DISCE

**DEVELOPING
INCLUSIVE
AND SUSTAINABLE
CREATIVE ECONOMIES**

DISCE CASE STUDY FRAMEWORK

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Executive summary

At the centre of the research design for *Developing Inclusive and Sustainable Creative Economies* (DISCE) are regional case studies in ten European regions. We argue for the importance of adopting an 'ecological' approach to understanding (and managing) creative economies. Such an approach necessarily influences the conceptual and methodological framing of each work package, and of the DISCE project overall. Therefore, this report discusses the activities of Work Package 3, 4 and 5 (WP3-5) together, and their impact upon the case study framework for DISCE as a whole.

Drawing on the methodological literature (Stake 2005; Easton 2010; Gillham 2010; Swanborn 2010; Remenyi 2012; Yin 2014; Thomas 2016), this report begins with a discussion of the distinctive features of case study research, and why case studies are particularly appropriate and useful for DISCE. It then gives more detail of the specific approach to case study research the DISCE team has developed, and explains how we will generate and gather our data. The paper concludes with a presentation of the provisional case study sequencing and timetable, as well as further details of our procedures for analysing the case study data, and our plans for reporting.

Please note: This regional case study framework is a living document that will be updated during the course of the project, including, in particular, in the light of our pilot case study (discussed below).

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1. Case Study Research: An Overview and the DISCE Approach

What exactly are case studies? What distinguishes case studies from other approaches to research? What are their specific capacities for generating new knowledge? And how exactly will we be making use of a case study approach as a central part of *Developing Inclusive and Sustainable Creative Economies*?

1.1 What is Case Study Research?

Despite their widespread use, the methodological literature on case studies is "comparatively speaking, not vast, and is actually very heterogenous" (Swanborn 2010: 12). Perhaps the best known text on the subject is Robert Yin's *Case Study Research: Design and Methods*, now in its sixth edition. Yin offers a two-fold definition of a case study. The first part addresses the 'scope' of a case study. He explains that it:

- investigates a contemporary phenomenon (the "case") in depth and within its real-world context, especially when

- the boundaries between phenomenon and context may not be clearly evident. (Yin 2014: 17)

The second part of the definition highlights specific methodological features. This type of inquiry:

- [...] relies on multiple sources of evidence, with data needing to converge in a triangulating fashion, and as [...] result

- benefits from the prior development of theoretical propositions to guide data collection and analysis. (Yin 2014: 17)

There are several important points to note here, but one that is especially significant for DISCE is that case studies are particularly appropriate to the study of *phenomena whose boundaries are not clearly distinguishable from their context*. In the light of the work that members of the DISCE research team have undertaken previously on notions of creative *economies, ecologies, networks and clusters* (e.g., Comunian et al. 2010; Comunian 2011; Wilson et al. 2017; Wilson & Gross 2017; Gross & Wilson
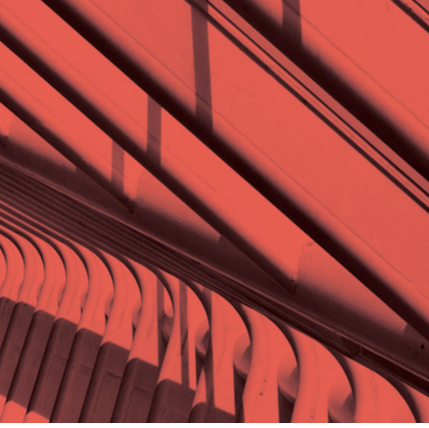
2018; Gross & Wilson 2019) – in which systems of creative practice have been found to be deeply and complexly embedded within their 'contexts' - this makes a case study approach particularly appropriate to the investigation of creative economies.

Gary Thomas suggests that case studies are "analyses of persons, events, decisions, periods, projects, institutions or other *systems* which are studied holistically by one or more methods." (Thomas 2016: 23 [emphasis added]) One methodological starting point for DISCE is the need to examine creative economies as *systems* – or ecosystems – characterised by interconnections and interdependencies. Here we should note a second feature of Yin's definition of case studies: that they typically "benefi[t] from the prior development of theoretical propositions to guide data collection and analysis." A second methodological starting point for DISCE is that the component parts and boundaries of creative economies are a matter requiring both empirical *and* conceptual investigation. Given DISCE's theoretical propositions with regards to the nature of 'creative economies' (discussed further in the WP5 literature review) – positing human experience and systemic relations / interdependencies as key features - a research approach that is specifically suited to addressing systems from multiple levels is ideal.

Thomas goes on to explain that, "The case that is the subject of the inquiry will illuminate and explicate some analytical theme, or object." (Thomas 2016: 23) As discussed further below, within the methodological literature there are a range of views regarding the role of theory within case study research. The important point to note here is that a case study will be a case *of* something. Whilst there are a variety of potential approaches to case study research, including some which are more 'exploratory' than others, unlike the classic ethnographic work of early twentieth-century anthropologists - in which the researcher undertakes participant observation with a general interest in understanding the way of life within a place - in case study research there is a (at least a minimal) *theoretical framing* of what the site of research constitutes an example of. For DISCE, these are examples of (existing / emerging / potential / absent) *inclusive and sustainable creative economies.*

It is also helpful to consider what a case study is *not*. Case studies typically employ multiple methods, and this can often involve the use of both qualitative and quantitative instruments. A case study does not necessarily only use qualitative methods. Yin discusses six types of data that may be employed within a case study: documents, archives (public records), interviews, direct observation, participant observation, and physical artefacts. This list can be extended much further, including the use of focus groups and surveys. Moreover, it is important to recognise that a case study is *"not a method, nor is it a set of procedures. Rather, it is a focus."* (Thomas 2016: 37 [Italics in original].) A case study is not a method as such. Nor is it, in itself, a full methodology: there can be many varieties of case study research committed to quite contrasting epistemological positions and methodological choices. Rather, it is helpful to think of a case study as a *research strategy* (Swanborn 2010: 22), which can be employed via a wide variety of specific methodological commitments and specific combinations of methods.

1.2 Why Make Use of Case Studies?

Yin suggests that "the distinctive need for case study research arises out of the desire to understand complex social phenomena." (Yin 2014: 4) Gary Thomas also emphasises that:

> The case study provides a form of inquiry that elevates a view of life in its complexity. [...] It's the realisation that complexity in social affairs is frequently indivisible which has led to the case study having the status of one of the most popular and most fertile design frames for researchers' work. (Thomas 2016: x)

As the definitions from Yin, Thomas and Swanborn indicate, one of the specific strengths of case study research is the possibilities it offers for studying the interconnections and interdependencies of social phenomena. It is precisely because of the complexity inherent to our object of study - creative economies - that a case study approach is required. The following comments from Swanborn speak directly to one of DISCE's key methodological commitments: *purposeful openness* with regards to the boundaries of creative economies. Within a case study approach:

> The phenomenon is studied in its natural surroundings because, at the start of the research, it is not yet quite clear *what the spatial and temporal boundaries of the phenomenon are*. In other words, it is not yet clear which properties of the context are relevant and should be included in modelling the phenomenon, and which properties should be left out. (Swanborn 2010: 15 [Italics in original])

It is instructive to consider the criticisms that have been made of case study research as being insufficiently 'scientific', by virtue of operating with too many components – too many 'variables'. Thomas suggests that, whilst we cannot identify a distinct school of case study thinking, as such, what unites the heterogenous field of case study research is "its emphasis on the whole – the holistic". (Thomas 2016: 47) In contrast to some of the dominant accounts of modern scientific method, the starting point taken within case study research is that "certain phenomena are *more* than the sum of their parts and have to be understood as a whole, rather than as a set of interrelating variables." (Thomas 2016: 47 [Italics in original]) For Thomas, such an approach is justified by the very nature of social phenomenon, as constituted by complex processes of meaning making. Social phenomena, by their very nature, require different methods to those studied within the natural sciences. In defending case study research from its (potential) critics, then, Thomas says that "A case study is about seeing something in its completeness, looking at it from many angles. This is good science. In fact it is the *essence* of good science." (Thomas 2016: 23 [Italics in original])[1]

These accounts of the distinctive strength and potentials of case study research closely connect with DISCE's ambition to paint a 'comprehensive picture' of creative economies. Moreover, the inherent orientation of case study research towards the use of a variety of methods speaks very directly to the interdisciplinarity of the DISCE project. Yin suggests that:

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[1] Moreover, DISCE's focus on cultural phenomena directs the research team to ensure that *people's experiences*, and specifically their experiences of (dis)connection – with others, with self, with the world – are included as a part of that 'completeness'.

