

mapping the crafts sector in Southern Ireland



study team:

John Lord
Drew Mackie
Willie Miller
Ines Triebel

Willie Miller Urban Design
20 Victoria Crescent Road Glasgow Scotland G12 9DD
t: +44 141 339 5228 f: +44 141 357 4642 m: +44 7799 066100
www.williemiller.com | wim@williemiller.com

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1. introduction

The brief

- 1.1 In August 2012 the West Cork Development Partnership (WCDP) issued a brief for a **cultural mapping** exercise. The brief was issued by WCDP on behalf of a consortium of local development companies (LDCs)¹ in association with the Crafts Council of Ireland (CCOI).
- 1.2 The LDC consortium and CCoI had previously signed a **Memorandum of Understanding** and had agreed to work together to develop a strategy and action plan for the development of the crafts sector. Briefs were agreed for two research studies: the cultural mapping exercise and a parallel study (undertaken by Indecon Economic Consultants) to establish the current status and future clustering potential of the crafts industry in Ireland.

Study objectives

- 1.3 In October 2012, a consultant team led by Willie Miller Urban Design (WMUD) was appointed to carry out the cultural mapping study. At the inception meeting (November 2012) the WMUD team tabled a discussion

paper which fleshed out aspects of the initial proposal. Following discussion, the **objectives** of the study were confirmed as:

- to map the **geography of the crafts sector** in rural Ireland, and the factors that shape it
- to understand better **how places and landscapes influence the work of designer-makers**
- to analyse the **business, professional, artistic and social networks** that sustain crafts in rural Ireland, and
- to examine the contribution of the crafts industry to a prosperous and sustainable **rural economy**.

- 1.4 It was confirmed that the WMUD study should focus on the **five LDC areas**. However, the parallel economic study by Indecon covers the whole of Ireland, and it was agreed that the mapping study should offer insights and recommendations for action in all areas, especially rural communities.

¹ Ballyhoura Development Ltd, Kilkenny LEADER Partnership, South Tipperary Development Company and Wexford Local Development.



Methodology and programme

1.5 A **methodology** was agreed, focusing on three key tasks:

- a review of the available **research literature** from Ireland and internationally, with a particular focus on the relationship between place and craft production
- a detailed analysis of the **geography of the crafts sector in rural Ireland**, using Geographic Information Systems (GIS) data to locate designer-makers, galleries/retailers, education and training providers, suppliers, support services and others
- research to **identify and map the networks** that sustain the crafts sector.

1.6 A **work programme** was agreed, focusing on these key tasks and comprising:

- identification, collection and analysis of **GIS data**
- identification of relevant **studies and reports**
- attendance at the annual international trade fair - **Showcase** - to meet designer-makers
- the design and implementation of an

online survey of practitioners on the CCoI database and others

- a series of **workshops**, designed and run jointly with Indecon (March 2013).

Study themes

1.7 This report draws together the results of this programme of research, analysis and consultations. Like the original brief, our approach has been informed by the belief that there are important lessons to be learned from **the relationship between the places where designer-makers live and work, their practice and their businesses**. We set out to examine whether there is any evidence of craft “ecosystems” in some areas. It has been suggested that, in Ireland and elsewhere, some places offer ideal conditions to attract and grow craft enterprises. We wanted to see if our analysis confirmed this view and to ask whether similar conditions might be created or replicated in places where the ecosystem is absent or fragile.

1.8 Our working hypothesis, based on the reputation of places like West Cork, was that **some locations are inherently attractive to craft makers** by virtue of their landscape setting, history and culture, or the presence

of an arts community and/or networks. But we were also interested in the example of Kilkenny where sector intervention has led to the development of the design gallery and workshops, the provision of specialist education and training all of which have helped the city to gain a reputation as a crafts hotspot.

the wider rural economy. Another working hypothesis, derived from a first-cut review of the literature, is that crafts form part of a wider cultural or creative economy which may also include the performing and visual arts, artisan food production, heritage, design and even digital media. The proposition is that people working in these discrete but related fields may help to establish a **creative milieu** in some

- 1.9 The brief also called for an examination of the links **between the crafts sector and**

Cushendale Woollen Mills





locations, promoting enterprise and creating opportunities for skilled people. Some subsets of this cultural economy (notably arts, crafts, food and heritage) may combine to create an attractive tourism offer for discerning, high-spending independent travellers who are seeking an authentic Irish experience.

Report structure

1.10 This report is in **seven sections**, including this introduction:

- Section 2 sets out the context for the study
- Section 3 summarises the results of the literature review
- Section 4 describes the geography of the crafts sector in the five LDC areas
- Section 5 sets out the results of the network mapping exercise
- Section 6 records key messages from the March 2013 workshops
- Section 7 draws together our conclusions and recommendations
- A full list of the secondary sources consulted is contained in the annex.

Cormac Boydell



2. context

The evolution of the modern crafts sector in Ireland

Crafts in mid-20th century Ireland

- 2.1 In their essay “Materiality, Modernity and the Shaping of Identity”, Elaine Sisson and Linda King note that, with the exception of Ulster, the industrial revolution had more or less by-passed Ireland in the 19th century. As a result “**professionalised design practice has a relatively short history** [in Ireland] when compared to other European countries” (Sisson and King, 2011). In the same collection of essays Anna Moran states that “without a developed industrial base or a strong design culture, Ireland was reliant on state intervention to assist in the stimulation and promotion of design”.
- 2.2 According to the craft historian, Eleanor Flegg, the crafts sector had experienced **decades of drift** since the Irish Free State was established, “with little government support, with individual craftspeople scattered through the local communities, creating work that had outlived its traditional function and was not in any sense commercially viable” (CCoI, 2005). That began to change with the publication in 1949 of the Bodkin report, which included a section on design in industry. The Irish Arts Council was set up in 1951 and it joined forces with the Design Research Unit of Ireland to organise two major exhibitions. The first (1954) introduced Irish consumers to international design, while the second (1956) showcased Irish glass, ceramics, cutlery and other products.
- 2.3 In 1961, Córas Tráchtála Teo (the body charged with improving standards of industrial design in Ireland) hosted a visit by a group of **six Scandinavian designers**, who had been commissioned to carry out an audit of the state of design in Ireland and to make proposals for the future. The group’s visit, though relatively brief, has been seen as a defining moment in the history of craft and design in modern Ireland.
- 2.4 The Scandinavians’ report, **Design in Ireland**, (SDGI, 1961) began by noting that “Irish culture has developed a distinct leaning towards literature, theatre, the spoken word and abstract thinking, rather than creation by hand or machine and the visual arts”. Nevertheless, an attempt was made to identify the “Irish design tradition”, and the authors noted **three distinct historic strands**:
- rural handicrafts such as tweed weaving and knitting



- early Christian culture, and
- the Georgian tradition, which is “English, not Irish, in its origins”.

2.5 There followed a wide-ranging and trenchant survey of the **state of design in Ireland** in the middle years of the 20th century. **Design in Ireland**, which was written on behalf of the group by Paul Hogan of CTT, proved highly controversial and “[m]any resented the criticisms levelled at Irish products, education and postage stamps” (CCoI, 2005). Although the group’s views were not confined to crafts (they also tackled graphics and packaging) the report contains **commentaries** on textile design and printing, linen, Donegal tweed, carpet-making, glass, ceramics, metalwork, furniture manufacture and souvenirs. The report uses the language of “design” and “industrial design”, but the focus is primarily (though not exclusively) on what we would now call crafts or applied arts. There is a strong emphasis throughout on the need to establish design awareness in Ireland and to grow the domestic market for well-designed contemporary products.

2.6 **Design in Ireland** praised the “valuable and brilliant” Donegal tweed industry and Ireland’s “magnificent achievement” in developing a glass industry “based on skilled craftsmanship” in a short period of time, but the bulk of the report was very

challenging. Paul Hogan records that the group was “extremely critical of standards of design in Irish industry and commerce, and in education found that ‘none of the institutions which we saw or heard of provided an education for designers which we consider to be adequate’”. CTT had already introduced policies to promote design in Ireland, but the report gave the effort **new momentum and urgency**.

Kilkenny Design Workshops

2.7 The development of **Kilkenny Design Workshops** (KDW) established in 1963 and opened in 1965, was a CTT initiative. KDW’s first annual report stressed the significance of craft-based industries for the Irish economy:

“...textiles, clothes, furniture, carpets, shoes and all types of leatherwork, cutlery, glass, earthenware and china, metalwork and jewellery, wallpaper, sports goods, printed matter and a host of others. These are the things in which design plays a decisive part and on which a country – especially a small country – depends most heavily to establish recognition for itself in world markets.”

2.8 **Designing Ireland**, the catalogue of a 2005 exhibition which celebrated the **contribution**

“KDW designers produced well designed objects that were seen and used by the people of Ireland”

of KDW, tells the story of the workshops (CCoI, 2005). It highlights the diversity of activity (“work with indigenous industries, the development of the industrial design studio and the continuance of...craft workshops including ceramics, silver and metalworking and textiles”). The catalogue records contemporary concerns that “the ‘folksy’ façade” of the craft workshops was obscuring KDW’s work on industrial design before, in 1974, responsibility for the workshops transferred from CTT to the Department of Industry and Commerce.

- 2.9 In the following years, KDW’s operations expanded to include residential training, the incubation of commercial spin-offs, consultancy and a successful retail operation. As a result, “the city of Kilkenny changed fundamentally, from a county town to a **tourism centre with a reputation for crafts, arts and design**” [our emphasis].

KDW: the legacy

- 2.10 The Kilkenny Design Workshops closed in 1988. In her contribution to the **Designing Ireland** catalogue, the exhibition curator Joanna Quinn concluded that “the primary significance of the Workshops was that **KDW designers produced well designed objects that were seen and used by the people of**

Ireland. Many of these products were sold through the Kilkenny shops which were hugely influential in advancing retailing and promoting individual designers and craftspeople. KDW designs ranged from ceramic tableware, textiles..., silverware, furniture, industrial products and graphics”. Logos for P+T, Telecom Éireann, OPW and others “contributed to the Irish visual landscape” (CCoI, 2005):

“KDW’s influence on the craft sector was enormous as it revitalised often dying craft-based industries, attracting non-Irish craftspeople and, through the shops, contributing to the selling of craft in Ireland and therefore making the craft sector economically viable. The formal apprenticeships in the metal working workshop and the informal apprenticeships that operated in the other workshops trained many people who went on to have successful careers in their own sectors. Its promotions



weaving stock,
wool spinning



helped create markets for Irish products, KDW designed or not.”

- 2.11 In her essay on KDW, “Tradition in the Service of Modernity”, Anna Moran (King and Sisson, 2011) argues that a central theme of KDW’s craft-based work was **“a subtle negotiation of tradition and modernity”**:

“The goods presented for sale at [KDW] promotions were the products of a modern Ireland, their clean lines evoking the visual language of international modernism, while their materials, and often the methods used in their making, referenced a traditional and vernacular Ireland”.

