



Smart Island

**THE CREATIVE INDUSTRIES GUERNSEY
A STRATEGY DOCUMENT**

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This paper is an attempt to delineate, describe and understand the potential of Guernsey's youngest economic sector, the Creative Industries.

The term 'creative industries' describes the generation of creative intellectual property with potential to be commercialised. It is skills driven, low footprint, and high value added.

The definition of the creative industries by UK Department of Culture, Media and Sport consists of the following sectors:

- Advertising
- Architecture
- Art and antiques markets
- Computer and video games
- Crafts
- Design
- Designer fashion
- Film and video
- Music
- Performing arts
- Publishing
- Web development/Software
- Television and radio

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I. INTRODUCTION

I.1 AN OPPORTUNITY FOR A SMART ISLAND

Guernsey is well placed to develop its creative industries for a number of reasons.

- There is close proximity to the UK and London. The UK is the acknowledged world leader in creative industries which account for 7.3% of UK GDP.
- We already have an established base of creative industries in Guernsey with a significant skilled workforce. A Guernsey Arts Commission sponsored survey conducted at the beginning of 2012 found 161 businesses with over 1000 workers, of whom over 700 have a creative or arts based degree. The survey found no evidence of employment of license holders in these roles. Creative businesses have developed through servicing the large financial sector, and the creative skills base has been further expanded by Specsavers' establishment, on island, of the UK's largest in-house creative team.
- Guernsey is a highly attractive place for creative professionals to live and work. As the Oxford Economic Report states:
'Guernsey, like many scenic and coastal communities with a modern edge and good accessibility to a major global city, would normally serve as a natural magnet for creative industries professionals. ...there is potential to grow the industry indigenously ...this aim...could also bring knock-on benefits to industries such as tourism and ICT.'
- Guernsey has easy access to excellent creative educational facilities in the UK. Every year over 200 students leave the island to study arts subjects in the UK, and the large numbers of returning students provide a large potential skill base.
- The island has good ICT connectivity, albeit currently at a high cost.

Many of the creative industries have a distinctive mode of organisation:

- often micro-businesses
- networked
- commercially interdependent

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1.2 DIGITAL TECHNOLOGY AND CREATIVE BUSINESS

The transition from analogue to the digital world has transformed the distribution of content. It is creating new business models and changing the value chains upon which they depend.

This is particularly applicable to Creative Industries, where digital technology provides new media for expression, and new channels for communication and distribution. In particular, high speed internet is transforming how creative content and services are created, distributed and marketed.

The drastically reduced cost and infrastructure required for digital distribution opens up the market for small independent businesses in the creative sector and enables the development of new models for licensing copyright and intellectual property. Digitalisation offers significant opportunities for the development of the sector and for successfully introducing network solutions to overcome barriers to growth. There is much interest in the growth potential of what has become labelled 'multimedia' business. This covers a range of creative IT activities including designing internet pages, multi-page packages, computer games, animation and interactive services.

Creative intellectual property needs no root except a supportive culture.

The main factor limiting the development of creative business is the small size of the available market on island. Other limiting factors are the lack of a local university and restrictions on the free inflow of labour.

However Guernsey benefits from strong off-island connectivity, the power of the web to work with anyone around the world and in turn be able to export almost instantly, anywhere in the world, and the close proximity to the creative industries based in London and the UK, together with first class creative courses in UK universities. This means that the focus has to be on off-island collaboration and export if the creative industries in Guernsey are to thrive and grow.

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2. CREATIVE INDUSTRIES STRATEGY

2.1 STRATEGIC OBJECTIVES

- To improve the commercial capacity of Guernsey's creative industries
- To identify barriers and drivers of productivity and growth within the Creative economy
- Building on this, to develop and implement a strategy to maximise the contribution of the creative economy to the main economy

The Strategy identifies the following priorities to underpin these objectives:

- Improving Business Development
- Identifying Markets and Meeting Consumer Demand
- Driving Creative Innovation
- Promoting and Protecting Intellectual Property Rights
- Advocating Collaborative Networks and Spaces
- Research

2.2 IMPROVING BUSINESS DEVELOPMENT

It is essential for the growth of the creative industries on Guernsey as a business sector that the opportunities offered by the development of digital technology are seized. In order to grow the sector there is a need to improve business development opportunities.