Mixed methods research forces the methods to share the same research questions, to collect complementary data, and to conduct counterpart analyses (e.g., Yin, 2006b) [...]. As such, mixed methods research can permit researchers to address more complicated research questions and collect a richer and stronger array of evidence than can be accomplished by any single method alone. (Yin 2014: 66-67)

Given the complexity of our object of study, *inclusive and sustainable creative economies*, a research strategy that is specifically suited to drawing together a range of methods and perspectives is essential.

1.3 DISCE's Overarching Research Question

The ambition of the DISCE project - working with a wide range of meta-theoretical presuppositions and methods, drawing on a variety of disciplinary traditions, and across ten case study locations - poses challenges with regards to how best to ensure clarity and unity of purpose in the research design, whilst doing justice to the complexity of the object of study. The literature on case studies suggests that, when undertaking research of this kind, establishing clarity of purpose is key. For Thomas, "Designing research is like designing anything else – you start with a purpose and then plan how to achieve it." (Thomas 2016: 26) He describes the temptation of selecting aspects of research design before having identified the overall purpose. Swanborn offers a similar caution, reminding the reader that, "As in all research, in doing a case study we focus on the problem we want to solve." (Swanborn 2010: 16)

The overall research question that DISCE is seeking to answer is: ***What are inclusive and sustainable creative economies, and how can they be developed?*** The answer we provide to this question will, of course, involve many aspects and layers. The research has multiple strands, in order to provide responses to this question from a plurality of perspectives. This is necessary, given the complexity of the object of study – inclusive and sustainable creative economies – with many (visible and emergent) component parts and interrelations. Under the umbrella of our overarching question we are addressing a range of sub-questions with regards to:

1) Data [led by WP2]

2) Higher education, work, skills and (in)equality [led by WP3]

3) Business models and business modelling [led by WP4]

4) The conceptual and normative bases of creative economy discourse and practice [led by WP5]

5) Policy [All]

Additionally, in answering our overarching research question, we of course need to engage with how *inclusive and sustainable creative economies* have been understood previously – whilst recognising that we are constituting an object of study in a particular way, that is not precisely the conceptualisation that other researchers, policy-makers and practitioners have operated with. In this context, it is important to consider further the role of theory within case study research.

1.4 What is the Role of Theory Within Case Study Research?

As indicated above, Thomas explains that to be a 'case', the phenomenon studied needs to be a case of something (Thomas 2016: 14). He suggests that case study research comprises two parts, firstly "a subject" (i.e. an example / site of research), and secondly, "an analytical frame or object." (Thomas 2016: 15) This, of course, requires a formulation by the researcher(s) of what this is a case of. Here Yin takes a strong line on the need to articulate *propositions* as part of case study research.

> [The] role of theory development, prior to the conduct of any data collection, is one point of difference between case study research and related qualitative methods such as ethnography [...] and *grounded theory* [...]. Typically, these related methods may deliberately avoid specifying any theoretical propositions at the outset of an inquiry (nor do these methods have to cope with the challenge of defining [the boundaries of] a "case"). [...] The theoretical propositions can represent key issues from the research literature or practical matters such as differing types of instructional leadership styles or partnering arranging in a study of organizations. Such propositions will enable the complete research design to provide surprisingly strong guidance in determining the data to collect and the strategies for analyzing the data. For this reason, some theory development prior to the collection of any case study data is desirable. (Yin 2014: 37-8 [Italics in original])

DISCE is studying its ten cases as examples of (existing / emerging / potential / absent) *inclusive and sustainable creative economies*. We have done foundational analytical work on the notions of 'inclusive', 'sustainable' and 'creative economies', (discussed further in other outputs, including the WP5 literature review), and the fieldwork will be conducted in relation to these theoretical propositions, whilst intended to speak back to – and develop further – those propositions.

1.5 What Forms of Generalizable Claims Are Case Studies Able to Support?

The question of the role of theory within case study research relates closely to the issue of whether, how and to what extent case studies can form the basis for generalizable research findings. Here Swanborn draws on the distinction between *extensive* and *intensive* approaches to research. An extensive approach collects information "about the relevant properties of a large number of instances of a phenomenon" drawing conclusions by "calculating and interpreting correlations between the properties of these examples." Contrastingly, an intensive approach focuses on only *one* specific instance of the phenomenon being studied, or only a handful of instances in order to study a phenomenon in depth." (Swanborn 2010: 1-2 [Italics in original]) In the light of this categorization, Swanborn poses the question of what forms of generalizable claims intensive research, such as case studies, can support.

In responding to this same question, Yin distinguishes between two types of generalization: *statistical generalization* and *analytic generalization*. (Elsewhere, the first of these is referred to as 'sample-to-population' generalization). He suggests that:

> case studies, like experiments, are generalizable to theoretical propositions and not to populations or universes. In this sense, the case study, like the experiment, does not represent a "sample," and in doing case study research, your goal will be to expand and generalize theories (analytic generalizations) and not to extrapolate probabilities (statistical generalizations). (Yin 2014: 21)

This distinction, whilst not employed by all writers on case study methodology, is a useful heuristic with which to clarify the specific methodological approach we are taking in the DISCE project. It underpins our research design – and the decision making that underlies it - at several stages in the project. This ranges from the rationale for the selection of our case study locations (discussed below), to how we ultimately articulate the implications of our case study findings. Yin argues that:

> A fatal flaw in doing case studies is to consider statistical generalization to be the way of generalizing the findings from your case study. This is because your case or cases are not "sampling units" and also will be too small in number to serve as an adequately sized sample to represent any larger population. […] Rather than thinking about your case as a sample, you should think of it as the opportunity to shed empirical light about some theoretical concepts or principles […]. (Yin 2014: 40-41)

