Conditions for entrepreneurship development in creative industries in Portugal[1]

José António Porfírio[2] and Tiago Carrilho[3]

Abstract – Creative Industries are at the core of the development of modern societies, fuelling innovation and promoting the development of new business models. However, the adequate conditions for the development of Creative Industries is not usually spontaneous, and must be developed. At the same time, likewise other types of entrepreneurs, creative entrepreneurs present some idiosyncratic characteristics that make them "special". In the present paper we present the preliminary results for Portugal, of a large study conducted among creative entrepreneurs in some Southern European countries and in the UK, under an EU project. The principal objective of this paper is to present the conditions that established creative entrepreneurs in Portugal consider vital for their establishment and the inherent development of their businesses.

We conclude that the development of creative entrepreneurship has implicit specific characteristics that differentiate it from the overall entrepreneurship picture, and that creative entrepreneurs, although present also some differences according to the different sectors of creative industries considered, are in themselves different from the general entrepreneurs. This may have consequences at the level of public policies' conception and implementation that must be considered by the countries that want to promote entrepreneurship in creative industries.

***Keywords* —** Creative industries; Entrepreneurship; Fear of failure; Entrepreneurship policies.

I. Introduction

Audretsch and Thurik (2004)4 identified two different economic models where the political, social, and economic response to an economy dictated by particular forces: the managed economy and the entrepreneurial/Knowledge-based economy. In the first one, the force is large-scale production, reflecting the predominant production factors of capital and unskilled labor as the sources of competitive advantage. In the second one, the dominant production factor is knowledge capital, which is complemented by entrepreneurship capital, representing the capacity to engage in and generate entrepreneurial activity. In each economic model, institutions are created and modified to facilitate the activity that serves as the driving force underlying economic growth and prosperity.

Throughout EU countries one can observe different tailor-made policies for creative industries aiming to stimulate economic development of creative industries, comprising. These policies often comprise dedicated policies for its sub-sectors and represent an explicit attention for creative industries in standard economic policies.

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II. CONDITIONS FOR ENTREPRENEURSHIP IN CREATIVE INDUSTRIES

Research in creative industries analyses a specific sector or various subsectors and respective interrelations. Examples of specific subsector analysis focuses on TV industry [1], cinema [2], games [3], VFX production [4], crafts [5] or digital media [6] ; authors study subsector interrelations (e.g. based upon design subsector, [7] or artisan and commercial entrepreneur's 'types' (e.g. [8] ; [9] ; [10].

Motivation aspects of creative entrepreneurs combine pull (e.g. dissatisfaction with previous job) and push (e.g. self-fulfilment) factors ([11] ; [12]). Artistic orientation is more associated to lifestyle motivation (work/life balance, geographic location) than financial aims [13]. This orientation also shows an on-going dilemma of creative entrepreneurs in terms of personal satisfaction or output to 'fit' the market ([14] ; [15]).

The research on geographical context focus on 'hard' and 'soft' factors to explain why certain areas attract creative industries (e.g. [16] ; [17] ; [18] ; [19]). The analysis of creative cluster development is based upon several variables such as business support, cultural and financial infrastructures, markets (local, regional, national and international), scale and scope of creative industries, public and institutional promotion, in order to study creative strategies (dependent, aspirational, emergent and mature) [20]. Cultural infrastructures can play an essential incubator role when combined with university training programs [21].

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[2] José António Porfírio is a Professor of the Social Sciences and Management Department of Universidade Aberta, Portugal (jose.porfirio@uab.pt).

[3] Tiago Carrilho is a Professor of the Social Sciences and Management Department of Universidade Aberta, Portugal (tiago.mendes@uab.pt)

[4] Audretsch, D, and Thurik, R. (2004) A Model of the Entrepreneurial Economy *International Journal of Entrepreneurship* 2 (2), 143–166.

According to Rae [22] contextual learning can be developed through immersion within the industry and opportunity recognition by cultural participation. Learning is often technical, functional and problem solving in order to develop skills, gain experience (often as employees) and 'train' social contacts to 'discover' a specific subsector. Opportunities are recognized through the social network of an industry by identification of specific needs, problems and potential customers (idem).

The definition of creative industries can be associated with social networks: "the set of agents and agencies in a market characterized by adoption of novel ideas within social networks for production and consumption" [23]. This economic activities create and maintain social networks. Production and consumption generated 'values' are associated with social network choices and are uncertain and novel by nature [24].