There is currently a proposal (the 'Silicon Island' initiative) to create opportunities for the development of digital skills by providing training in Web Development. However while this is a very positive development in a key expertise local creative businesses do not often have the resources to release for skills training. Digital apprenticeships for creative business would create skills and directly generate work since the digital market is not physically restricted. Jersey and the mainland provide ready markets for businesses with the expertise and resources to expand. There is a global shortage of creative digital expertise.

“There is a global shortage of creative digital expertise.”



2.3 IDENTIFYING MARKETS AND MEETING CONSUMER DEMAND

New ways to market and distribute creative products and services are emerging in the 21st century, as are new methods of engaging audiences. Digital technologies are enabling creative businesses to connect with markets in Guernsey and across the world.

Most island based creative businesses are small. Opportunities for market development activities are restricted in spite of demand. There is an urgent need to create networking opportunities between island businesses and a shop window for markets outside Guernsey. Effective, accessible networks of creative businesses will help to provide this. A creative business development director for the island could help small businesses establish an international presence and develop markets.

2.4 DRIVING CREATIVE INNOVATION

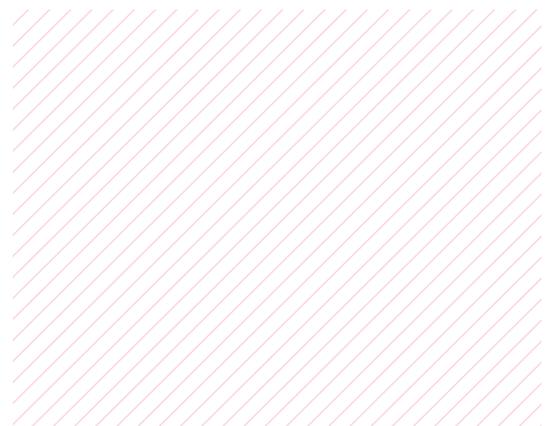
Developing human capital through education, skills and training will be a cornerstone of Guernsey's productive capacity in the 21st century. Creative talent can have a positive impact not only on creative industries, but on the capacity for all sectors to adapt to future challenges.

An arts and ICT-rich school education for all young Guernsey people, together with a College of Further Education which has art, media, and drama departments will contribute significantly to the development of creative industries. Already, an extraordinary 20% of Guernsey students at UK universities study for art and design degrees.

What is lacking is post higher education and university provision on island and focus on transition from education into employment. Provision of apprenticeship and post tertiary education opportunities on Guernsey would ensure professional and creative development and retention of skills in the creative sector.

The following ideas can help to address this deficiency:

- Pathways to employment in creative industries and skill improvement, through the continuing development of qualifications.
- Improved networking and accessibility
- Link graduate scheme with skills strategy
- Web programming boot camps
- Annual creative, innovation and ideas conference
- Young creative entrepreneurs programme
- MA courses on-island from UK universities
- Talent pathways scheme to support and inspire young people from all backgrounds to pursue careers in the creative sectors
- Digital and creative apprenticeship scheme
- Timeshare work placement scheme





2.5 PROMOTING AND PROTECTING INTELLECTUAL PROPERTY RIGHTS

A defining feature of creative industries is the generation of creative ideas that have the potential to be commercialised.

Understanding IP rights is key to being able to function optimally as a creative economy.

The digital era has seen the advent of information and communication technologies and platforms. This has increased the complexity of managing intellectual property, and has also given rise to exciting opportunities to reach and develop new markets. In this environment, it is increasingly important that creators and creative businesses are well informed about how to manage their intellectual property rights.

2.6 ADVOCATING COLLABORATIVE NETWORKS AND SPACES

Creative industries thrive on collaboration. Creative content and services are often the product of collaborative partnerships or a combination of specialist skills. Segments of the creative industries tap into each other's unique strengths to shape or influence creative output.

Connectivity of ideas can be encouraged through many of the ideas noted in 2.4 above. In particular there is a need for improved online networking and accessibility. Connections can stimulate joint ventures and activities that might otherwise not occur.

Questions to answer and act upon include:

- The UK's Creative Industries has some of the best infrastructural support in the world. Its colleges and universities are world-renowned. The formal and informal networks that connect the best of contemporary British arts practice with them and the creative industries generate a virtuous circle. How can Guernsey generate networks for shared intelligence and collaboration so that small and medium-sized creative businesses can benefit from research in universities and other businesses?

“Creative industries thrive on collaboration.”

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- How can the Creative Industries stimulate innovation in the rest of the economy?

Innovation is increasingly a shared activity. It relies on networks built on trust, proximity, repeat engagement and 'social capital'. The strength of trust between actors in the innovation system determines how much collaborative learning takes place.

