



# CREATIVE HUBS BAROMETER 2017

Capturing the profile and evolution  
of creative hubs throughout Europe

EUROPEAN  
**CREATIVE HUBS**  
NETWORK

 European Creative  
Business Network



The Creative Hubs Barometer 2017 is an output of the European Creative Hubs Network (ECHN) project, co-funded by the European Union's Creative Europe programme and led by the British Council in partnership with 7 organisations.

The Barometer is a pilot study aiming to map and describe the creative hubs (sub-)sector in Europe. It has been commissioned by the British Council, and developed in collaboration with ECBN.

**Team:** Rui Monteiro, Lead Researcher and Manager

**In collaboration with:** ECBN (European Creative Business Network)

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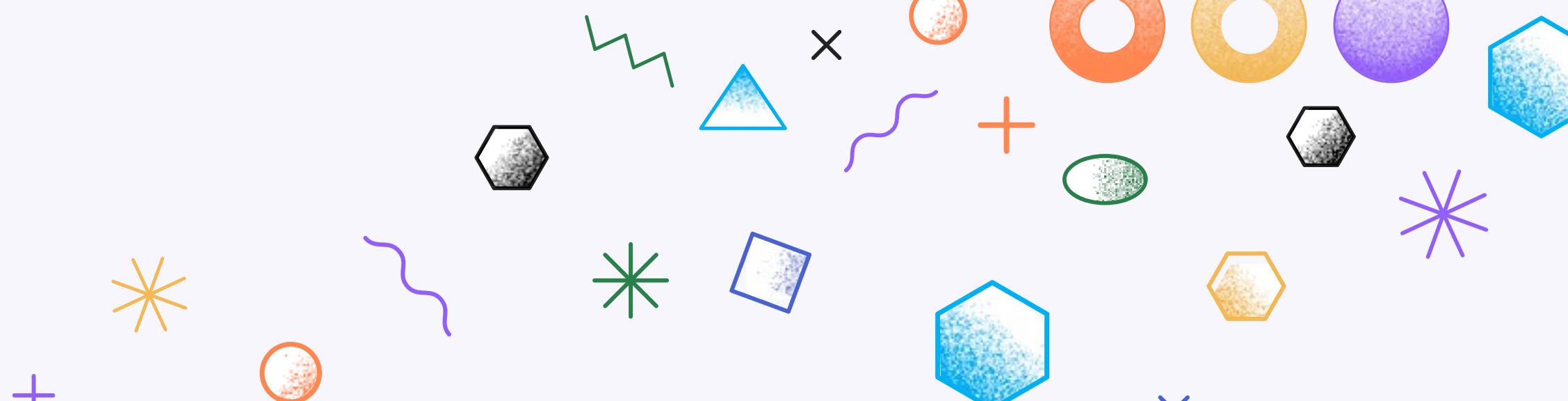


# 1. ABOUT

Welcome to the Yearly Creative Hubs Barometer, the first study to provide an overview on the operations and strategy of creative hubs throughout Europe.

The Barometer is based on a self-assessment feedback targeted at creative hub managers in order to know more about trends in their sector, to better advocate for it, and to better understand where their hub fits in the creative economy.

As an on-going project, we intend to continuously improve this study and whenever relevant, include further specific areas for analysis, while still capturing an overview of the ecosystem.



This Barometer is not only taking a picture of the state of creative hubs in Europe, but is fundamentally a reflection exercise that can hopefully lead to asking the right questions and taking the right actions for the sustainability and success of the hubs and the cultural and creative industries.

We provide our sincere thank you to all the hubs that generously participated in the process. Your representation is important!

# 2. KEY FINDINGS



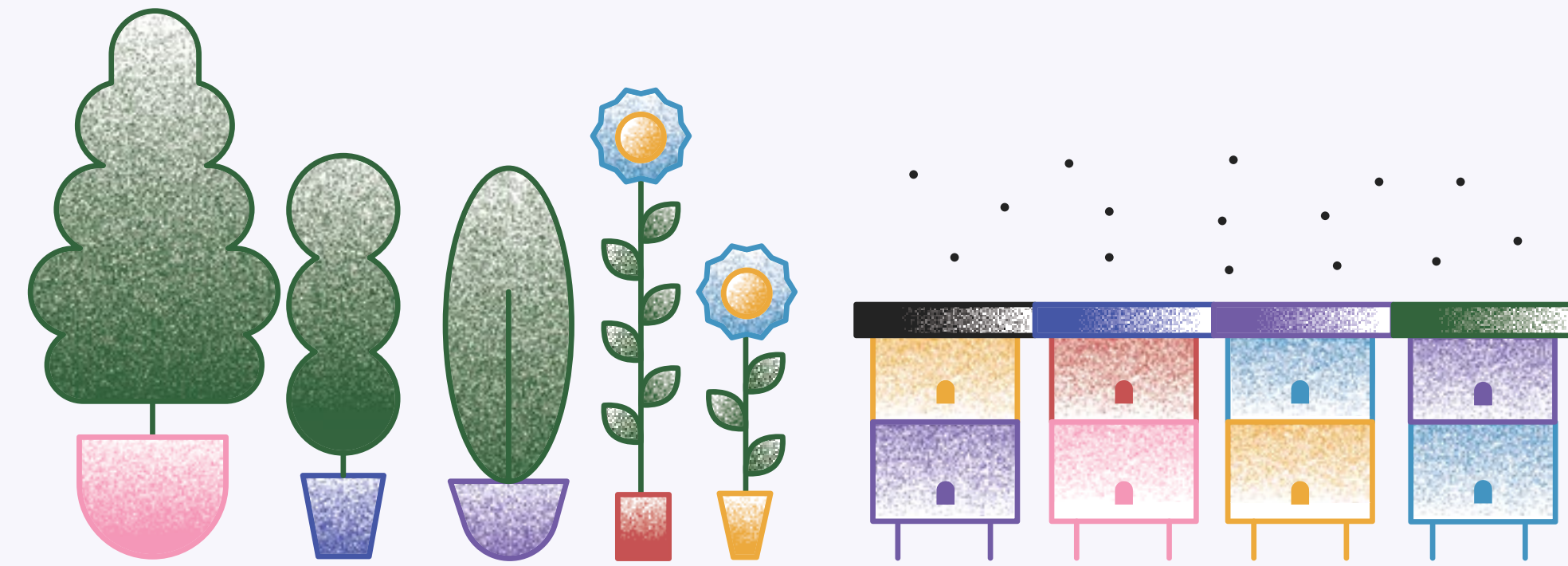
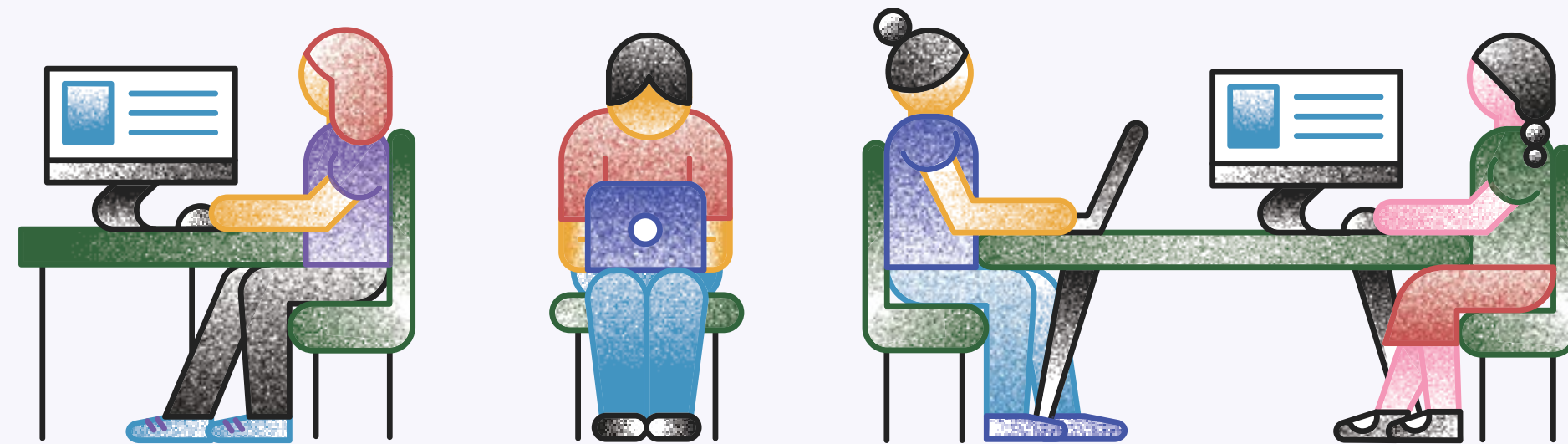
Based on all valid responses, a global analysis on the hubs operations and strategy was developed:

## A first picture of creative hubs

- the recent date of establishment of most hubs in the sample supports the general understanding that creative hubs are a recent phenomenon, with more than half (59%) having been created in the past 5 years, and over 96% of the surveyed hubs having been created after the year 2000;
- most hubs embrace and support projects from the full range of cultural and creative industries sub-sectors, while those who are targeting specific sectors highlight design, digital and visual arts as primary targets;
- hubs present themselves in a variety of legal forms, with 41% being private companies, 31% marked as associations, charities, cooperatives or foundations, while the remaining 19% categorised as “other” which includes mostly public organisations;
- their financial structure demonstrates that hubs are small organisations, with almost half (49%) having a turnover below 150k € and 75% are below 1M €;
- on average hubs reported having an 8-person staff (average of 7.5) allocated to different areas (including part and full-time), and for those who require external subcontracting, the majority of such services is about housekeeping, even though specific services supporting hub main activities are also reported.

## Activities and impact

- most hubs provide what can be referred to as “low intensity” service providers as they offer services such as networking & events, space rental and workshops, while a smaller proportion offers “high intensity” services such as incubation, acceleration or research and development support, all of which require a higher degree of organisational complexity;
- in 2016, the sample of 78 hubs have supported through their different services a total of 8.723 organisations (average of 109 per hub) and 31.682 individuals (average of 396 per hub), with a clear majority having provided support that extends over 6 months;
- the vast majority of hubs identified as having a social and well-being impact firstly, followed by an economic impact and only a minor proportion identified with having an environmental impact.



## Expectations for the future

- the vast majority are very confident on their 4+ years sustainability and believe that a higher demand for their services will be verified already in 2018;
- there is also a clear trend on the immediate next year goals, namely for an increasing number of supported organisations, a higher turnover and a higher service diversification;
- in regard to the political role of ECHN, hubs favour a true European added value through a strong and joint community that is able to have visibility at political level, but also to bridge international partnerships among the community;
- in regards to the operation role of ECHN, hubs favour the opportunity to establish international connections and learning opportunities with fellow peers and experts.

# 3. EXPLORING THE RESULTS

## 3.1. BASIC INFORMATION

Creative hubs are appearing at a faster rate in the past 5 years, than ever before. They come in different shapes, but most are still essentially at an early stage in their lives.

Could they represent a response to a more profound economic and social change that is underway and are they here to stay, or are they merely a sign of passing times?

This is obviously a question to which we can only guess and bet our chances on. Nevertheless, it is clear that hubs are experimenting with different organisational formats, reaching out to specific sub-sectors or ensuring they provide the specialised human resources for a sustainable and successful activity. It will be interesting to analyse how hubs will evolve over the years when compared to present data, particularly regarding their consolidation.

Other questions that might be worth exploring have been raised in the meantime: What distinctions are there in the services hubs offer through their virtual and physical channels? What criterion is used to select which sub-sectors to support? Or what is the profile and background of their staff and how is it chosen?

This first chapter provides a picture on creative hubs shape and size.