Building on Yin's account of analytic generalizability, Swanborn explains that "in case study research, it is assumed that we do not deal with a sample-to-population logic, but with generalizing from case results to a theory or model." (Swanborn 2010: 66). It may seem that Yin and Swanborn are in danger of underplaying the capacity of case studies to generate distinctively empirical findings, (especially in the case of a large scale project such as DISCE, with ten case studies). However, Yin does clarify that "the aim of analytic generalization is still to generalize to other concrete situations and not just to contribute to abstract theory building." (Yin 2014: 41) He further clarifies that an analytic generalization "can take the form of a lesson learned, working hypothesis, or other principle that is believed to be applicable to other situations (not just other "like cases")." (Yin 2014: 68)
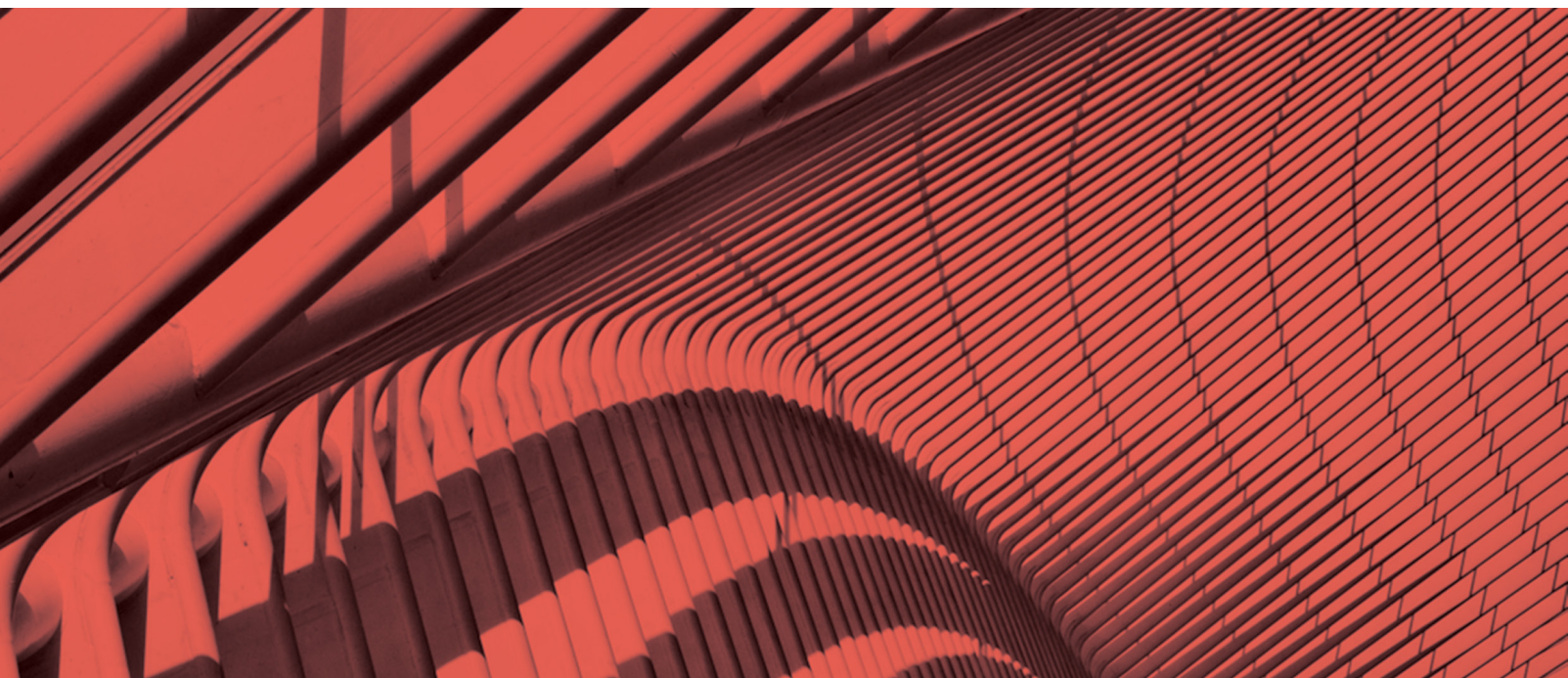
In defending the capacity of case study research to generate insights of significance beyond the specific case(s), Thomas argues that those who claim case studies suffer from their inability to generate generalizable findings fail "to recognise the limits of induction in the social sciences generally". (Thomas 2016: 70) He employs the notion of 'abduction' to refer to a particular kind of generalization that he argues is typical of the social sciences: "making a judgement concerning the *best explanation* for the facts you are collecting" (Thomas 2016: 70 [emphasis added]). This is not the same as the inductive reasoning employed within the natural sciences. Thomas, then, takes a slightly different position to Yin with regards to how he articulates the mode of generalization that case study research enables. None the less, in language that is close to Yin's, he suggests that "Developing or testing theory can be thought of as being at the centre of case study." (Thomas 2016: 70)

The overall DISCE research design combines ten case studies (which each involve a wide range of data collection methods, outlined below) with the analysis of regional, national and EU-wide quantitative data (led by WP2). Through this combination of approaches, the DISCE project is specifically designed to contribute new analytical generalizations *and* new statistical generalizations: as well as providing rich empirical findings with regards to ten specific locations across Europe.

1.6 Rationale for DISCE's Location Selections

As indicated above, the issue of the generalizability of case study findings is closely connected to the question of what rationale to employ in choosing case study locations. Yin suggests that it is a misunderstanding to attempt to select cases that are 'representative' of a sample population. This concurs with the approach we have adopted.

During the project inception phase, the following criteria were developed as the primary basis for the case study selection:

1.   *The location has not already been extensively studied* [a qualifying criterion]

2.   *Size (population of approximately 150,000)* [a qualifying criterion]

3.   *Future planning (levels of self-recognition of the cultural eco-system within the location: for example, cultural strategy documents, bids to be a Capital of Culture)* [seeking a diverse spread of case study locations against this criterion]

4.   *Current profile (density of cultural and creative infrastructure)* [seeking a diverse spread of case study locations against this criterion]
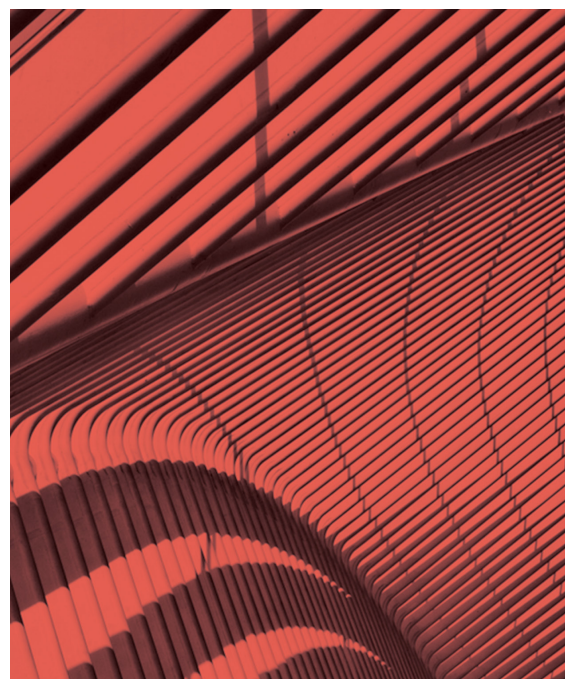
Next, the DISCE project used the preliminary information from the quantitative mapping (see below), secondary data sources, and the research team's existing knowledge of the potential locations in their regions, to investigate potential case study locations against these four criteria. This process involved identifying potential case study locations across five geographic regions of the EU: British Islands (2), Northern Europe (2), Central Europe (2), Southern Europe (2) and Eastern Europe (2).

For this purpose, a template was developed to draw information on the potential locations (Appendix 1). This process resulted in over twenty potential case study locations being investigated. Thereafter a qualitative mapping of the potential case study locations was undertaken across the qualitative criteria resulting in a preliminary selection of ten case studies. These case studies were widely spread across an informal graph, which served as a heuristic device with which to compare the approximate profile of each of our potential case study locations, against criteria 3 (Future planning) and 4 (Current profile).

In making this overall selection of ten locations, we have tried to ensure a good spread of creative economy activity: from traditional arts, culture and heritage, through to design, animation, computer games, etc. (i.e. some locations have obvious strengths in traditional performing arts; others have strengths in technologically-advanced creative industries). The creative industries have been defined and subsequently categorised in a variety of ways, including UNCTAD's four group classification – heritage, arts, media, and functional creations. The UNCTAD classification served as a starting point also for our case study approach. As important as our understanding of CCI sectoral and cross-sectoral performance remains, taking due account of the *ecological* nature of creative economies demands that the research design 'moves beyond' a sectoral approach *per se*.

With the aim of involving a diverse range of cities meeting the criteria outlined above, we have made a selection of ten case studies that, in combination, make a good set. The final selection was dependent upon the desk research and on the accessibility / feasibility of the case study location (e.g. by finding a local partner to assist in accessing the relevant local actors as well as in gathering information about the local institutions and interviewees), which were found highly important based on the insights generated through the pilot case study, conducted in Central Europe.

1.7 Initial Quantitative Mapping of DISCE Case Study Locations

DISCE combines qualitative and quantitative methods within the ten case studies. As part of the inception phase, Eurostat data has been used by WP2 to identify key statistical features of potential case study locations. In particular, maps of the possible case studies have been created, showing how the selected locations fit into the wider European NUTS-3 and NUTS-2 pictures. In this way, WP2 has contributed to the identification of case studies jointly with the other WPs. Over the course of the DISCE project, WP2 will develop a statistical profiling of the case study locations concerning the creative economies in those locations. The case study areas will be analyzed against a range of indicators, and their performances compared with other regions inside the same country, but also across countries.

