The creative economy in CCC cities and regions

Creative City Challenge

SWOT Analysis Report 6.2

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1 Introduction

1.1 The Creative City Challenge project

The importance of innovation and creativity for the competitiveness of the European economy can hardly be underestimated. The Lisbon agenda, which aims at making the European Union the most competitive and dynamic knowledge-based economy in the world by 2010, recognises innovation as a key driver of the economic performance of cities and city-regions in the current post-industrial economy. The European Year of Creativity and Innovation (2009) has reconfirmed the need for Europe to strengthen its capacity for creativity and innovation, in order to be able to cope with the challenges of globalisation.

To enhance their innovative capacity, many cities strive to place the 'creative city' concept on their policy agenda. Current policies focus on improving entrepreneurship in creative industries, on building networks of entrepreneurs or providing space for such activities, and on developing creative zones, incubator spaces or hotspots. Still lacking however, is an integrated evidence-based strategy for cities to strengthen their innovative capacity that also explicitly takes into account the interactions between these local policies and the goals set in Lisbon and Gothenburg.

The INTERREG IVB project Creative City Challenge (CCC) aims to build and implement such a strategy by means of a methodology of pilot projects developed and carried out by, and in, cities and city-regions across the North Sea Region (Figure 1, p.8). These pilots will take the triple helix of 'organisational capacity' of government, knowledge institutions and private businesses as a starting point, thus contributing to a strong programme of transnational interchange of learning, materials and best practice. Disseminating the outcomes of the project will unlock a formidable potential in improving the innovative capacity and competitiveness of cities in the EU, and in the North Sea Region in particular.

1.2 Objectives of the SWOT analysis

The SWOT analysis is carried out in Activity 2 of Work Package 6 on Research-based Strategy Development. On the one hand, it should provide a background and an overview of the differences between partner cities and regions with respect to the creative production and consumption milieu. As such, it also provides a basis for the transnational learning process of Activity 6.5. On the other hand, the SWOT results in a number of policy options for each partner city and region, which enables partners to position their current activities and projects and, even more, the way these are being further developed.

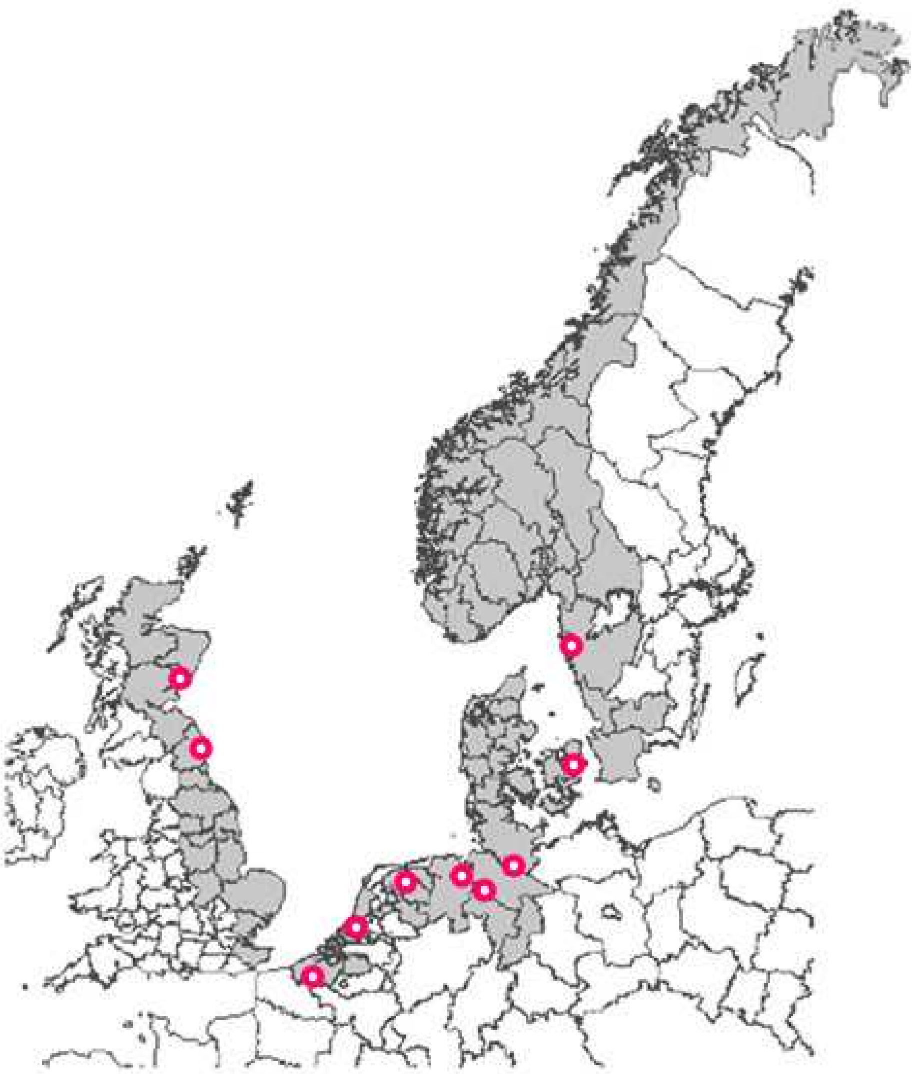
The main objectives of the SWOT analysis then are:

- to provide a systematic picture of the present state of the creative economy in all partner cities, in order to have a base situation from which to assess the results of the project;
- to identify promising (and less promising) fields for policy intervention, in order to know where resources can best be targeted at, at which scale and with which actors being involved;
- to identify promising fields for transnational learning (Activity 6.5): what are a city' strengths that other cities may learn from, and what are its weak points where it may benefit from other cities' experiences;

- to gain insight in the extent to which the projects analysed in WP 3-5 connect to the strengths and weaknesses, opportunities and threats of the respective cities; this is important to assess both their chances for success and their possible contribution to the local economy.

The SWOT analysis is carried out in close relation to Activity 6.1, the Framework Report (Romein and Trip, 2010). In particular, the SWOT analysis is an operationalisation of the framework of analysis that has been elaborated in the Framework Report. Both activities have also been carried out, for a large part, simultaneously in time. Nevertheless, the current SWOT Analysis Report and the Framework Report can also be read independently form each other.

Figure 1: The North Sea Region and the cities and regions involved in the CCC partnership.



Source: map by Kris Oosting, in: Smit (2010).

1.3 Structure of the report

The structure of the SWOT report is as follows. First, Chapter 2 briefly outlines the SWOT method applied, and the four phases of the analysis. Chapter 3 then discusses the indicators and data collection more in detail. Chapter 4 presents an overview of results, particularly by means of a number of key figures on city characteristics, employment and firm structure in creative industries. It also provides an overview of the strengths and weaknesses, opportunities and threats identified in the various partner cities and regions. The main findings per city or region are summarized in Chapter 5, by means of a number of policy options that have been identified as an outcome of the SWOT analysis. Finally, Chapter 6 presents the main overall conclusions, as well as some reflections on the result of the analysis.

The complete SWOT analysis for all partner cities and regions is included in the Appendix to the report, which is available in digital form on the CCC website (www.creative-city-challenge.net).

2 Methodology

2.1 Introduction

The SWOT analysis discussed here is based on the model presented by Kearns (1992).[1] In contrast to a 'standard' SWOT it is a so-called 'confrontation matrix', which provides a better and more natural overview of relevant focus points for policy.

Starting point of the SWOT analysis has been the framework of analysis as presented in the Framework Report. This is briefly recapitulated in Section 2.2. The analysis itself consists of four phases. Thus, Sections 2.3 to 2.6 subsequently discuss 1) the selection of indicators, 2) the method of analysis of strengths, weaknesses, opportunities and treats, 3) the application of a confrontation matrix, and 4) the organisation of reporting, including the feedback to and from partners on the preliminary results.

2.2 Framework of analysis

Table 1 (p.12) presents an overview of the wide range of factors that are or may be relevant for the WPs of the CCC project, as discussed in the Framework Report (Romein and Trip, 2010:14). Following Asbeek Brusse *et al.* (2002), three types of space are distinguished: spatial-physical, social and symbolic space. Likewise, three types of space qualities can be distinguished, supplemented by the qualities of people, particularly entrepreneurs. Table 1 positions these four types of qualities in relation to the Work Packages of the CCC project. Thus, WP3 (entrepreneurship and skills development) mainly involves factors related to people, while WP 4 (networks and dialogue) and WP5 (creative clusters, hotspots) chiefly involve social, spatial and symbolic place qualities. For further background information the reader is kindly referred to the Framework Report.

2.3 Phase 1: indicators and data collection

The factors in Table 1 have been 'translated' into operational indicators for which data have been collected on the basis of which the various factors could be assessed as 'strong' or 'weak' factors in the city's or region's creative economy.

Data have been collected locally, by the partner cities and regions involved in the CCC project. This implies that the number of indicators had to be relatively limited, and based on an estimation of data availability from easily accessible sources. On the other hand, the indicators selected should cover all relevant aspects of the creative production and consumption milieu. Indicators and data collection are discussed in further detail in Chapter 3.

[1] The application of this model has been discussed with an expert from the Faculty of Architecture of Delft University of Technology. The model has in a largely similar form been applied in an analysis of the city of Delft (Romein and Trip, 2009).

Table 1: Factors for growth and development of the creative production (P) and consumption (C) milieu, in relation to CCC work packages.

	qualities of people, entrepreneurs	social place quality	physical/spatial place quality	symbolic place quality
WP3 Entrepreneurship	▪ number of students in 'creative' studies (P) ▪ near graduates with ambitions to start a business (P) ▪ creative business start-ups (P) ▪ mix of 'passion' and 'economic drive' (P) ▪ management skills and capabilities (P)	▪ cooperation between higher education institutions and creative sector (P)	▪ 'creative' training, education and research infrastructure (P)	
WP4 Networks & dialogue	▪ capability to connect to internal and external relation networks with creative industries (P)	▪ accessibility and openness of relation networks with creative industries (P) ▪ 24/7 meeting places; 'third places' (P) ▪ diverse labour pool (P) ▪ diversity of jobs (C) ▪ liveliness, 'street life' (P/C)	▪ concentrations of businesses, creative and other (P) ▪ educational and research infrastructure (P)	
WP5 Creative clusters & hotspots		▪ diverse population (C) ▪ liveliness, 'street life' (P/C) ▪ tolerance to social diversity and other cultures (P/C)	▪ concentrations of businesses, creative and other (P) ▪ supply/prices of working spaces (P) ▪ idem housing (C) ▪ amenities for households (C) ▪ diversity and density of built environment(P/C) ▪ architectural quality (P/C) ▪ availability of combined living/working dwellings (P/C) ▪ presence of business amenities (P/C)	▪ authentic cultural heritage (P/C) ▪ 'narrative'/'DNA' of a city (P/C) ▪ sense of solidarity, community (P/C) ▪ 'creative' image (P/C)

2.4 Phase 2: analysis of the creative production and consumption milieu

In Phase 2, the indicators for which data have been collected must be assessed, in order to designate factors as strengths or weakness. Strengths and weaknesses (S/W) focus on the current situation: 'what is there?' As such, they may be considered relatively static.