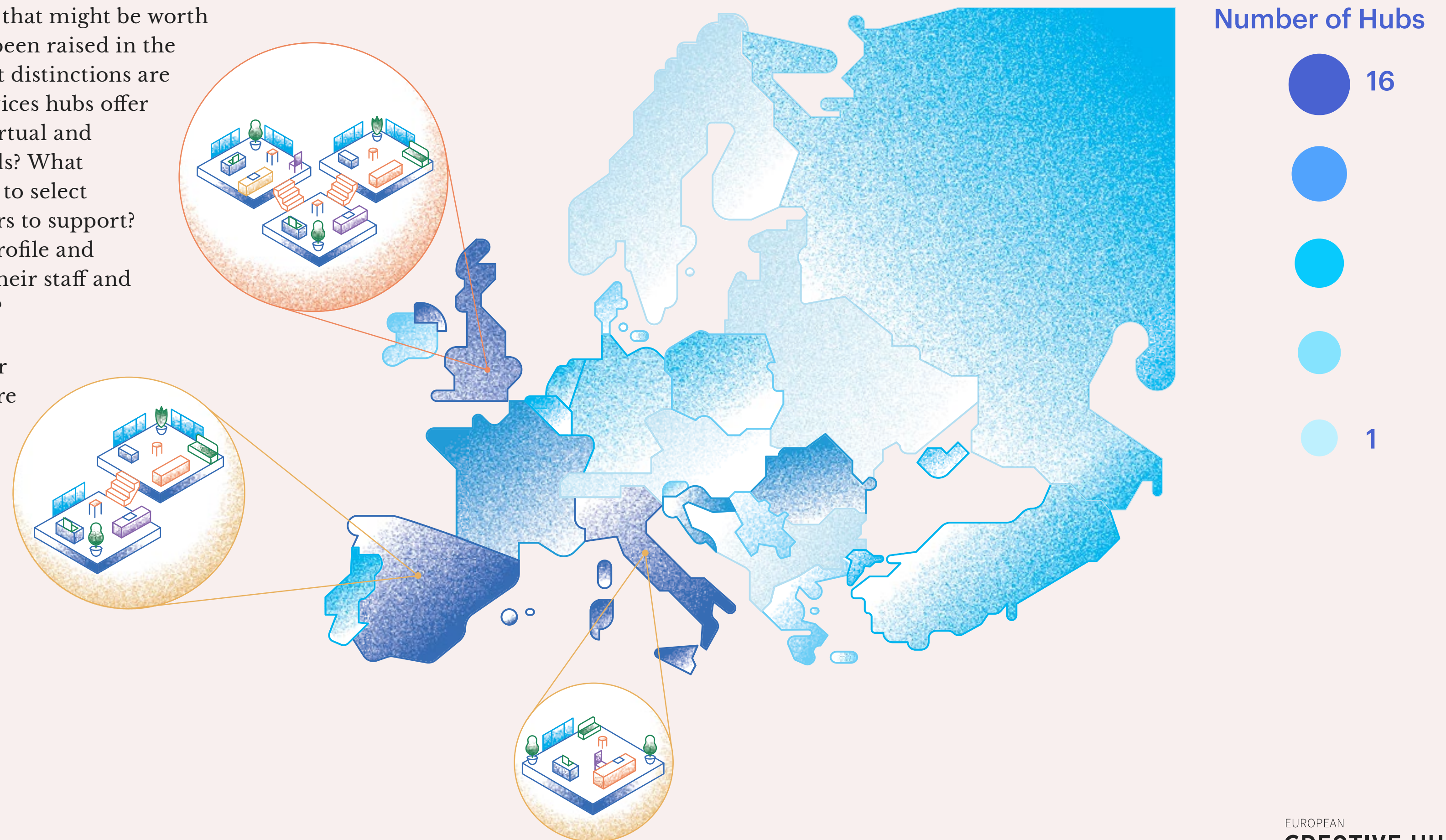
### Country

(of survey respondents)

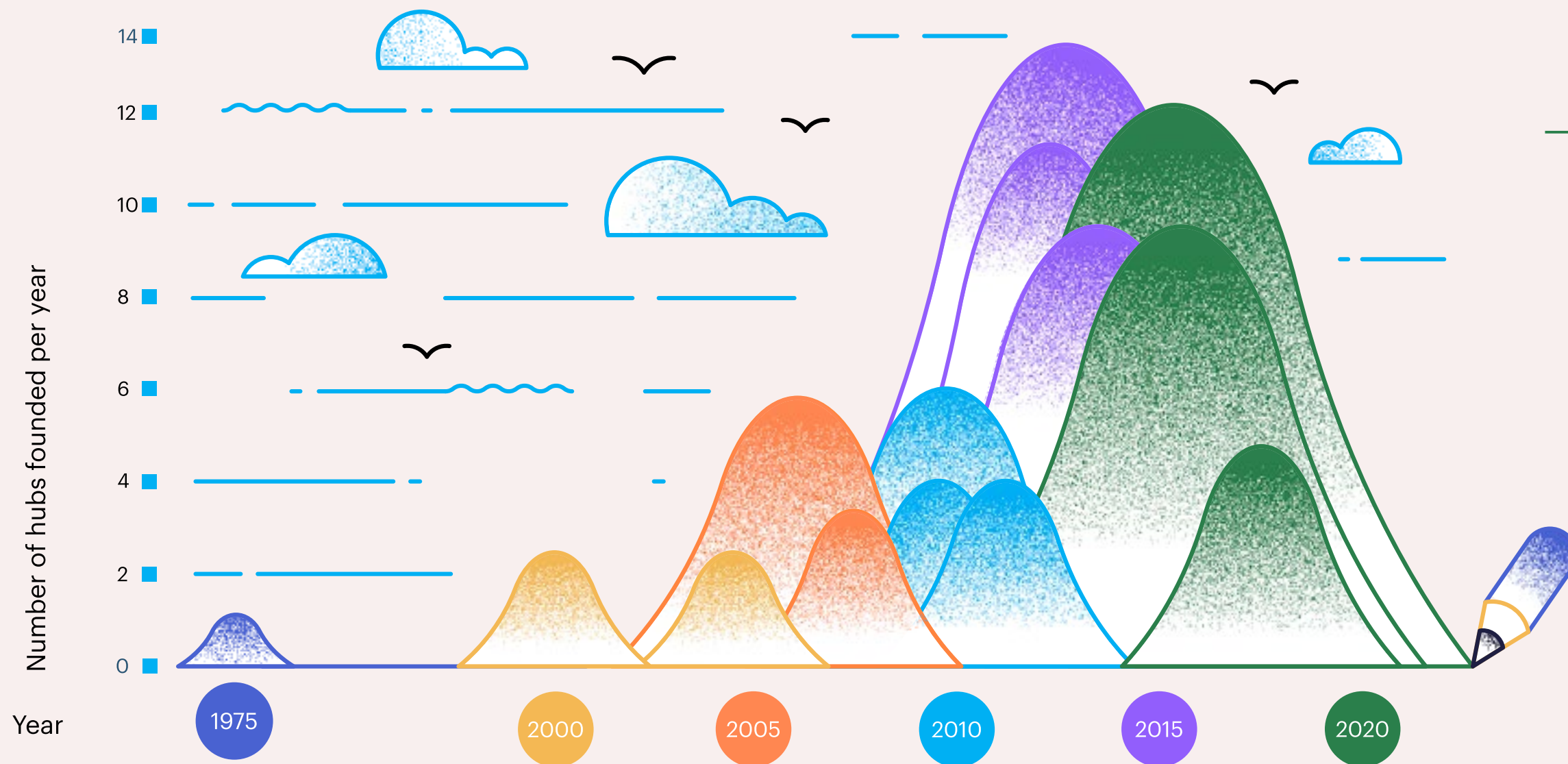
→ good geographical coverage, with a total of 26 countries represented

→ the most represented country is the UK (16), followed by Spain (9) and Italy (5)

→ 8 countries are represented with only one hub each.



## Foundation date



→ oldest foundation date goes back to 1977 (1 hub) while earliest are from 2017 (4 hubs)

→ more than half (59%) were founded in the past 5 years (since 2013)

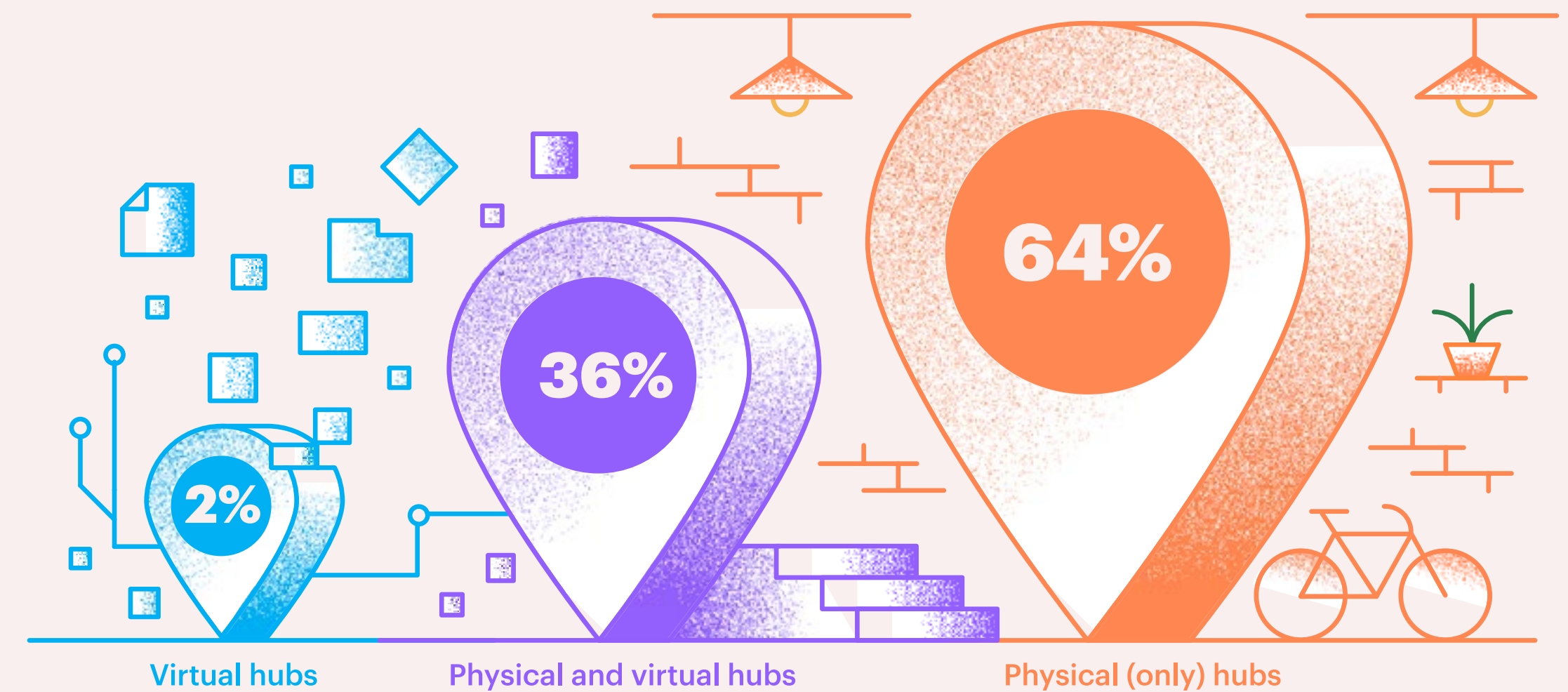
→ almost all surveyed hubs (96%) were created after the year 2000

## Typology

(selection of more than one option was possible)

→ almost all hubs have a physical location (98%), while the remaining do not have a physical location