1.8 Why Study Ten Locations?

"The research question dictates many of the operational aspects of an academic research programme." (Remenyi 2012: 37) For DISCE, given the central concern to understand *What are inclusive and sustainable creative economies, and how can they be developed?*, it is necessary to undertake a comparatively large number of case studies. This relates to one of the project's premises, that creative economies are by their nature complex interdependent systems, involving (tangible and intangible) resources, relationships, and experiences of many kinds. On this basis, and accommodating the possibility of high levels of specificity / idiosyncrasy within particular cities, studying ten locations allows for a greater opportunity to observe commonality as well as specificities, providing stronger grounds for theoretical generalizability than a smaller number of cases would enable. Moreover, given that one of the contexts of the study is 'Europe', and to take Europe as a geographical frame for our central research question, involving case studies across a comparatively wide range of European locations is necessary. On the other hand, ten case studies constitutes the upper limit of what is practical within the resources of this research project, in undertaking case study research of this kind.

1.9 Establishing the 'Logic' of DISCE's Research

As Yin explains, all types of empirical research have a *research design*, whether these are implicit or explicit. "In the most elementary sense, the design is the logical sequence that connects the empirical data to a study's initial research questions and, ultimately, to its conclusions." In other words, "a research design is much more than a work plan". It deals with "a *logical* problem and not a *logistical* problem. (Yin 2014: 28-29 [italics in original]). In the preceding sections we have established the logic of the research, in linking the research question to the research methods, location selections, and indicating the kinds of generalizable claims we will be ultimately making. We have done so, primarily, by reflecting on what it means for DISCE to be taking a 'case study' approach.

1.10 Doing 'Inclusive' Research

Our research ethics procedures have been fully approved, in compliance with the standard practices of DISCE's partner universities. For further details of our research ethics procedures, please see DISCE WP7 deliverables: Ethics Requirements.

Over and above these requirements, one of the specific commitments of this research project, *Developing Inclusive and Sustainable Creative Economies*, is that the research process will itself be inclusive. Undertaking an inclusive approach to this research is both an epistemological imperative (i.e. understanding creative economies as complex systems necessitates an inclusive approach to participant recruitment and involvement) and an ethical one. In the WP5 literature review, we discuss a range of ways in which 'inclusive research' has been understood and practiced, and indicate the specific approach to inclusive research we are developing (iteratively) within DISCE. In doing so, we are engaging particularly with literatures on care, and exploring new possibilities for research practices informed by *ethics of care*.

2. Case Study Research Materials

Each case study adopts a coordinated multi-method approach on three levels (see Comunian 2019).

(1) *Micro-level:* the analysis will focus on individuals: creative workers but also aspiring creatives (such as graduates aiming to enter the creative labour market) as well as individuals that contribute to the local creative economies in informal ways (volunteer, participants, etc.). This level of analysis is also important in terms of gathering data about people's *experiences*, which are central to our understanding of creative economies.[2]

(2) *Meso-level:* here we examine the organisations, interconnections and infrastructures that bring people together. This may include (in)formal companies or volunteer groups, and the networks that bring together these organisations and their cross-collaboration (such as creative clusters, community hubs). They can be more formal organisations, such as public sector arts institutions or large companies.

(3) *Macro-level:* explores macro-level interactions and outputs – specifically, creative economy manifestations in terms of geographical ecosystems and the interactions between creative production and consumption, and the role of policy within these. At this level, we examine the overall profile of the city-region, in quantitative but also policy terms. In doing so, we address systems of producing and exchanging resources and value (including systems of value recognition).

This overall approach to the case studies, addressing micro, meso and macro scales, will facilitate an 'ecological' approach to the analysis (see, for example, Gross and Wilson 2018; Gross and Wilson 2019). Through this research design, and the close collaboration between WPs 3-5, we thereby overcome limitations of current research that tends to be limited within specific scale boundaries and only rarely aim to capture multi-level perspectives (across the micro-, meso- and macro-levels). As highlighted by Comunian (2019), we will not only look at the various levels but also at the interconnections and interaction across levels. For example, what might enable

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2   See the WP5 literature review for further discussion of the specific account being provided here of the centrality of 'experience' to understanding creative economies.

individuals working in a creative sector to come together with shared views and start a new organisation or campaign? An overview of the data collection templates and instruments that will be applied to each case study, is presented in Appendix 2.

2.1 Pilot Study

The research has been specifically designed to promote sharing, connection and overlap between WPs, enabling deep collaboration and interdisciplinary dialogue. This includes training DISCE's post-doc researchers, supporting them to play vital roles in the interdisciplinary research - working across different methods, and between academia and policy. Furthermore, in order to provide a strong foundation and harmonisation of the practices in reference to data collection and empirical work, the case study from the Central Europe area will be organized collaboratively across all partners, treating this location as a pilot study to test our methods and empirical approach. Following the pilot, each research partner is responsible for collecting the case study materials in their own region: UTU (Northern Europe), KCL (British Islands), GSSI (Southern Europe), SSE (Eastern Europe). The case study research will draw from multiple sources including documents, interviews and survey materials, and will follow a mixed-methods approach.

In the next sections we outline our approach to data collection and research materials for each of the work packages.

2.2 Data collection and research materials for WP3

WP3 sets as its objectives:

- To understand career perspectives, challenges and training needs of creative workers across a selection of European countries and CCIs sectors

- To map the creative HE across a selection of European countries and the training provided to future creative workers across a range of skills (including entrepreneurship, innovation and equal rights at work).

- To explore issues of inequality and exclusion in the CCIs and how they could be addressed through training

In the inception phase, these objectives were further developed following a review of the wider literature on the developing number of HE courses linked to the cultural and creative industries sector and the body of literature on precarious labour and workforce inequality within the CCIs. DISCE researchers are interested in reflecting upon the growing scholarly link between the cultural/creative city and cultural/creative education (Chatterton 2000; Comunian & Gilmore 2015). The growing awareness of precarious labour conditions (Gill and Pratt 2008) and their impact on unequal employment patterns within cultural and creative labour markets (Conor et al. 2015) has created an opportunity to explore the relationship between HE, creative labour and local public policy. Hence, the WP3 aims were further developed to explore the trajectories of creative careers.

- It will explore how and who has access and opportunity in the creative economy and who is excluded.

- It will consider the relationship between Higher Education institutions and the creative sector.

- It will investigate how the creative economy has offered new employment opportunities across Europe but also created inequalities and poor working conditions.

- Finally, we will explore how new frameworks for workers' rights, best practice for workforce development and new models of activism can offer insight into how to improve the quality and ensure the sustainability of creative careers over time.

In order to respond to the above aims, WP3 seeks to:

- Understand the role of Higher Education Institutions in developing local creative economies and ecosystems.

- Understand what pedagogical concepts inform creative education within HE and how it prepares graduates to the sector and its working structures/patterns.

- Understand access routes to creative HE education, HE policy framework and socio-economic barriers.

- Understand the career pathways of creative/arts based graduates and how their learning informs their career trajectories.

- Consider how skills development and learning is supported in the creative workplace and far beyond.

- Explore what we can learn from pockets of resistance and activism that have emerged within the creative and cultural industries.

- Understand accountability frameworks and protection mechanisms available for creative/cultural workers.

- Understand the relationship between creative careers, (geographic) mobility and the potential impact of Brexit.

WP3 will make use of versatile research materials, including the following:

- Quantitative mapping of existing HE infrastructures and student data

- Semi-structured interviews with current creative students.

- Comparable alumni survey of creative graduates.

- Content analysis of creative HE course communication and teaching materials.

- Survey or interviews with creative educators and HE managers/leaders.

- Literature review of workforce inequality and resistance.

- Mapping of creative activist networks and movements across Europe.

- Semi-structured interviews with local creative economy workers within each

case study location. These interviews with participants from local businesses, cultural organisations and venues, alongside those employed – formally or informally (such as volunteers, interns and activists) - within arts and cultural management and municipal creative development, will enable DISCE researchers to develop detailed knowledge of the local cultural and creative ecology.

WP3 will result in the following reports (deliverables):

- A Cultural and Creative Work in the EU report, including a summary of the identified issues on participation, inclusion and equality within the CCI workforce and a mapping document of the organisations and campaigns (across Europe) that advocate for change.