To assess factors as strengths or weaknesses for all cities and regions by desk research would require the collection of reference data on a regional or national level. Even then differences between countries may bring about numerous methodological pitfalls. The alternative would be to carry out a large number of interviews with e.g. local creative entrepreneurs.[2] It is virtually impossible to do this 'top-down' within the available time, even regardless of the difficulties posed by distance and language differences. Moreover, even if extensive research 'on the spot' would have been possible partners' local expert knowledge would still have been indispensable to assess e.g. the local policy context.

To avoid this, assessment of data has been done locally, by means of the partners' expert judgement. This implies, however, that cities can not be compared on a one-to-one basis with regard to the strong and weak points of their creative production and consumption milieu, since strengths and weaknesses are no absolute quantities. Instead, they reflect how cities and regions see their own position. With regard to this, the data collection template specifically stated that partners should be critical when assessing strengths and weaknesses, focusing on the actual state of the creative production and consumption milieu rather than on their policy objectives. Nonetheless, it appeared that some partners have been more critical than others.

Furthermore, Phase 2 includes the identifying of specific opportunities and threats. In contrast to strengths and weaknesses, opportunities and threats are more dynamic: 'what is happening?' They concern processes and developments that possibly influence the chances of creative industries and the creative production and consumption milieu. Opportunities and treats may be city-specific, but more often are of a general nature.

Opportunities and threats are often understood to be on a higher spatial scale than the factors included in the SWOT - i.e. the factors that define the quality of the creative production and consumption milieu. In fact, however, both opportunities and threats can be found both within and outside the city (e.g. local revitalisation policy that includes large-scale demolishing of dwellings; construction of roads; national or EU regulation; global economic developments).

The result of Phase 2 is an inventory of strengths and weaknesses, opportunities and threats for each city involved, i.e. the 'four lists' that typically emerge from a SWOT analysis.

2.5 Phase 3: confrontation matrix

In Phase 3, for each city a confrontation matrix (Figure 2, p.14) is applied to go beyond the four categories of strengths, weaknesses, opportunities and threats, and to identify promising fields for policy intervention.

The strengths and weaknesses, opportunities and threats that have been identified in Phase 2 are ranked along the margins of the matrix. The cells of the matrix indicate the four possible combinations, each of which has other implications for policy. Four types of policy options can be formulated:

- invest in promising strengths to exploit comparative advantages;
- mobilize resources to defend threatened strengths;
- decide about whether to invest to strengthen promising, but weak areas;
- control damage by weak and threatened areas by avoiding them and looking for alternatives.

These four perspectives can then be related to the projects brought in by the respective cities. This provides an indication of e.g. how promising projects would seem, and how large their contribution could be to the local creative economy.

[2] This was indeed done in the analysis of Delft by Romein and Trip (2009), but this involved only one city, while language and distance posed no additional problems.

It should be noted that not all combinations of strengths or weaknesses and opportunities or threats result in a policy option. There must be a logical ‘match’, which is more probable as both factors concern the same type of (production or consumption) milieu.

Eventually, the detailed policy options in the cells of the confrontation matrix may be aggregated to distinguish a number of overall main policy options that have a more comprehensive nature. These main policy options are the main outcome of the SWOT analysis on a city level, and are presented in Chapter 5 of the current report.

Figure 2: The confrontation matrix.

	major opportunities	major threats
primary strengths	**invest** clear matches of strengths and opportunities lead to comparative advantage	**defend** areas of threat matched by areas of strength indicate a need to mobilize resources either alone or with others
primary weaknesses	**decide** areas of opportunity matched by areas of weakness require a judgment call: invest or divest; collaborate	**damage control** areas of threat matched by areas of weakness indicate a need for damage control

Source: based on Kearns (1992:13).

2.6 Phase 4: reporting and feedback

The final phase of the analysis involves reporting and feedback. The CCC partners have a significant role, as local experts, in the collection of data and the assessment of factors as strengths, weaknesses, treats or opportunities. Their feedback is therefore necessary to validate the results of the SWOT analysis.

Preliminary results of the SWOT analysis have been distributed to al partners and have been discussed in a plenary discussion during the project meeting in Gothenburg (5-7 May 2010), as well as afterwards by e-mail. This has lead to a number of corrections and additions, and an overall validation of the results.

3 Data collection

3.1 Introduction

This chapter discusses more in detail the indictors that have been used and the process of data collection. Based on the approach described in Chapter 2, especially on the framework of analysis presented in Section 2.2, data have been collected in the cities and regions that participate in the CCC project according to a standardized template. Subsequently, strengths and weaknesses and opportunities and treats have been appointed.

Section 3.2 discusses the first part of the data collection template, which covers a number of general characteristics of the cities and regions involved, including the employment in creative industries. Section 3.3 likewise discusses the indicators that cover the strengths and weaknesses of the creative production and consumption milieus. Section 3.4 provides a brief overview of the sources that have been used. Finally, Section 3.5 elaborates on the way opportunities and threats are distinguished.

3.2 General data

Table 2 presents the first part of the data collection template, including a number of general indicators on the city or region involved. In particular population (4), employment (5) and surface (6) show the considerable size differences between these cities and regions, but can also be used to calculate a few relative figures based on other data (such as employment in creative industries relative to total employment).

Table 2: General data indicators.

nr.	indicator	nature of data
1	template completed by (name)	
2	city/region	
3	administrative entity for which data has been collected	
4	total population of city/region (inhabitants)	quantitative
5	total employment (jobs)	quantitative
6	total surface (km^2)	quantitative
7	employment in creative industries (jobs per subsector)	quantitative

Question 7 is key in that it addresses the size of the creative industries in terms of employment, including the distribution of jobs over subsectors within the creative industries. We applied the definition applied by e.g. the German Federal Ministry of Industry and Technology. It is based on the European NACE Rev.2 classification, which exists since 2006. NACE Rev.2 largely corresponds to the UN classification ISIC Rev.4.[3] Table 3 (p.16) shows the applied classification in detail. Eventually all partners were able to collect employment data according to one of these classifications, with some

[3] Respectively the EU classification *Nomenclature statistique des activités économiques dans la Communauté européenne* and the worldwide *International Standard Industrial Classification*. The classification systems largely correspond.

small deviancies. Only in Dundee part of the data was not available. In view of the difficulties usually involved in collecting these data on an international level we consider this a satisfying result.

Table 3: Applied statistical classification of creative industries.

	NACE Rev.2	ISIC Rev.4
publishing activities	58.1	581
film industry	59.1	591
manufacture of sound storage media & publishing of music	59.2	592
broadcasting industry	60	60
cultural economic branches	90	90
libraries & museums	91.0.1; 91.0.2; 91.0.3	9101; 9102
trade of cultural goods	47.59.3; 47.61; 47.62.1; 47.63; 47.78.3	4759; 4761; 4763; 4773
architecture	71.1	711
design	74.1; 71.12.2	741
advertising	73.1	731
software & games	58.2; 62.0	582; 620

3.3 Strengths and weaknesses

The second, and largest part of the data collection template included 16 indicators to be assessed as strengths, weaknesses, or neutral factors with regard to the development of the creative economy (Table 4, p.17). These were grouped according to the issues addressed in the Work Packages 3 to 5. It should be noted that the employment in creative industries (7, see Table 2) was also included in the WP3 indicators. Otherwise there was a relative focus on WP5 of creative clusters, for which a number of qualitative indicators has been included.

The template included both quantitative and qualitative indicators. In both cases, however, partners were asked to provide a qualitative statement as to why a specific factor was rated as strong, neutral or weak (see Section 2.4). The questions 10 and 13, on the number of large cultural events and amenities, proved to be of a mixed quantitative/qualitative nature, as most partners provided not just a figure, but also a list of relevant amenities and events.

3.4 Sources

Data have been collected from a wide range of sources. Qualitative data were found at a large number of reports and websites, which are not listed here. Quantitative data – primarily statistics on employment and city characteristics – basically have been collected from national, regional and municipal databases and statistical agencies. Table 5 (p.17) provides an overview that is not complete, but nevertheless illustrates the wide range of used sources.