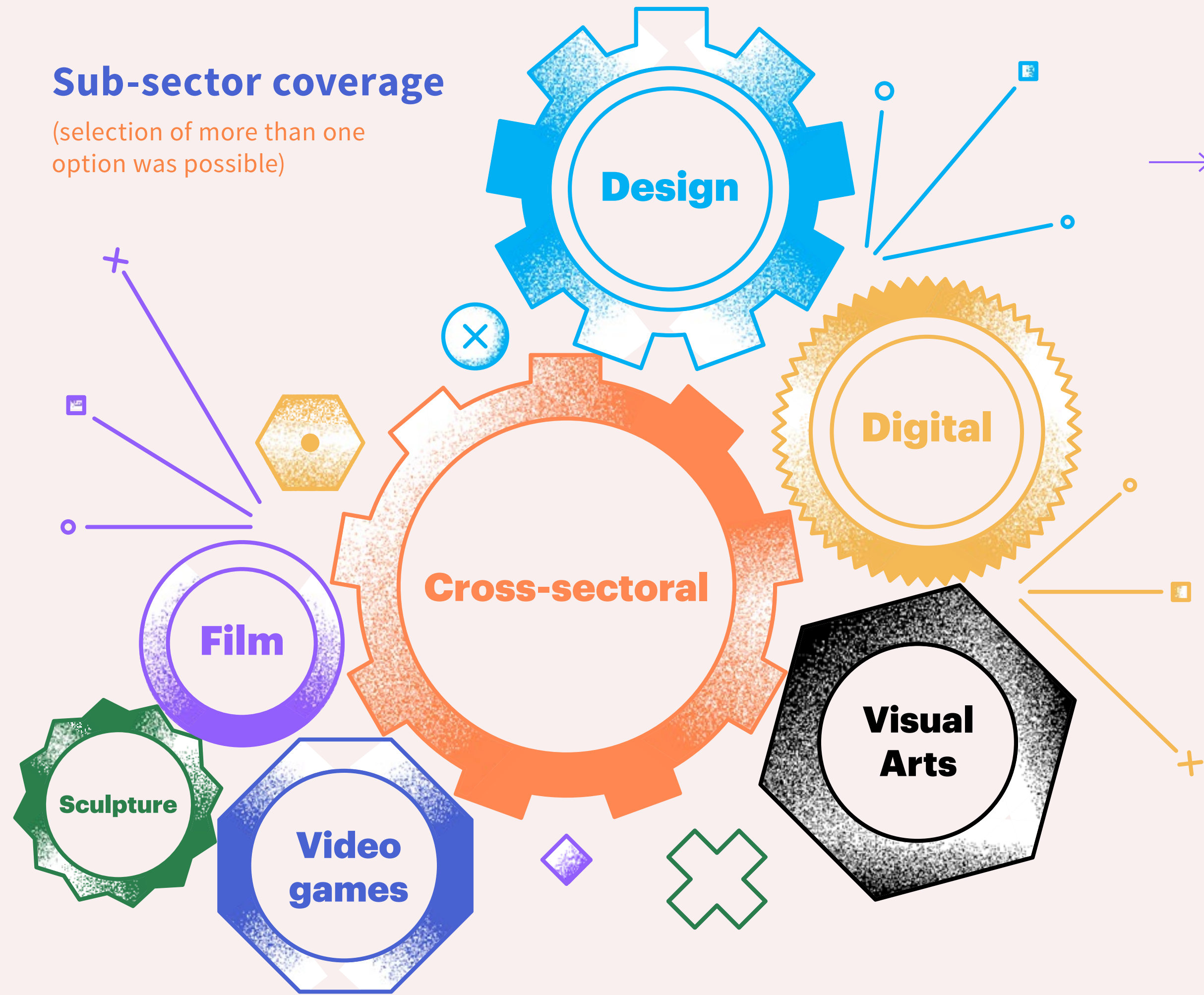
→ part of the hubs with a physical location also have a virtual existence (36%)





## Sub-sector coverage

(selection of more than one option was possible)



→ the vast majority of hubs (81%) identifies as “cross-sectoral” most supported sub-sectors include “design”, “digital” and “visual arts”

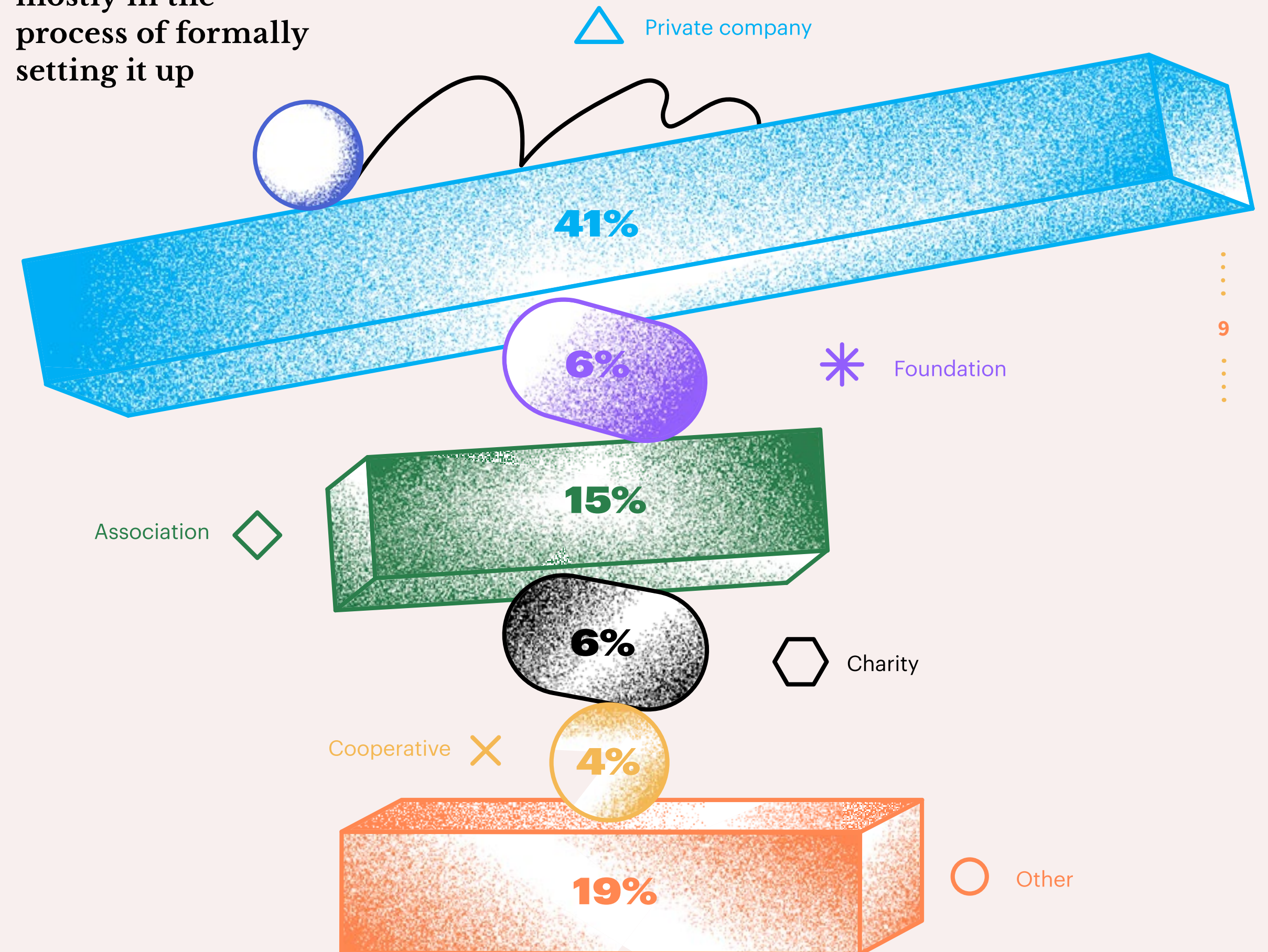
→ least supported sub-sectors include “sculpture, video-games and film”

## Formal legal entity

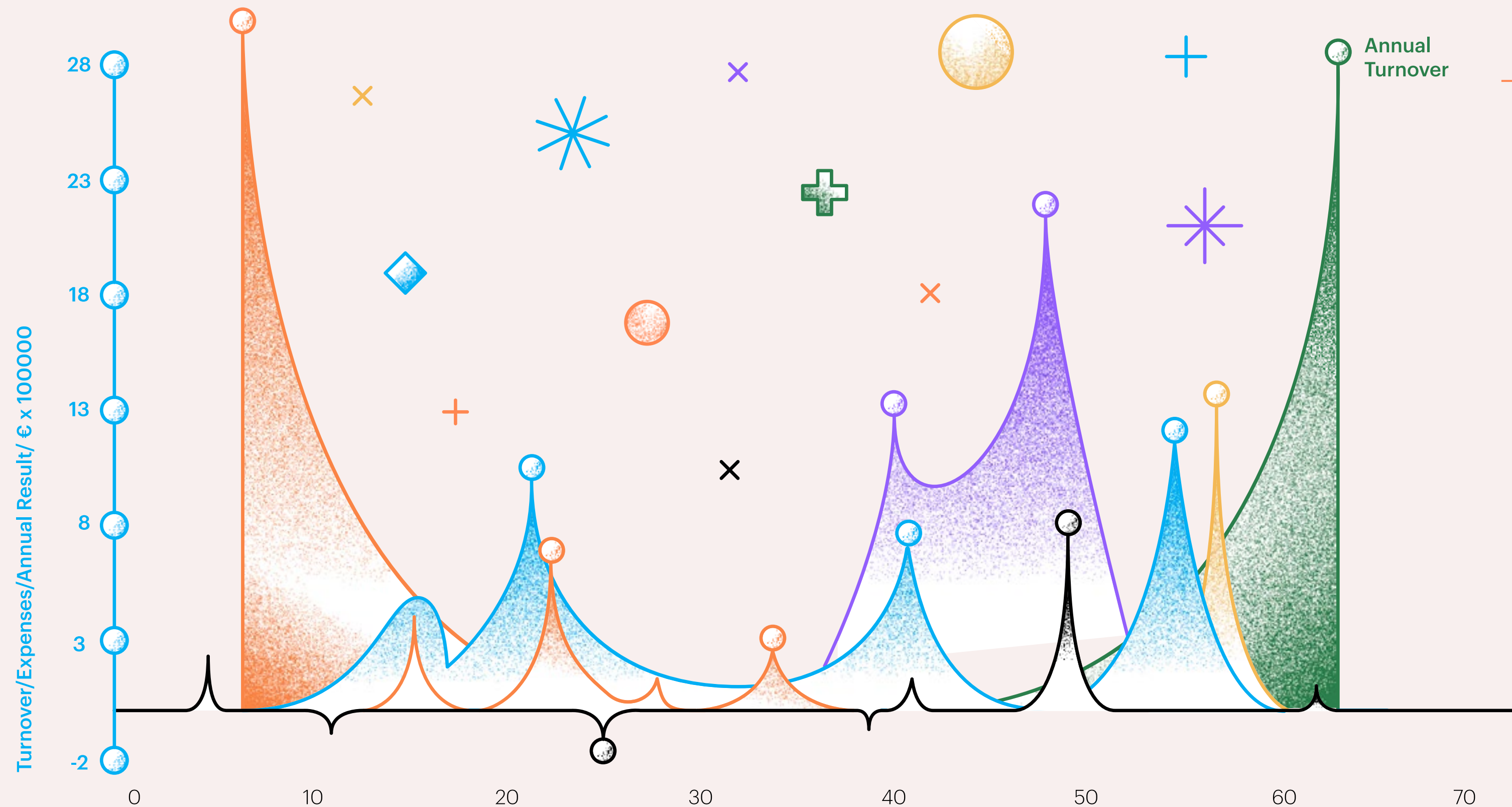
→ the vast majority (93%) stated having a formal legal entity, while the remaining percentage were mostly in the process of formally setting it up

→ a good amount (41%) are a “private company”, followed by “association” (15%)

→ the ones who responded “other” include public institutions or consortiums

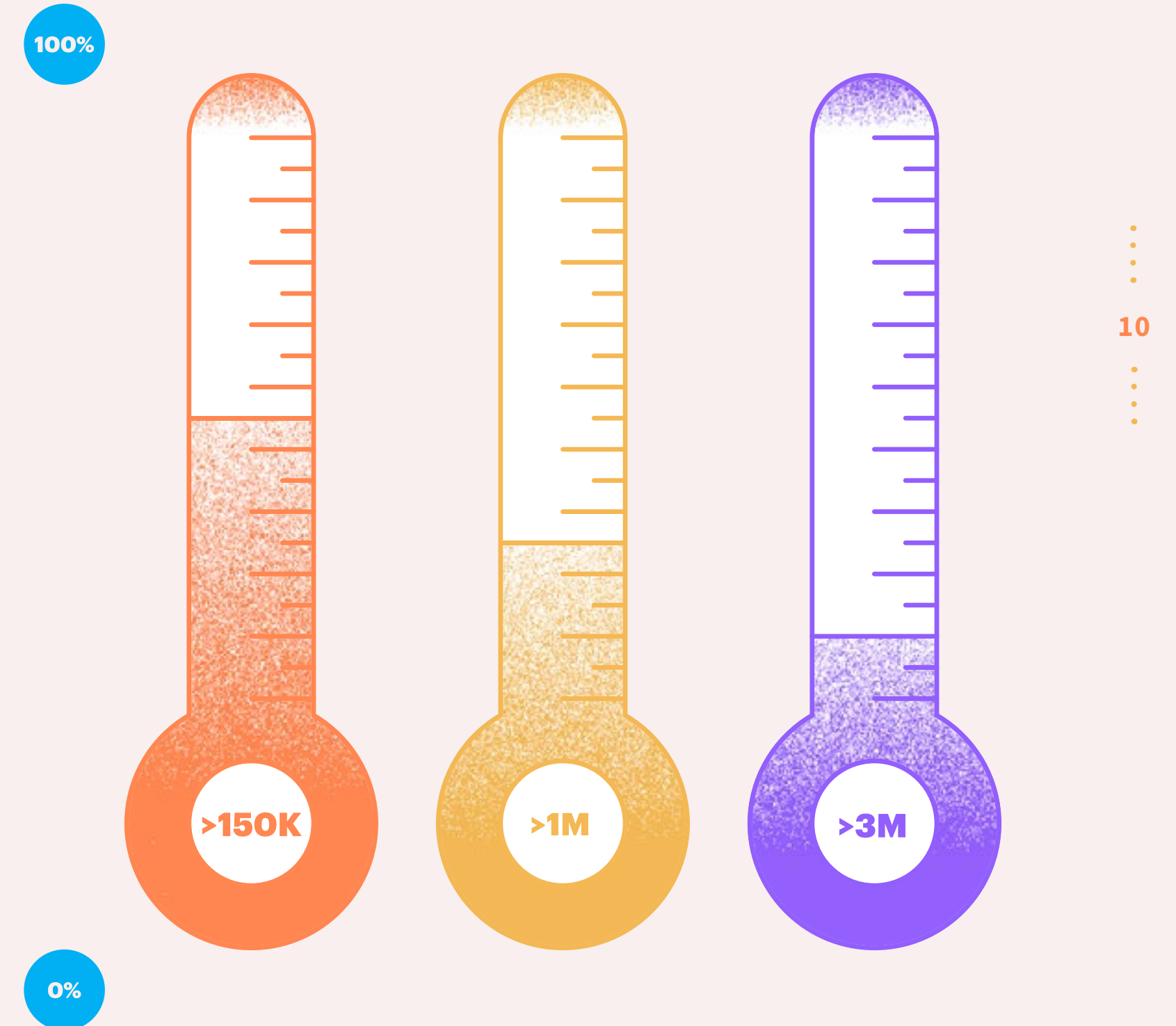


# Financial results



→ there is some diversity in regard to the turnover and expenses volume, even half (49%) is below 150k€