- Creative Workforce and HE in Europe Statistics Report (in collaboration with WP2): A summary of data available and key statistics and trends from an analysis of the EU workforce survey. An overview of the specialised HE sector across Europe. (Month 15) (KCL)

- Creative Workforce: Understanding skills & training needs in the CCIs; Inequalities and Exclusion Reports; Descriptive results/typologies of creative workforce and skills and training needs in CCIs in the case study locations and in each sector (Heritage, Arts, Media and Functional Creations). An analysis of the skills and training needs in the CCIs; A summary of equality and exclusion in the CCIs, with a focus on policy frameworks and recommendations. (Month 36) (KCL)

- Policy recommendations for Promoting Creative Workforce and Creative HE in Europe: A set of clear, targeted policy recommendations, co-developed through workshops with project partners and stakeholders. The report will provide an understanding of how HEIs respond to developing needs of the sector and how they collaborate and share knowledge with the CCIs in Europe. (Month 36) (KCL)

2.3 Data collection and research materials for WP4

WP4 sets as its objectives:

- To gain deeper insights regarding barriers to and enablers of new business models, innovations, employment, and growth at the firm/individual level in the CCI sectors across the EU.

- To gain in-depth understanding of earning logics between labour markets and entrepreneurship and the role of independent agents as a new disruptive force in renewing the CCIs in the EU.

- To develop and contribute to more effective policy responses for promoting new business models and revenue streams for CCIs.

In the inception phase these objectives were further developed. More specifically it was considered necessary to extend the concept of business models to include also social business models or value creation models in a broader sense (Yunus et al., 2010) in order not to limit the scope of the WP4 into the for-profit

business organisations. Further, there may be interesting informal organisations (or networks) that are active and in this sense important to locate and study - for the purposes of understanding, for example, how innovation takes place in the CCIs. Consequently, WP4 will take great care in locating and including not only formal and for-profit business organisations within the research.

Second, there is the need to understand the patterns of employment and activity within creative economies, wherein there is a great heterogeneity amongst the creative workers who often engage in different forms of paid but also unpaid portfolio working (Bridgstock et al., 2015). Hence, WP4 will also ensure that the participants for the study will represent the great diversity in the creative workforce - not limited to the salaried employees or self-employed in the sector.

Hence, the aims for WP4 were specified as follows:

- To develop new knowledge about the different business models (social business models; value creation models) for the businesses and organisations in the CCIs

- To understand the role of innovation for the businesses and organisations in the CCIs

- To facilitate new business/value creation models/new innovations in the CCIs

- To Identify patterns of employment (activity) of individuals in CCIs, and related tensions/challenges

- To facilitate [business] development and identity work for the creative individuals

- To identify opportunities and challenges for community and network development

- To understand the different motives and models of policy development in the CCIs across regions

- To facilitate policy development for the CCIs

As discussed above, the DISCE project has an explicit focus on inclusivity: both to understand what 'inclusive' (and sustainable) creative economies are, and to undertake research processes that are themselves inclusive. To these ends, WP4 research questions purposefully seek to avoid a-priori assumptions and taken for granted ideas, such as the type of 'value' that organisations pursue, for example. WP4's research questions are as follows:

1a) What kind of value do organisations pursue? 1b) How do they (aim at) creating value, and how do they generate money (funding / profit)? 1c) With whom and how do these organisations co-operate?

(2a) What new innovations are developed, how and with whom? (2b) What innovative / disruptive forces are contributing to change?

3a) What kinds of opportunities and challenges are there for new business, value creation and innovation? (3b) And how can these opportunities be developed (co-created)?

(4a) How do individuals active in CCIs balance different forms of employment and forms of income?(4b) What are the (identity) tensions?

5) How can opportunities for balancing between different forms of employment and identity work be improved?

6a) What is the role / communities in regional CCI ecosystems? 6b) How can networks and communities support employment, growth and innovation within CCIs? 6c) Who are the key actors and how do they co-operate (if at all) in the ecosystem?

7a) What is the role / importance of CCIs for the region? 7b) How do (and how can) the regional/local policymakers support employment, growth and innovation within CCIs? 7c) What is the importance of shadow economy / public economy (crowding out or complementing formal and private activities?)

8a) What kind of policies exist for the CCIs (regional/local level) – what are their reasonings, aims, emphases and resources? What are their connections to national and EU policies (if any)? 8b) How to co-create new solutions / policy initiatives for the benefit of CCIs at the regional/local level?

In order to answer these questions, the following data collection procedures will be taken and research materials will be gathered.

- WP4 will organize interviews with the different organisations (for-profit companies, not-for profit companies, third sector organisations, public organisations, informal organisations to match the DISCE project aim of inclusiveness), 20-32 interviews per case region.

- WP4 will organize workshops with organisations (a mix of organisations) (1-3/ case region) to collect information but also to mobilise new thinking around business models (value creation models) in the CCIs.

- WP4 will organize a survey distributed via different channels to reach out to creative workers (in the broad sense, including volunteers and other unpaid individuals contributing to the CCIs). The survey will cover 40-60 creative workers & 32-40 volunteers (per case ecology).

- WP4 will organize workshops with the creative (paid and unpaid) workers. The invitations will be sent to the survey respondents, interviewees and an open invitation will be distributed via different networks and channels. There will be 1-3 workshops per case region to collect more information but also to mobilise new thinking around creative work.

- WP4 will conduct interviews with hub and network managers (promoters) reaching out to at least 3-5 hubs/networks per case region.

- WP4 will conduct a policy analysis and interviews with policy makers reaching out 3-5 makers per case region.

- WP4 will organize workshops with the policymakers and hub/network managers (potentially including also businesses/creative individuals to create a mixed group). The workshops will collect information but will also serve to mobilise new thinking around policies for creative workers and creative industries (1-3/ case region).

An interview template will be further developed based on the survey instrument, and a template for analysing the policy documents will be developed during the course of the pilot case study.

WP4 will result in the following reports (deliverables):

- Between labour markets and entrepreneurship - Independent agents in CCIs: a new disruptive force: Descriptive results/typologies of individual earning logics in the Case regions and in each sector (Heritage, Arts, Media and Functional Creations). An analysis of the role of independents agents in renewing the sector. An overview of the boundaryless/portfolio careers & revenue streams of creative individuals in Europe (Month 30) (UTU)

- Emergent business models for CCIs: digitisation, innovation, IPR and networks: Descriptive results/typologies of business models in the Case regions and in each sector (Heritage, Arts, Media and Functional Creations). A summary of emergent business models reporting the results of the comparative case analysis. (Month 30) (UTU)

- Policy recommendations for promoting innovative business models and unleashing the potential of CCIs in Europe: Businesses and Individuals: This report will provide an understanding of best practices and policy recommendations for contributing to innovative business models and new revenue streams for CCIs in Europe (Month 36) (UTU)

2.4 Data collection and research materials for WP5

WP5 sets as its objectives:

- To identify the challenges and opportunities for CCIs to contribute to 'inclusive and sustainable growth' understood in terms of cultural development i.e., encompassing cultural opportunity, care and connectivity, and to provide an encompassing framework for addressing 'growth' not only as GDP, but as cultural development.

- To produce a Cultural Development Index (CDI) to consider the relationship between individual cultural freedom (opportunity), collective cultural solidarity (care), and the broader systemic conditions of the cultural eco-systems in which they are situated (connectivity).

- To develop and contribute to more effective policy responses for promoting CCIs to contribute to cultural development.

In the inception phase these objectives were further developed – with the ongoing task of producing a literature review (D5.2 - month 12) informing the overall research design at several levels, including helping to articulate: DISCE's specific approach

to case study research, the design of the community forums, the precise formulation of interview questions, and methodological options with regards to data analysis. In particular, WP5's focus on an 'ecological' approach, and on the central importance of human experience, raises important questions regarding the scale and scope of creative economies, which have a direct bearing on the range of participants included in the project.

The WP5 literature review provides a critical analysis of how 'inclusive and sustainable creative economies' have been (explicitly and implicitly) understood by researchers and policy makers. In particular, this widens analysis of 'growth' beyond GDP, exploring dimensions of human and cultural development and care. In 'rethinking inclusive and sustainable growth' WP5 takes a step back to ask what 'growth' means, and to explore what culture-related growth, *beyond* GDP, might entail (see, for example, Stiglitz et al., 2018). Our recent research (Wilson et al., 2017; Wilson & Gross, 2017; Gross & Wilson, 2018; Gross & Wilson 2019) identified three key aspects of the development of creative economies requiring further analysis. First, cultural opportunity: the freedom each person has to co-create versions of culture (giving form and value to their *experiences* by doing and making). Second, the importance of *ecological* perspectives: recognising the complex interplay and interdependence (i.e., *connectivity*) between the publicly subsidised arts, the commercial creative industries and everyday creativity. Third, care as a form of solidarity: the concern and support needed from others to maintain, continue and/or repair the world.