Social networks are rooted in particular places where cultural production and consumption benefit from proximity. Opportunities arise based upon face-to-face contacts, information exchange or mentoring ([25] ; [26] ; [27]). The importance of the local networks can change according to entrepreneur's development stage: in the start-up phase entrepreneurs seek for collaboration and feed-back from established entrepreneurs and also from neighborhood friends and acquaintances, taking advantage of meeting places as clubs and bars; when they are more established entrepreneurs look forward to reach networks with higher levels of scale (urban or even international) and consider the meeting places just for personal enjoyment [28].

Creative worker's reveal convergence between sub-sectors and multiple roles across sub-sectors or along the value chains. For example, the design subsector in London has at least one company connected with all the main other sub-sectors of creative industries, and it is frequent that design subsector accept workers from other subsectors or design workers contracting [29]. Network opportunities lie either on formal organizations (fixed in time and space) or on less formal organizations (multiple times and spaces, open access principle – e.g. communities of practices) ([30] ; [31]). Artisan local networks tend to be horizontal and strong (close relationship between entrepreneurs) while commercial local networks tend to be more vertical and weaker (labor force contracting or firms contracting other local firms) [32].

Social network analysis has been studying core/periphery structures of groups and organizations (e.g. [33] ; [34] ; [35] ; [36] ; [37]). In some sub-sectors like film industry, individuals who are integrated at the core have greater access and exposure to relevant sources of legitimacy and support, whereas they face difficulties to generate new ideas and to escape from the established norms of the field ([38] ; [39]). The strong presence of public institutions in the formal 'upperground' can create a lock-in effect for freelance workers who interact mainly within the 'underground' levels [40]. Gatekeepers can connect some actors and provide favorable conditions to maintain long-term relationships, although other actors can be marginalized and separated from de network-core preventing knowledge seeking initiatives ([41] ; [42]), market opportunities in urban centers in sub-sectors like film industry [43] or potential clients for outer-suburban areas [44].

In small business of TV industry the network of suppliers and production facilities of large companies explain the low investment in equipment. Larger companies function as a hub for formal and informal network. Formal networks are suitable to obtain information especially in terms of opportunities recognition. Informal networks are essential to get work and to make television programs based upon additional services required by small businesses ([45] ; [46]).

III. CREATIVE INDUSTRIES IN PORTUGAL

For Portugal, and specifically for the purpose of this article we will follow a definition of creative industries that joins the considerations of INE [47] and Mateus [48]. The mix of these two definitions renders the most similar definition of Creative industries that we can get, for the purpose of the survey conducted in Portugal.

According to INE [49], the creative and culture activities include the following sub-industries: Cultural Heritage (museums); visual arts; periodical publications; cinema; performing arts; Architectural; and broadcasting. Yet, figures considered by INE do not include sub-sectors like IT or engineering. For our survey purposes we include the following sub-sectors of creative industries (CI): film, video games, apps, web design, software, advertising/branding, architecture, design, craft, print, retail, food/catering and environmental.

In 2011 the cultural and creative industries in Portugal represented around 1,6% of total employment in Portugal, a total of about 77.000 persons. In 2012, based on the Labour Force Survey [50], the creative and cultural sector employed 78.6 thousand individuals. From those, 62.1% were aged between 25 and 44 years old, 53.1% were men, and 37.8% had completed a tertiary level of education. Between 2000 and 2011 CI in Portugal have created more than 22.000 jobs, although they have lost about 4.000 jobs in the same period, in line with the overall economy in terms of general decrease in employment. In 2011, based on the Integrated Business Accounts System, the "Advertising agencies" represented 19.3% of total business volume of the cultural and creative sector (5.1 billion Euros) and the "Performing arts" activities reached 27.9% of all sector enterprises (53 064) [51].

Between 2002 and 2011 [52] the international exchanges of Portugal in the goods and services of the CI represented between 3% and 4% on average, of total country exports, showing the following trends:

- The annual average growth rate of exports exceeded 10% in the last decade, above the rhythm of overall exports of the Portuguese economy (9,8%). The Creative Services grew around 15% while the creative goods exports grew just at a rate of 7%;

- Portuguese CI exports recovered from 2009 international crisis in line with the main export sectors like electric equipment our food;
- Their contribution to total exports growth was around 3% since 2002;
- The annual growth of CI imports was around 7% in the same period (7.7% for the same indicator in the overall economy);
- The cover exports rate in CI has raided in recent years: around 66% between 2003 and 2006 and 95% of imports in 2011.