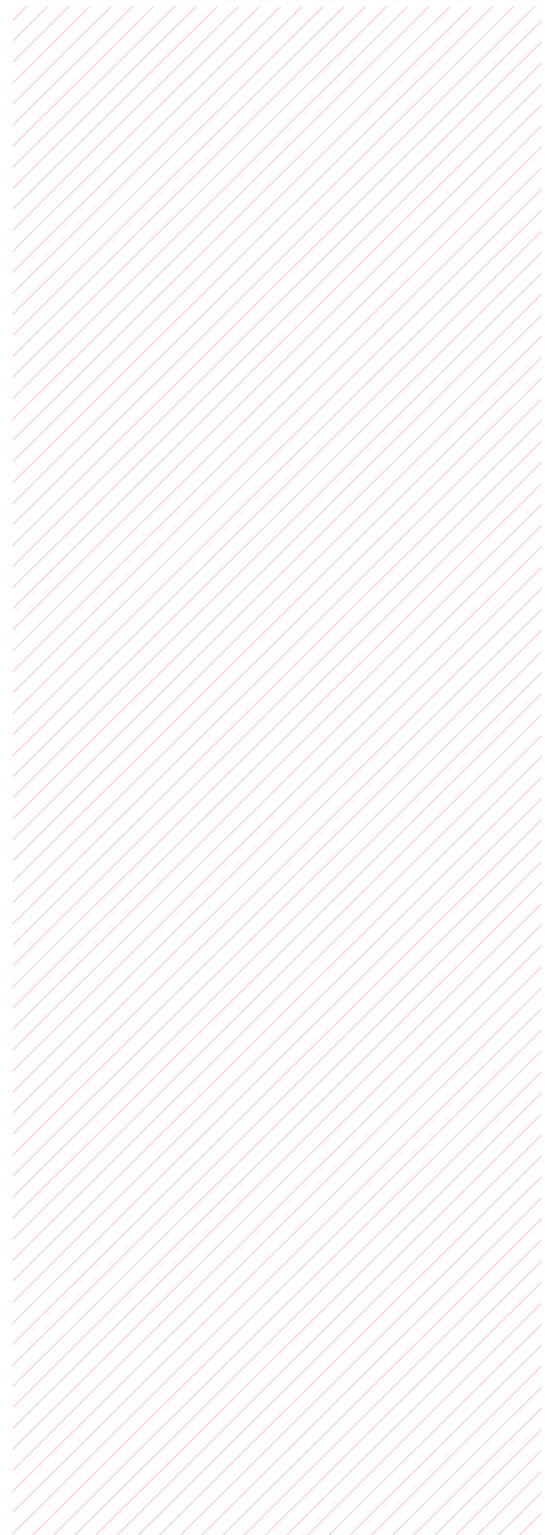
Barriers to growth will be limited market size therefore consideration needs to be given to developing global connections and global exposure essential for sector growth.

2.7 RESEARCH

Given the newness of this economic sector research needs to be carried out to understand what contribution it currently makes to the Guernsey economy and the potential it has.

Such research should cover the following elements:

- Definition of Guernsey's creative industries sector
- Number and size of businesses
- Contribution to GDP
- Export earnings
- Opportunities for growth
- Barriers to growth