→ 75% are below 1M € while only 7 (out of 65) reported a turnover between 1M and 3M Euros

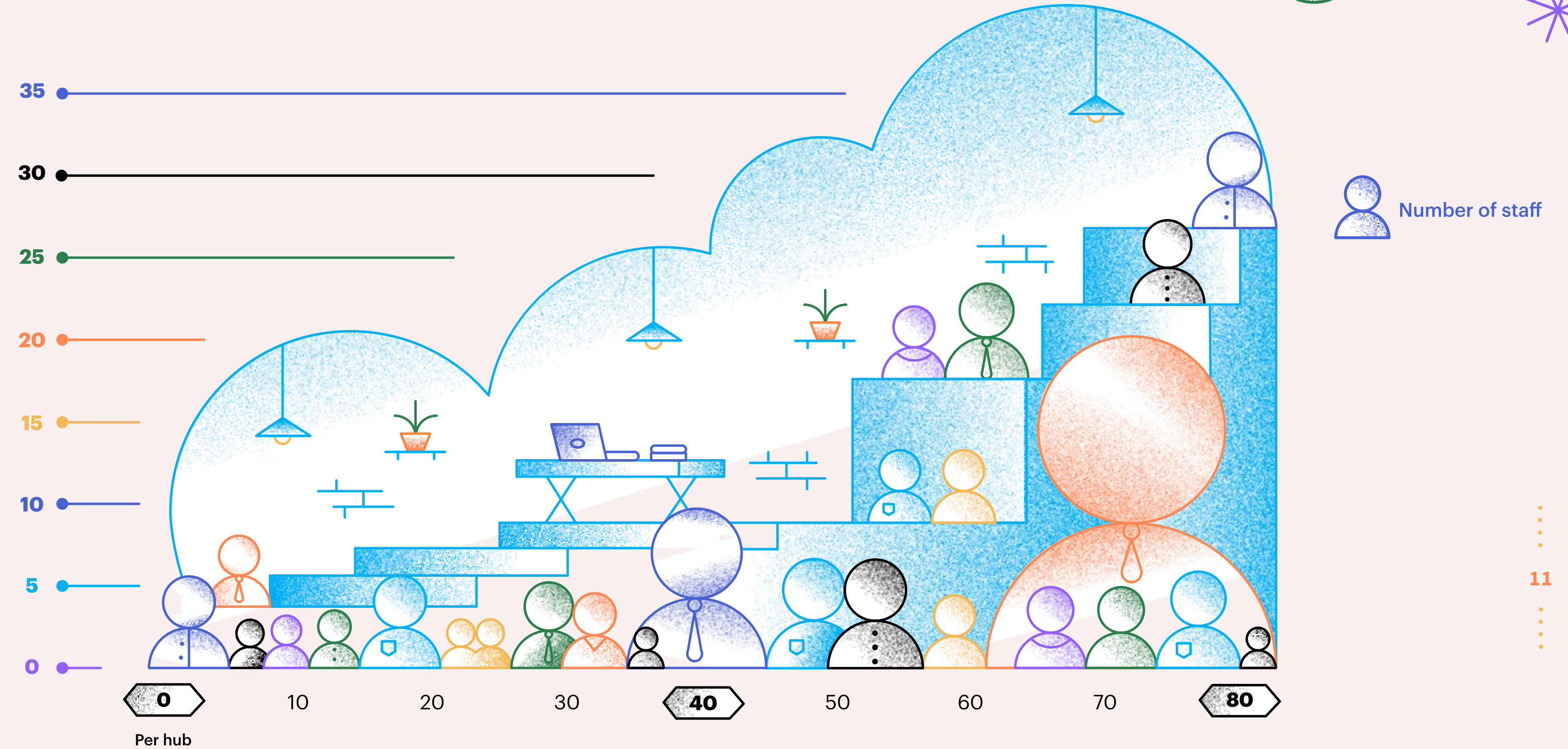


→ a sample of 63 hubs were considered for this analysis as some did not provide any information, others provided contradictory information and others, due to their recent foundation, still had no data available the vast majority has a neutral result

→ at the end of the year or very close to zero, independently of their turnover and expenses volume

# Staff

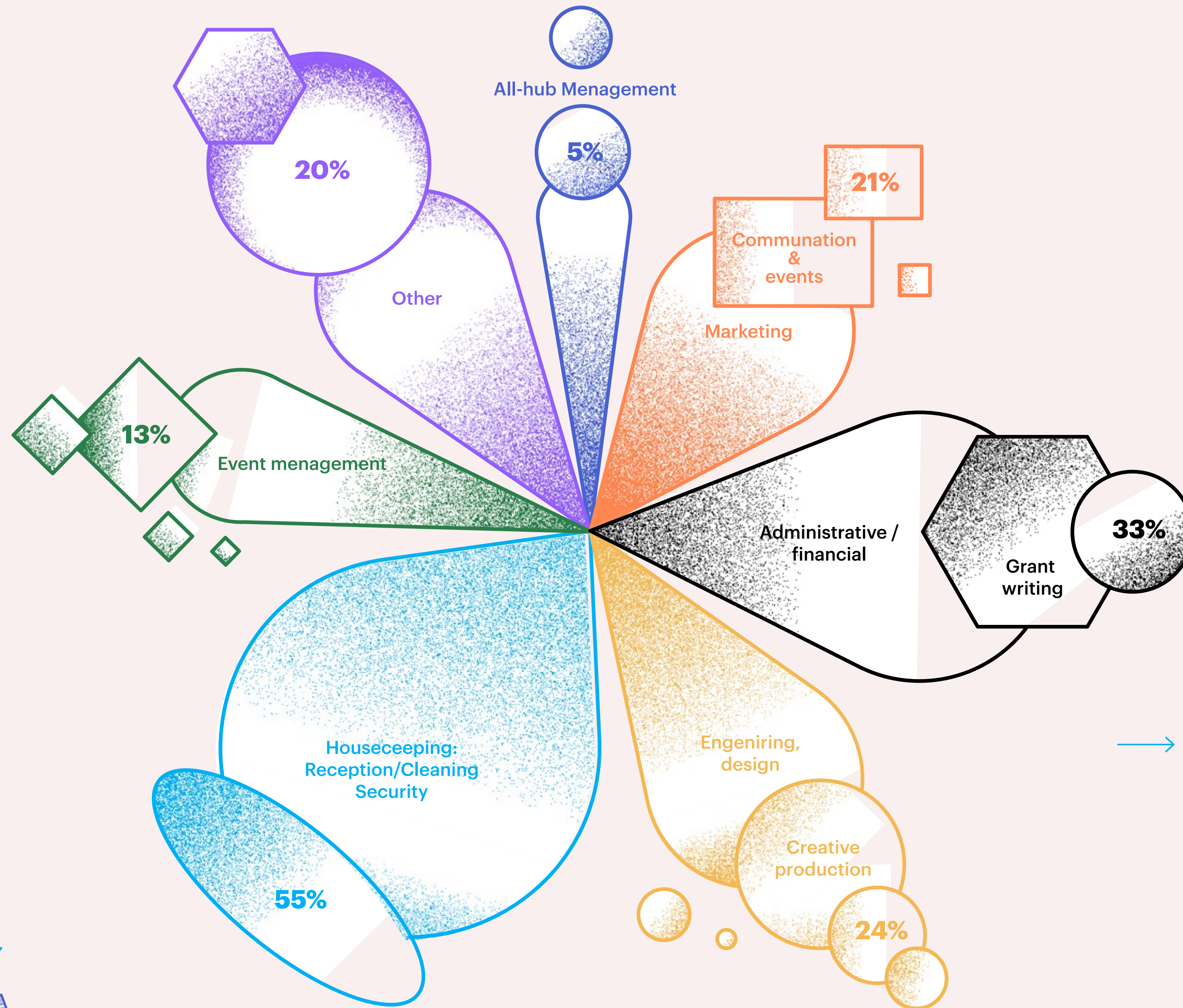
- hubs have an average of 7.5 staff working with them (full and part time)
- 68% of hubs have full AND part time staff, 26% have ONLY full time and 6% have ONLY part time staff
- up to half of the hubs have 6 or less total staff, up to 75% have 9 or less total staff and up to 95% have 25 or less total staff
- the amount of part-time staff needs remains approximately constant across hubs, irrespective of the number of full-time staff at the hub



	All-hub Management	Marketing / communication & events	Administrative / financial, Grant writing	Engineering, design, creative production	Housekeeping: Reception / Cleaning / Security	Event management	Other
reported maximum staff	15	5	7	12	10	4	10
average staff per hub	2.1	1.5	1.3	1.2	1.3	1.1	0.7
Total % of hubs with staff allocated to specific area	96%	80%	74%	53%	63%	68%	26%

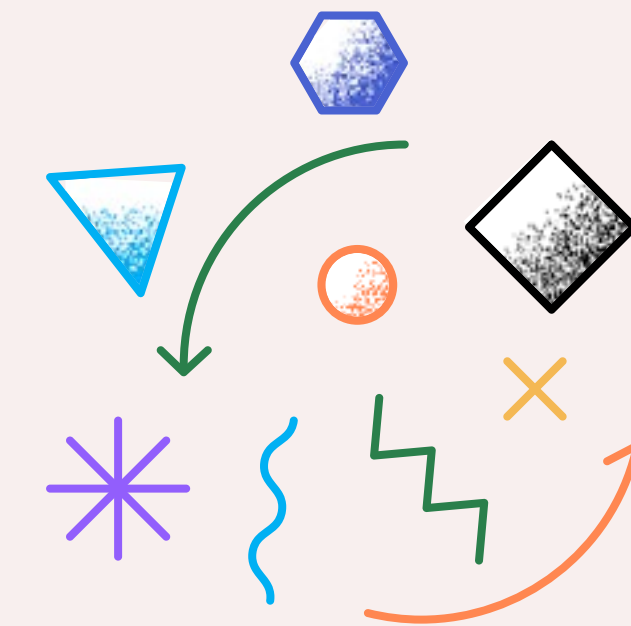
- the majority of hubs have dedicated “all-hub management” staff, representing the highest average of all available staff profiles (2.1)
- the other profiles have on average one person allocated

- others included, for example, fundraiser, infra-structure management, innovation manager, among others



## Subcontracted external services for management activities

(selection of more than one was possible)