- 2.12 This “balancing act between tradition and modernity “ was also reflected in the way KDW products were marketed at home and in international markets, especially the USA:

“...the displays and promotional materials surrounding their sale framed KDW products in **a discourse of the handmade**, evoking authenticity and tradition through allusions to a lineage of craft practice, echoed within elaborate in-store constructions of Irishness”.

- 2.13 The KDW outlet at Altman’s department store in New York City operated from 1967 to 1972. Moran states that the image presented

was **“Irish, rural and international, but in that specific order”**. The many Scandinavian, Dutch and British who had played a key part in the KDW were “not completely airbrushed out of the picture, [but] the way in which they are described asserts that they were working within a specifically Irish context, and as part of a revival of Irish crafts”.

- 2.14 The tension between tradition and modernity has a long history. Adamson (2013) argues that the idea of craft dates back to the industrial revolution, when the advent of factory organisation and mass production meant that “[w]hat had been an undifferentiated world of making, in which artisans enjoyed relatively high status...was carved into two, with craftspeople usually relegated to a position of inferiority”:

“This bifurcation divided the infinitely complex field of human production into a set of linked binaries: craft/industry, freedom/alienation, tacit/explicit, hand/machine,

traditional/progressive...[the] oppositional model of modern craft”.

2.15 These “binaries” continue to resonate. They are reflected in the literature review (Section 3) and were also a feature of the workshops (Section 6). The disastrous effects of the crash of 2008 notwithstanding, Ireland has changed beyond recognition in the past 50 years. IDA Ireland celebrates modernity and innovation: Ireland is a “Smart Economy”, with an investment proposition based on talent and competitiveness. But the **selling of Ireland** as a visitor destination is a narrative based primarily on heritage, tradition and rurality. For example, the Discover Ireland website describes Irish crafts in these terms: “Calling on a tradition of Celtic design that goes back to the Irish crosses and beyond, craftspeople throughout Ireland are creating contemporary designs with an Irish twist, in everything from woodturning to jewellery.”

The crafts sector today

2.16 The Indecon report will offer an authoritative account of the ‘current status and future clustering potential of the crafts industry in Ireland’ in 2013. The number of craft enterprises registered with CCoI has grown to about 2,399, with textiles (24%),

jewellery (16%) and ceramics (16%) the most popular categories. It continues to be a sector of micro-businesses: 49.3% of survey respondents reported annual revenues of less than €10,000; 70.1% earned less than €25,000. Most makers sell their work direct from the studio or through shops/galleries, although online sales are increasing, and a large majority (83%) have a website.

2.17 The sector has suffered as a result of **the financial crash** and the subsequent recession.

Philip Cushen





Cork Craft Month, 2011



2.18 An analysis of the Census of Population labour force data for 2011 shows that, of the 5 LDC areas, **the greatest concentration of craft workers is in County Cork** with 1,898 people accounting for 11% of the State total. The share for the other counties which include LDC areas ranges from 2-4%.

2.19 The Indecon report offers some evidence of **collaboration in the crafts sector**. 64% of survey respondents have taken part in joint marketing, advertising and promotion activities; 56% have taken part in joint sales initiatives; and 48% in training sessions/workshops. A significant minority have participated in product development with another designer/partner (39%) or have co-located with others (31%). By contrast,

only a small proportion of respondents have collaborated on the use of equipment, purchasing or shipping. The survey does not indicate which of these forms of collaboration are **local**, but we assume it is a high proportion.

Supporting the crafts sector in Ireland

2.20 The **Crafts Council of Ireland (CCoI)** is the principal champion of the crafts sector in Ireland. The key themes of CCoI's current programme (which is funded by the Department of Jobs, Enterprise and Innovation via Enterprise Ireland) are:

- developing the market for Irish craft and design
- developing the knowledge and skills of emerging and existing craftmakers
- raising awareness, understanding and appreciation of Irish craft and design
- supporting membership organisations in the development of the crafts sector
- developing the innovation, enterprise and design capability of the sector.

2.21 Available **support for designers and craft enterprises** includes the CCoI Mentoring Scheme, a Continuing Professional Development (CPD) Programme and the Building Craft Enterprise Programme.

2.22 CCoI’s **Craft in Ireland** website (www.craftinireland.com), originally launched as part of the 2011 Year of Craft, “showcases the vibrancy of Ireland’s craft sector and features events celebrating Irish creativity both at home and abroad”. Products by featured designer-makers are promoted through the linked Give Irish Craft website, but Craft in Ireland also positions crafts as part of the visitor experience. CCoI and Fáilte Ireland have joined forces to present the Irish Craft Studio Experience: 85 studios across Ireland which offer the “best visitor experience”.

2.23 The Craft in Ireland page of the Discover Ireland website encourages visitors to sample **Ireland’s “very special craft experience”** in terms that suggests that crafts are still navigating the boundaries between tradition and modernity, but with the emphasis – at least for tourism promotion purposes – firmly on the former.

“Calling on a tradition of Celtic design that goes back to the Irish crosses and beyond, craftspeople throughout Ireland are creating contemporary designs with an Irish twist, in everything from woodturning to jewellery.”

Anne Harrington Rees, European Baskets





2.24 County Enterprise Boards, LEADER partnerships, membership organisations and others support **local craft initiatives**. The Craft in Ireland website lists 14 “craft trails”, although this is something of a misnomer: the list includes galleries, “craft villages” and online directories as well as tourist trails.

Seven Sisters, Showcase, 2013



Conclusion

2.25 The **key messages** from this section of the report are as follows:

- professionalised design practice has a relatively short history in modern Ireland
- state intervention has played an important part in stimulating modern craft and design industries
- the 1961 **Design in Ireland** was an important catalyst for change which led indirectly to the creation of Kilkenny Design Workshops
- KDW raised the profile of craft and design in Ireland and international markets
- the crafts sector has continued to operate at the sometimes contentious boundary between tradition and modernity
- where crafts converges with tourism a narrative of Irishness, tradition and culture continues to prevail
- the modern crafts industry has achieved significant scale, but it has been hit hard by the financial crash
- the State continues to champion and promote crafts through the work of CCoI, Fáilte Ireland and a range of local groups and organisations.

3. literature review

3.1 This section of the report presents the results of a **review of the published literature** on the relationship between the crafts sector and places. It should be noted that very little of the published research directly addresses the questions at the heart of this study. This means that we have had to proceed on the basis of inference and triangulation, drawing on the literature relating to the creative and cultural industries more generally, and to rural economic development and tourism. There is only a limited amount of genuine scholarly research to call on; many of the reports and studies reviewed here are, at least in part, exercises in advocacy on behalf of the crafts sector. These reports contain much of value but they need to be treated with some caution. All the sources cited in this section are listed in the bibliography.

3.2 There is clear evidence here that, for **designers and makers of craft products, place matters** - in a variety of ways. However, it is very difficult to quantify the effect of the quality of place as either a determinant of location or an influence on the work. The Indecon report shows that there is a concentration of designer-makers in West Cork and there is a small but quite dense “cluster” around Kilkenny City. But this evidence needs to be balanced against the results of the GIS analysis in Section 4 of this report which show that the geographical

distribution of craft workers is closely linked to settlement size, good transport links and the quality of broadband services. Place matters, but it does not prevail over all other location factors.

3.3 Craft workers are not an homogeneous group, and their aspirations and motivations are as varied as any other community. BOP Consulting (2012) have developed a **typology of designer-makers**, based on two key variables: qualifications and career path (Figure 3-1). We might speculate that first career craft workers are more likely to set up in business in their home area or close to the college/art school where they trained. Equally, we know that migrants (from other parts of Ireland and overseas) have been key players in the growth of the crafts sector in the modern era: it seems likely that some returners and career changers will mark a new stage in their lives/careers by moving to a new location.

Figure 3-1: A typology of designer-makers

		Craft qualifications	
		1 st /2 nd degree	Other/none
Is craft the first career?	Yes	Craft careerists	Artisans
	No	Returners	Career changers

Source: BOP

3.4 Fillis (2009) discusses the **motivation** of different types of craft business owners



and managers who he categorises as lifestylers, entrepreneurs, idealists and late developers. Idealists may **create their own market**, producing premium-priced crafts objects that express the maker's "conceptions of beauty, emotion or some other aesthetic ideal". By contrast, entrepreneurs are more likely to produce work that caters to conventional market demand. Is it reasonable to infer that lifestylers and idealists are more likely to be attracted to locations that reflect their values and aesthetic preferences?

- 3.5 Based on his research in the UK and Ireland, Fillis argues that the craft sector is important in its own right as a source of jobs and wealth creation, but that it also makes a "vital **contribution to the wider economy**...facilitated through, for example, its relationship with the tourism industry, its role in the wider creative and cultural industries [and] its contribution to rural economies through its entrepreneurial endeavour...The craft sector is also a source of creativity and innovation...Those working in the sector exhibit many entrepreneurial attributes [including] ideas generation, opportunity recognition and risk-taking..."



Eimear Conyard

3.6 For Fillis, "the craftsperson [is]...a risk-taking entrepreneur" and the sector is "characterised by small entrepreneurial businesses operating in an economic environment where technological change occurs quickly". He concludes that "[t]he successful craft firm develops a set of creativity-related competencies, linked to networking, relationship building, opportunity recognition and exploitation... Those working in the craft sector can be seen as a **metaphor for successful marketing and entrepreneurial practice**, where many firms operate within very limited budgets but are able to differentiate themselves from other firms through application of creativity of both thought and practice" [our emphasis]. These themes are addressed in the network analysis (Section 5).

- 3.7 In **Making Value**, a study commissioned by the Crafts Council (UK), Schwarz and Yair (2010) highlight the contribution of **portfolio craft workers**: people who, some or all of the time, work "beyond the making, exhibition and sale of a craft object". Portfolio workers apply their technical and design skills in other industry settings, and in educational and community contexts.

“the value of ‘craft’ in contemporary economy and society is not limited to the value produced by those identifying themselves as makers, or solely held within the objects they produce”

They take on “multiple roles, consciously presenting themselves in different ways for different audiences, markets and areas of work. They have a deep sense of integrity about their creative identity and distinctiveness, which informs where, with whom and in what ways they choose to work. Moving with agility between different projects, they find creative impetus in their engagement in other sectors and settings”. The network analysis suggests that portfolio workers can be pivotal and influential figures because they act as a bridge between sectors and communities.

3.8 Schwarz and Yair conclude that “the value of ‘craft’ in contemporary economy and society is not limited to the value produced by those identifying themselves as makers, or solely held within the objects they produce”. Craft may be better understood as “a distinctive set of **knowledges, skills and aptitudes**, centred around a process of reflective

engagement with the material and digital worlds. Makers are engaged in this process across industry, community and education settings, acting as what Richard Sennett calls ‘sociable experts’ with distinctive and beneficial ways of collaborating with others: The craft of making physical things provides insight into the techniques of experience that can shape our dealings with others” [our emphasis].