In the inception phase, WP5 has begun to further unpack the work that needs to be done to understand notions of 'inclusivity', 'sustainability' and 'growth' with regards to the CCIs, investigating the nature and conditions of cultural opportunity, care and connectivity (Wilson et al. 2017; Wilson & Gross 2017; Gross & Wilson 2018; Holden 2015; Holden 2016). Beyond this, the work package team are addressing a wide range of interrelated questions and themes which are discussed in the literature review. These include the relationship between culture and GDP; the contribution of the Human Development and Capability Approach (see Sen 1999; Nussbaum 2011) as an alternative narrative of economic development (set within a broad contextualisation of 'human development'); the critique of the 'development' agenda; the challenge of moving beyond two dominant approaches to 'culture', i.e., anthropological vs. humanistic; critical debates in the literature about the relationship between culture and development; the intersection of inclusivity and sustainability agendas and ecological perspectives; as well as (ethics of) care and wellbeing . WP5's review of existing indexes and indicators relating to cultural development will explore the possibility and promise of shifting the narrative of culture beyond 'cultural value' (see Crossick & Kasynska 2016), towards the process of valuing itself, and in the service of a 'caring methodology'.

In respect of WP5's overall objective of 'rethinking inclusive and sustainable growth', the case study research will also pay particular attention to the following areas of enquiry:
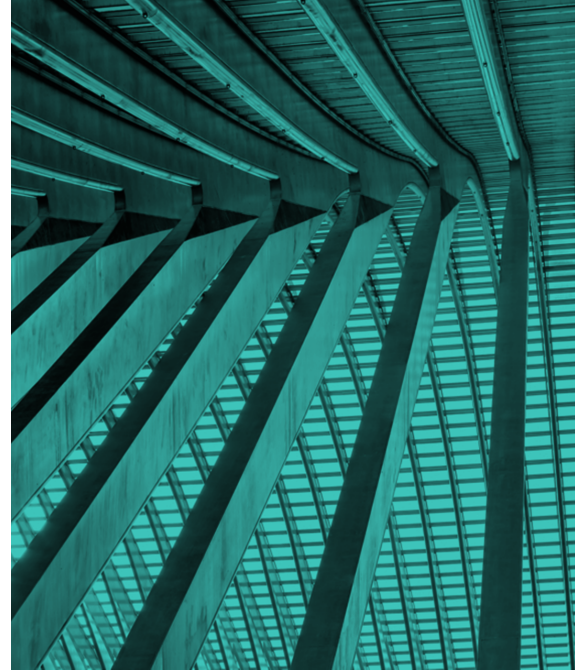
1.   Investigating the blurring of the boundaries of production and consumption, opening up a continuum of cultural practice including being an audience member, consumer, practitioner, manager, 'creative citizen' (Hargreaves & Hartley 2016) and developing new insights with regards to the ways in which these roles develop – and are moved across and between – within a range of specific cultural eco-systems.

2.   Studying relationships between public, private and non-profit activity across cases and the implications for what activities are funded and how; the roles of 'creative citizens', who play a crucial but often invisible role in connecting up sites of cultural and creative practice of different kinds; and investigating the varieties of cultural solidarity (care) that take place.

3.   Exploring the civic role of publicly funded arts organisations as 'pillar organisations' comparing the challenges and opportunities for operating in these ways across the case study locations.

4.   Exploring how cultural organisations (a) take notice of the cultural opportunities of people, (b) take responsibility for motivating and enabling these opportunities, (c) build competencies that enable them to do this well, and (d) respond to the changing landscape of cultural opportunities.

Given the explicit focus of WP5 (and DISCE as a whole) on 'inclusivity', there are particular methodological challenges involved in reaching participants that might not otherwise be included in projects focusing on the 'cultural and creative industries'. Here we might usefully think in terms of *both* breadth and depth of inclusion. We want to reach participants whose stories do not usually get told (breadth of inclusion); but we also want to provide opportunities for more inclusive (deeper) narratives to be shared, covering aspects of experience which may not typically be treated as relevant to understanding creative economies. In this respect, over and above the use of the research approaches outlined already in relation to WP3 and WP4 (including both quantitative and qualitative methods), WP5 are particularly interested in developing life-history accounts, and these are embedded within the interview protocols being applied across all work packages.

Additionally, given the attention within WP5 to issues of care and solidarity, there will be a concerted effort to ensure that the case study research adopts an explicitly caring approach in its design, (as indicated above, and discussed further within the WP5 literature review). Within the pilot phase this includes taking an active interest in the caring responsibilities of potential participants, and (where necessary) seeking to make appropriate provision (for example, providing creche facilities / children's entertainment) whilst carers are interviewed.

3. Case Study Sequencing and Timetables

A provisional schedule for conducting the case studies is presented below:

PILOT STUDY (2019-2020)	Sep	Oct	Nov	Dec	Jan	Feb
· Preparation & confirmation of the full fieldwork protocol	■					
1. Preparation for case study	■					
2. First fieldwork visit		■	■			
3. DISCE team discuss initial findings			■			
4. Second fieldwork visit				■		
5. DISCE team discuss & formulate provisional findings					■	
6. Third (and final) fieldwork visit						■

CASE STUDIES x9 (2020)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
1. Preparation for case study	■	■									
2. First fieldwork visit			■								
3. DISCE team discuss initial findings				■							
4. Second fieldwork visit					■	■					
5. DISCE team discuss & formulate provisional findings									■		
6. Third (and final) fieldwork visit										■	■

1. Preparation for the Case Study

Desk research, identifying:

- Potential research participants (individuals, groups, organisations, networks).

- Potential key contacts / gatekeepers.

- Publicly available documents related to the creative economy (e.g. any strategy documents for the creative economy published by the local authority).

- Publicly available data related to the city / city-region (e.g. demographic data).

Establish contact with key contacts / gatekeepers, and:

- Make arrangements for the first fieldwork visit, namely:

(i) An ABCD workshop (see below).

(ii) Initial one-to-one interviews.

2. First fieldwork visit

- Initial one-to-one interviews.

- Informal conversations to identify sources of documentation / data.

- Informal conversations to identify other potential research participants.

- ABCD workshop. An Asset-Based Community Development workshop (see Hargreaves and Hartley 2016) is a way of bringing people together to address a question, problem, challenge or opportunity. The idea is that the event includes as a wide range of people within a 'community' (however defined), and facilitates the articulation of the range of 'assets' the community has – understood very broadly, including many and varied types of material and immaterial assets, from finance and buildings, to relationships, skills and knowledge – that may speak to *answering / solving / meeting / realizing* that question / problem / challenge or opportunity.

The workshop seeks to map these assets collectively. The process is linked directly to the central issue being addressed during the session. The workshop can be used, precisely, to explore what the questions, problems, challenges and opportunities are that this group of people are bringing into the room from their own work / lives. At the same time, as indicated above, it is important that we go into these workshops with a clear sense of our own overall research question. ***What are inclusive and sustainable creative economies, and how can they be developed?*** The DISCE team will do this whilst being open to the diversity of experiences and perspectives that will be relevant (potentially in many unexpected ways) to answering that overarching research question. These workshops will generate an initial sense, on our first visit, of some key component parts, features and relations within the creative economy in that location.

3. DISCE team discussion of initial findings

- In person if possible, involving all members of the DISCE team.

- In advance of this discussion, we will establish shared analytical processes / frameworks.

4. Second fieldwork visit

- One-to-one interviews.

- Collection / study of documents, if not accessible online (e.g. in libraries / archives).

5. DISCE team discuss & formulate provisional findings

- In advance of this discussion, we will establish shared analytical processes / frameworks.

