communities, such social (and economic) impacts include for example, feel good factors, the regeneration of buildings and a stimulation of touristic interest. Yet much more is unknown and not yet studied or measured in terms of the extent of such impacts. Moreover, these CI businesses co-exist, quite contentedly it would appear, with

the more traditional industries across the region. But what this analysis has also provided insight into is that although the Creative Sector is extremely diverse (by its nature the Creative Sector is diverse, and this is not something only experienced in the South Baltic) it might also be considered to be neither strong nor weak but somewhere on a scale between the two. But the demonstration of diversity is itself a strength in that it is not over reliant on any one aspect with the Creative Sector. Furthermore, although there is a significant lack of local data that could be used as indicators, it is evident that regions do have regional Creative Industry on the agenda for future growth and thus there is a growing awareness at regional and local levels of the value and contribution of Creative Industry to these economies and of the need to stimulate growth further. However, the research has demonstrated that when it comes to the key question of not only how to maintain the status quo but in order to actively encourage growth within the regional Creative Industries the answers are extremely broad in scope and range from discounted accommodation to encourage business growth through to providing direct grants for start-ups. Such diverse suggestions merely support the view that there is still a lot to learn about Creative Industry and how to harness it and develop it across the South Baltic Region.

Summary

Creative Industry in South Baltic Area Region

The article presents primary and secondary data collected in research on Creative Industry in South Baltic Region. In the article authors present the wide overview on creative industries in West Pomerania region and give the background on situation of creative industries in South Baltic Area. This region is particularly interesting in research considering the diversity in the development dynamics of the creative sector. In this region there are places leading in the development of the creative sector in Europe, as well as places where this sector is just beginning to develop and take advantage of the prevailing trends.

Key words: creative industries, regional development, innovation, entrepreneurship.

Streszczenie

Sektor kreatywny w regionie Południowego Morza Bałtyckiego. Artykuł prezentuje dane pierwotne i wtórne dotyczące sektora kreatywnego w Południowym Regionie Morza Bałtyckiego.

Autorki skupiły się na prezentacji sytuacji sektora kreatywnego w województwie Zachodniopomorskim i porównania go do sytuacji tegoż sektora w Południowym Regionie Morza Bałtyckiego. Region ten jest szczególnie interesujący badawczo zważywszy na zróżnicowanie w dynamice rozwoju sektora kreatywnego. W regionie tym występują miejsca przodujące w rozwoju sektora kreatywnego w Europie, jak i miejsca, w których sektor ten dopiero zaczyna się rozwijać oraz wykorzystywać panujące trendy.

Słowa

kluczowe: *sektor kreatywny, rozwój regionalny, innowacje, przedsiębiorczość.*

JEL

Classification: D4, E2, L2, M1, O1

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