Portugal is in the E.U. 16th position in terms of creative production[5], in 27th position in the global ranking, between Ireland and United Arab Emirates. Comparing creative production and wealth, Portugal shows positive results in face of similar or more developed countries like, Italy, Spain, Greece or Slovenia. Yet Estonia has a similar wealth level and is in 10th position in the global ranking [53]. Creative production is one of seven criterion which integrate the world innovation index. This index evaluate the conditions and outcomes of global innovation in CI. Based upon a partnership between Intellectual Property World Organisation, INSEAD and Cornell University, is the first international index which develops a preliminary creativity analysis in more than 140 countries.

According to the Government Budget, the consolidated expenditure of the State Secretary of Culture reached a total of 167.7 million Euros in 2012 (a decrease of 22.2% over 2011). According to data collected through the Survey on Public Financing of Cultural Activities, in 2012 the Municipalities allocated 401.5 million Euros to cultural activities, mainly in the following areas: cultural precincts (19.2%) cultural heritage (17.7%), books and press (14.6%), socio cultural activities (13%) and music (6.4%) [54].

It becomes visible that in the last four years, municipalities have tried to enhance the creation and development of creative hubs, linked to local industries. More and more this becomes evident in several regions of Portugal (one of the most emblematic examples being the municipalities of Cascais and Lisbon). Within this increasing local movement, it is observable that several international forums are being organized on a local basis, held in several municipalities with the main objective of promoting future collaboration and meeting spaces of production and creative incubation at a regional, National and European level, and thus, encourage the exchange of experiences on the needs in terms of infrastructure, business models, skills and management training and education of these organizations.

There is a clear intention to create the foundations for the development of an international network of spaces dedicated to the promotion of a creative economy and also to enhance the discussion of public policies to support the basis of an appropriate development of the creative sector within the new framework of EU programming.

Some good examples have been developed in the Creative Industries to overcome the referred situation, of which we highlight the National Prize for the Creative Industries” or the Lisbon Challenge, promoted by Beta-I, a recently created incubator that developed a very interesting acceleration program and entrepreneurship contest that includes the Creative Industries.

On the North of Portugal, where we saw the main rise-up of Creative industries, it is also interesting to mention the creation of Oliva Creative Factory, a newly created incubator mainly dedicated to Creative Industries’ start-ups, at the same time that we notice the decrease of activity in one of the first virtual incubators dedicated to this industry, i.e. the inSerralves incubator.

In 2009 in the Northern Region of Portugal there were 93 university graduations corresponding to around 3.700 vacancies in creative areas. In the absence of regional data, according to regional support entities, this apparent favourable background for entrepreneurship in CI resulted in a few creative business initiatives for firm projects in the region. The link between universities and the market is still weak: the majority of the almost 5.000 recently graduates in CI courses did not create their own business. We can observe this phenomenon is in other Portuguese sectors. However, the situation in CI, especially in the ‘cultural’ sub-sector, has even worst results in terms of self-employment [55].

IV. EMPIRICAL WORK ON CREATIVE INDUSTRIES IN PORTUGAL

The present paper is based on an empirical work developed in Portugal destined to analyse the conditions for the development of entrepreneurship and the conditions for success of creative industries in Portugal.

This work consisted in a set of five semi-structured interviews with responsible from several institutions dedicated to promote entrepreneurship in Portugal, and also a survey conducted to creative industries in Portugal.

Considering the interviews that we were able to conduct with different national experts on entrepreneurship, and particular those responsible for different Programs and Entrepreneurship institutions in Portugal, there is a general opinion that there exists clearly an adequate infrastructure for the development of entrepreneurship in the Creative Industries. In fact, different officials from these institutions reported that they consider that apparently there is even a lack of demand for Services from the potential entrepreneurs within the Creative Industries Sector, compared to the institutions available (especially in some regions of our country) to provide these services.