6. Third (and final) fieldwork visit

- Focus groups / workshops: sharing and testing provisional findings.
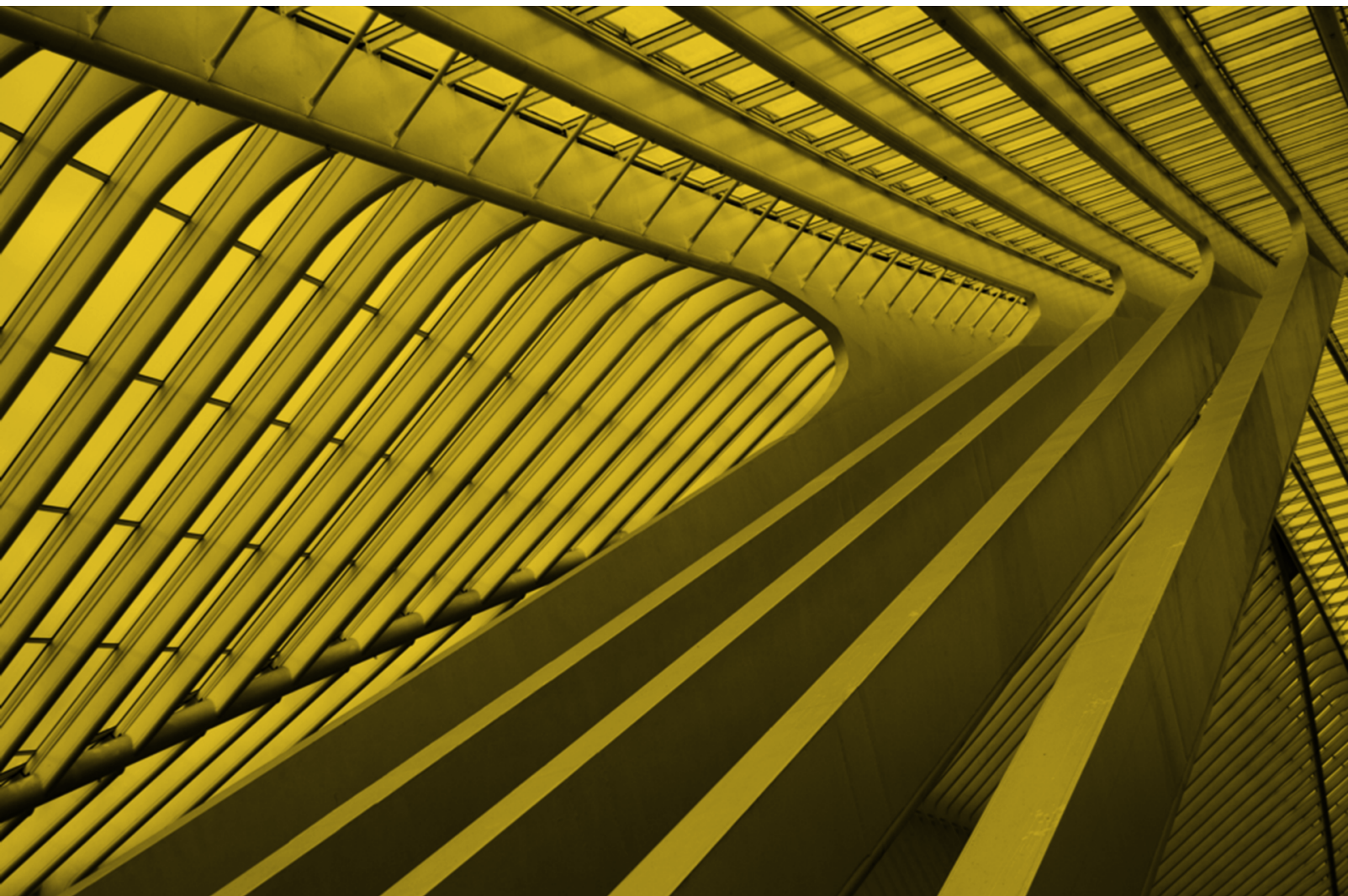
4. Case Study Analytical Procedure and the Reports

The analytical strategy follows a cross-case comparative approach across three stages of research:

Stage 1: Mapping: Cultural/Creative Regional Ecosystems

First, the different materials will be analysed to develop a case study for each of the creative economies to be studied (ten case studies). This will enable a 'holistic' / 'ecological' analysis: addressing the interconnections between multiple kinds of (material and immaterial) resources, within each eco-system; as accessed via multiple sources of data. In doing so, we will make use of a range of analytical tools, (including statistical mapping and quantitative indicators) from WP3-5.

Stage 2: Thematic analysis

Second, the different materials will feed into each of the WPs and enable the analysis of core themes comparatively between the cases, in order to generate new understanding at a European level of the following issues:

- Skills and training for creative workers [WP3]

- Inequality and exclusion in the creative workplace [WP3]

- The role of HE in local CCEs [WP3]

- New and emergent business models in the sector [WP4]

- Independents agents in the CCIs [WP4]

- Individual-level earning logics in the CCIs [WP4]

- Re-thinking inclusive and sustainable growth [WP5]

Stage 3: Sector analysis

We will consider the findings from *Stage 2* comparatively, in relation to the sub-sectors of the local creative economies we mapped in different location. This will highlight specific best practices or challenges identified for specific sectors (e.g. Heritage: Museums / Crafts; Media: Film / Publishing; etc.). Here, elements of collaboration and co-creation might emerge in the project as opportunities for best practices might be shared and implemented across diverse sites of cultural and creative production.

The findings from the DISCE project will be reported in the following reports:

Deliverable number	Report (Deliverable) name	Work package number	Short name of lead participant	Delivery date (in months)
3.2	Creative Workforce and HE in Europe Statistics Report	WP3	KCL	15
3.3	Creative Workforce: understanding skills & training needs in the CCIs; Inequalities and Exclusion Reports	WP3	KCL	36
3.4	Policy Recommendations for promoting creative Workforce and Creative HE in Europe	WP3	KCL	36

Deliverable number	Report (Deliverable) name	Work package number	Short name of lead participant	Delivery date (in months)
4.2	Between labour markets and entrepreneurship - Independent agents in CCIs: a new disruptive force	WP4	UTU	30
4.3	Emergent business models for CCIs: digitisation, innovation, IPR and networks	WP4	UTU	30
4.4	Policy recommendations for promoting innovative business models and unleashing the potential of CCIs in Europe: Business and Individuals	WP4	UTU	36

Deliverable number	Report (Deliverable) name	Work package number	Short name of lead participant	Delivery date (in months)
5.2	The intersections of human development, cultural development and practices of care	WP5	KCL	12
5.3	The Cultural Development Index (CDI); Theorising and implications of the Cultural Development Index	WP5	KCL	36
5.4	Policy recommendations for sustainable and inclusive cultural growth	WP5	KCL	30