Table 4: Data indicators reflecting strengths and weaknesses.

nr	indicator	nature of data
	WP3: Entrepreneurship and skills development	
8	number of firms in creative industries (according to above definition)	quantitative
9	number of business start-ups in creative industries	quantitative
10	programmes for stimulating business start-ups in the creative industries	quantitative/qualitative
	WP4: Network, dialogue and business cooperation	
11	number of students in university and higher vocational education	quantitative
12	number of graduate students in 'creative' studies (e.g. art school, architecture, dance academy, music, journalism etc.; see the above definition)	quantitative
13	programmes for stimulating networking between creative businesses or entrepreneurs	quantitative/qualitative
	WP5: Creative clusters	
14	number of annual cultural festivals and events with 10,000 participants or more	quantitative
15	number of cultural amenities with 10,000 visitors or more per year (e.g. museums, theatres)	quantitative
16	surface of water, parks, nature (or percentage of total surface)	quantitative
17	supply of housing and potential shortages in the housing market	qualitative
18	supply of working spaces for creative businesses and potential shortages in the market	qualitative
19	liveliness in the inner city (e.g. is there 24/7 activity? Are sufficient 'third spaces' available for informal meetings? Are sufficient attractive pubs, bars, restaurants and specialist shops available? Street music or cultural activities?)	qualitative
20	level of tolerance to social diversity	qualitative
21	level of tolerance to ethnic differences	qualitative
22	presence of neighbourhoods of great architectural quality or authenticity	qualitative
23	image of the city or region as a 'creative' city/region	qualitative

Table 5: Main sources of quantitative data.

city/region	main sources
Bremen	various regional authorities; statistical analysis Söndermann
Dundee	Dundee City Council; GRO Scotland; DC Thomson; Interactive Tayside; CEO (Cultural Enterprise Office)
Groningen	Municipality of Groningen; University of Groningen; Hanze University; Statistics Netherlands
Hamburg	German Federal Statistical Office; Statistische Amt für Hamburg und Schleswig-Holstein; Handelskammer Hamburg; www.lexolino.de
Høje-Taastrup	Statistikbanken; Høje-Taastrup Kommune; Ehrvervsregister online; Taastrup Kulturcenter
Leiedal	FOD (National Institute for Statistics); Flemish Administration/Province of West-Flanders/VLHORA; RSZ (Rijksdienst voor sociale zekerheid)
Newcastle-Gateshead	Newcastle Gateshead Initiative; census data; NCC GIS team/Gateshead LDF; Annual Business Inquiry; ING Research; BNG Creative Sector Study; arts council; NCC Adult and Culture Services; NCC Green Spaces Strategy
Oldenburg	Landesbetrieb für Statistik und Kommunikationstechnologie Niedersachsen (LSKN); Stadt Oldenburg
Skaraborg	Statistics Sweden

3.5 Opportunities and threats

Whereas strengths and weaknesses have been based on the factors that determine the development of the creative production and consumption milieu, presented in the analytical framework of Table 1 (p.12), opportunities and strengths may be less tangible. Local in-depth knowledge seems crucial here as well. A number of generally formulated opportunities and treats have been formulated by Delft University of Technology.

Three general opportunities were formulated:

1. growing diversity of lifestyles accompanied with increasing aesthetic reflexivity, i.e. the growing ‘need’ for individuals to identify and display themselves as representative of a lifestyle by means of consumption and/or production in accordance with lifestyle-bound symbolic values (tastes, design, fashion, …);
2. increasing ‘incorporation’ of environmental and social sustainability-based legitimacies in content and organisation of production, consumption behaviour, and regulation/legislation on different politico-administrative levels (local/regional, national and European). The interaction of these legitimacies contributes to both more profitable creative industries and more attractive qualities of place;
3. the current economic downturn clearly hits traditional industries and offers opportunities for a new policy perspective that is more in favour of creative industry than before. It may even be a decisive incentive for cities to achieve a necessary change of priorities.

In addition, five general threats were formulated, some of which were mutually related:

1. the bifurcated structure of many creative branches structurally limits the growth and development potentials of its lower circuit of ‘petty producers’ and is therewith a permanent barrier to their professionalization, commercial staying power and innovative capacity;
2. investments of public resources in creative city policy may contribute to rising socio-economic inequality and, in interaction with the possible rise of local political forces that oppose to these expenditures, a decline of social tolerance for creative talent and their lifestyle(s);
3. necessary budget cuts, for instance due to the current economic downturn, may strengthen the above threat. What is more, these may also lower the willingness by local policy makers for such investments in favour of a redirection of priorities towards more traditional sectors that are perceived safer as the much more experimental creative industries;
4. gentrification; or price-rises of living and working spaces to levels that are no longer affordable for most creative talent as a boomerang effect of the success of creative city policy;
5. increasing competition from symbolic value production in emerging markets / middle income countries makes it more an more difficult for ‘high-income cities’ (in NSR region and other parts of EU) to maintain their lead.

Partners then were asked to consider whether these opportunities and threats indeed applied their city or region or not. Also, they were explicitly asked which *other* opportunities and threats (if any) they consider important for creative city development in their city or region. Therefore, in addition to the above possible opportunities and threats a range of issues were mentioned partners that apply to their specific city or region. These are not listed here, but can be found in the next chapter (Table 10b, p.25) and in the complete SWOT analyses in the Appendix.

4 Overview of results

4.1 Introduction

This chapter contains a descriptive overview of the collected data. The sections 4.2.to 4.5 respectively present key figures of size and nature of the partner cities and regions; size of employment in their creative sectors by type of industry; perceptions of pre-defined indicators as strengths and weaknesses; and processes that are perceived as opportunities and threats to further development of the local or regional creative economy. Each section consists of a table that summarises the collected data and some accompanying comments to that table.

4.2 City, population and creative milieu

The cities and regions that participate in CCC differ considerably in size and nature. Regarding population size, Table 6 shows that the largest one, Hamburg (1,775,333) is almost 40 times as large as the smallest one, Høje-Taastrup (47,741). Both are 'outliers' since the ratio of the largest and smallest of the remaining seven other partners is less than 5. These are all medium-sized cites or regions with numbers of inhabitants ranging between 661,666 (Bremen) and 142,470 (Dundee).

Table 6: General characteristics of CCC partner cities and regions.

	Bremen	**Dundee**	**Groningen**	**Hamburg**	**Høje-Taastrup**	**Leiedal**	**Newcastle-Gateshead**	**Oldenburg**	**Skaraborg**
inhabitants	661,166	142,470	184,213	1,775,333	47,741	295,850	462,100	160,279	256,234
surface (km^2)	352	41	84	755	78	446	278	103	7,393
density (inh./km^2)	1,878	3,475	2,193	2,351	612	663	1,665	1,556	35
employment	287,900	80,156	134,207	797,514	32,354	115,251	267,000	101,200	120,269
no. of students in higher education	30,810	17,000	50,300	71,062	923	7,199	88,386	12,310	8,689
jobs / 1000 inhabitants	435.5	562.6	728.5	449.2	677.7	389.6	577.8	631.4	469.4
students / 1000 inhab.	46,6	119,3	273,1	40,0	19,3	24,3	191,3	76,8	33.9
creative gra-duates / 100 students	39.2	n.d.	2.8	6.92	n.d.	32.3	0.9	n.d.	n.d.

Table 6 also presents size in terms of surface in km^2. By dividing population size by surface, population density has been calculated for each city or region. Population density is highest for Dundee (3,475 inh./km2), the city with by far the smallest surface of all. Nevertheless, the figure for Dundee is only just over twice as high as that of number six in the ranking by population density, Oldenburg (1,556). Outlying values are only observed at the bottom end of the ranking, i.e. Leidedal, Høje-Taastrup, but in particular Skaraborg. Whereas Dundee, Hamburg, Groningen, Bremen, Newcastle-Gateshead and Oldenburg are single cities, or a twin city in the case of Newcastle-Gateshead, the three outliers are composed of several towns and villages which explains their relatively low population density. Leiedal is a voluntarily institutional arrangement – a so-called 'intercommunale' – for development co-operation between the 13 municipalities of the region of

Kortrijk (Flanders). It is a fairly urbanised region but with an area of green open land at its southern fringe. Høje-Taastrup municipality consists of three towns and 14 original villages. Its low population density is also explained by its suburban nature within the greater metropolitan area of the Danish national capital city Copenhagen. Skaraborg finally, is the most striking of these three cases due to its size. It is a statistical district consisting of 17 municipalities – ranging roughly between 5,000 and 50,000 inhabitants – that is ten times as large in square kilometres as the second largest partner in CCC, Hamburg. These municipalities' built-up areas are interspersed by much larger areas of open space than is the case in Leiedal or Høje-Taastrup. Consequently, its population density of only 35 inh./km^2 is by far the smallest of all partners in CCC.

The economic importance of the total number of jobs in a city or region can only be interpreted if it is related to the size of the active population between 15 to 64 years of age of that city or region. More jobs than people in this age class implies a more flourishing local economy, reflected by a positive net commuting balance, than the opposite. Unfortunately, the available data for CCC cities and regions only allows a comparison of total employment to all inhabitants. Nevertheless, the observation that the figure of 728.5 jobs per 1000 inhabitants of Groningen is the largest of all reflects its nature of the only sizeable urban labour market in the province of Groningen that generates net commuting flows from its extended hinterland that consists of small towns, villages and open countryside. Further, the figure of 677.7 jobs per 1000 inhabitants of Høje-Taastrup is larger than the figures of all single cities except Groningen; highly remarkable if we take nature into account its suburban nature. This high density of jobs may be related to the high level of connectivity of Høje-Taastrup by train, including local (Copenhagen-area), regional, national and international train connections (for example to Hamburg). In the absence of data on the size of the 15-64 population, this type of conclusion is less easy to draw for the other cities of regions.

Finally, Table 6 presents the number of students per 1000 inhabitants. A high value of this indicator represents a typical 'student city' that usually stands for an ambiance and a consumption milieu that is relatively popular among creative people. Of the nine partner cities, only Groningen (273.1), to a lesser extent Newcastle-Gateshead (191.3) and probably also Dundee (119.3) can be typified as genuine student cities. At the opposite end of the ranking, relatively few students live in intercommunale Leiedal (24.3) and in Høje-Taastrup (19.3). It is noteworthy however, that the share of graduates of creative studies within the student population is very low in the student cities Groningen (2.8) and Newcastle-Gateshead (0.9), but rather high in Leiedal (32.3).

4.3 Creative industries

The overall quantitative importance of creative industries appears to vary considerably between the partner cities and regions (Table 7, p.21). In the city of Groningen, almost one in every ten jobs (9.55%) is in the creative industry while this is only one in every forty in Leiedal (2.54%). Put it differently however, these same figures also mean that more than nine out of ten jobs in each city or region are not in creative industries. Perceived in this way, the differences in relative importance of these industries in the cities' and regions' employment structures is less outspoken.

The sectorial structure of employment of the creative industries shows more noteworthy variations between the cities and regions than these industries' total size. Most partner cities and regions show a certain level of specialisation in one or a few types of industry. The highest level of specialisation can be observed in Bremen and Høje-Taastrup where half of the creative workers (resp. 49.5% and 50.1%) is involved in software and game industry. Actually, with shares between 20 and 35 percent of the creative workers, this type of industry is prominent in all other cities as well, except for Hamburg

(0.62%) where it is almost negligible.[4] In these other cities, the importance of software and game industry is accompanied by one or two other types of industry that also employ between 20 and 40 percent of their creative workers. These are respectively publishing activities in Dundee (39.9%); architecture in both Skaraborg (18.3%) and Oldenburg (18.0%); and architecture (21.0%) and trade of cultural goods (22.0%) in Newcastle-Gateshead. All together, two or three types of industry in the size class of 20 to 40 percent of creative employment make up to about 50-70 percent of total creative employment in these four cities. This is also true for Hamburg, but unlike these four cities software and gaming is not one of these types of industry. The least degrees of specialisation finally, are observed in Groningen and Leiedal.