3.9 A report on crafts in Canada (Peartrees Solutions, 2001) focuses on the difficulty of **defining the sector**. It identifies five key market segments: tourism, gifts, boutiques/ galleries, catalogues and electronic sales.² In occupational terms, the craft sector may begin with a “core [of] full-time professional craftspeople engaged in one-of-a-kind or studio production work. A related ring could consist of those who produce in large workshops and large quantities, and another ring could include those who manage crafts

² When the report was published (2001) the last of these was in its infancy.



Karen Morgan Ceramics

galleries or outlets, or engage in other forms of crafts sales, marketing or distribution. Another ring may consist of part-time, and still another amateur or hobby producers... Being inclusive but careful to categorize will also assist in tracking how the sector evolves and to follow how firms or individuals move from one segment of the crafts sector to another.”

valued functional as well as artistic items... Markets for these goods are both domestic and international, and a significant area of growth is demand from tourists looking for high quality, uniquely Canadian items to use, to wear, or display in their homes. The crafts sector provides alternatives for those whose tastes go beyond the purely

functional and mass-produced, and can appreciate the beauty of a unique design and superior craftsmanship” [our emphasis].

3.10 Peartree Solutions note the continuing **ambivalence of governments and agencies towards the crafts sector**. There is “a perception that it is neither economically important enough to warrant economic development support nor sufficiently artistic to deserve significant attention from culture or heritage ministries.” The report suggests that: “Some of the difficulty...may rest in the degree to which crafts is also a very popular field for amateurs and hobbyists. While amateur activity should be valued in its own right, in the minds of the public it tends to obscure the activity of highly skilled professional artisans and craftspersons. The contemporary crafts sector produces highly



3.11 The five local development company (LDC) areas covered by this report are largely rural, although they include some substantial towns (Wexford, Kilkenny City) as well as areas of suburbanised countryside around Cork and Limerick. Richards and

Wilson (2003) note that, while the concept of the “creative economy” is seen as an essentially urban phenomenon, **the rural has become a “creative space” in its own right**. Rural places have become creative havens for people retreating from city life; there is a long tradition of rural/coastal artists’ colonies³; and, critically, communications

³ Richards and Wilson cite a 1994 study of South West England which

Mad Hats, Creative Island
Showcase 2012

technology and other trends have resulted in the “de-differentiation” of urban and rural places.

- 3.12 Richards and Wilson note that, in Europe and internationally, the increase in the number of creative entrepreneurs moving to the countryside has been accompanied by rural tourism and other initiatives, resulting in the “**serial reproduction**” of a relatively narrow range of development strategies. Rural communities face an increasing struggle to differentiate themselves from one another, and development agencies may need to make a dispassionate assessment of their localities’ competitiveness strengths: in crafts, as in other sectors, some places are more equal than others.



- 3.13 In Ireland, the crafts sector makes a significant contribution to the rural economy in some areas. At the workshops there was broad consensus that West Cork and

Kilkenny have the most fully developed “craft economies” (Section 6). The concept of a **rural cultural economy** is discussed in detail in a paper by Scott (2010) which examines the case of the English Lake District, a place “where a relatively inviolable natural and symbolic heritage constitutes the foundation of a regional

economic development process”. This heritage is an “extensive, immobile, non-metropolitan, and emphatically fragile residue of common-pool resources”.

The Lake District is celebrated for its outstanding natural beauty as well as for its literary and cultural associations. For at least 250 years, this

combination has attracted tourists with the result that, in the modern era, “a complementary economic order has emerged facilitating access to the landscape and providing a growing body of... consumer services”. This is “**a peculiar kind of cultural economy**...a system of production and consumption comprising goods and services...whose value to the consumer resides in the recreational, aesthetic, and

showed that places that are popular with tourists are also attractive to “life-style entrepreneurs”.



semiotic pleasures that they induce” [our emphasis].

- 3.14 The Lake District’s “distinctive regional culture” has attracted “discerning visitors” for decades, but the traditional economy and the way of life that went with it have all but disappeared. During the twentieth century, *“the old farming economy...steadily gave way to alternative forms of enterprise answering to the needs and impulses of the ever-growing numbers of tourists...In short, a complex cultural economy rooted in the region’s landscape appeal, and playing on an ethos of the outdoors, quietude, and close scrutiny, has come gradually into being”*.
- 3.15 Despite its economic dependency on tourism, Scott concludes that the Lake District is *“generally deficient in networks of specialized and vertically interrelated firms forming a structure of input-output relations...Instead, local units of production...are primarily related to one another in a system of conglomerate interdependency, meaning that they derive competitive advantages [by] exert[ing] a kind of collective magnetism through their joint supply of a range of suitably-matched goods and services”* [our emphasis]. This description is borne out by the results of our network analysis.

Nuala Jamison - Bracelet – gold and clear acrylic pieces threaded on gold chain



- 3.16 Scott notes that, as the tourism economy has grown and become more sophisticated there was been a resurgence of interest in local food and *“a notable expansion of...craft activities”* including *“masonry, boat building, pottery, basket weaving, jewellery, furniture making, and the spinning and weaving of woollen textiles. Some of these crafts are based on long-standing Lakeland traditions, while others are of more recent origin, but all of them are consistent with the vocation of the region as a locus of sustainable tourist-oriented production”*.
- 3.17 The cultural economy of the Lake District remains “a work in progress”, but *“a viable future pathway can probably be charted out on the basis of carefully regulated investment in and upgrading of pursuits such as organic farming, high-end restaurants, arts and crafts, festivals..., conference and educational*



ventures”. Despite the “traditional” appeal of such activities, they have little to do with Lakeland’s old agrarian economy which has all but disappeared. Tourism and the crafts sector create their own myths. Scott concludes that *“the region’s cultural economy depends not so much on innovation in the narrow technical sense of the term, but on an overall atmosphere – and a facilitating grid of commercial activities – that is...conducive to experiential discoveries on the part of those who take the time and trouble to become acquainted with its unique fund of natural and symbolic endowments and who allow those endowments to work on their faculties for ‘fancy, fantasy and wishful thinking’”*.

3.18 Naylor (2007) also addresses the issue of **rural innovation**. Based on research in the UK, he notes that while innovation is usually seen as an urban phenomenon, the

creative industries have grown strongly in rural areas. There is empirical evidence that that *“the creative industries provide a range of innovation ‘inputs’ into other sectors of the rural economy”*. Naylor argues that individuals working in the visual arts and the crafts sectors make an especially important contribution to cultural tourism, rural diversification and placemaking. In these areas, the creative industries act as “innovation enablers” both by diffusing and developing creative products, services and experiences that are new to the rural economy. This is consistent with Fillis (2009) and Schwarz and Yair (2010).

3.19 Naylor highlights the pivotal role of **migrants from urban areas** in driving the rural creative economy; because of this, he argues, cultural innovation in the countryside is about the diffusion of “essentially urban cultural practices, ideas and values”. The implication is clear: rural locations and lifestyles are very attractive to some mobile craft workers, and the latter may make a valuable contribution to the local economy – but migration can also change rural areas profoundly because, in a variety of ways, incomers **bring the city with them**. As a result rural places are becoming more urban and cosmopolitan in character.



3.20 In many places, surviving elements of the traditional rural economy coexist and merge with new, essentially urban products and services. This **duality** is examined by Experian and BOP (2006) in their report on the **Creative Countryside**, which focuses closely on the role of the craft sector: *“...rural areas have design traditions in pottery, glass-making, leather work, weaving, furniture making, clothing design, and jewellery which often retain something of their rural origins, character and ethos. At the same time traditional rural crafts such as hedge-laying, dry-stone walling, rope-making, blacksmithing, tree-coppicing, charcoal-making, basket-making, rustic joinery and wood-work, saddlery, barn building, and animal husbandry skills are being reworked into new forms by contemporary artists and craft workers, who are finding new markets for rural crafts, traditional skills, crafts, processes, materials and architecture being used in urban contexts, and through other innovative architectural and public art applications.”*

3.21 Fillis (2009) distinguishes between a **contemporary craft culture**, which “*does not have any meaningful relationship with the past*”, and **vernacular crafts**, which “*derive from the culture of the society in which they have developed and tend to be linked to the more traditional view of the crafts based*

in rural communities”. Both strands, he notes, attract demand from domestic and international tourists.

3.22 Experian and BOP argue that, in Britain at least, there are significant variations in the **capacity of rural areas** to attract creative industries including crafts. It seems very likely that the same is true in Ireland. The key differentiating factors reflect aspects of both tradition and modernity:

- workforce skills and education
- accessibility and transport infrastructure
- openness to immigration and new ideas
- the quality of the natural and built environment
- the relative strength of tourism
- entrepreneurship
- a strong and visible local identity
- effective partnerships, networks and local institutions.

3.23 The Conference Report of Canada (CRC, 2008) picks up one of these themes by highlighting the importance of **diversity** – of ethnicity, gender, age and religion – as the basis for creating social capital and encouraging collaboration in Canada’s creative industries:

Cormac Boydell, Greens and Yellows on Black, Irish terracotta with glazes



“..respecting cultural diversity and welcoming people from diverse backgrounds into our communities and workplaces are not only marks of our hospitality. They are also indicators of how successful we will be in attracting creative talent and investment to Canada, and how competitive we will be in marketing our creativity and innovation to the world”.

3.24 A number of the reports cited here highlight **an apparent paradox**: a significant strand of craft production celebrates traditional skills and products and markets their local distinctiveness. But the places sometimes described as “creative hubs” may have

succeeded precisely because they are open, welcoming and cosmopolitan. They attract talented incomers who bring new skills and ideas but who, by definition, cannot claim to be rooted in the locality or its culture and traditions even if they are inspired by them.

3.25 This insight represents a challenge to Bradley and Kennelly (2008) whose book, **Capitalising on Culture**, makes the case for an **economic and cultural renaissance in Ireland** based on a “New Revival Framework” founded on “distinctive, inimitable, rooted resources” and “meaning, identity, sense of place and tacit knowledge”. For Bradley and Kennelly, “global competitive advantage”



Oliver Fenwick
Through the Mill

is based on “knowledge unlikely to exist elsewhere”, and “locals recognis[ing] their common identity, concentrating efforts so that belonging to a particular place becomes a strength”. Quoting the economist David McWilliams, they argue that “tradition, competence, uniqueness, lineage and nostalgia are likely to become important selling points for many Irish products”. But this analysis needs to be reconciled with the cosmopolitan, international character of the crafts sector in Ireland. Immigrant craftspeople have applied their internationally recognised professional competences to their interpretations of local culture. Incomers derive inspiration from their chosen locality and culture, and they have made a vital contribution to the revival of crafts in Ireland, but their relationship with the place is inevitably very different from that of indigenous designer-makers.