Additionally, the findings will be reported in academic papers in conferences and academic journals as well as developed into policy briefs and other papers targeted at practitioners and policy makers.
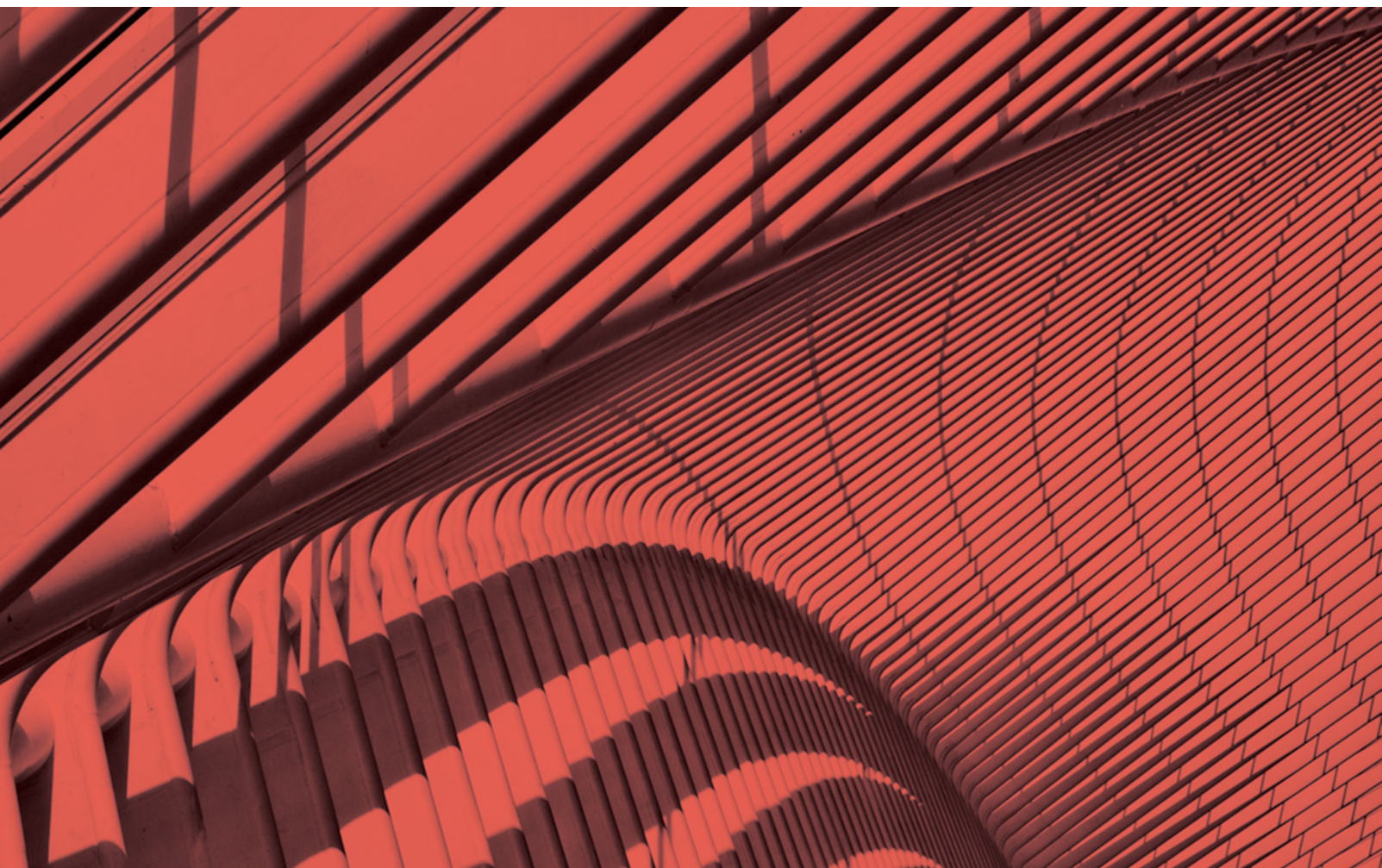
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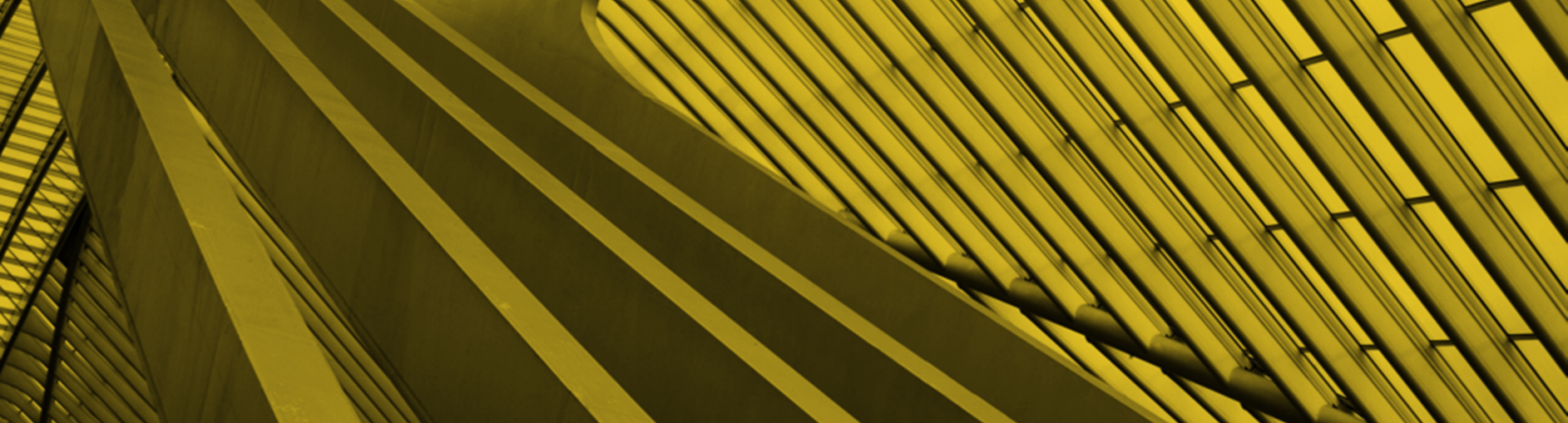
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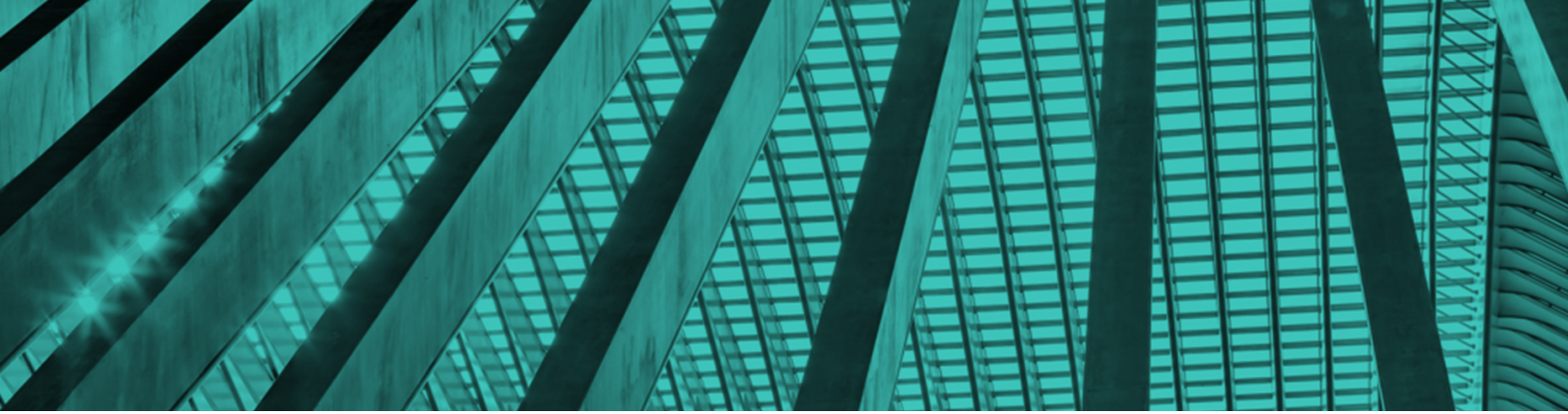
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Appendix 1. DISCE Regional Case Study Template

Region name:	
Size/ Number of inhabitants	
Geographical location: urban / rural	
Presence of higher education:	
Dominant sectors (in terms of CCIs particularly) in the region:	
Special characteristics (postindustrial, Brexit etc.)	
Previous studies (on CCIs) available:	
Why this region is of interest?	
Accessibility (possible contacts, easiness of travel...):	

Appendix 2. Data collection templates and instruments

Template guiding planning for the data collection (Primary data)

- Research participants (how many and who, per case study region)
- Recruitment process (how participants are recruited, from where)
- Methods
- Other DISCE data sources that potentially address this research question
- Research question the dataset will answer (Micro, Meso, Macro)
- Data collection (Micro, Meso, Macro)
- Commentary/Reflection
- WP Lead

Template guiding planning for the data collection (quantitative mapping)

- Aim/Task
- Research question
- City-region / case study area background data needed
- EU data sources that address this research question
- Possible sources of secondary data (Micro, Meso, Macro)
- Research question (Micro, Meso, Macro)
- Data collection
- Commentary/Reflection
- WP Lead

Data collection instruments

- Quantitative mapping of existing HE infrastructures and student data
- Semi-structured interviews template with current creative students and survey instrument for alumni creative graduates.
- Content analysis template of creative HE course communication and teaching materials
- Survey or interview template of creative educators and HE managers/leaders.
- Semi-structured interview and survey templates for creative workers and activists
- Workshop formats and reporting template