Table 7: Employment in creative industries: size and distribution by subsector (percentage)

	Bremen	**Dundee**	**Groningen**	**Hamburg**	**Høje-Taastrup**	**Leiedal**	**Newcastle-Gateshead**	**Oldenburg**	**Skaraborg**
JOBS	**12,798**	**6,525**	**12,823**	**58,517**	**2,360**	**2,922**	**18,700**	**3,941**	**4,578**
SHARE OF TOTAL EM-PLOYMENT	**4.45**	**8.14**	**9.55**	**7.34**	**7.29**	**2.54**	**7.00**	**3.89**	**3.81**
BY SUBSECTOR									
publishing activities	0.53	39.85	8.94	16.89	2.25	0.89	7.12	11.32	14.31
film industry	2.43	n.d.	2.69	5.67	4.15	0.31	5.08	0.23	1.55
manufacture of sound storage media & publishing of music	2.92	n.d.	0.20	6.00	0.25	9.03	0.64	0.05	1.29
broadcasting industry	5.51	0.23	1.41	0.50	3.35	14.58	2.00	0.79	1.29
cultural economic branches	7.86	3.83	9.69	1.00	2.46	7.05	4.00	10.35	7.19
libraries & museums	0.16	2.30	5.13	2.75	5.13	6.67	2.86	4.97	18.89
trade of cultural goods	3.37	n.d.	12.10	19.72	2.46	14.13	22.00	5.99	3.49
architecture	5.80	2.45	15.81	21.49	1.06	3.76	21.00	18.02	18.35
design	8.92	15.33	0.96	23.07	16.61	10.64	10.80	7.03	0.42
advertising	13.05	0.77	7.93	2.28	12.20	3.76	3.00	5.68	3.43
software & games	49.45	35.25	35.14	0.62	50.08	29.16	21.50	35.57	29.79
TOTAL	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**

Creative industry is usually characterised by many small to micro-enterprises and a large number of free-lancers. In some cases, i.e. in specific branches in specific cities or countries, the firm structure is bifurcated, consisting of a very few large firms and a great many micro-enterprises that work on temporary project basis and employ free-lancers for projects. Table 8 (p.22) reveals that creative industries in most CCC cities and regions are no exception to the general characteristic of a sector that is dominated by small to very small enterprises. In five of the nine cities, the average number of jobs per firm is below 5 and in three other ones between 5 and 10. To some degree, the creative

[4] Data from the Hamburg Chamber of Commerce indicate that this figure is probably too low, possibly due to a different definition. However, data from these two sources are hardly comparable as very different classifications have been applied.

industry of Dundee is the only exception with an average of 18.64 jobs per firm. This is probably explained by the prominence of publishing activities that employ a much larger share of the creative workers in Dundee (39.9%) than in the other cities and regions and which type of industry may either consist of firms that are larger than those in other creative branches or are characterised by a bifurcated structure. Finally, the relative number of start-ups in creative industry, i.e. per 100 firms in all types of industry, is also larger in Dundee than in the other cities and regions. However, the value of this observation is limited because data are missing for four of these eight other cities and regions.

Table 8: Firm structure and start-ups.

	Bremen	**Dundee**	**Groningen**	**Hamburg**	**Høje-Taastrup**	**Leiedal**	**Newcastle-Gateshead**	**Oldenburg**	**Skaraborg**
no. of firms in c.i.	1,956	350	2,636	13,300	449	1,897	>2,000	907	2,174
jobs per firm	5.80	18.64	4.86	4.40	5.26	1.54	9.35	4.35	2.11
no. of business start-ups in c.i.	n.d.	103	352	1,507	n.d.	164	82*	n.d.	n.d.
start-ups in c.i. / 100 firms	n.d.	29.43	13.35	11.33	n.d.	8.65	n.d.	n.d.	n.d..

* Newcastle only.

4.4 Overview of perceived strengths and weaknesses

The strengths and weaknesses of each city or region are classified as being related to its creative production milieu (P), its creative consumption milieu (C) or to both types of milieus (P/C). On the whole, three of the 15 pre-defined factors (see Table 3, p.16) are generally assessed as a strength by the cities and regions – large-scale cultural amenities and levels of tolerance to both social diversity and ethnic differences (Table 9, p.23). All three are factors related to their consumption milieu. The cities' and regions' main bottlenecks for the development of their creative industry firms concern the real estate market, in particular current and potential shortages of working spaces (P): 7 cities and regions assess this supply as a weakness. Comparatively, the supply of residential space (C) is assessed as a neutral factor – neither strength nor weakness – by five of the nine cities and regions.

The other 10 factors included in Table 9 are less univocally assessed either as a strength or a weakness by the cities. Actually, they are more often assessed as neutral. Regarding the factor 'liveliness of inner city', there appears rather a noteworthy differences of opinion between the more compact single cities which consider this a strength and the suburban town Høje-Taastrup as well as the polycentric regions Leiedal and Skaraborg which consider it a weakness.

If we analyse the data in Table 9 by city or region, these single cities appear more satisfied with their creative milieus than Høje-Taastrup, Leiedal and Skaraborg. The only exception is Newcastle-Gateshead, which shows itself quite critical on three production-related factors - the numbers of firms and start-ups in creative industries and the programmes to stimulate start ups. This critical attitude does not appear justified by small numbers of jobs in these industries (Table 6, p.19).

4.5 Overview of perceived opportunities and threats

All the opportunities and threats that were formulated in advance by the team of the Delft University (see Section 3.5) except one are considered to be valid for one or more partner cities or regions (Table 10a, p.24).

Table 9: Partners' assessment of strengths (+), weaknesses (-) and neutral factors (+/-).

	milieu	Bremen	Dundee	Groningen	Hamburg	Høje-Taastrup	Leiedal	Newcastle-Gateshead	Oldenburg	Skaraborg
no. of firms in creative industries	P	+	+	+	+	+/-	+/-	-	+	+/-
no. of business start-ups in creative industries	P	n.d.	+	+	+	n.d.	+/-	-	+/-	+/-
programmes for stimulating business start-ups in the creative industries	P	+/-	+	+/-	+	+/-	+	-	+/-	+/-
no. of students in university and higher vocational education	P	+	+/-	+	+	-	+/-	+	+	-
no. of graduate students in 'creative' studies	P	+	n.d.	+/-	+/-	n.d.	+	+	+/-	+/-
programmes for stimulating networking between creative businesses or entrepreneurs	P	+	+	+	+/-	+/-	+	-	+	+/-
no. of annual cultural festivals and events with 10,000 participants or more	C	+/-	-	+	+	+/-	+	+/-	+	+/-
no. of cultural amenities with 10,000 visitors or more per year	C	+/-	+	+	+	+	+	+	+	+/-
surface of water, parks, nature (km^2)	C	+	+	+/-	+	+	-	+	+/-	+/-
supply of housing and potential shortages in the housing market	C	+/-	+/-	+/-	-	-	+/-	-	+/-	+
supply of working spaces for creative businesses and potential shortages in the market	P	-	-	+	-	-	-	-	+/-	-
liveliness in the inner city	P/C	+/-	+	+	+/-	-	-	+	+	-
level of tolerance to social diversity	C	+	+/-	+	+	+	n.d.	+	+	+/-
level of tolerance to ethnic differences	C	+	+	+/-	+	+	+	+	+	-
presence of neighbourhoods of great architectural quality or authenticity	P/C	+/-	+/-	+	+	-	+/-	+	+/-	+
image of the city or region as a 'creative' city/region	P/C	+/-	+/-	+	+	-	+/-	+	+/-	-

Note: P: factor related to creative production milieu; C: factor related to creative consumption milieu; P/C: factor related to both types of milieus.

In addition to these rather general opportunities and threats, partners were also explicitly asked which *other* opportunities and threats they considered important for creative city development in their city or region. Some partners – in particular Leiedal and Newcastle-Gateshead – indeed mentioned other issues as opportunity or threat. Table 10b (p.25) presents these other issues, with numbers for partners that mention more than one other opportunity or threat. The opportunities brought up for Leiedal are mainly prospects for development of its creative industry that arise from its identity of an inter-municipal arrangement for policy co-operation. Dundee, Hamburg and Newcastle-Gateshead take the view that the current global economic downturn also offers opportunities for the creative industries. The additional threats mentioned by the partner cities and regions are more diverse than the opportunities. For Leiedal, its nature of a platform of 13 municipalities that co-operate on a voluntarily basis is also a threat because of the risk of fragmented action by the different municipalities. But in addition, Leiedal also considers a lack of creative image, a lack of space and a lack of talented workers threats. The latter of these shortages, of talented workers, is also considered a bottleneck for the development of the creative industry in Dundee and Oldenburg. In Bremen and

Skaraborg finally, local policy makers lack a vision on this development, or simply pay insufficient attention to it.

Table 10a: Shared opportunities and threats.

OPPORTUNITIES	CITIES AND REGIONS
Expanding market due to growing diversity of lifestyles and aesthetic reflexivity	Bremen, Dundee, Groningen, Hamburg, Høje-Taastrup
Increasing sustainability-based legitimacies in production and consumption	Groningen, Hamburg
Economic downturn offers new policy perspective in favour of creative industry	Bremen, Groningen, Høje-Taastrup
THREATS	
Bifurcated structure of branch as barrier against small firm development	Bremen, Dundee, Hamburg, Høje-Taastrup, Skaraborg
Rising local opposition against expenditures in C.I. and decline of social tolerance for creative lifestyle(s.	Dundee, Groningen
Necessary budget cuts due to the economic recession redirect policy priorities towards more traditional industries.	Groningen, Hamburg, Leiedal, Newcastle-Gateshead
Gentrification and price-rises of living and working spaces	Bremen, Dundee, Hamburg, Høje-Taastrup, Oldenburg
Increasing competition from symbolic value production in emerging markets / middle income countries makes	none

4.6 Overview of confrontation matrix

The confrontation matrix includes strength and weaknesses in one of its margins and opportunities and threats in the other. Each cell of the matrix includes promising fields for policy interventions that are based on the confrontations of strength and weaknesses with opportunities and threats that define this cell (see Chapter 2). The complete confrontation matrix of each city is presented in the Appendix to this report.