→ support services  
“housekeeping” is the most sought out externally

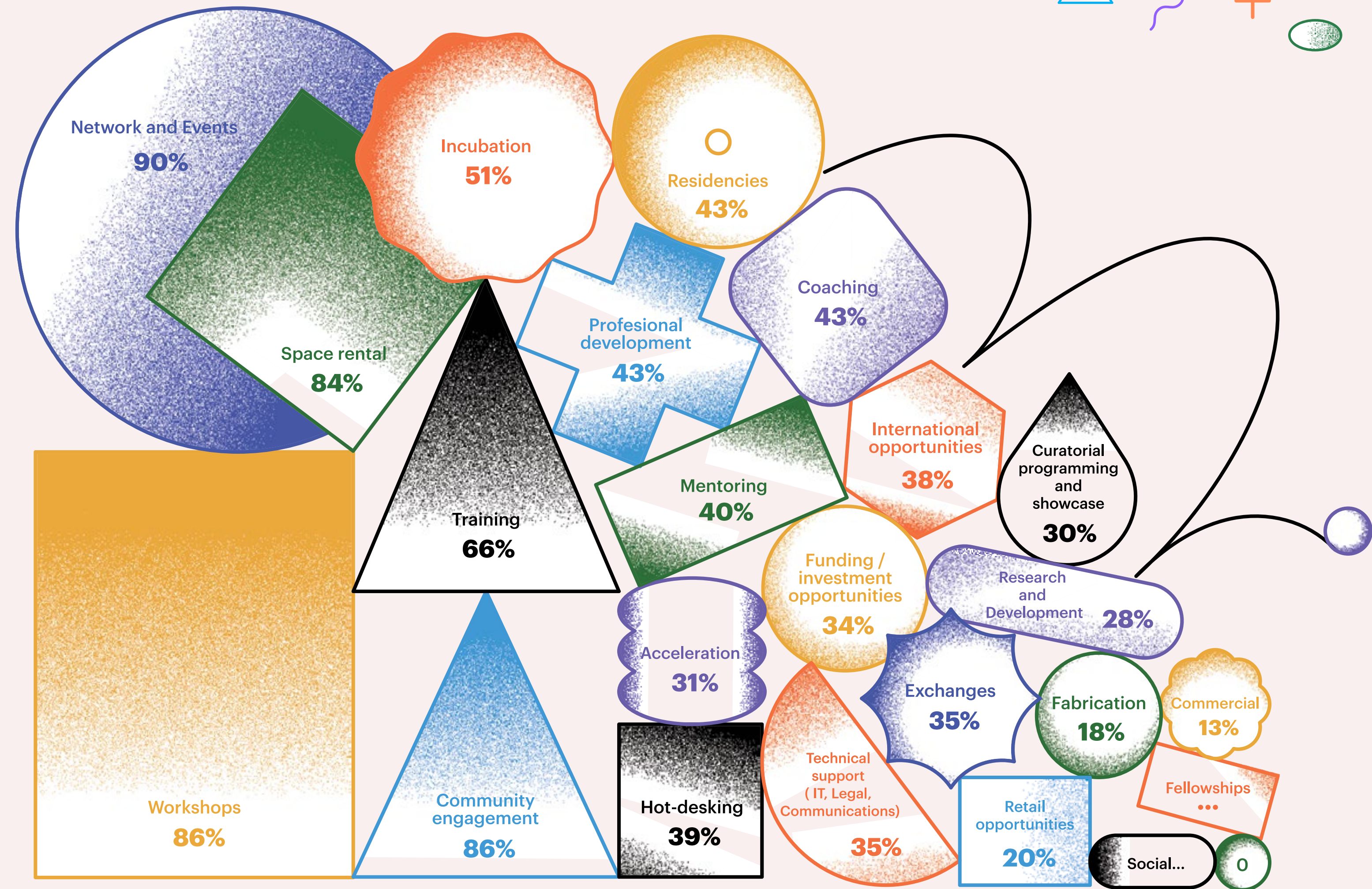
→ subcontracting for construction works were not considered

## 3.2. ACTIVITIES

Hubs have mostly focused their activities on providing the essential set-up for early-stage projects to evolve, basically consisting of an office/desk, some form of capacitation and a community. Other organisations pipeline and gather resources for more complex services.

Is a higher complexity organisation a natural evolution? Or do different solutions respond to different needs? Or is it both? What resources are needed for each solution and how are they assembled? And what investment is required?

These are merely some questions that present results provoked for reflection, perhaps to be answered in a next round of the Barometer or in a different context. In any case, and so far, creative hubs are showing a very positive and promising reach.



### Provided services

(selection of more than one option was possible)

→ the vast majority offers “network & events”, “space rental” and “workshops”

→ a smaller proportion offers “research and development support”, “funding / investment opportunities” or “fabrication”, to name a few

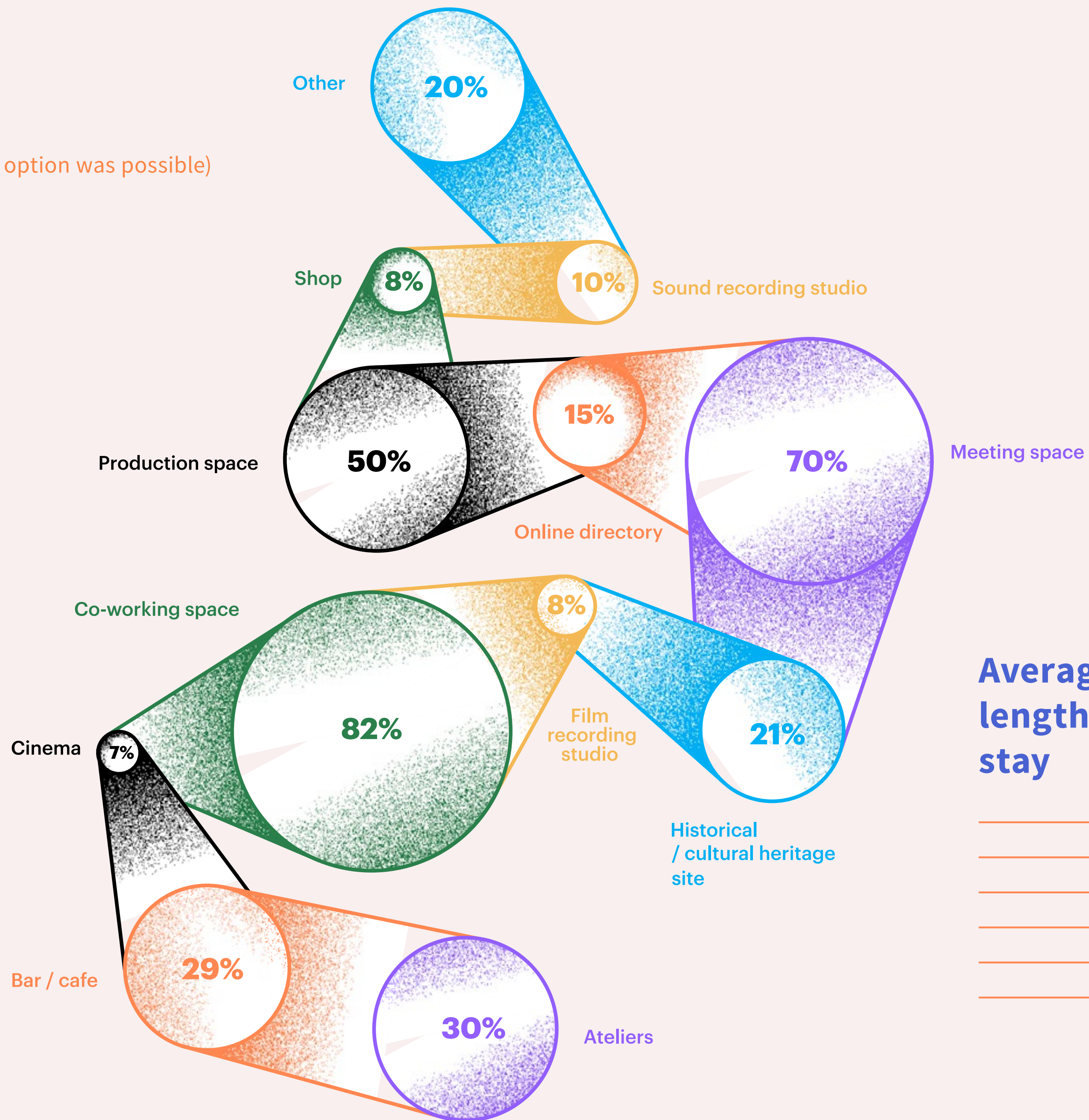
## Facilities

(selection of more than one option was possible)

→ the majority (over 60%) provide meeting and co-working spaces

→ only a few provide high investment facilities such as cinema, film or sound recording studio

→ others included dedicated event spaces, hardware lab, research labs, or conference rooms

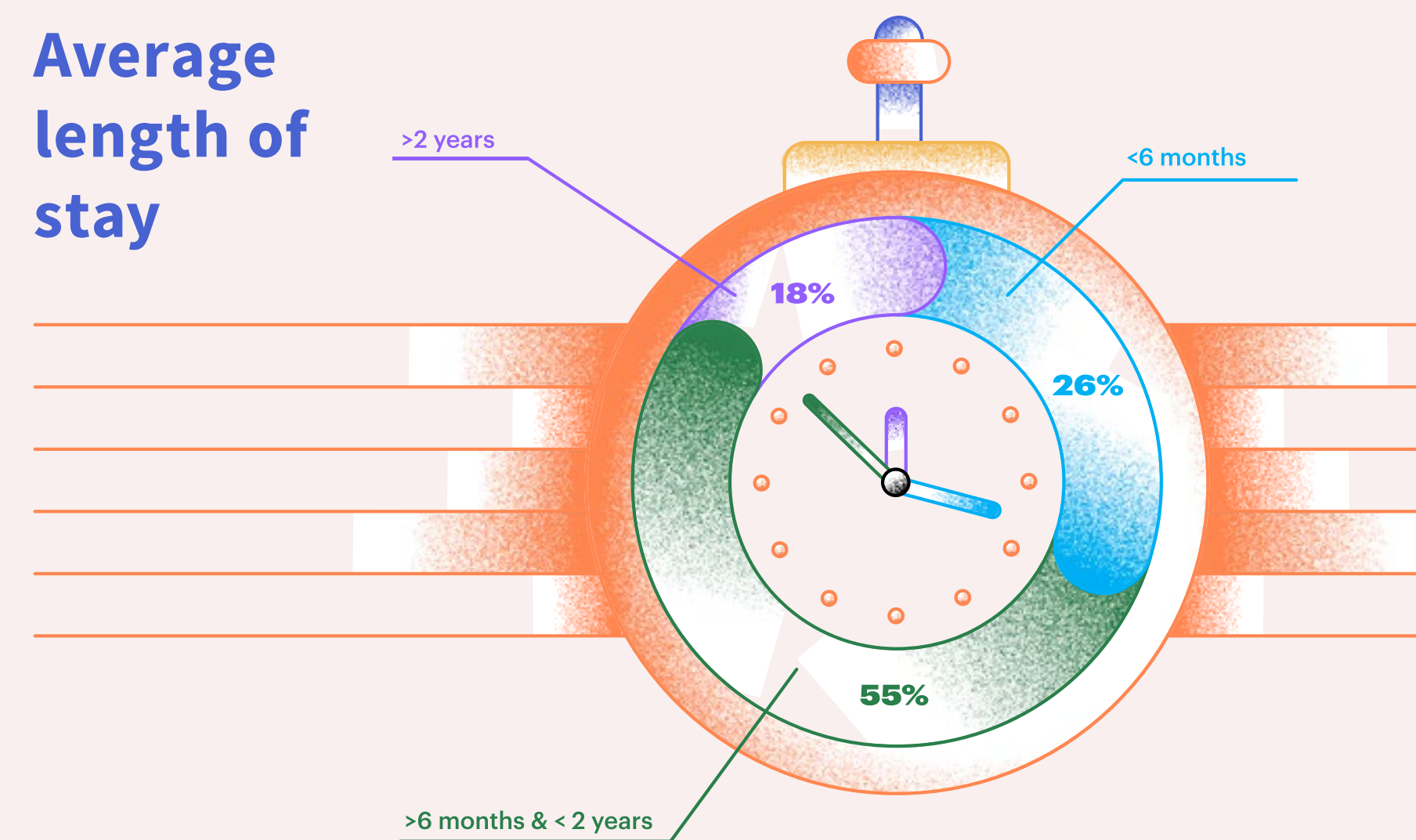


## Organisations / individuals supported in 2016

	Organisations	Individuals
total	8723	31682
average	109	396
standard deviation	397	798
min	0*	0*
max	3500	4000

\*minimum is zero as some hubs, due to their recent foundation

## Average length of stay



### ▶ 3.3. IMPACT

As a form of organisation that is trying to respond to the challenges of its sector, it is interesting to note that most hubs identify themselves as having a social and well-being impact. This becomes particularly interesting when most hubs are a private company.