3.26 The workshops held in the LDC areas in 2013 revealed some ambivalence about overtly **Irish/Celtic craft products**. Fillis (2009) has

researched the links between Celtic themes and tourism in Ireland, Scotland and Wales. He notes that “[m]any...craft businesses deliberately incorporate an element of Celtic design into their work, relying on the symbolism and associated meaning to sell the product to culturally close markets”.

But he found that some other makers were dismissive of “Celticness”.



3.27 Based on the available literature and a host of anecdotal evidence, there is no doubt that **place “inspires” craft designs and products**, and that it does so in a variety of ways. At one end of the spectrum are products directly

influenced by local landscapes, culture and tradition or produced using locally sourced materials. However, there is also a substantial body of work (often described as contemporary and targeting international markets) which does not refer directly to its place of origin, but which reflects the designer-maker’s response to light, the colour palette and other more elusive qualities. Thus, for Ospina (2012) West

Linda Wilson
Fairisle Long Sleeved Top
and Polka Dot Skirt

Cork’s craftsmen and women are influenced and inspired, “albeit unconsciously”, by “a special atmosphere, a stillness and quality of light which appeals to our sense of beauty, mystery and wonder”.

3.28 Alison Ospina’s **West Cork Inspires** tells the story of the creative community in that region since the 1960s (Ospina, 2011). Ospina gives a brief account of the evolution of West Cork into a **creative rural community**, the key features of which can be summarised as follows:

- West Cork’s poverty and isolation in the 1960s and 1970s meant that artists and makers could find **low cost homes and workspace**
- artists and makers were drawn to the “**wild, empty landscapes**” of south west Ireland
- the move to West Cork was inspired in part by an emerging **counter-culture**: the nuclear disarmament campaign, women’s liberation, environmental politics and the self-sufficiency movement all encouraged creative people to “live closer to nature” and reject aspects of the consumer society



- the emergence of the contemporary craft scene was driven by **immigration**: West Cork attracted a cosmopolitan community of “like-minded people”, drawn from Dublin and Cork, the UK, France, Germany and the Benelux countries

- the village of Ballydehob became a **hub for craftspeople and artists**: the Flower House shop and café was an important sales outlet
 - as the craft scene developed and matured, **groups and organisations** emerged, including the Cork Craftsman’s Guild and the Society of Cork Potters.

3.29 West Cork was **changed “radically and irrevocably”**. The influx of would-be makers

“brought a much needed vitality and colour to the area”, and the newcomers enjoyed the “sense of community... [and the]...feeling that they were part of a wider movement”. The bohemian incomers were given a warm and generous welcome by the local population. Ospina suggests that south west Ireland has always been a cosmopolitan place, “visited, fought over, and settled by soldiers, sailors, fishermen, mercenaries and various groups



from mainland Europe and Scandinavia”.

3.30 This account may be idealised in some respects, but **West Cork Inspires** captures the essence of an influential paradigm that other areas (in Ireland and overseas) have tried to emulate. It describes a process in which the **special qualities of the place** exerted a **pull** while changing social attitudes **pushed** people towards new lifestyles and values; when the movement of people – from Ireland and overseas – reached a critical mass, West Cork began to develop a reputation as a “creative community” that drew collectors and discerning visitors to the area and encouraged the growth of an infrastructure of shops, galleries and open studios that enabled West Cork to become a craft destination – a key element of the tourism offer and a contributor to local economic development.

3.31 Designer-makers value particular place attributes, although these are by no means all “traditional” qualities. The literature shows that **consumers** also value craft products that are associated with, among others, authenticity, quality, workmanship and personality (MHM, 2010) People are “drawn in by the story behind the object or the ideas it represents”; such stories are often associated with particular places. In England, the crafts sector has benefited from



“a significant shift in consumer demand, towards value-centred products, services and experiences which meet emotional – as well as functional – needs”.

3.32 However, it would be a mistake to assume that demand for such value-centred products is a given. A decade earlier, a report commissioned by CCoI (3Sixty Marketing, 2001) found that “Irish-made” had lost some of its former cachet. More sophisticated consumers, exposed to other countries and cultures were reportedly keen to develop their own style. The **fashion cycle** appears to have gone full circle since then, returning to niche, personalised identities, authenticity, ethical values, all of which are “new ways to signal connoisseurship”.

3.33 We complete this review with the **survey of 40 creative businesses in the west of Ireland** conducted by White (2010). White examines “what attracts creative talent to rural areas and how the creative industries can be supported and developed...” Her key findings include:

- quality of life and the natural environment influence the location decisions of



creatives: “landscape, remoteness, natural surroundings, waterways, lighting, space and heritage were named as important for allowing creativity to thrive”; all those who had relocated to the region said they had been seeking a quieter lifestyle and an escape from city living

- creative workers can work in almost any location, but they want to be connected: a quality broadband connection and good transport infrastructure are especially important
- interviewees were confident that creative talent was available in the region, but most had found recruitment very or quite difficult, with creative technology sectors experiencing the greatest difficulty; people working in the sector are highly mobile and retaining skills can be a challenge
- all respondents reported low levels of networking and business-to-business linkages in rural areas, and some felt this was a constraint on innovation and creativity
- some people, especially those whose work involves “creative expression”, observed that public sector agencies found it hard to engage with a “heterogeneous”, networked community of the self-employed and micro-enterprises; some feared that efforts to

“value” and “develop” the sector could undermine its independence and essential qualities.

Conclusion

3.34 The key messages from this section of the report are as follows:

- designer-makers are not a homogenous group: some groups (lifestylers/ idealists) are more likely to be motivated to relocate to particular areas by their landscape quality; rich history and culture, and by the presence of a creative community/milieu)
- the literature shows that crafts in Ireland and the UK make a wider economic contribution – through links to tourism and the creative/cultural industries and as a source of innovation/creativity
- many craft workers have portfolio careers and their contribution extends well beyond making objects – they work in industry, education and community contexts
- the creative economy is a largely urban phenomenon but some rural places have become creative spaces in their own right
- the English Lake District is a well-documented example of a rural cultural economy where value resides in landscape, history and cultural heritage: there is little evidence of specialisation or supply chain



linkages, but local enterprises are related to each other in “a system of conglomerate dependency”

- innovation as conventionally understood is not a feature of the Lake District, but the review highlights the role of the creative industries as innovation enablers in rural areas
- an influx of creative talent tends to make the countryside more urban and cosmopolitan
- traditional/vernacular crafts tend to be firmly rooted in place; but contemporary crafts have a more complex relationship with place although it may still exert an influence on the work
- it has been argued that tradition, lineage and nostalgia are important selling points for Irish products, but the review suggests at least some tension between that view and the cosmopolitan, international character of the sector
- West Cork and Kilkenny are the best known (but very different) examples in Ireland of crafts-led rural development
- Wexford is very strong in terms of numbers of craft enterprises and has potential for growth and further development
- in both cases they have become magnets for talent – from the rest of Ireland and overseas: migrants have played a key role in driving growth and enhancing Ireland’s reputation in the craft/design market
- designer-makers value landscape, heritage and culture as sources of ideas and inspiration but attitudes to overtly Irish/ Celtic products are ambivalent
- the Creative West study shows that creatives (in a range of sectors) value quality of life/ natural environment, but they still need to be connected – by road and broadband.



Irish Weavers
Guild

4. the geography of the sector

4.1 Using the CCoI database of designer-makers, craft businesses, retailers and galleries we have analysed the **geographical distribution** of the sector in the 5 local development company (LDC) areas. Using geographic information systems (GIS) data, we also correlated the results to other spatial information. The results are interesting and suggestive, although they raise some important methodological issues.

4.2 The **CCoI database**, though much the best available source, does not claim to

be entirely reliable or comprehensive: it only captures designer-makers who have applied for membership and met the registration criteria. Definitions of the crafts sector can encompass a broad spectrum of skills and levels of engagement. They include individuals who practice craft as a hobby, as well as professional designer-makers. Currently, CCoI has two levels of registration; one for ‘professionally active craft enterprises’ and one for the wider craft community. This analysis focuses on professional craft enterprises but we are