Not each confrontation of a strength or a weakness with an opportunity or a threat involves a policy options; it depends on their respective contents whether a policy intervention is feasible. Actually, the opportunity that a confrontation makes an intervention feasible is largest if both the strength or weakness and the opportunity or threat concern the same type of milieu, i.e. either production or consumption milieu. Table 11a and 11b (pp.26-27) summarise in which cities and regions confrontations of strengths (11a) and of weaknesses (11b) with opportunities and threats make, to our conviction, policy interventions recommendable. The cities and regions are indicated in these tables by the first letter of their name, and the numbers in subscript to these letters correspond with the numbers in Table 10b (p.25). Without entering into further detail, the tables reveal that quite a few of all the potential confrontations – probably more than half – do not result into policy options. The policy options themselves are presented by city and region in the Appendix to this report, and in aggregated form in the next chapter.

Table 10b: Place-specific opportunities and threats.

OTHER OPPORTUNITIES	
Dundee	New policy perspective in favour of creative industry due to economic downturn that hits traditional industries to the benefit of both
Groningen_1	Increasing role of universities in dynamics of creative industry
Groningen_2	New EU support 2013-2020 for Lisbon-type agenda
Hamburg	New policy perspective due to economic downturn that stimulate learning by traditional industries from creative industries, both in terms of business processes and product innovation
Leiedal_1	Increasing attention of local/regional policy makers to creativity, innovation, including grants for companies
Leiedal_2	Cooperation with, and potential of Lille-Kortrijk-Tournai European Metropolis
Leiedal_3	Incentives from higher authorities to embed innovation structurally
Leiedal_4	Flemish policy framework stimulates cooperation between different types of organisations
Leiedal_5	Opportunity to enhance innovation in policy domains other than economy (health care, recreation etc.)
Leiedal_6	Strong knowledge base for serious gaming
Newcastle-Gateshead_1	Effect of economic downturn on creative sector – lack of easy jobs for school leavers, graduates and other plus those made redundant from other sectors, makes it more likely that more business start ups will occur in non traditional sectors
Newcastle-Gateshead_2	Effect of economic downturn and quality of life choices encourage migration of creative sector business to smaller, cheaper cities with better lifestyles i.e. less congestion, more access to countryside etc.
Newcastle-Gateshead_3	Property price reductions, lower interest rates and collapse of housing market in UK reducing competition for sites and buildings and leaves more opportunities for creative sector expansion
none	Increasing knowledge of local government on transition from manufacturing- to knowledge- and creativity-based regional economy may result in good conditions for development (momentum for creative city policy)
OTHER THREATS	
Bremen	Creative industries cannot meet risen expectations and lose the attention by public policies' focus on growth sectors
Dundee	Retention or attraction of talented staff by larger (creative) companies, partly due to lack of priority by companies themselves, and lack of 'creative' city image promotion by the City
Groningen	Possible lack of critical mass in development of creative cluster (Ebbinge Quarter)
Leiedal_7	Ambition of surrounding cities to promote themselves as design cities
Leiedal_8	Little remaining space for creative industries
Leiedal_9	Lack of 'creative' image of the region
Leiedal_{10}	Strong focus on 'Vlaamse Ruit' (Ghent-Antwerp-Brussels-Leuven)
Leiedal_{11}	Ongoing brain-drain, ageing society
Leiedal_{12}	Fragmented action in the region
Leiedal_{13}	Lack of strong/holistic/strategic vision on creativity and innovation as a result of electoral process
Newcastle-Gateshead_4	Mainly non commercial sub sectors affected by public spending cuts i.e. Arts Council, LAs, RDAs etc
Oldenburg_1	Local political culture to play different policy fields – incl. creative industry – off against one another is being enhanced due to economic recession
Oldenburg_2	Brain drain as young graduates leave the city because of a lack of suitable jobs in the creative industries
Skaraborg	Lower willingness by local policy makers to invest in creative city policies, due to economic downturn and lack of vision, courage and persistency among policy-makers

Table 11a: Policy options connected to strengths of partner cities and regions.

		OPPORTUNITIES				THREATHS				
		Expanding market due to growing diversity of lifestyles and aesthetic reflexivity	Increasing sustainability-based legitimacies in production and consumption	Economic downturn offers new policy perspective in favour of creative industry	Other	Bifurcated structure of branch as barrier against small firm development	Rising local opposition against expenditures in C.I. and decline of social tolerance for creative lifestyle(s.	Necessary budget cuts redirect policy priorities towards more traditional industries.	Gentrification and price-rises of living and working spaces	Other
STRENGTHS		B, D, G, H, HT	G, H	B, G, HT	D, G_{1-2}, H, L_{1-6} , N_{1-3} , S	B, D, H, HT, S	D, G	G, H, L, N_{4-5}	B, D, H, HT, O	B, D, G, L_{7-13}, , O_{1-2}, S
# firms C.I	B, D, G, H, O	H, G, D	G							G
# business start-ups C.I.	D, G, H	H, G, D	G		G_2	D		H	D	G
Programmes for start-ups C.I	D, H, L	H, D			$L_{1-2,4,6}$, D	H, D	D	L, H	D	$L_{9-11,13}$, D
# students in 3rd education	B, G, H, N, O	H, B		G	N_1,H, G_1					G
# students in 'creative' studies	B, L, N				N_1, $L_{1,2,4,6}$	B		N_4		$L_{7,9-11}$
Programmes for business networking	B, D, G, L, O	G, D, B	G	G	$L_{1-4,6}$, G_{1-2} , D	B, D	G, D	L, G		O_{1-2}, B, G, D, $L_{7,9,10,12-13}$
# large annual festivals and events	G, H, L, O	H, G,	G		$L_{2,4}$		G	H, G		O_{1-2}, $L_{9-11,13,}$ G
# large cultural amenities	D, G, H, HT, L, N, O	HT, G, D			$L_{2,4}$		G, D	H, G		O_1, $L_{9,10,13}$, G
Water and green	B, D, H, HT, N	D								
Supply of housing	S									
Supply of working spaces	G			G				G		
Liveliness inner city	D, G, N, O									D
Tolerance to social diversity	B, G, H, HT, N, O						G		B, HT, H, O	O_2, B
Tolerance to ethnic differences	B, D, H,HT, L, N, O						D		O	O_1
Neighbourhoods of architectural quality	G, H, N, S		G		N_2			N_5	H	
Creative image of city	G, H,N ,	H, G		G	N_{1-3} , G_1		G	H, G, N_{4-5}	H	

Table 11b: Policy options connected to weaknesses of partner cities and regions.

		OPPORTUNITIES				THREATHS				
		Expanding market due to growing diversity of lifestyles and aesthetic reflexivity	Increasing sustainability-based legitimacies in production and consumption	Economic downturn offers new policy perspective in favour of creative industry	Other	Bifurcated structure of branch as barrier against small firm development	Rising local opposition against expenditures in C.I. and decline of social tolerance for creative lifestyle(s.	Necessary budget cuts redirect policy priorities towards more traditional industries.	Gentrification and price-rises of living and working spaces	Other
WEAKNESSSES		B, D, G, H, HT	G, H	B, G, HT	D, G_{1-2}, H, L_{1-6} , N_{1-3} , S	B, D, H, HT, S	D, G	G, H, L, N_{4-5}	B, D, H, HT, O	B, D, G, L_{7-13}, O_{1-2}, S
# firms C.I	N				N_2					
# business start-ups C.I.	N									
Programmes for start-ups C.I	N				N_1 , N_3			N_{4-5}		
# students in 3rd education	HT, S	HT							HT	
# students in 'creative' studies										
Programmes for business networking	N				N_{1-3},			N_{4-5}		
# large annual festivals and events	D				D					
# large cultural amenities										
Water and green	L				L_2			L		
Supply of housing	N, HT, H			HT	N_2 , N_3				HT, H	
Supply of working spaces	B, N, L, HT, D, H, S			B, HT	N_{1-3} , D, S	HT, D, S	D	N_{4-5} , H	B, HT, D, H	B, L_8 , S
Liveliness inner city	L, HT, S	HT			L_4 , S					
Tolerance to social diversity										
Tolerance to ethnic differences	S									
Neighbourhoods of architectural quality	HT	HT								
Creative image of city	HT, S	HT		HT	S	HT, S				S

5 Main findings per city or region

5.1 Introduction

After the discussion of the aggregated results and key figures in Chapter 4, the current chapter briefly presents the main findings per city or region. In each case, some observations are included with regard to the specific location or characteristics of the city or region involved, as well as, if appropriate, the strengths, weaknesses, opportunities and threats that have been reported. After that, the main policy options are presented that have been formulated on the basis of the confrontation of these strengths, weaknesses, opportunities and threats (see Section 2.5). The complete SWOT analyses, including the description of all strong, weak and neutral points, all opportunities and treats, and the complete confrontation matrix for each city, can be found in the Appendix.

5.2 Bremen

Politico-administratively, Bremen is the name of both a municipality (city) and one of the federal states of Germany. The federal state consists of the city of Bremen (325 km^2 and approximately 550,000 inhabitants) and the seaport city of Bremerhaven (79 km^2 and approximately 115.000 inhabitants). The data for this SWOT analysis concern the federal state of Bremen. To place this into the right perspective, one should take into account that Bremerhaven is an exclave of the city on a distance of 60 km to the north and that both parts of the state are enclaves in the federal state of Lower Saxony.

The impression that raises from the assessment of factors as strengths or weaknesses is that the quality of Bremen as a place to live is rather good. Actually, only the supply of creative working spaces is being assessed as a weakness. With regard to the opportunities and threats it can be noticed that Bremen – more than most other cities – considers creative industries to be part of the urban economy at large.

The following main policy options have been identified:

1. *Invest in programmes to stimulate networking between creative businesses and with traditional industries.*

   Actually, both market trends and new policy perspectives provide a clear momentum for investments in growth and further development of creative industries; not as a separate activity system but as an interlinked component of the Bremen economy as a whole. The present number and range of programmes to stimulate networking between businesses or/and entrepreneurs is an adequate vehicle to take advantage of this momentum. Insofar these programmes are now limited to creative firms, these should be extended by including firms in 'traditional' industries.