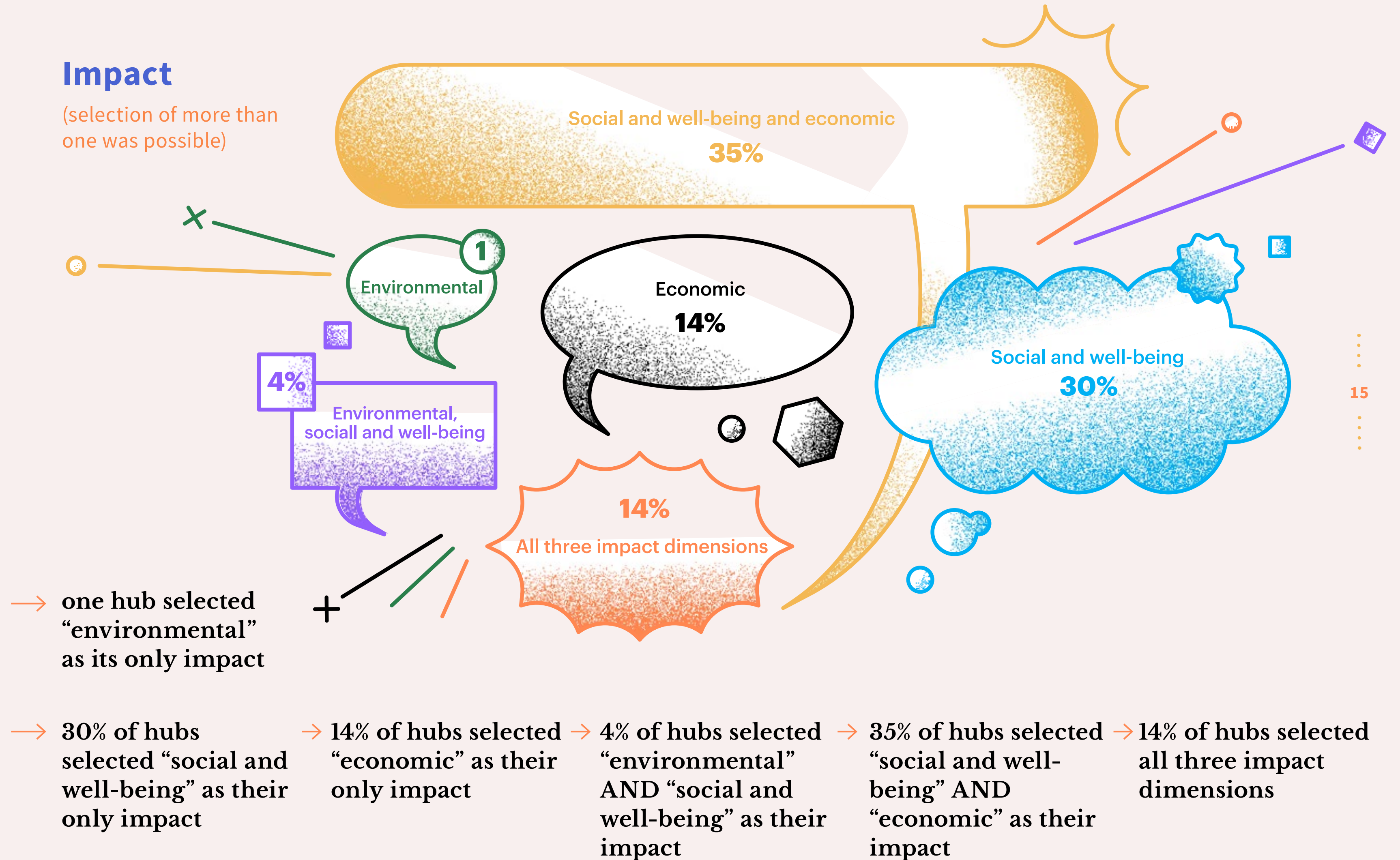
Is this a contradiction? Or is it a sign that their legal form is just an instrument to an end and perhaps caused by the non-existence of more compatible forms? What about the environmental

impact? Provided the major challenges that society is facing at this level, couldn't this also be an opportunity for hubs to demonstrate their strength and problem-solving capabilities?

These reflections are almost certainly a consequence of the new and recent nature of creative hubs. But despite the struggles they face, it is very reassuring to look at all the different complementary projects they are exploring, dealing directly with their impact and wider sense of community.

### Impact

(selection of more than one was possible)





## Inspiration from the hubs

Going beyond their core activities, creative hubs are also experimenting and implementing projects that ultimately impact on other dimensions and on how they aspire to grow their community. Here are some brief examples of what hubs are doing for your inspiration:

### \* Environmental

- urban garden;
- community farming;
- bee keeping;
- solar energy;
- recycling;
- DIY workshops;
- resource sharing;
- recycled materials for building renovations;
- repair café;
- roof garden;
- car pooling;
- paperless procedures;
- eco hackathons;
- cycling schemes;

### ⬡ Social and well-being

- literacy programmes for youth and unemployed;
- community breakfasts;
- Friday thematic bars;
- yoga and mindfulness classes;
- dance classes and sport activities;
- games night;
- child care;
- activities with refugees;
- fundraising for social impact organisations;
- book fairs;
- art exhibitions;
- reaching out to local community and minorities;
- tree planting;



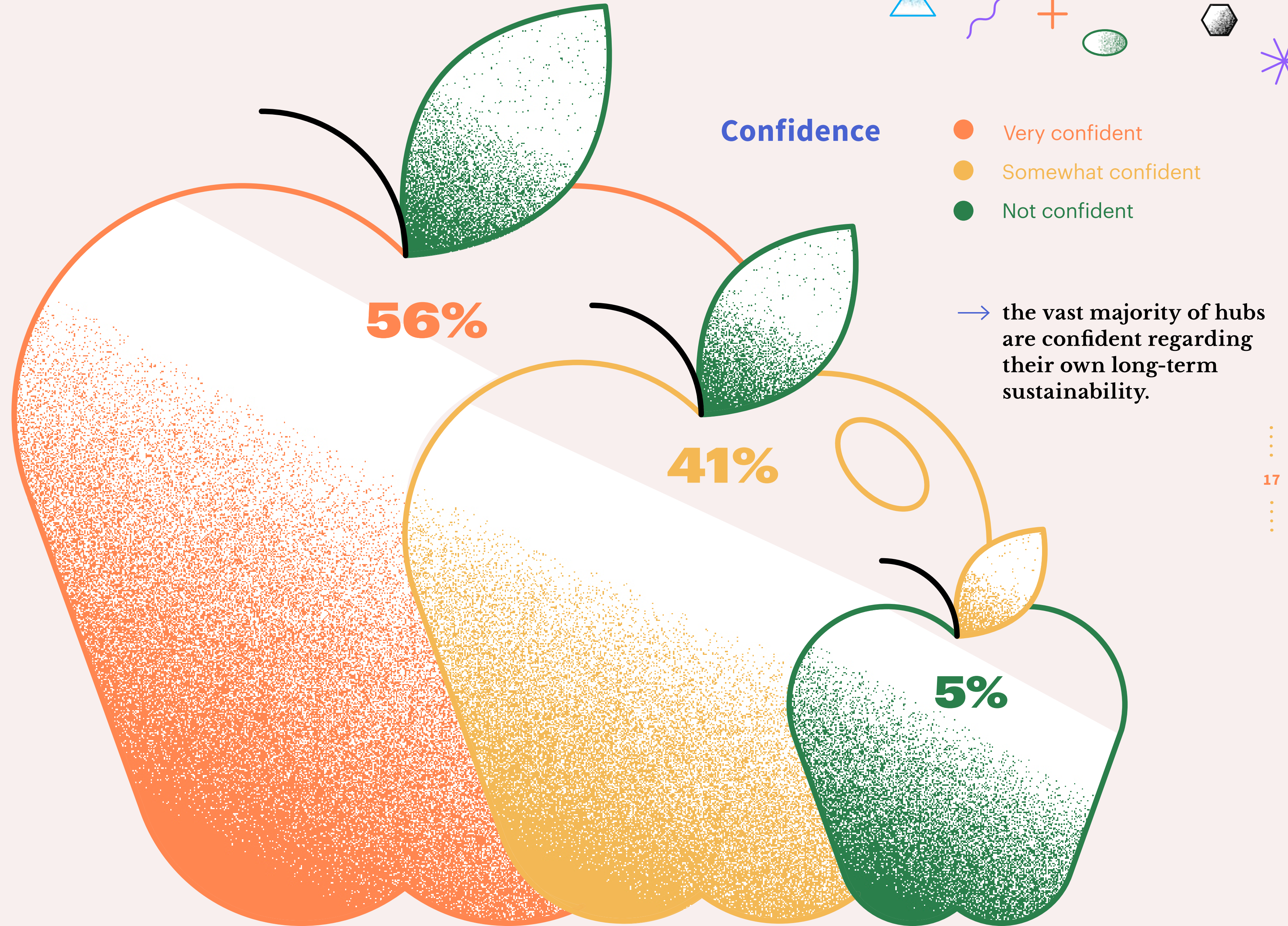
## ▶ 3.4. FUTURE

### What about the future and next steps?

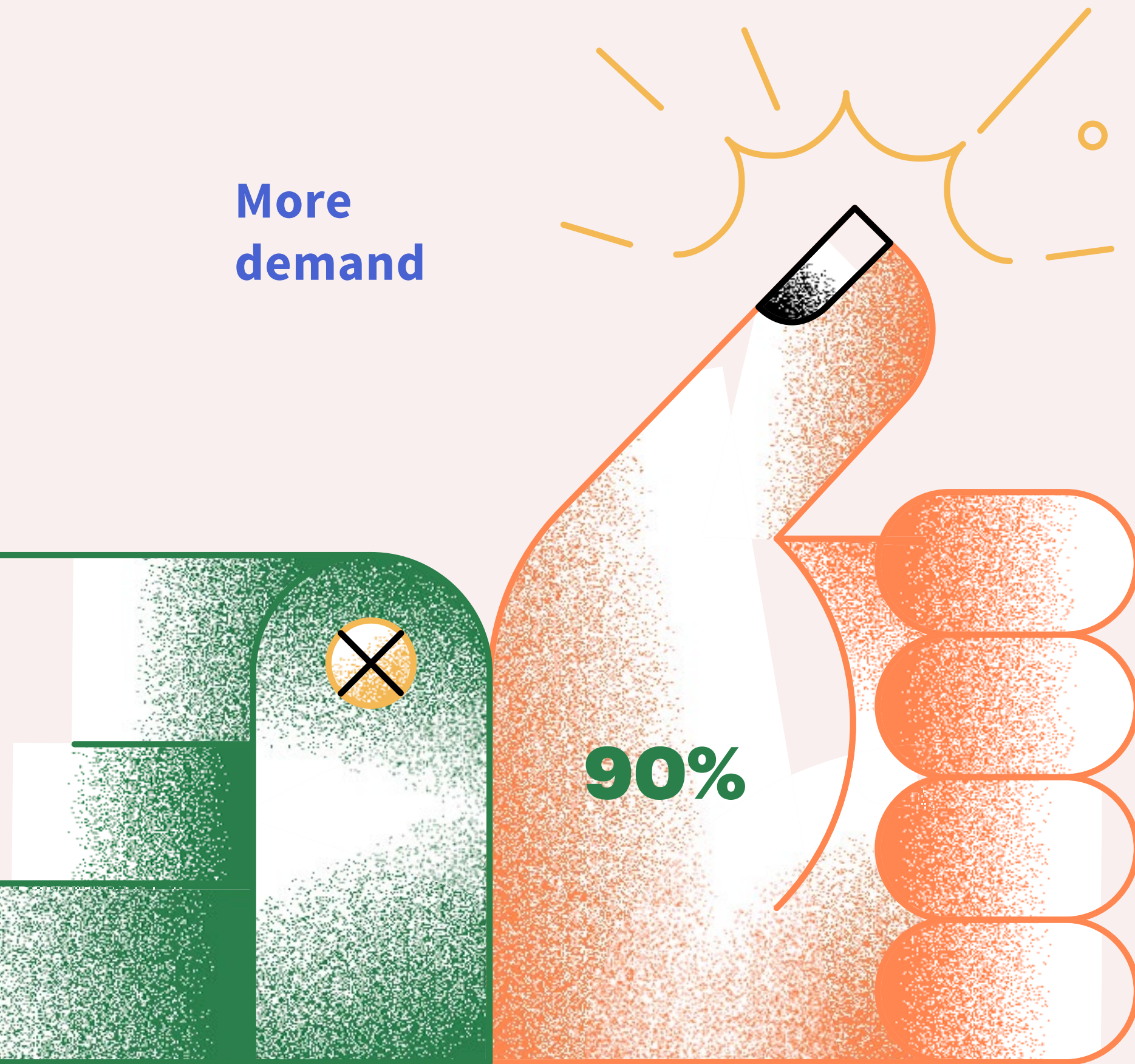
One of the clearest conclusions from this Barometer is certainly that hubs expect an even better year, both regarding expected demand and their own confidence.