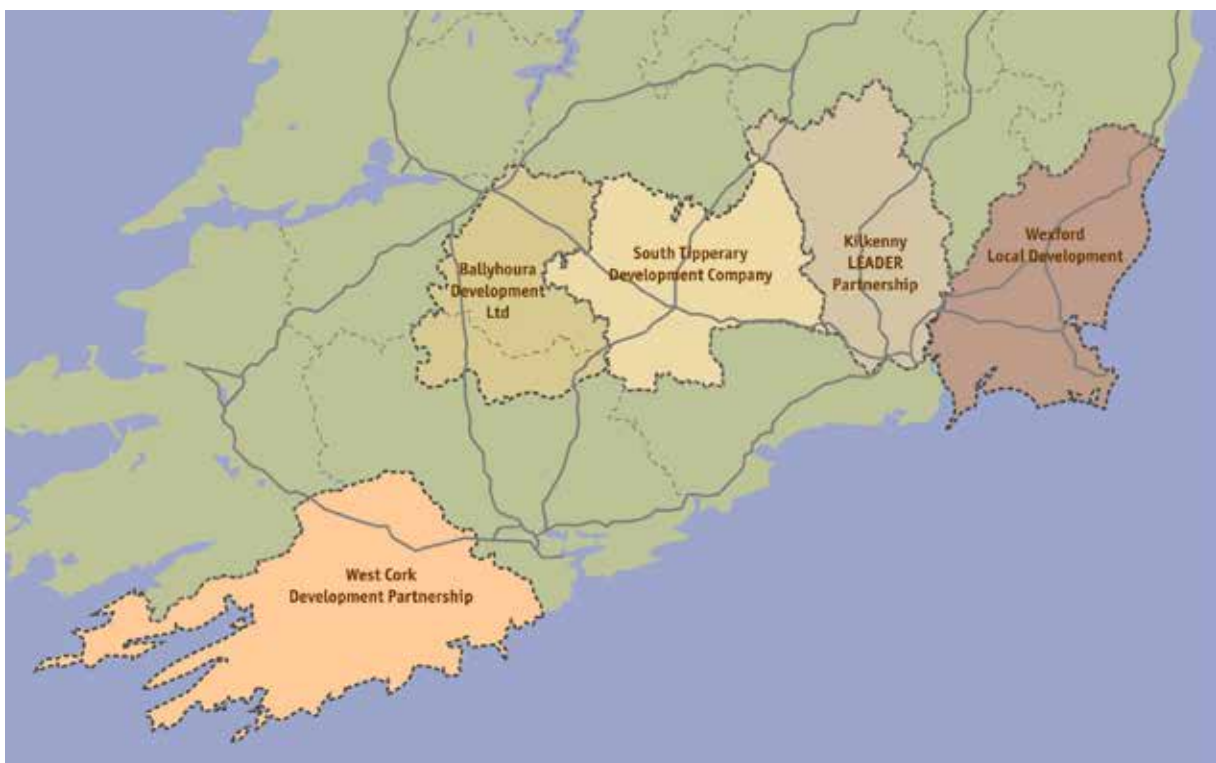
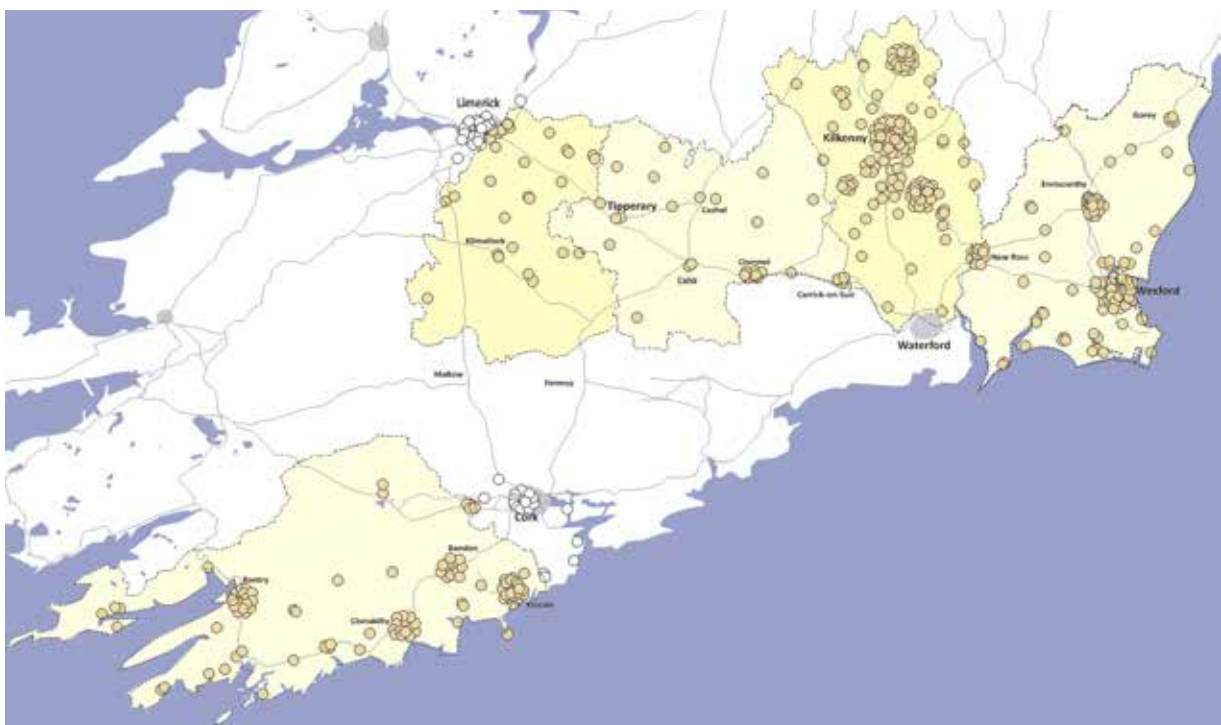


Figure 4-1: The location of the five local development companies



Figure 4-2: Distribution of designer-makers across the five LDC areas



conscious that hobbyists, those currently training in a craft discipline and others make an important contribution to the crafts ecosystem.

- 4.3 The brief called for detailed **mapping of the 5 LDC areas** (Figure 4-1). Four neighbouring areas form a band across the south of the country, from Ballyhoura in the west, through South Tipperary and Kilkenny, to Wexford in the east. West Cork is detached from the rest of the group. The result is, of course, a partial view. We have not analysed

data on the distribution of the crafts sector across Ireland, which would have provided useful context for the analysis. At the local level, it would have been useful to understand the relationship between the mostly rural LDC areas and nearby cities, especially Cork and Limerick.

- 4.4 Figure 4-2 shows the distribution of designer-makers across the five LDC areas. We have mapped the location of a total of 695 craft enterprises from the CCoI database, distributed as shown

in Figure 4-3. It should be emphasised that these cohort sizes do not reflect the distribution of all craft workers from the 2010 Census of Population. Analysis for the latter is available at the **county** level, which only corresponds to LDC boundaries in some cases; for convenience, the results are included in the table. The largest concentrations of CCoI registered enterprises are in West Cork and Kilkenny, followed by Wexford. The cohorts for Ballyhoura and South Tipperary are considerably smaller.

LDC area	CCoI registered enterprises mapped		County	Craft labour force	
	No.	%		No	%
Ballyhoura	88	13.1	Limerick	642	16.9
Kilkenny	185	27.5	Kilkenny	455	12.0
S Tipperary	57	8.5	Tipperary	278	7.3
West Cork	191	28.4	Cork	1898	49.9
Wexford	151	22.5	Wexford	530	13.9
Total	672	100.0	Total	3803	100.0

Figure 4-3: Geographical distribution of CCoI registered craft enterprises, and of craft workers

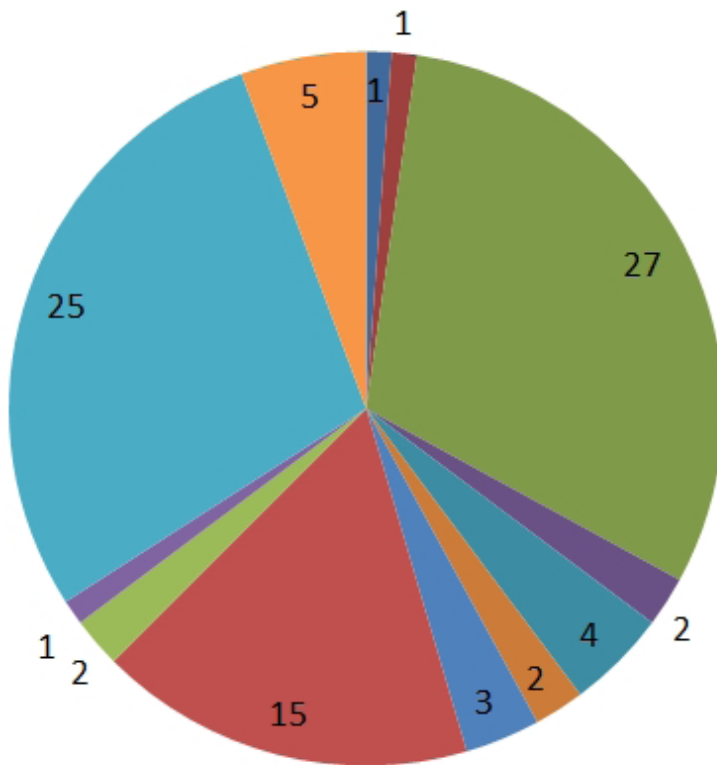
4.5 The maps and charts on the following pages present a more **detailed analysis for each of the LDC areas**. In each case, we have shown:



- the **numerical distribution of designer-makers by product type**
- the **spatial distribution of designer-makers by product type**
- the **spatial distribution of designer-makers linked to landscape character areas**

- the largest groups of designer-makers are working in ceramics and textiles
- designer-makers are scattered across the rural area, but there is a large concentration in the suburban fringes of Limerick City
- the largest group of designer-makers is concentrated in the Shannon valley, with most of the rest in lowland areas.

4.6 The results for **Ballyhoura** are shown in Figures 4-4 to 4-6 below. The key messages can be summarised as follows:



■ basketry	1
■ bookbinder	1
■ ceramics	22
■ furniture making	2
■ jewellery	4
■ metal working	2
■ mixed media	3
■ other	15
■ paper working	2
■ printing	1
■ textile making	24
■ woodworking	5

Figure 4-4: Ballyhoura – distribution of makers by product type

Ballyhoura 88

Figure 4-5: Ballyhoura – spatial distribution of makers by product type

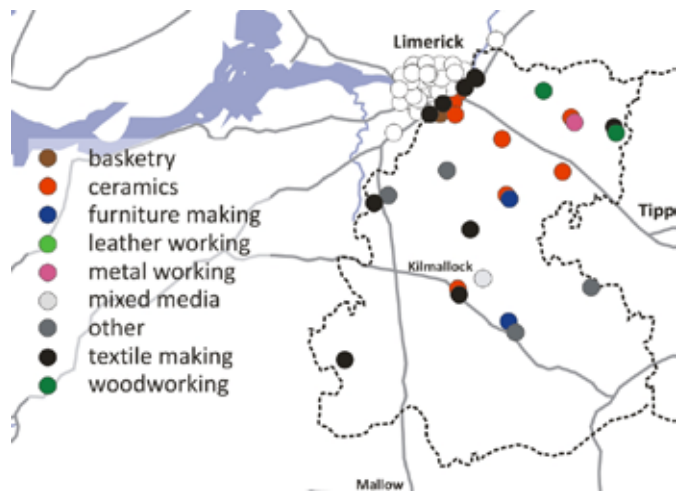
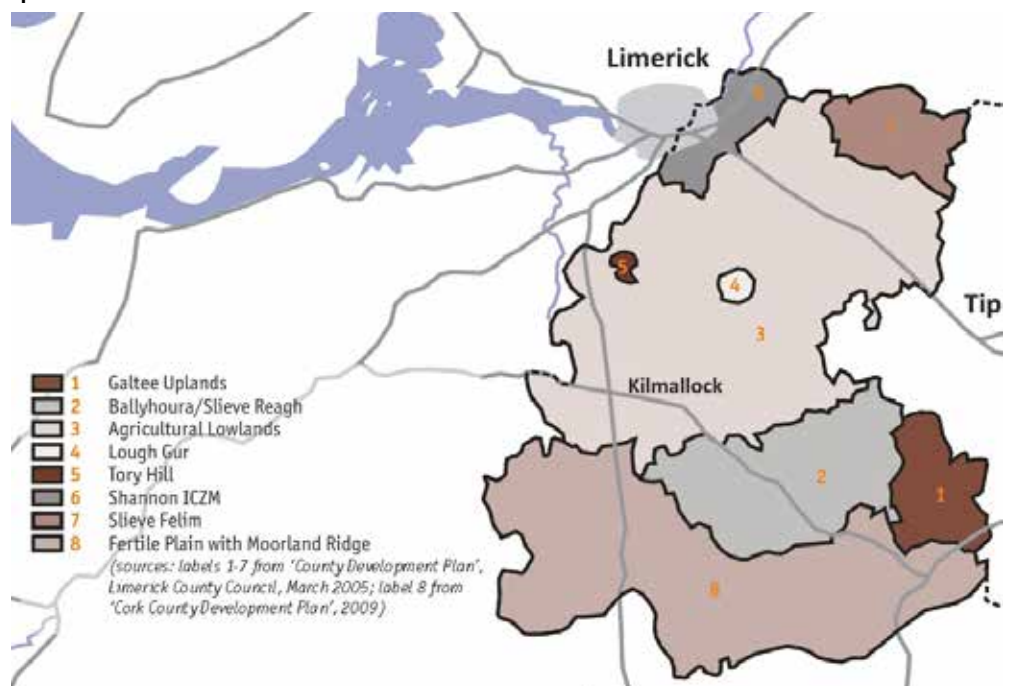


Figure 4-6: Ballyhoura - spatial distribution of makers linked to landscape character





4.7 The results for **Kilkenny** are shown in Figures 4-7 to 4-9 below. The key messages can be summarised as follows:

- the largest groups of designer-makers are working in ceramics (23.8%), textiles (16.2%) and jewellery (15.1%), but with a significant group of “others” (20.5%)
- there is a dense concentration of

designer-makers in Kilkenny City, with additional clusters around Castlecomer and Thomastown

- a large majority of designer-makers are located close to major roads in lowland areas along the valley of the River Nore, but with a significant cluster in the uplands at Castlecomer.