2. *Intensify policy emphasis on making working spaces available to creative producers*

   The shortage of available working spaces for creative producers has arrived at a low where new, probably quite 'unusual' instruments are required. Firstly, Bremen can take advantage of the working together of traditional and creative businesses in production chains, i.e. by persuading traditional industries to rent any unused spaces to creative producers in need of space. Secondly, it can facilitate the taking into use of unused spaces by these producers in zones that are not under strain of gentrification, for instance by making occupation in these zones regulation-poor.

3. *Strengthen the mutual relationships between creative studies and creative economy in Bremen*

   To take advantage of the momentum for investments in growth and further development of creative industries, Bremen can make more effort to strengthen the relationships between creative higher education, creative entrepreneurs and creative production in practice to their mutual benefits. That can be done for instance by means of elaborating a programme of apprenticeships for students in local creative branches, inviting creative producers to hold guest lectures or workshops at creative branches of studies, and permitting these producers to make use of knowledge and in-house facilities (library, laboratories) at institutions of higher creative education.

4. *Keep up a long term perspective and realistic perspective with regard to the policy line to develop the creative economy*

   Developing creative industries that are being embedded in the urban economy at large is a slow process full of hurdles that takes time to be effective. This makes their development vulnerable to changing agenda's of public policy-makers when these observe new growth sectors emerging that seem more promising in the short. Changing attention and investments to other sectors too rapidly may not only imply a waste of the efforts that have been made in stimulating the creative industries, but also a lost opportunity for economic growth.

5.3 Dundee

The strengths and weaknesses of Dundee both include qualities of its production and consumption milieu. The supposed opportunities and threats would on the other hand primarily impact upon the city's production milieu. Due to the compactness of the city and its relatively large student population, the consumption milieu of Dundee is not yet being threatened, although it is very quiet during summer holidays. The main policy options that could be formulated therefore also aim mainly at the production milieu.

The following main policy options have been identified:

1. *Improve the supply of affordable working spaces*

   The provision of affordable and suitable working spaces for creative entrepreneurs – especially start-ups – might be improved, for instance by stimulating the conversion of old, unused buildings such as industrial buildings that have become vacant, or by stimulating developers to include affordable working spaces in their development projects. This is not necessarily a matter just of public investment, but also of mediating and informing parties – entrepreneurs, developers – about the possibilities and advantages. Furthermore, business support programmes may help to make entrepreneurs and start-ups aware of difficulties and possibilities they may encounter on the market for affordable working spaces.

2. *Retain creative talent for Dundee*

   Take measures to retain especially young creative workers for Dundee firms or, even more important, for Dundee itself. An important aspect of this is to strengthen the image of Dundee as a vibrant, creative city. Promoting the liveliness of the inner city, organising cultural events in connection to the city's creative sector – and serving as a platform for creative entrepreneurs and potential creative entrepreneurs – and the provision of cheap working spaces may all contribute to this. Besides, it is important to focus the stimulation and support of creative entrepreneurs and start-ups on creative employees that consider leaving Dundee or starting their own business outside of Dundee – convince them to stay! This should preferably be done within the context of the triple helix, involving in particular the firms and branches that suffer most from the 'creative brain drain'.

3. *Ensure the robustness of creative city policy against the effects of economic downturn*

   Creative city policy may be vulnerable in times of economic downturn and budget cuts. Therefore it is important to make it as robust as possible, closely tied to other policy fields rather than standing out as a 'fancy' policy field that may seem redundant to some. Distinct creative city policy initiatives, such as the organisation of cultural events in relation to the creative sector, might be organised in such a way that they appeal to a broad audience and are not overly expensive. In other cases, such as working space provision, other partners within the triple helix might take over, and local government may concentrate (more) on mediating rather than investing.

4. *Expand the scope of creative city policy*

   Creative city policy might be more effective if it would be broader in scope. At the moment, the focus is predominantly on the digital industries, and on larger firms – in other words, vested interests. This means a large part of the growth potential in the creative sector is, relatively speaking, neglected, to the long-term detriment of the creative production system as a whole. Stimulation programmes should therefore be expanded, or other programmes added, to include also small-scale, but often quite innovative, creative businesses. Likewise, related policies such as the programme of cultural events, or policies aimed at the consumption milieu and quality of life, should also aim at the entire 'chain' of creative activities from experimental start-ups to long-established businesses.

5.4 Groningen

An important characteristic of the city of Groningen, and one that resonances in several of the below issues, is its position as the only large city in the northern provinces of the Netherlands. This means the city services an extensive region and attracts a relatively large number of amenities. In education, health care, culture etc. the position of Groningen is stronger than might be expected on the basis of its population size. The principle of borrowed size is reversed, the city lending its size to the much smaller towns that surround it.

The following main policy options have been identified:

1. *Strengthen and make more explicit the relation between universities and creative industries*

   The link between the local universities and the creative sector in Groningen is already quite strong, but it might be strengthened and made more explicit. This may involve a further development of the role of higher education institutes in the triple helix (e.g. in the development of incubator buildings or the participation of universities in business stimulation programmes), but also a further focus of the study programmes on creative activities or a cross-fertilisation between creative and other studies.

2. *Embed the development of the Ebbinge Quarter (CCC pilot project) in an urban and regional context*

   The development of the Ebbinge Quarter as a creative zone is very promising, but may lack sufficient critical mass. It is therefore important to link it to the development of the creative economy elsewhere in the city and the region. This may be done by accommodating new or existing activities in the area and relating them to creative industries; this may involve e.g. cultural events or apprenticeships for students. The Palace and other amenities could provide ample opportunity for this. On the other hand, however, it is important to link creative entrepreneurs in the Ebbinge Quarter to creative activities elsewhere, either by stimulating them to participate in informal business networks, or to facilitate actual cooperation between businesses or entrepreneurs.

3. *See to the structural embeddedness of creative city policy*

   It is essential that creative city policy is embedded in all relevant policy fields. This is the more so as in times of economic downturn and consequent budget cuts creative city policy seems relatively vulnerable, being a new and to many still a somewhat vague policy issue. To make creative city policy more effective and more robust against criticism, it may be intertwined more closely with ‘general’ policies (cultural, business support etc.), rather than be recognizable in the first place as a ‘fancy’ topic. This would make creative city policy more effective, and probably less ‘conspicuous’. If budget cuts are nevertheless unavoidable, prevent cutting those activities that are most closely connected to the growth of local creative industries and their specific production and consumption milieu.

4. *Strengthen the creative city image of Groningen*

   Groningen’s strong position as a creative city may not be sufficiently recognized, especially outside the three northern Dutch provinces. Therefore, intensify the promotion of Groningen as a creative city, also on a regional, national or international scale. Be aware of the possible image damage due to budget cuts in essential factors of the creative production and consumption milieu.

5. *Further stimulate business networking*

   The current positive attitude toward creative industries may be used to further reinforce the creative production milieu, e.g. by stimulating networking between creative and other entrepreneurs, or to make (potential) entrepreneurs aware of opportunities for innovation and new market areas.

6. *Make optimal use of triple helix partners*

   In order to make strengthen the position of Groningen as a creative city, it is important to make optimal use of the available triple helix partners. This applies to all relevant policy fields, such as culture, real estate or education. Rather than an aim in itself, this is a general principle that could be applied in all of the above policy options.

5.5 Hamburg

Hamburg, like Bremen, is both a city and a federal state, each with its own politico-administrative representation and corresponding competences. Unlike Bremen however, city and state – the Free and Hanseatic state of Hamburg – cover the same territory. Hamburg is the largest of the CCC partners.

The following main policy options have been identified:

1. *Interlink creative industry, creative studies and creative image of Hamburg around the theme of environmental sustainability*

   Both the size of the creative industry and the results of the programmes to support new start-up are to the satisfaction of Hamburg's policy-makers. Nevertheless, both the positive attitude in Hamburg with regard to lifestyle-related consumption in general and the increasing presence of environment-friendly lifestyles in particular create a context for further development of the creative city Hamburg. To take advantage of this context, both innovative production by creative business as such and the content of study packages and image building of the city should be interlinked around the theme of environmental sustainability. Increasing attention for networks of business relations with 'traditional industries' may trickle the economic fruits of environmental sustainability down into the broader economy.

2. *Adjust business start-up supporting programmes in a way that pays more attention to strengthening of entrepreneurship and makes them more defensible against austerity policies*

   The current supply of programmes that support creative business start-ups in Hamburg is considered adequate. Nevertheless, their results are still suboptimal because many new entrepreneurs are still observed to lack some vital qualifications. Moreover, these programmes are being threatened by a decreasing willingness of local policy-makers to invest in creative city policies on the whole. To be more successful also in the long, these programmes should adjust both their content – pay more attention to entrepreneurship – and their defensibility vis-à-vis other policy fields in these days of budget cuts. A campaign to emphasise the growing importance of creative industry for the urban economy and its dependency – as a new type of industry – on starting firms may be helpful.

3. *Adjust geographical and institutional scope of policies to make (more) residential and working spaces available to creative producers*

   Both housing and working spaces for creative producers are in short supply in Hamburg. What is more, gentrification processes in several districts of the city may further aggravate this shortage. Against this background, the scope of policy measures to make spaces available to creative producers should be extended geographically and institutionally. Geographically, this involves mixed-priced development of spaces in gentrifying districts as well as facilitating the location of creative producers in ‘cheap’ districts; and institutionally the involvement of all triple helix actors in providing appropriate spaces. Concerted action of local government with knowledge institutions, property developers or/and large firms in traditional industries may make new residential spaces, but in particular new working spaces available. ‘New’ in this respect not necessarily means newly built.

5.6 Høje-Taastrup

A recurring theme in the assessment of the creative milieu of Høje-Taastrup is its location close to Copenhagen, the capital and the largest city of Denmark. Høje-Taastrup and Copenhagen are located at a distance of less than 25 km, or 10 to 15 minutes by train. The most important industries in Høje-Taastrup Kommune itself are business services (finance, trade, hotel etc.).

The factors distinguished as strengths all concern the creative consumption milieu, while weaknesses are related to both the production and consumption milieu. Notably, those factors specifically related to production climate are mostly considered neutral, i.e. no particular strengths or weaknesses. This may be related to the relatively small scale of Høje-Taastrup, which makes it difficult to draw direct comparisons to other, larger cities.