Generally, opinions obtained from the persons interviewed pointed that creative businesses linked to cultural industries are usually developed by entrepreneurs that usually denote a significant lack of management and organization skills. According to the interviewees, in earlier stages of development of their projects, the support creative entrepreneurs can get from incubators, although crucial could be insufficient. However, we consider that a fine tuning of this conclusion needs to be conducted, since we are not able to conclude effectively if the reason for this situation remains on the incapacity of existent incubators and other entrepreneurship institutions to effectively support the overall needs of entrepreneurs (which we hardly believe), or lacks on the incapacity of entrepreneurs, or would-be entrepreneurs, to identify adequately what are their needs, and ask it to the existent institutions (that we tend to believe that is the more effective reason).

Notwithstanding, according to the interviewees, regarding the entrepreneurs' general availability and aptitude to receive training, it seems that there is a natural difference between cultural and creative entrepreneurs, especially those more related with digital media and software development. The mind set of these last ones seems to be keener to mathematics and management than that of the entrepreneurs more linked with cultural industries.

Another crucial issues when we speak about creative industries is the setting up and development of networking.

In Portuguese creative industries we observe remarkable differences regarding information and communication technologies networks (businesses in digital media like software for communication technologies) and 'cultural' networks (here included architecture, arts, handicraft, fashion design, cinema and video, music, theatre): whereas information and communication technologies networks are dynamic and have potential for development, 'cultural' networks are almost absent and need higher quality business projects.

In networks of industrial software applied to communication technologies, entrepreneurs collaboration strive for obtaining inputs and advise directed to identify and explore new opportunities for innovation, to have access to technological and scientific knowledge, and to support management and strategic firm decisions [56]. Firms constitute the most relevant origin of resource utilization and they have a leading role in knowledge networks. Informal networks permitted searching for immediate practical problems (market segments information, access to clients) and for long-term problems (strategy implementation, market segments identification) [57]. Mobile communication companies (TMN, Vodafone and Optimus) and a multinational (IBM) are brokers that provide new information for small firms regarding innovation and technological and scientific knowledge. The broker role is particularly important in the case of a large company whose size, reputation and credibility make it a preferential partner to foster innovation and knowledge diffusion by establishing links between universities and national firms. Strong links between spin-offs and parent organizations (mostly firms) are based on multiplex ties (ties which result in more than one type of knowledge flux) and informal connection between national and multinational firms of the same sector (e.g. firms for software development) ([58]; [59]).

Portuguese entrepreneurship culture was, until recently, essentially closed and not favourable to network dynamic. Contrary to 'cultural' businesses, however, mainly information and communication technologies businesses have been undertaking a change in entrepreneurs' behaviour for information and resource exchanges, common projects and exploration of informal networks for business creation and development. A recent inquiry [60] directed to 30 entrepreneurs of Portuguese COTEC SME Network - of which 63.3% represented the information and communication technologies sector – revealed this kind of dynamic. The main advantages mentioned by entrepreneurs members of this network were innovation stimulation (66.7% of total SME inquired), access to pertinent information (66.7%), greater social recognition and promotion of the company (63.3%), access to new knowledge and to training networks (43.3%), closer contact with other start-ups and spin-offs (50,3%) and better access to innovations within their own business sector (43.3%). In terms of resource sharing, a large number of SME (73.3%) considered that the network fostered a continuous innovation culture and 63.3% mentioned cooperation with other companies in the network. Of the companies that cooperated with others, 47% stated cooperation with others to foster innovation and 53% referred that cooperation resulted in creation of new business opportunities.

'Cultural' networks of entrepreneurs present a weak dynamic. Although entrepreneurs have talents with potential, networks lack a human resource 'critical mass' for quality business projects and entrepreneurs are not well organized in terms of effective collaboration. Frequently there is a juxtaposition of creator/promoter role and consumer role. Informality is often due to agent's condescension. That is inherent to a 'tradition' of subsidize dependency and lack of professionalism. The almost absence of network dynamic is also related to difficulties in projects survival, financial sustainability and market penetration [61].

Based on the results of the 5 semi-directed interviews conducted between September and October 2014, we developed a questionnaire aiming creative industries entrepreneurs in Portugal, which was conducted between November 2014 and January 2015. At the end of January 2015 we've obtained some preliminary results for 17 questionnaires completed answered.