Figure 4-7: Kilkenny – distribution of makers by product type

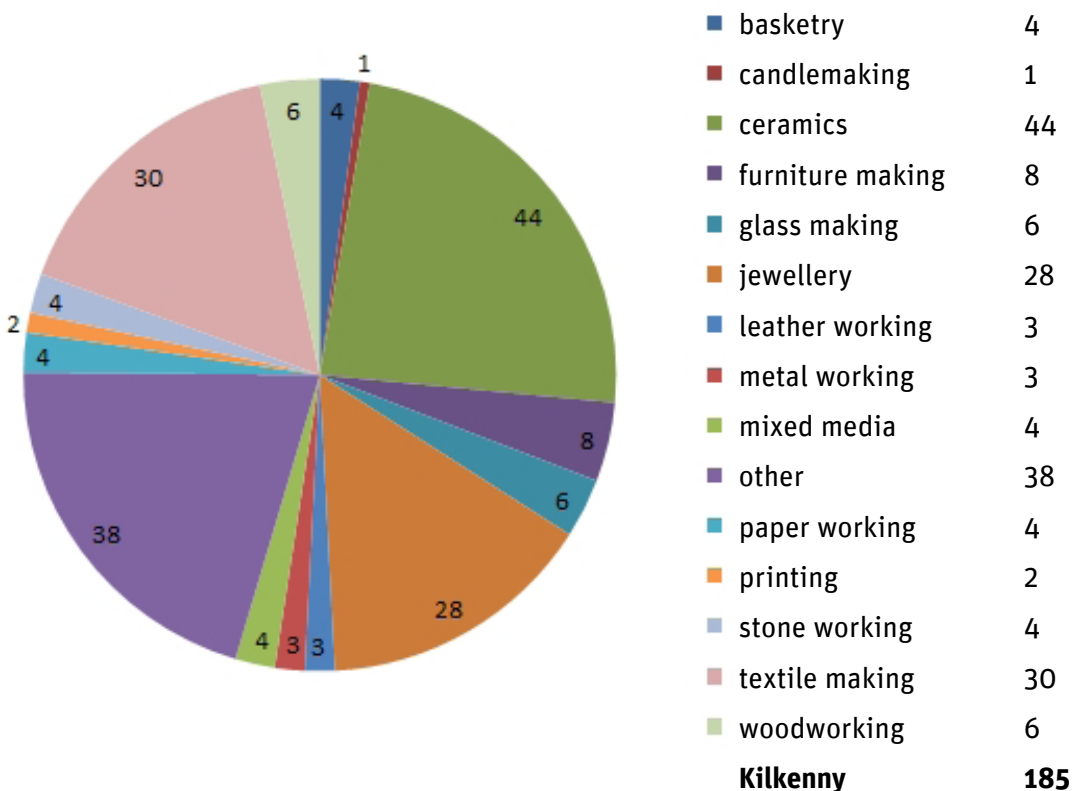


Figure 4-8: Kilkenny – spatial distribution of makers by product type

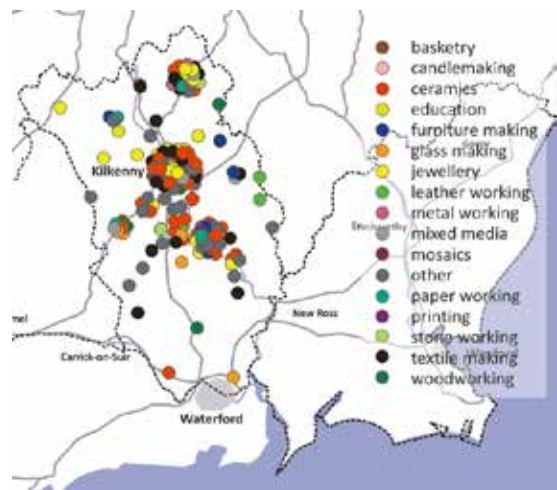
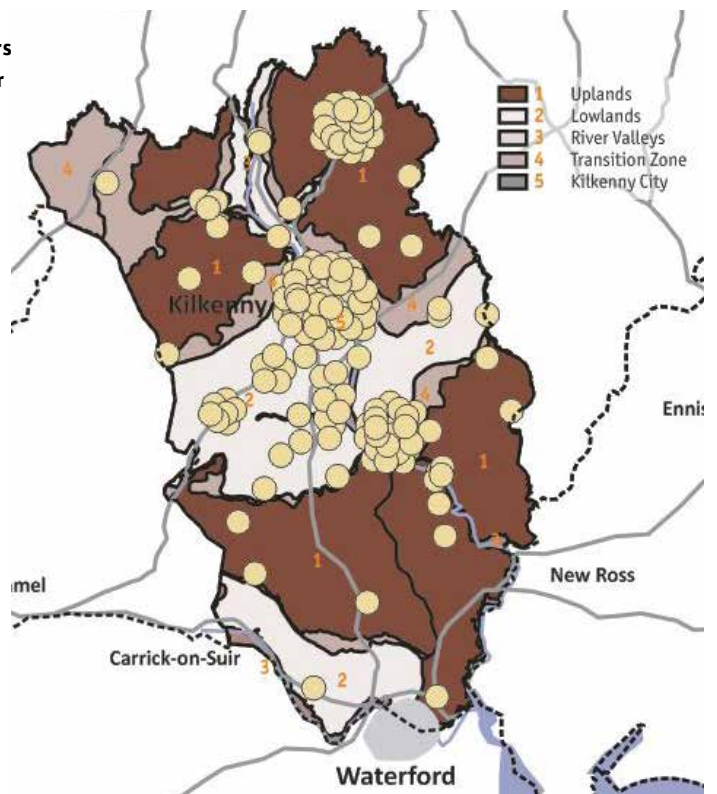


Figure 4-9: Kilkenny - spatial distribution of makers linked to landscape character





4.8 The results for **South Tipperary** are shown in Figures 4-10 to 4-12 below. The key messages can be summarised as follows:

- the largest groups of designer-makers are working in ceramics (26.3%), textiles (19.3%) and jewellery (12.3%)
- designer-makers are scattered across the LDC area, but with a significant concentration around Clonmel

- the vast majority are located in lowland areas, including the Lingaun valley, and close to major roads.