The following main policy options have been identified:

1. *Strengthen the organisation and position of creative entrepreneurs*

   Strengthen the internal organisation, and the sense of community, of the creative industries. This could make the creative sector more visible within Høje-Taastrup, and better able to defend its interests – e.g. concerning the provision of working spaces – vis-à-vis other parties such as the municipality or developers. This implies for instance stimulating networking among creative entrepreneurs, supporting the foundation of branch organisations, and the active involvement of (representatives of) creative entrepreneurs in urban-economic decision-making.

2. *Provide affordable housing and working spaces*

   Provide affordable and suitable housing and working spaces for various social groups, in particular ‘creatives’ and students, in various neighbourhoods throughout the city. One way to do this is to redevelop buildings that may become available – due to economic downturn or other reasons – for combinations of cheap housing and working.

3. *Maintain the consumption milieu and good quality of life*

   Whereas the proximity of Copenhagen may be a handicap with regards to some aspects of the quality of life, Høje-Taastrup may also ‘borrow size’ from its large neighbour. Some factors deserve attention, however, which could make the city more interesting for a diversity of ‘creatives’ and students. New developments, whether the development of new areas or the (re)development of single buildings in existing neighbourhoods, should aim at increasing the quality and distinctiveness of neighbourhoods. Attempts should be made to increase the liveliness in the inner city; in this respect, student housing and liveliness may be mutually reinforcing.

4. *Improve the visibility of creative industries and the ‘creative’ image*

   Høje-Taastrup lacks a distinct image as a ‘creative’ city. Therefore, creative industries in Høje-Taastrup should be made more visible, both within the city as on the regional level. One way to do this is by linking cultural amenities and events – there is only one major event per year at the moment – to the city’s creative industries, e.g. by temporary design exhibitions or a gaming event. Such events may also provide a networking platform for the creative industries, which could make local firms more visible on a national or international scale, and at the same time strengthen the sectors internal organisation (see above).

5.7 Leiedal

Data for Leiedal have been collected on the regional level (the Kortrijk region). The Leiedal area has sets of threats and opportunities that differ notably from those of the other CCC partners because these are connected to the peculiar institutional organisation and arrangements of policy making at various political-administrative levels at the same time. These are voluntary regional cooperation, various levels in the Federal State of Belgium, and the larger cross-border French-Belgian European Metropolis Lille (Fr) – Kortrijk (Be) – Tournai (Be) (LKT).

The following main policy options have been identified:

1. *Embed programmes to support strengthening of creative entrepreneurship, businesses and business networks structurally in policies at different institutional levels*

   Take advantage of the increasing positive assessment of creativity and innovation for economic development by policy-makers at local, regional and cross-border levels by continuing and structurally embedding investing in programmes to support starting businesses (entrepreneurship) and creative entrepreneurs’ networks at these very levels, irrespective of economic recession and changes of government due to elections.

2. *Reform the supply of creative studies in the European metropolis LKT in order to enhance its complementarity*

   Place coordination of regional creative study programmes on the policy agenda of the LKT European metropolis. The objective of this coordination is to create a highly complementary ‘package’ of creative studies and research activities that attract and retain creative talent. The final aim of these actions is to strengthen the regional knowledge-base for the creative economy

3. *Embed people-oriented approach in creative city policy, with particular emphasis on investment in cultural amenities and events*

   Invest persistently and visibly in maintaining a lively and complementary supply of cultural amenities and events in relation to strengthening the creative economy, with special emphasis on an attractive cultural climate for young graduates and starting entrepreneurs.

4. *Strengthen policy emphasis on making working spaces available to creative producers*

   The shortage of affordable working spaces is increasing to a degree that it has become a threat rather than just a weakness. Consequently, the set of policy instruments to deal with this problem should be extended with new, probably quite ‘unusual’ instruments, for example enlarging the possibilities to work at home or use offices and industrial buildings that become available due to economic recession.

5. *Extend triple helix cooperation to (more) creative city policy fields*

   Invest in strengthening coordination and cooperation of Triple Helix partners – local and regional governments, entrepreneurs’ associations, and higher education and research institutes - in the above policy fields (creative studies, working spaces, ‘creative’ image, inner city climate) that all contribute to further development of the creative economy in the Kortrijk region.

5.8 Newcastle-Gateshead

Newcastle is a city on the north bank of the River Tyne and Gateshead a town on its south bank. Seven bridges between both banks unite the two into a twin city with many and quite strong cross-relations. The data collected for the SWOT involves both parts; for some items explicitly distinguished and for others combined into single figures.

All identified opportunities and threats are economic in nature, and most are directly related to the current economic recession. This means that the recession is not only considered a threat, but is also supposed to create opportunities for the development of the creative economy of Newcastle-Gateshead.

The following main policy options have been identified:

1. *Strengthen the relationships between creative studies/students and the city*

   The large number of students and graduates of creative disciplines is a strength of Newcastle-Gateshead, but the current economic depression has placed this in a context of both threats and new opportunities. To make the most of this context, students and graduates should be more explicitly prepared (trained) for a future as creative entrepreneur in Newcastle-Gateshead, whereas Newcastle-Gateshead should do its utmost to avoid harmful effects of budget cuts on vocational training and to make these young people aware of the opportunities to start a businesses in the city.

2. *Invest in maintaining and communicating quality of life of Newcastle-Gateshead for creative entrepreneurs*

   On the whole the capacity of creative entrepreneurs and businesses to pay prices and tariffs in larger cities is diminishing. This means a growing opportunity for Newcastle-Gateshead with a quality of life that is characterised by quite a few strengths to attract entrepreneurs that look for a cheaper business environment. In order to take advantage of this opportunity, the city should avoid budget cuts that are at the expense of quality of life issues that are appreciated by the ‘creative class’. Furthermore, it should reserve a budget to communicate – regionally and nationally – its advantages of Newcastle-Gateshead as a place to establish (start or move to) a creative business.

3. *Intensify measures to bring affordable residential and working spaces for 'creatives' on the market*

   Both residential and working spaces for 'creatives' are in short supply. In order to make the most of the readiness of creative graduates to start their own business and of the good opportunities of Newcastle-Gateshead to allure creative firms and potential entrepreneurs, the city should put in a diversity of efforts to provide affordable spaces to live and to work that can be afforded notwithstanding the current needs of budget cuts. It is worth thinking of purchasing inexpensive buildings that become available due to growing numbers of closures of traditional businesses, redevelop these and bring them on the market for creative firms. Whenever possible, the public budget available for this may be combined with those for programmes to support start-ups in the foundation of incubators and non-governmental parties may cooperate in these efforts.

4. *Strengthen programmes to stimulate start-ups and networking*

   Newcastle-Gateshead can profit more from the opportunities for the development of its creative industry due to the economic recession, since it is a relatively affordable city in terms of accommodation. To do so, it should improve the quality and effectiveness of the programmes to support starting businesses and stimulate networking in this type of industry. This can be done by including the provision of clustered working space – now quite scarce – to the programmes; by involving non-governmental parties in the design and implementation of the programmes.

5.9 Oldenburg

Although the data collection on the issues to be valued for the SWOT analysis as either 'strength', 'neutral' or 'weakness' has been carried out very thoroughly and the outcome appears rather comprehensive, none of these items is being appreciated as 'weakness'. Further, no opportunities for further development of the creative economy of the city are being signalled. Consequently, three of the four cells of the confrontation matrix are 'empty'.

Additional data sent in a later stage indicated that two issue should be changed from 'strength' in 'neutral', and added another threat; the overall picture as sketched above remained unchanged, however.

The following main policy options have been identified:

1. *Ensure the robustness of creative city policy against budget cuts and political 'play'*

   Especially in times of economic downturn, creative city policy may be vulnerable to budget cuts and the exchange of competing interests. To make it more effective, and less vulnerable, creative city policy should in integrated in all relevant policy fields, rather than constitute a separate policy field. Specific initiatives related to the creative economy, such as cultural events in connection to local creative industries, should appeal to broader audience.

2. *See to the supply of affordable housing and working spaces in the CCC pilot project Bahnhofsviertel*

   The fear exists in Oldenburg that the Bahnhofsviertel may become too expensive for 'creatives', but this is not yet the case at the moment. Measures may therefore be considered to ensure the availability of affordable working spaces and housing in the area also in the future. One possibility would be to make ‘package deals’ with developers, by requiring them to include a certain amount of affordable housing or working spaces in their project.

3. *Stimulate entrepreneurial skills and business start-ups in creative industries, particularly by graduates*

   Many graduates who want to work in the creative industries have to leave Oldenburg because these industries in Oldenburg do not growth much and do not provide many new jobs. Simultaneously, a need is indicated for new ideas and ‘fresh blood’. Effort should therefore be increased to stimulate these young people to start their own business, and to support them by proving them with the necessary entrepreneurial skills. In addition, the attractiveness of Oldenburg for young people – e.g. the liveliness in the inner city and the existence of cultural events – should be maintained. Neglecting this might cause even more young people to leave the city.

5.10 Skaraborg

Data have been collected on a regional level, for the Skaraborg region. This is located at some distance northeast of Gothenburg in eastern Västra Götaland, between lake Vänern and lake Vättern.

In terms of the confrontation matrix, it is noteworthy that no clear matches were found between the main strengths, which all concern the consumption milieu, and the opportunities and threats, which are only few and are strictly limited to the production milieu. The general impression is that the assessment of factors a strengths or weaknesses has been carried out with a quite critical eye on the own region. This should be taken into account to consider Skaraborg’s strengths and weaknesses in the right perspective, particularly in comparison to other cities and regions. Actually, also the region’s different, rural character makes it different from the other partner cities and regions.

The following main policy options have been identified:

1. *Strengthen the organisation and position of creative entrepreneurs*

   Strengthen the internal organisation of the creative industries, e.g. by stimulating networking among creative entrepreneurs, supporting the foundation of branch organisations, and the active involvement of (representatives of) creative entrepreneurs in urban-economic decision-making. This could make the creative sector more visible within Skaraborg, and better able to defend its interests – e.g. concerning the provision of working spaces – vis-à-vis other parties such as the municipality or developers.

2. *Increase the supply of affordable working spaces*

   Call in the ‘triple helix’ in a broad sense to increase the supply of affordable working spaces for creative entrepreneurs. Knowledge institutions and private parties may be involved in the provision of working spaces, e.g. by the redevelopment of unused buildings. Moreover, the involvement of creative entrepreneurs themselves in this regard may be increased if the internal organisation of the sector is strengthened, and thereby its position to promote its interests in relation to other actors. Involvement of the triple helix also makes it more likely – and plausible – that it is not necessary only local government that has to bear the costs of the provision of working spaces.