After structuring their fundamental operations and strategies, hubs now aim to go further and is particularly interesting to note how most want to increase their service offer.

Alongside their expectations are their needs on making their journey as a community with international visibility and from whom they depend to take it to the next level.



More demand



90%

YES

→ hubs strongly believe that in 2018 there will be a higher demand for organisations such as creative hubs and the services provided by them



10%

NO

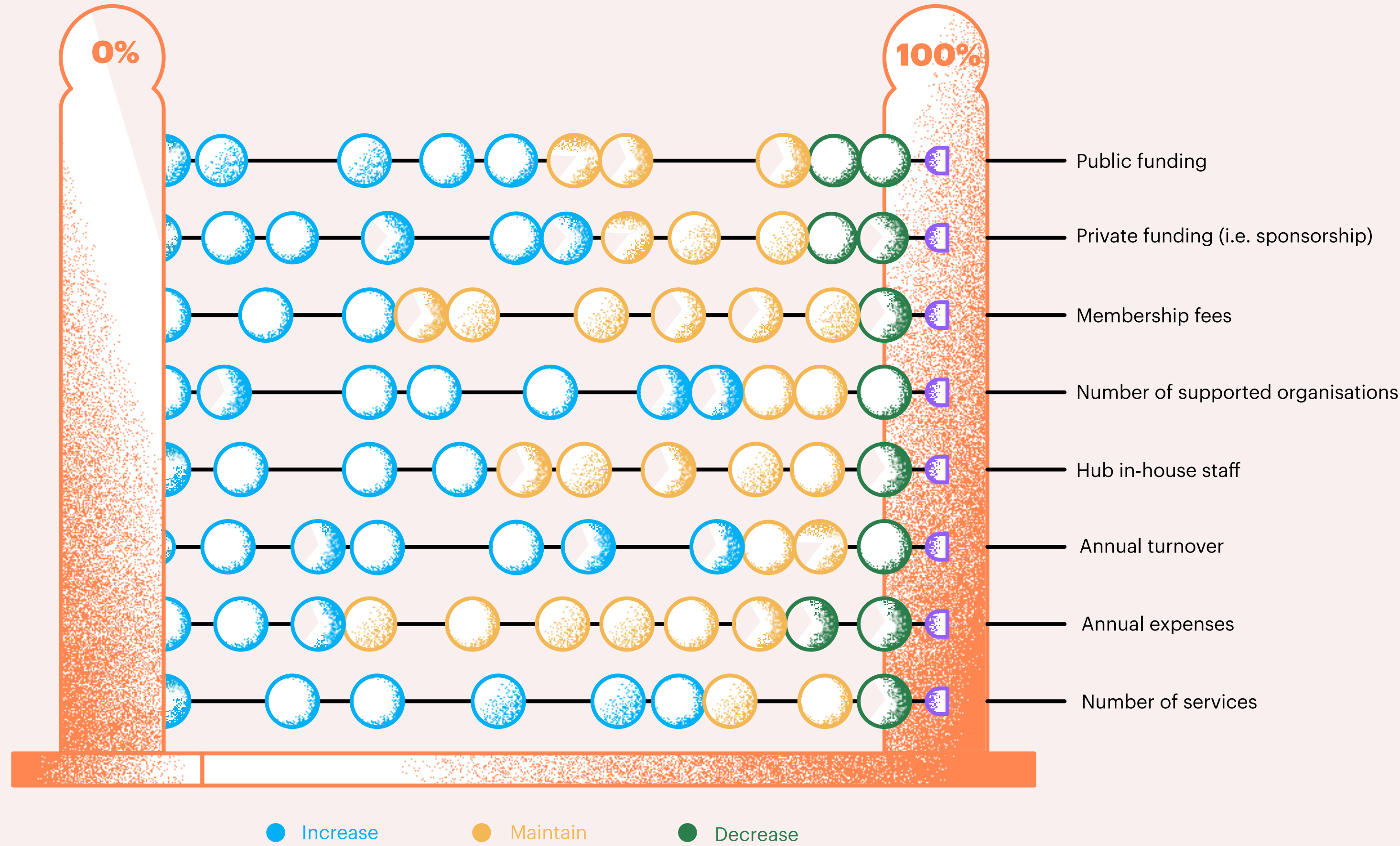
**Confidence for higher demand can be summarized according to the following points** (summarized from the responses provided by each hub):

- hubs seen as an interesting way of collective working, shared resources and networking, particularly for a growing freelancer community;
- the possibility that hubs offer to provide more organised solutions to societal and economic problems;
- awareness of other creative hubs being created or at least the existing interest in opening them;
- limited or non-existence response by the hubs to the high number of requests received by entrepreneurs to join in;
- the need for human contact, to be part of something new or to share experiences and how hubs can respond positively; and
- the increased recognition of the creative industries added value and hubs themselves as an opportunity for big companies.

**Less confident hub managers point out the following reasons:**

- demographic issues which might lead to a decreased workforce and as such a decreased demand for hubs; and
- an already high availability of creative hubs.

## Strategic decisions for 2017



## Main challenges / decisions for the next year?

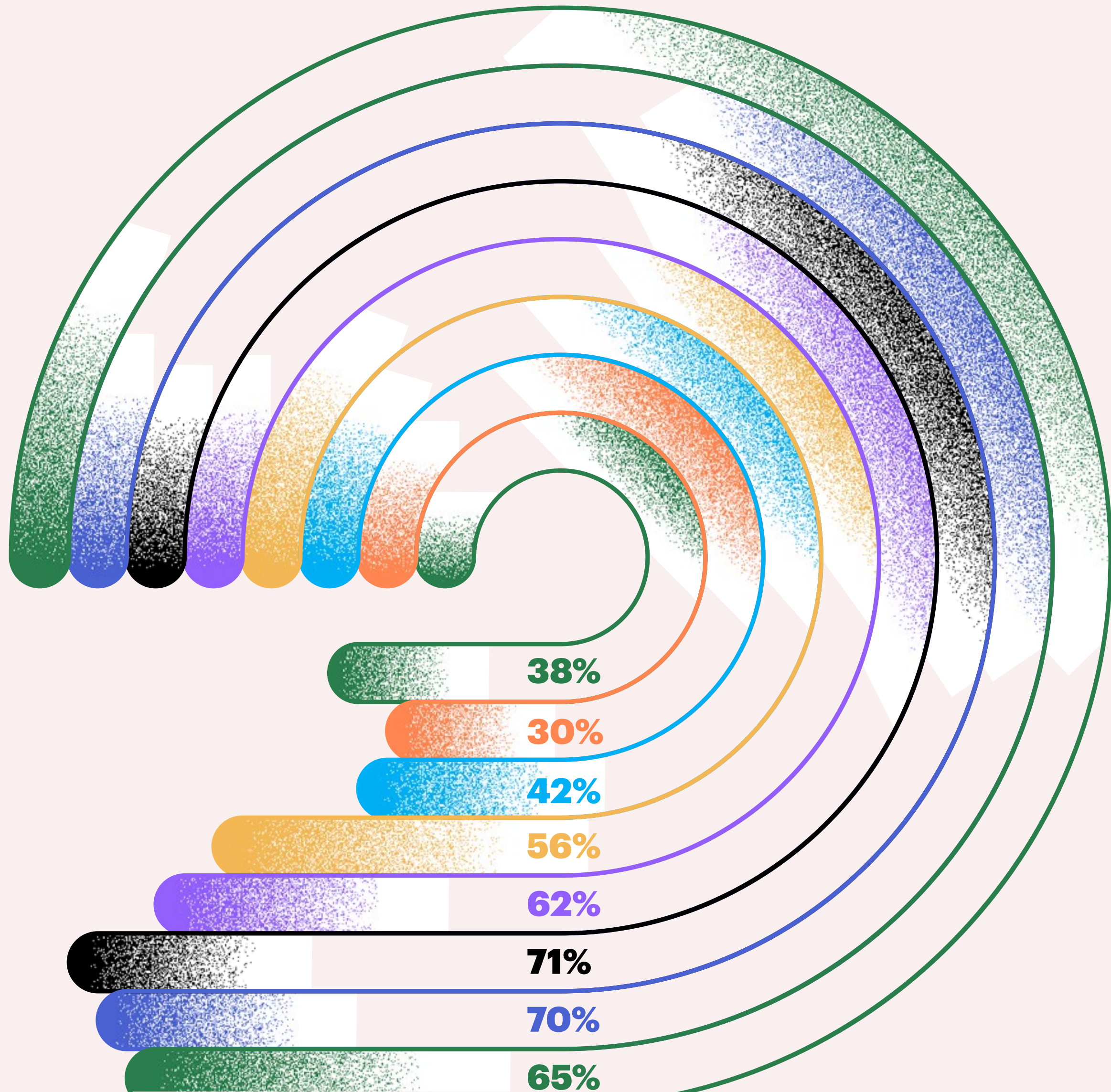
- Focus on economic / financial sustainability (including alternatives to public funding);
- Connection / reinforcement to other sectors (cross-fertilisation) and areas (such as academia)
- Development and strengthening of the community;
- Managing the influence of the real estate companies and possible negative impacts on hubs; - Better capacitation for their members in response to concrete needs (strategy, sales, etc.);
- Increased political lobbying (for a better legal framework for hubs, for a better cultural policy and for a better legal protection of freelancers);
- Managing the Brexit process;
- Balance between economic and social impact;
- Continuous international networking and peer-to-peer knowledge sharing;

→ overall the response to these indicators show a positive trend in the hubs intentions for further development

→ hubs also show an intention to increase their service offer

→ this is reflected on their intention to increase number of supported organisation, increase turnover, increase staff and decrease expenses

→ there is also a slightly higher number of hubs that intend to increase private funding, when compared to public funding



### Network advocacy priorities (at policy-making level)

- Obtain support for travel and accommodation grants
- Strategic development to increase membership
- Communication and digital engagement to keep community involved
- Strategic development on fundraising for the network's activities
- Research, training and capacity building opportunities
- Joint communication to increase external visibility of hubs, and disseminate information, research and...
- Strategic development to secure (international) partnerships
- Joint advocacy to influence policy making to reflect needs of hubs

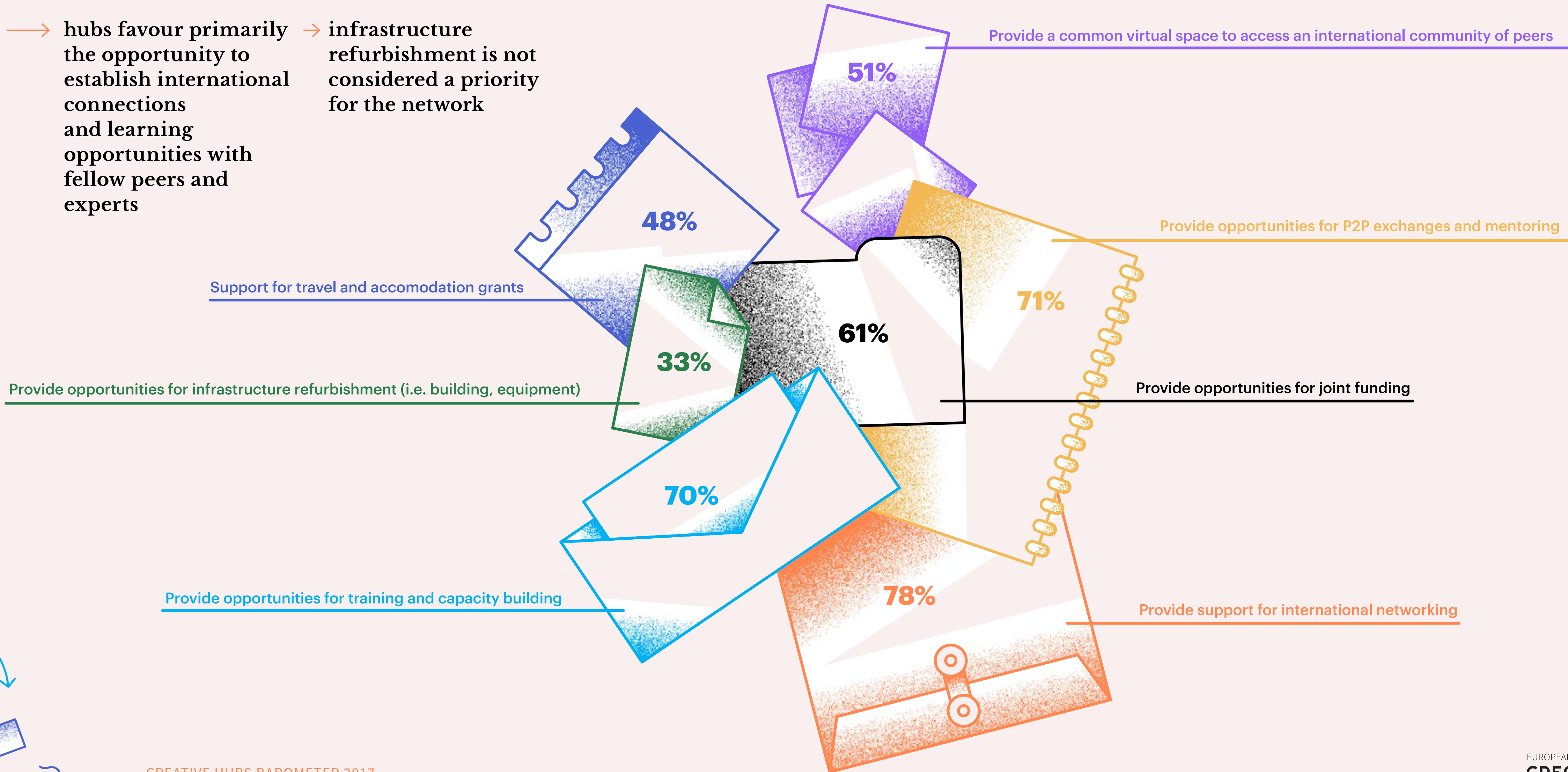
→ hubs favour mainly a common representation of their interests and visibility at the European level together with the facilitation of international partnerships

→ hubs also have an interest in being provided capacitation support in different dimensions (training, fundraising, community engagement, etc.)