Figure 4-10: South Tipperary – distribution of makers by product type

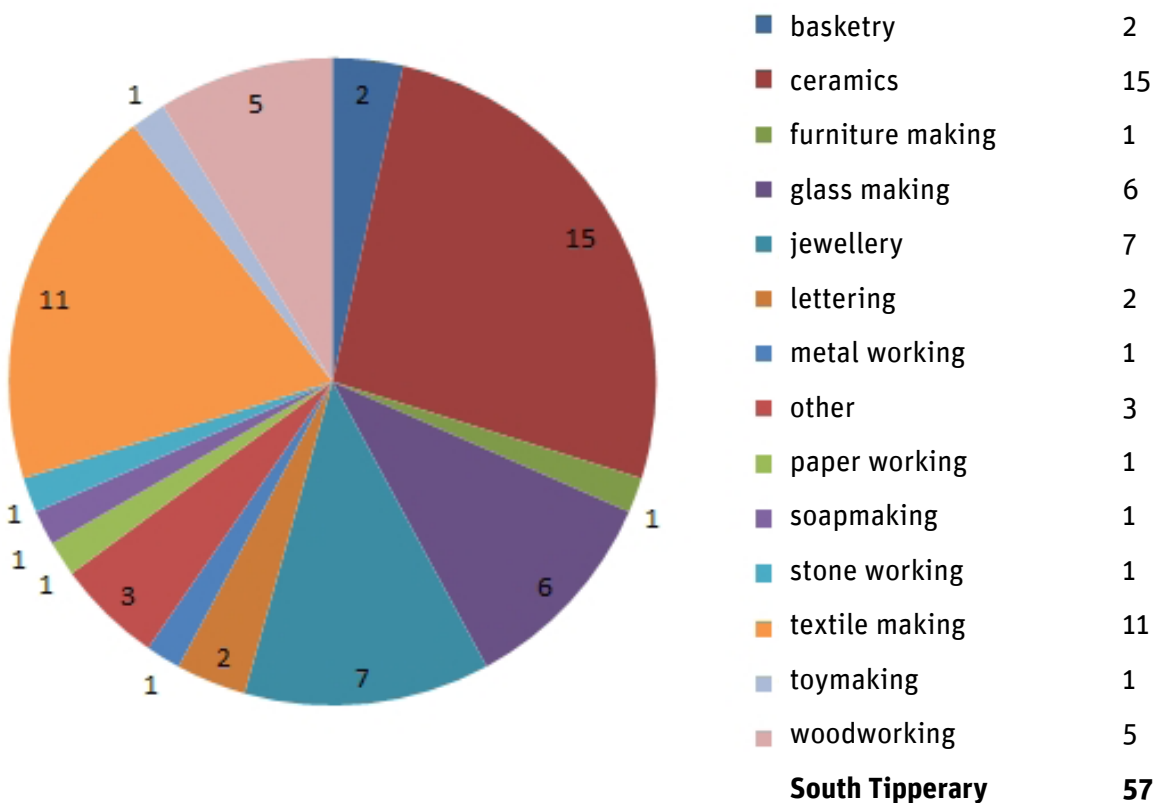


Figure 4-11: South Tipperary – spatial distribution of makers by product type

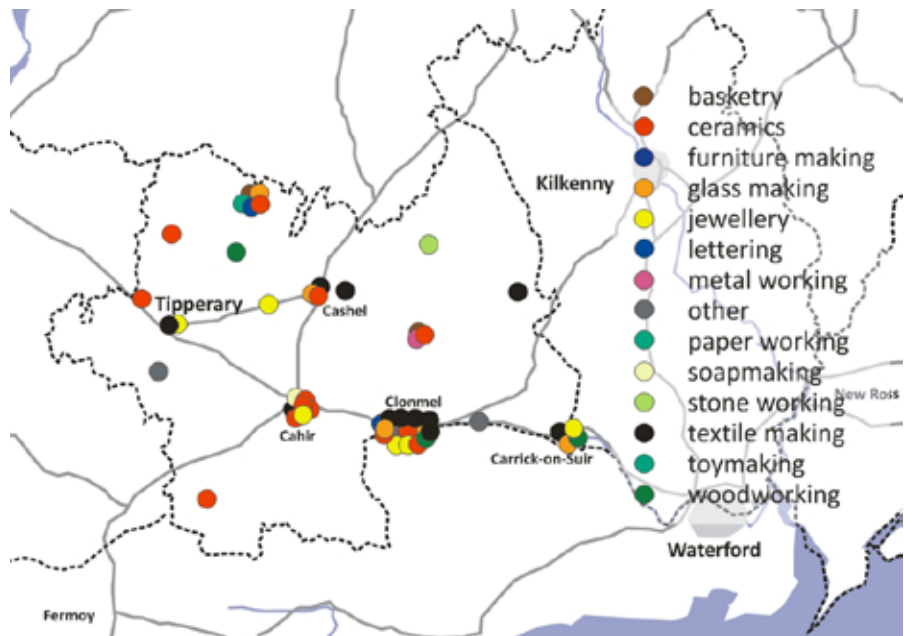
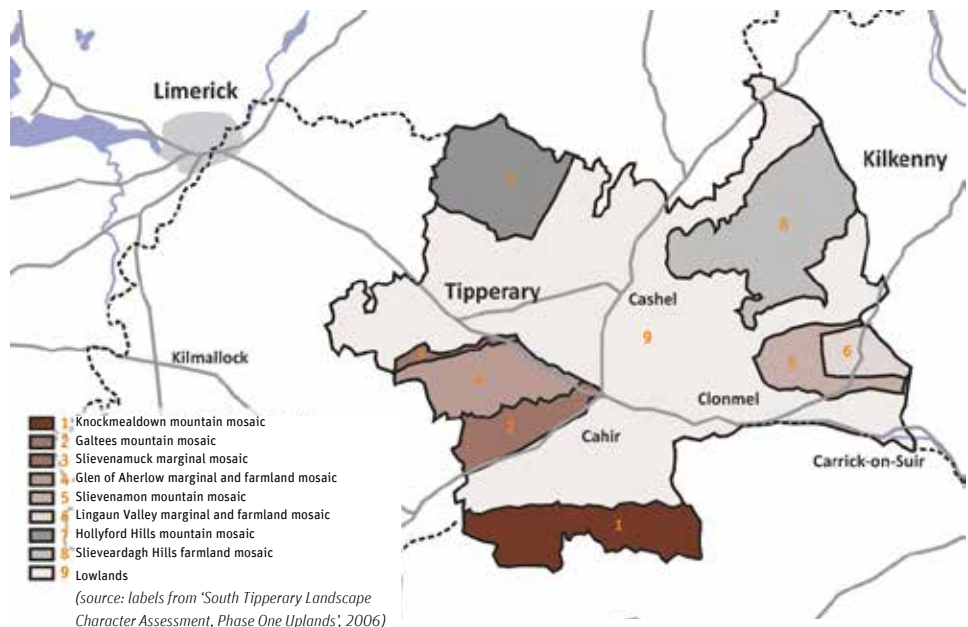


Figure 4-12: South Tipperary – spatial distribution of makers linked to landscape character



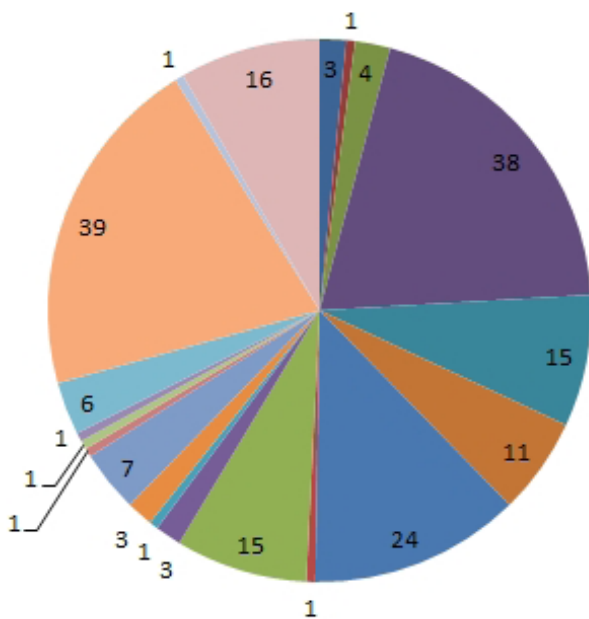


4.9 The results for **West Cork** are shown in Figures 4-13 to 4-15 below. The key messages can be summarised as follows:

- the largest groups of designer-makers are working in textiles (20.4%), ceramics (19.9%) and jewellery (12.6%)

- the majority of designer-makers are clustered around four principal settlements (Bantry, Clonakilty, Bandon and Kinsale) and on the suburban fringes of Cork City
- most designer-makers are located in lowland areas, but a significant proportion are based in coastal towns.

Figure 4-13: West Cork – distribution of makers by product type



basketry	3
bookbinding	1
candlemaking	4
ceramics	38
furniture making	15
glass making	11
jewellery	24
leather working	1
metal working	15
mixed media	3
musical instruments	1
other	3
paper working	7
pottery	1
printing	1
soap making	1
stoneworking	6
textile making	39
toy making	1
woodworking	16
West Cork	191

Figure 4-14: West Cork – spatial distribution of makers by product type

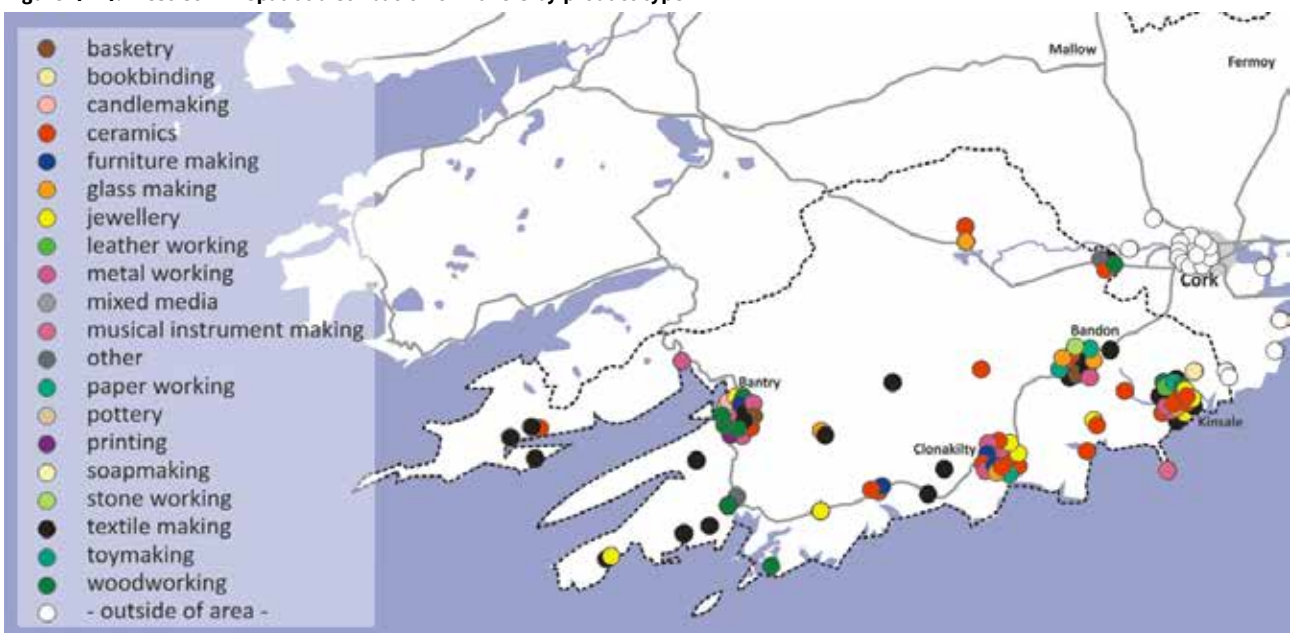
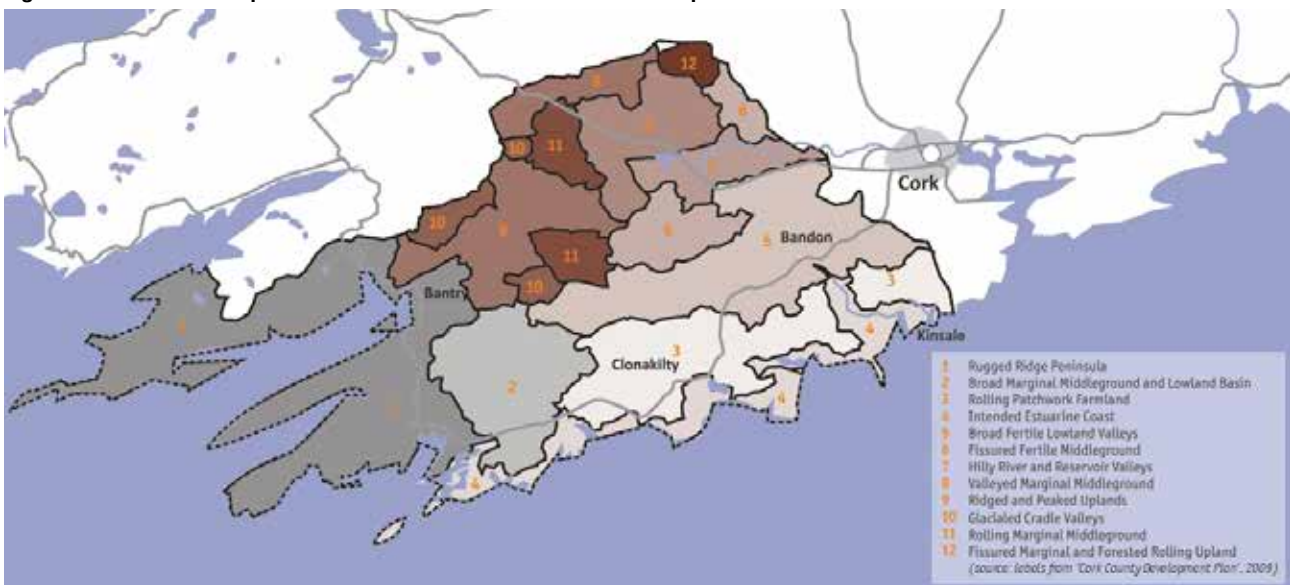


Figure 4-15: West Cork - spatial distribution of makers linked to landscape character