3. *Maintain and improve the consumption milieu*

   The current acknowledgement of the creative sector as an important factor in Gothenburg's production structure may generate the chance to invest also in improving the city's creative consumption milieu. Invest in quality of life and liveliness e.g. by means of organising cultural events, but also by focusing on tolerance and vibrant public spaces. The current 'momentum' should be used to embed these 'intangibles' in the various relevant policies, in order to make them less vulnerable to possible budget cuts.

4. *Strengthen the 'creative' image of Skaraborg*

   The acknowledgement of the importance of the creative industries, and the intended strengthening of the position and exposure of the sector, may contribute to a stronger focus on the creative image, and the promotion of a creative image. This may imply a focus on the main creative sectors, and on the cities and towns within the predominantly rural Skaraborg region. Budget cuts that could harm the creative economy – including the creative consumption milieu – should be avoided as much as possible, as they may affect the creative sector directly as well as indirectly, by deterioration of Skaraborg's reputation as a creative region.

6 Conclusions

6.1 Introduction

The main outcomes of the SWOT analyses of the level of the individual partner cities and regions have been discussed in Chapter 5. In this chapter, some overall conclusions may be drawn, against the background of observations from the comparative quantitative analyses in Chapter 4. Also, some reflection are made on the results of the analysis – in particular about the limitations of the approach that has been followed through.

6.2 Main findings

The main outcomes for the individual cities and regions have been summarized in Chapter 5 and will not be repeated here. A number of overall conclusions may be drawn, however.

1. *Trend is optimistic*

   The trend with regard to the development of the creative milieu in the CCC cities and regions is optimistic: more strengths than weaknesses are distinguished. Some considerable threats are identified, such as the effects of the economic downturn or shortages of personnel or accommodation, but it is acknowledged that the creative economy faces equally important opportunities. For some partners even the current crisis may provide new chances for the creative industries. However, it must be kept in mind that this is how the cities and regions regard themselves, and that their optimism is not necessarily justified by the empirical data they submitted.

2. *Importance of the geographical context*

   The different geographical context of the cities and regions analysed should be taken into account at all times, as it may considerably influence the outcomes of the analysis. Two categories may roughly be distinguished: one the one hand, single, more or less compact cities and a compact twin city (Newcastle-Gateshead), on the other hand suburban cities and more dispersed regions. Differences in size over both groups are moderate, apart from metropolitan Hamburg and largely rural Skaraborg. Yet, in terms of results, differences may be noticed.

   For one thing, on the whole single cities appear to be more satisfied with their creative milieu than the suburban and regional partners Høje-Taastrup, Leiedal and Skaraborg. This concerns both factors related to the production milieu, as consumption-related issues such as the liveliness in the inner city - if there is a distinct inner city at all.

   Other, more specific circumstances colour the outcomes, such as the high concentration of employment, students and amenities in Groningen. The largest city by far in an extensive hinterland, it shows some signs of the traditional ‘primate city’. A region such as Leiedal, where the urban pattern is dense but dispersed, and which faces competition from both large Flemish cities (such as Ghent) and the Lille agglomeration, is the opposite in many aspects.

3. *Emphasis on production climate*

The focus of the CCC project is primarily on creative industries and not on the creative class (e.g. Florida, 2002). Not surprisingly, therefore, all opportunities and most of the threats that have been identified by partner cities and regions concern the production milieu. Consequently, the majority of policy options also concerns the production milieu. Programmes to support business start-ups and networking between creative firms, and between creative and 'traditional' firms, the relation between business and education and research institutions and the availability of affordable working spaces are important issues in the policy options that have been formulated.

An important point of attention is also the role of the triple helix: involving local government, private parties (creative businesses, but also e.g. developers), knowledge institutions (e.g. universities) and other partners (e.g. Chamber of Commerce, cultural interest groups, art council) in the development of the creative production milieu. This may open new possibilities, increase commitment to creative city policy, and even save public money. CCC partner cities and regions are already quite active in involving triple helix partners, but for instance the involvement of universities may still be strengthened.

4. *Supply of working space*

A main weakness of the creative production milieu in almost all cities and regions is the supply of suitable and affordable working spaces for creative firms. This is important most of all for starting entrepreneurs, which require cheap accommodation, but is may also be a problem for established firms looking for expansion. A lack of working space may well cause firms to leave the city, or business starters to locate elsewhere in the first place.

Traditional office space does not always appeal to creative entrepreneurs, nor is it always suitable for creative activities which may require studios, ateliers etc. with specific characteristics. Suitable spaces may often be found in old buildings, such as former schools, factories, wharfs, etc. Examples of these can be found in all partner cities and regions. More alternatives may be possible, however, to increase the supply of working spaces. Business in other sectors may for instance be stimulated to share any redundant space with creative entrepreneurs, with possible side-effects in terms of networking. In newly developed buildings or neighbourhoods, developers may be encouraged to include a certain amount of affordable working (and residential) space. Again, for possibilities such as these it is essential to involve the various partners within the triple helix.

6.3 Reflection on results

A first issue that can not be stressed enough is the fact that the identified strengths and weaknesses, and opportunities and threats at the margins of the confrontation matrices reflect the self-image of the partner cities, or even only of those who represent these in the CCC project. Creative industry is usually characterised by many small to micro-enterprises and a large number of free-lancers. In some cases, i.e. in specific branches in specific cities or countries, the firm structure is bifurcated, consisting of a very few large firms and a great many micro-enterprises that work on temporary project basis and employ free-lancers for projects. Table 8 (p.22) reveals that creative industries in most CCC cities and regions are no exception to the general characteristic of a sector that is dominated by small to very small enterprises. In five of the nine cities, the average number of jobs per firm is below 5 and in three other ones between 5 and 10. To some degree, the creative industry of Dundee is the only exception with an average of 18.64 jobs per firm. This is probably explained by the prominence of publishing activities that employ a much larger share of the creative workers in Dundee (39.9%) than in the other cities and regions and which type of industry may either consist of firms that are larger than those in other creative branches or are characterised by a bifurcated structure. Finally, the relative number of start-ups in creative industry, i.e. per 100 firms in all types of industry, is also larger in Dundee than in the other cities and regions. However, the value of this observation is limited because data are missing for four of these eight other cities and regions.

No doubt that extensive research 'on the spot'– e.g. interviews with local entrepreneurs – would have yielded more comprehensive and better comparable data, but partners' local expert knowledge is indispensable no matter how (see Chapter 2). And such research would have been virtually impossible within the available time anyhow.

Actually, the self-image of the partners is indeed quite informative – as long as one is aware of the implications. One of the implications is that the partners seemingly differ on how critically they assessed the creative production and consumption milieu of their cities and regions. Partners from Newcastle-Gateshead and Skaraborg appear rather 'severe' assessors, whereas, in contrast, partners from a few cities could not, even on second or third instance, point at a single weakness of their creative milieu. This struck us as a little improbable, the more so as this optimism was not always backed by the empirical data collected.

Further, one may think of different sets of opportunities and threats for the different cities and regions as lacking comparability. However, direct comparison of cities and regions on opportunities and threats is strictly spoken not possible, nor was that ever a prime objective of the SWOT analysis as such. Rather, the analysis should provide an overview of the scores of the cities and regions on relevant indicators of the development of their creative production and consumption milieu as a useful basis for local policy options regarding their current activities and projects and, even more, the way these are being further developed.

A second reflection on the results of the SWOT analysis – also methodological in nature – concerns these policy options. We refer to the fact that we have formulated policy options for the different cities and regions in the project although we are outsiders who posses a general knowledge base and ample factual information about the cities and regions involved, but who largely lack local knowledge of these places. To lessen this disadvantage however, partners have had ample opportunities to adapt a draft text with proposed policy options. What is more, the project also benefits from this approach, again as long as we are aware of the implications. For, consigning the duty to formulate policy options to one partner in the project – Delft University of Technology – has the advantages that a project-wide overview raises and that similar policy options can be formulated to face similar local conditions. These advantages are valid even though direct comparisons of the cities is not an explicit objective of the project. A major of their values is that they contribute to the prime objective of transnational learning of the project.

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Creative City Challenge partnership

Germany
Hamburg University of Applied Sciences (Lead Partner)
Wirtschaftsförderung Bremen - WFB (former Bremer Investitions-Gesellschaft mbH - BIG)
Stadt Oldenburg
Kulturetage GmbHg

Netherlands
Gemeente Groningen
Delft University of Technology

Belgium
Intercommunale Leiedal
HOWEST University College

Denmark
Høje-Taastrup Kommune

United Kingdom
Dundee College
Newcastle City Council

Sweden
TILLT Culture & Working Life in West Sweden

Creative City Challenge work packages

WP1 Project management

1.1 Project management plan
1.2 Partner reporting and monitoring strategy
1.3 Monitoring and control

WP2 Publicity and communication

2.1 Website
2.2 Transnational dissemination
2.3 Cross-sectoral engagement
2.4 Internal communication strategy

WP3 Entrepreneurship and skills development

3.1 Assess and identify key business barriers and enablers to entrepreneurship
3.2 Development of learning materials
3.3 E-learning environment
3.4 Pilot delivery of enterprise skills development programme
3.5 Transnational mentoring programmes
3.6 Transnational programme of Masterclasses

WP4 Networks, dialogue and business cooperation

4.1 Inventory of existing instruments enabling cross linkages
4.2 Development and implementation of 'open' and one-to-one networking and cooperation instruments
4.3 NSR-Connect
4.4 INNOWITZ
4.5 NSR Creativity Award
4.6 Transnational travelling exhibition

WP5 Creative clusters

5.1 Baseline reports: identifying factors and spatial dimensions of innovation; identifying factors for effective branding
5.2 Live-work environments for creative industries
5.3 Area involvement of triple helix
5.4 Urban creative zones and open innovation systems
5.5 Programme for students/talent: transnational interchange

WP6 Research-based strategy development

6.1 Framework report
6.2 SWOT analysis
6.3 Academic check
6.4 Targeted study on urban quality and climate in urban competitiveness
6.5 Transnational learning
6.6 Integration of results