# Network activity priorities (for its members)

→ hubs favour primarily the opportunity to establish international connections and learning opportunities with fellow peers and experts

→ infrastructure refurbishment is not considered a priority for the network



# 4. CHALLENGES AND RECOMMENDATIONS

As a recent phenomenon, Creative Hubs are still establishing their positioning in the wider economic, social and cultural setting. They are nonetheless change (and changing) agents in what is still an atomised sector, that requires careful and precise support.

Creative Hubs are therefore representing a promise to strengthen the cultural and creative industries, by bringing together a local community of professionals, promoting its valorisation, developing a sense of ownership or increasing working conditions, to name a few challenges.

To fulfil such promise, work must then continue at different levels, namely by creative hubs managers and political stakeholders.

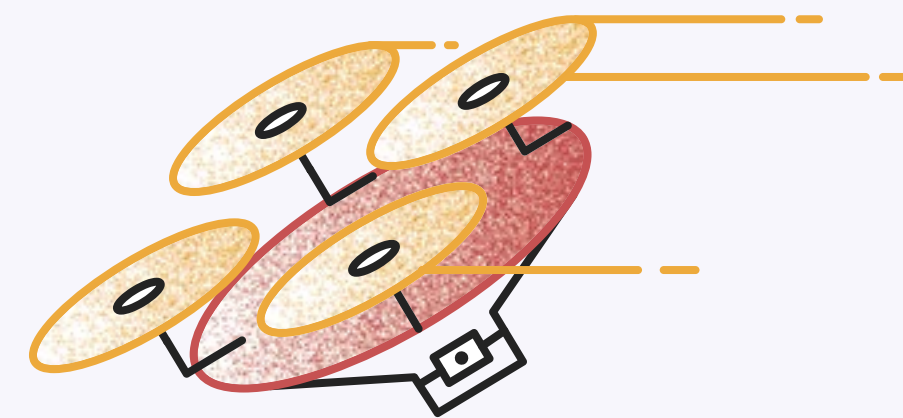
This first exploratory Barometer provides a set of insights from which we have derived them onto challenges and recommendations for reflection and action:

*(details on the next page)*



## Consolidation of operations

The upcoming years will still be a period for settling and hubs are eager to consolidate their activities, particularly now that the economic crisis is being left behind. This requires a continuous effort on the financial, human and physical resources level; a particular effort should be on strengthening their financial capacity. Policy makers should continue the development of programmes targeting directly creative hubs, which allow them to carry their daily activities, while consolidating their operations.

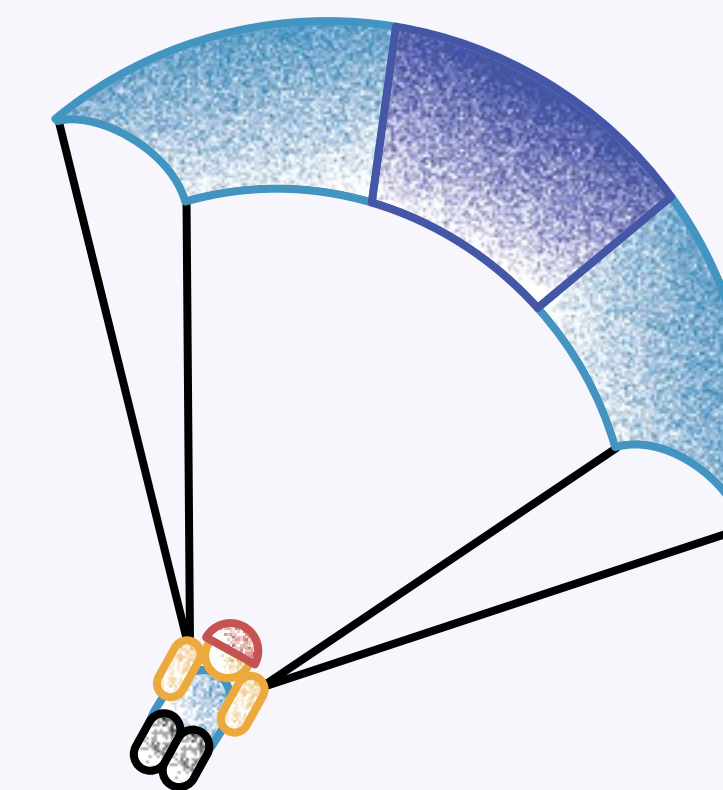


## Higher reach

As creative hubs aim at increasing their service offer and supported organisations and individuals, fundamental changes are required if a high-quality service and impact is desired. Taking it to the next level demands dedicated and specialised staff and appropriate partnerships. Hubs should then continue their own capacitation and to reach out to relevant knowledge production centres such as universities, R&D and innovation centres, as well fellow hub managers. Public policies can have a particular role here by establishing support programmes, but also by providing incentives to both hubs and referenced knowledge production centres to establish partnerships.

## Finding the bottom line

As change agents that have learned to quickly adapt to the requests of today's society, creative hubs are an exceptional place where interdisciplinary and critical thinking can meet to make thoughtful decisions on their positioning towards their own community and society at large, particularly when it comes to the economic, social, cultural or environmental dimensions. Such decisions can have a tremendous impact, which is why it is also a unique opportunity for policy makers to help establish a new framework that can fully support creative hubs reaching their potential when it comes to addressing the major societal challenges we are facing today.



## Strengthening the community

One of the clearest conclusions from the Barometer deals precisely with the sense of community in which hubs need to continue their activities. It is then a major priority that creative hubs continue sharing expertise and to develop a common voice at national and international level.

# 5. METHODOLOGICAL NOTES

## The development of the Barometer was prepared in four stages:

- definition of Barometer framework and aim
- design of online survey
- dissemination and response gathering
- data analysis and report development

## Preliminary notes:

- collected data was requested to represent the hub on the 31st December 2016
- individual hub data is confidential (only aggregated data is presented in this report)
- all responses were made mandatory
- as a pilot explorative project, sampling methods were not applied, which means that data and conclusions might not be fully representative of the creative hubs ecosystem

## Analysis:

- each question was provided a factual analysis, deriving directly from the data
- correlations were not established as statistically valid conclusions were not achieved, given the explorative nature of the Barometer
- whenever applicable, however, inquiries are made towards relevant issues that require further clarification for the upcoming Barometers

## Responses:

- a total of 82 responses were collected
- 4 were eliminated from the sample as one hub was yet to be created (and with no operations on-going) and remaining hubs responded twice
- hubs created in 2017 were included as their operations are already on-going
- a total of 78 responses were considered valid
- a total of 63 responses were considered for the financial results questions (turnover and expenses), as the remaining responses included invalid characters for analysis
- the list of all respondents is presented in the next chapter



# 6. LIST OF PARTICIPANTS

**1535° Creative Hub** (Differdange, Luxembourg)

**Art\_Inkubator in Art Factory** (Łódź, Poland)

**ATOLYE** (Istanbul, Turkey)

**AMI - DYNAMO platform** (Marseille, France)

**Audiovisual Arts Industry Indubator** (Vilnius, Lithuania)

**Baltic Creative** (Liverpool, UK)

**BASE Milano** (Milan, Italy)

**Beta Bar** (Bar, Montenegro)

**Betahaus** (Berlin, Germany)

**Bios Romantso** (Athens, Greece)

**Blick Shared Studios** (Belfast, UK)

**Boom! Studios** (Bangor, UK)

**Brussels Art Factory** (Brussels, Belgium)

**Business Hive Vilnius** (Vilnius, Lithuania)

**Center for Creativity Targowa** (Warsaw, Poland)

**CodeBase** (Stirling, UK)

**CoEspai Girona** (Girona, Spain)

**Comptoir des Ressources Créatives** (Liege, Belgium)

**Cook Hub** (Zagreb, Croatia)

**Creative Centre Poligon** (Ljubljana, Slovenia)

**Creative Dundee** (Dundee, UK)

**Creative Edinburgh** (Edinburgh, UK)

**Creative Factory** (Nantes, France)

**Creative house Skola6** (Cesis, Latvia)

**Creative Industries Network** (Madrid, Spain)

**CRU Cowork** (Porto, Portugal)

**DarbaVieta** (Riga, Latvia)

**Die Bäckerei - Kulturbackstube** (Innsbruck, Austria)

**DINAMO10** (Viana do Castelo, Portugal)

**FabLab Lisboa** (Lisboa, Portugal)

**Factoria Cultural** (Madrid, Spain)

**Ffangai** (Cardiff, UK)

**Flancon1170** (Sochi, Russia)

**Flash Office Solutions** (Bucharest, Romania)

**Give Sound of Your City** (Istanbul, Turkey)

**Godsbanen - The Freight Yard** (Aarhus, Denmark)

**HALA 100** (Split, Croatia)

**HIGGS** (Athens, Greece)

**Hill Street Design House** (Edinburgh, UK)

**HUB385** (Zagreb, Croatia)

**Iktinou Residency by ODC: THE ΦΛΑΤ** (Athens, Greece)

**Impact Hub Belgrade** (Belgrade, Serbia)

**KPH** (Copenhagen, Denmark)

**La Colaboradora - Zaragoza Activa** (Zaragoza, Spain)

**La Coursive Boutaric** (Dijon / Besançon, France)

**Las Naves** (Valencia, Spain)

**Liga Park** (Rostov-on-Don, Russia)

**Lottozero** (Prato, Italy)

**MA SPHERE** (Toulouse, France)

**Make Liverpool CIC** (Liverpool, UK)

**Many Studios** (Glasgow, UK)

**MART** (Dublin, Ireland)

**Materahub** (Matera, Italy)

**Mercato Sonato** (Bologna, Italy)

**Moving Gallery** (Tbilisi, Georgia)

**MOB Makers of Barcelona** (Barcelona, Spain)

**Nod makerspace** (Bucharest, Romania)

**Nova Iskra** (Belgrade, Serbia)

**POINT** (Bucharest, Romania)

**Public Room** (Skopje, Macedonia)

**Rational International** (Zagreb, Croatia)

**Republikken** (Copenhagen, Denmark)

**Social Innovation Hub** (Skopje, Macedonia)

**Spinoza** (Paris, France)

**Talent Garden Barcelona** (Barcelona, Spain)

**The FuseBox** (Brighton, UK)

**The Melting Pot** (Edinburgh, UK)

**The Generator** (Loughborough, UK)

**TAKTAL** (Glasgow, UK)

**Tramshed Tech** (Cardiff, UK)

**The Living Room** (Málaga, Spain)

**The Tara Building** (Dublin, Ireland)

**Tuzla Live Association - BRDO Coworking Space** (Tuzla, Bosnia and Herzegovina)

**Uxio Novoneyra Foundation** (Santiago de Compostela, Spain)

**UPTEC - Science and Technology Park of the University of Porto** (Porto, Portugal)

**Valletta Design Cluster** (Valletta, Malta)

**Warehouse Coworking Factory** (Marotta, Italy)

**Wasps studios** (Scotland, UK)

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