In a scale of 1 to 4 (being 4 the value for 'totally disagree' and 1 corresponding to 'totally agree') we started by analysing the importance of education for entrepreneurship development in the Creative Sector in Portugal. According to our preliminary results, education seems relevant to develop a sense of initiative and an entrepreneur attitude (mean: 3,06). Also, Education seems important to understand better the role of entrepreneurs in society (2,65), and at the same time seems important to increase the interest in becoming an entrepreneur (2,53); giving useful skills and know-how to run a business (2,59).

The questionnaire also inquired about the crucial elements to start a creative business in Portugal. In a 1 to 4 scale (from 'not important at all' to 'very important'), according to the answers received, the most important elements to start a business are: an appropriate business idea (3,59); the capacity to address an unmet need (3,53); the importance of a role model (3,06); the possibility of getting the necessary financial resources (3,00); and contact with an appropriate business partner (3,00). Dissatisfaction with previous work situation (2,76) is also worth mentioning.

In an opposite sense, the main difficulties to start a business in Creative Industries are the lack of available finance (3,06); the situation of not having a second change in the case of failure (2,94); and also the complex administrative procedures (2,65).

Questionnaire also inquired about fund's provisioning for the newly creative businesses in the Creative industries in Portugal. According to the entrepreneurs' opinions, the most important initial source of funding for the business was self-funding (for 47% of the entrepreneurs), followed at the same level (24%) by family or friends, business angels' funding, and personal bank overdraft (24%). Grants (18%) and business loan from banks (12%) seemed to be the last sources of funding used to start a business in the Creative Industries.

Motivations for entrepreneurship development are often referred in the literature as one of the most important drivers of entrepreneurship in any country, just balanced by aversion to risk.

In the Creative Industries in Portugal, motivation for self-employment derive mostly from the "desire for personal independence / self-fulfilment", gathering 82% of the answers, and also from the desire to contribute to societal development (with 71% of the answers), whereas "the willingness to exploit a business opportunity" seems to be the motivation of just 53% of the inquired entrepreneurs, exactly at the same level of the "freedom to choose place and time to work".

In opposition to the above opinions, the most feared risks for opening a new business in the creative industries in Portugal seems to derive from the possibility of getting "irregular income or not having guaranteed income" (collecting 71% of the opinions) followed by "the possibility of going bankrupt" (47% of the answers).

As referred at the very beginning of our analysis, institutional support reveals crucial for entrepreneurship in general, but is even more important for creative industries' entrepreneurs. Thus, our questionnaire also investigated the importance of this support using a 1 to 10 ranking (from 'not at all useful' to 'very useful'). After a deep analysis of the market, and based on the interviews' results, we isolated the following main institutions dedicated to promote and support entrepreneurship in Portugal: National Support Institute for SME (IAPMEI), Local Municipalities, Local and National Incubators, Banks, Business Angels (Bas), Venture Capital (VC), Higher Education Institutions (HEI), Entrepreneurs' Associations, and Development Associations dedicated to Creative Industries..

For all institutions considered, external support for creative entrepreneurs scored between 3 and 4 (mean) although we have to register high standard deviations (5,06 to 7,76). This means that for each institution there are considerably different 'evaluations'. However, the support programmes for entrepreneurship have a higher score (6,63) presenting also a lower standard deviation (2,23).

During the first year in business (known as the crucial year for business development), and using a scale from 1 to 10 (from 'not at all' to 'very much'), obtained answers reached a level of 6,63 considering creative entrepreneurs' 'feeling of being part of a community of other creative industry entrepreneurs' in their local areas. In relation to this, 41% of the entrepreneurs considered that "collaboration with local entrepreneurs for winning business is important in terms of raising money". Also, joint participation in public tenders reveals very important for 35% of the entrepreneurs involved in the questionnaire. However 'sharing practical knowledge, skill and experience with other entrepreneurs' score just 3,05 (with a standard deviation of 4,12) and amazingly, collaboration 'is not important' at all for 29% of the entrepreneurs.

V. Conclusion

From the preliminary results obtained from our studies. we may conclude that the development of creative entrepreneurship has implicit specific characteristics that differentiate it from the overall entrepreneurship picture. Creative entrepreneurs, although not an homogeneous group, since they denote some marked differences, according to the different sectors of creative industries considered (mainly derived from different personal characteristics), are in themselves and as a group, different from the general entrepreneurs. These results should be considered by public policies' key persons, because they may have consequences at the level of public policies' conception and implementation that must be considered by the countries that want to promote entrepreneurship in creative industries.

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