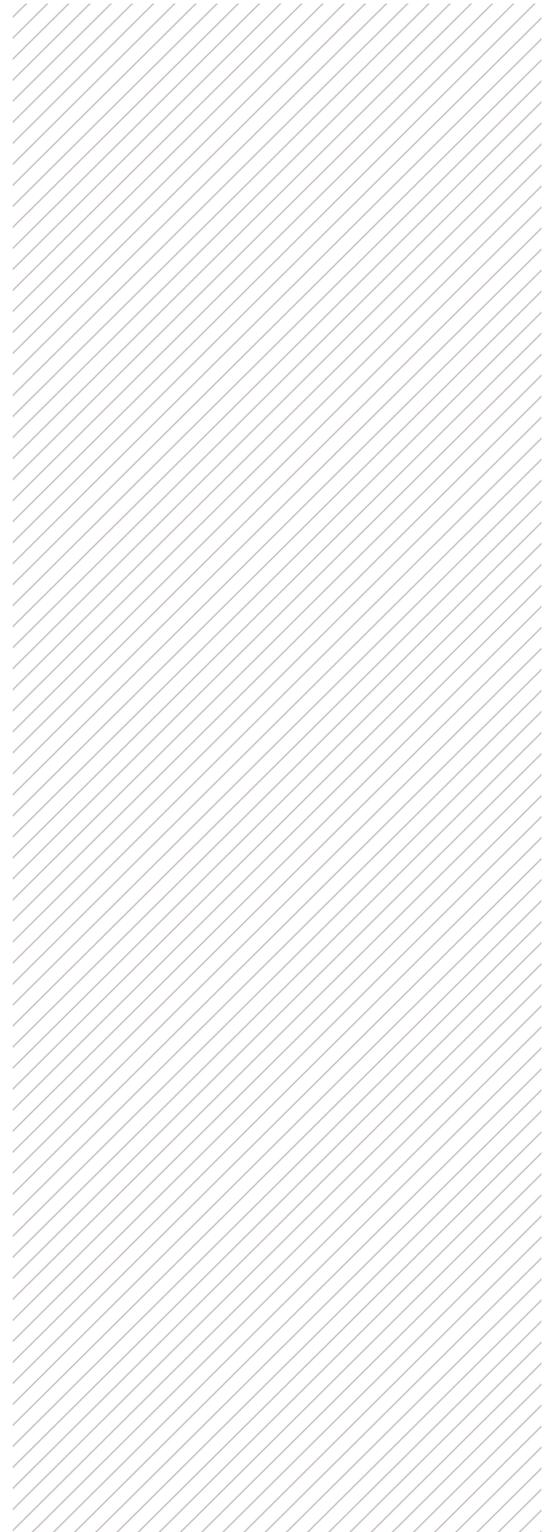


3. PUBLIC POLICY

The role of education, skills, diversity, networks, cultural investment and public institutions, access to finance, business skills, the IP framework, access to market, regulation, competition and crucially the collection and secure storage of IP and data are all vital to the creative industries, and within which public policy has a role to play.

The vitality of the creative sector needs to be underpinned by public policy active in the following areas:

- A creative industries policy that emphasizes productivity, employment, export and innovation
- Setting a helpful planning framework
- Providing access to flexible office and business space where there is market need, suitable for the needs of small and medium sized businesses
- Enabling small creative product businesses to gain access to markets and the provision of new marketing opportunities.
- Links between universities and business
- Encouraging and promoting festivals and events which enable commercial as well as cultural development
- Encouraging local networks and networking where they are seen as helpful by local creative businesses
- Career paths
- Competition policy
- IP laws
- More flexible immigration
- Leadership in respect of innovation/diversification
- Guernsey Enterprise Agency
- Tax/incentives schemes
- Incubator units
- Technology park
- Research of the creative industries sector
- Development of creative industries data in States of Guernsey economic statistics
- Understanding the industry-specific and wider social and cultural conditions for nurturing and commercialising innovation
- Fostering entrepreneurship



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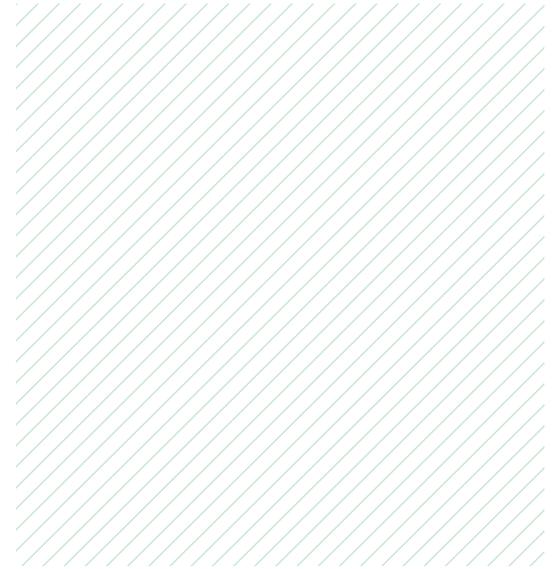


4. CONCLUSION

The creative industries sector has grown to become a distinct economic sector in Guernsey as well as becoming influential in shaping our cultural identity, and is increasingly becoming a key attribute in a globally competitive island economy.

The creative industries is an economic sector which offers opportunities for investment, opportunities for employment, opportunities for economic diversification, and opportunities to enrich the identity of Guernsey.

To remain innovative, a nation, even an island nation, must continue to attract the world's sharpest and most creative minds. And to do that, it needs to invest in further development of its talent base from both internal and external sources, because wherever talent goes, innovation, creativity, and economic growth will follow.



“The creative industries sector has grown to become a distinct economic sector in Guernsey.”