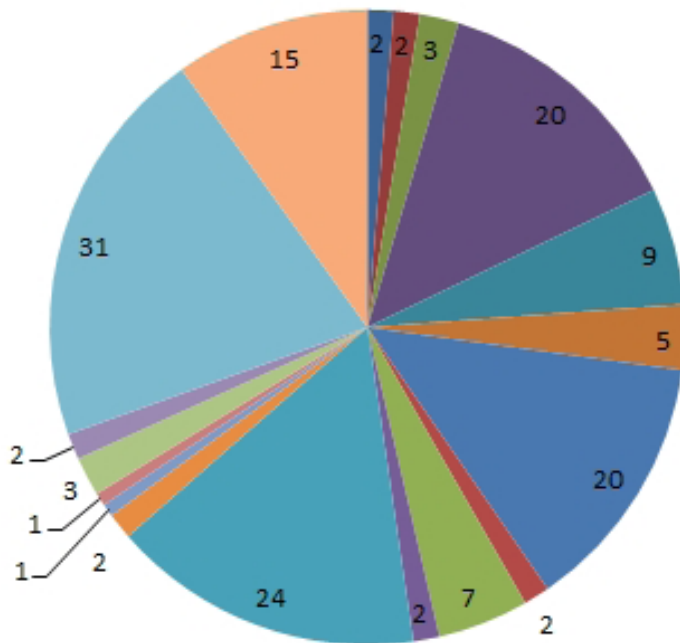




4.10 The results for **Wexford** are shown in Figures 4-16 to 4-18 below. The key messages can be summarised as follows:

- the largest groups of designer-makers are working in textiles (20.5%), ceramics (13.2%%) and jewellery

Figure 4-16: Wexford – distribution of makers by product type



- (13.2%), with a significant group of “others” (15.9%)
- the largest group of designer-makers are in Wexford City, but with other significant concentrations in New Ross, Enniscorthy and Gorey
- these are all lowland/coastal areas close to major roads.

■ art gallery	2
■ basketry	2
■ candlemaking	3
■ ceramics	20
■ furniture making	9
■ glass making	5
■ jewellery	20
■ lettering	2
■ metal working	7
■ mixed media	2
■ other	24
■ paper working	2
■ printing	1
■ sculpture	1
■ soap making	3
■ stoneworking	2
■ textile making	31
■ woodworking	15
Wexford	151

Figure 4-17: Wexford – spatial distribution of makers by product type

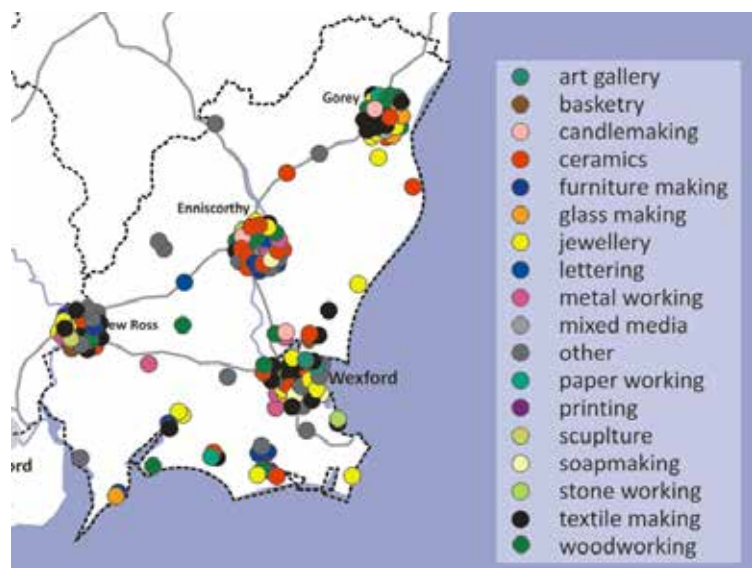
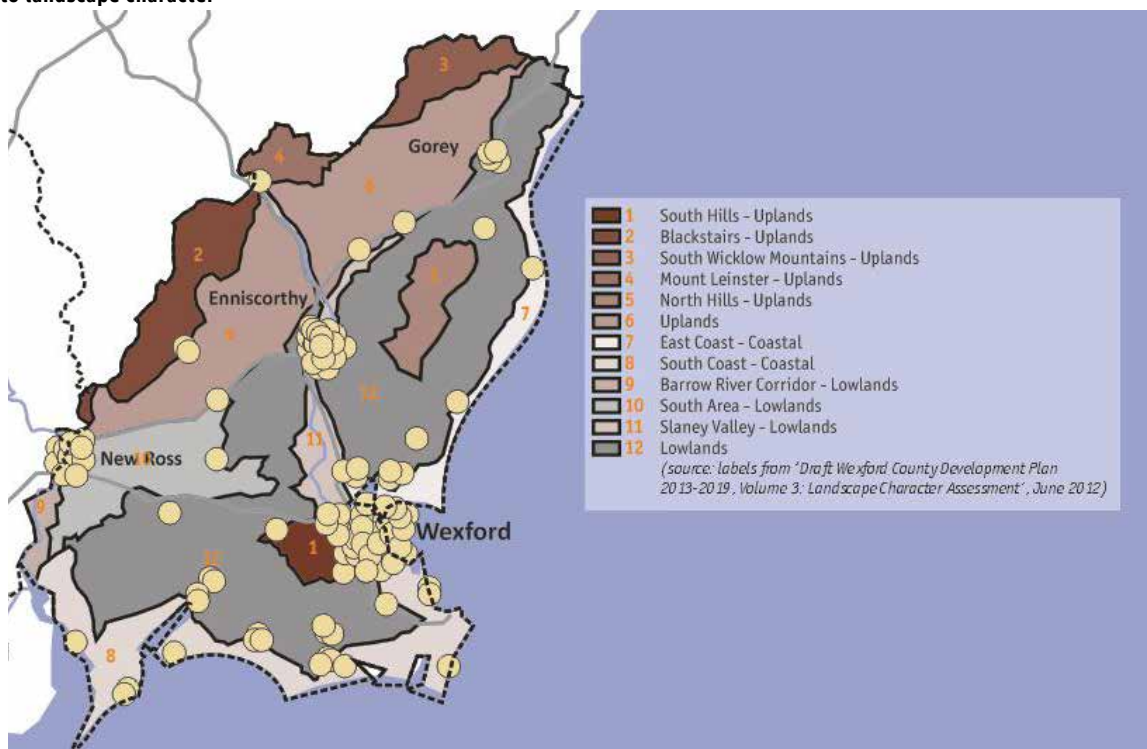


Figure 4-18: Wexford - spatial distribution of makers linked to landscape character





4.11 Looking across the five LDC areas, the **key findings** can be summarised as follows:

- designer-makers are working in a wide variety of forms/media, but the dominant disciplines are **textiles and ceramics**, followed by jewellery
- people working in all disciplines are most likely to be found in **urban areas**; where there are no towns of significant size, the pattern is likely to be scattered
- where there is a recognisable **urban hierarchy** it can take two forms: a single, dominant centre sometimes with a second tier of “satellite towns” (as in Kilkenny), or a more distributed polycentric model (West Cork)

4.12 Figure 4-19 sums up some of the key messages. It shows the location of designer-makers in relation to urban settlements and the roads network across the five LDC areas. The results suggest that **the location of craftworkers tends to follow the general pattern of settlement**, concentrating in towns and close to the strategic roads network. There are “outliers” – makers operating in isolation in rural and coastal locations – but this is, of course, true for the population at large. The broad picture is therefore consistent with the pattern noted by Scott (2010) for creative and cultural

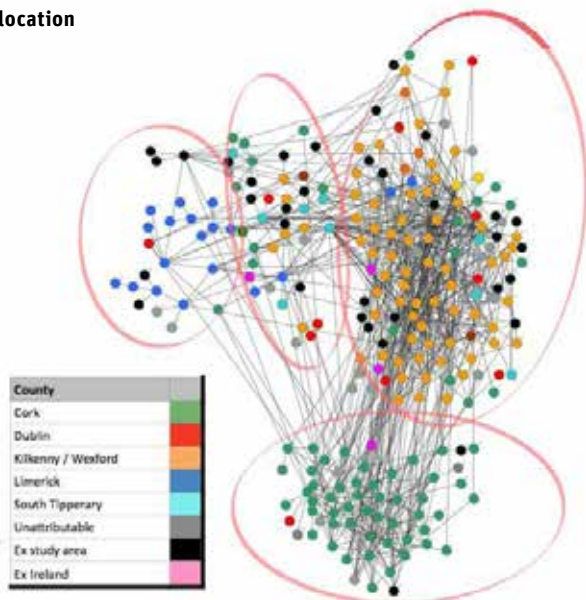
enterprises in the English Lake District: a diffuse, scattered cluster but with perhaps more marked “bunching” around the larger towns in Ireland than in the Lake District.

Location of makers and their networks

4.13 Fig 4-19 shows the network clusters of craft enterprises, agencies, suppliers, retailers and their connections (ringed in red) with nodes colour-coded to indicate the location by county of each designer-maker, agency, supplier or retailer. Note that:

- Cork based nodes are almost all in the same cluster indicating that they mainly interact with each other. There is a high density of connection between nodes in this area
- Kilkenny and Wexford based nodes are mainly contained in the same cluster indicating that there are many connections between nodes in these areas. In network terms there is little differentiation between these areas and they have been given the same code
- Limerick/ Ballyhoura based nodes are mostly in the same network cluster indicating that they mainly interact with each other. There is a low density of connection in this area and many

Figure 4-19: Network clusters and physical location



- are based on academic organisations
- the network cluster containing most nodes from South Tipperary also contains many nodes from other areas.

The map indicates a high correlation between location and the nodes that interact most with each other.

4.14 We have applied the concept of centrality to the road network of the study area to see if there is any correlation to the location of craft nodes. Fig 4-20 shows the road system mapped as a network so all connections between junctions are straight lines. The larger nodes are settlements and the smaller

nodes are junctions. Only major roads and the motorway system are included in the map. Motorways are shown as thick grey lines. Note that geographic location of nodes is only approximate.

4.15 Fig 4-21 shows the road network with the most central nodes shown by size. The centrality of nodes depends entirely on the pattern of connection rather than road capacity or existing traffic use. The point of this diagram is to explore whether there is any connection between places that are inherently central to the transport system and the location of crafts interests. It is noted that:

- the most central nodes are based in a triangle stretching from Clonmel to Limerick to Cork city
- Clonmel, Cahir and Mitchelstown are the best connected towns in the network and lie in the centre of this triangle

4.16 Fig 4-22 shows the “natural clusters” of nodes (indicated by colour) that arise from the network analysis of roads. We note that:

- Cork divides into a Cork / Kinsale coastal strip and a less connected western hinterland
- Kerry towns and junctions are in a



Figure 4-20: Road network

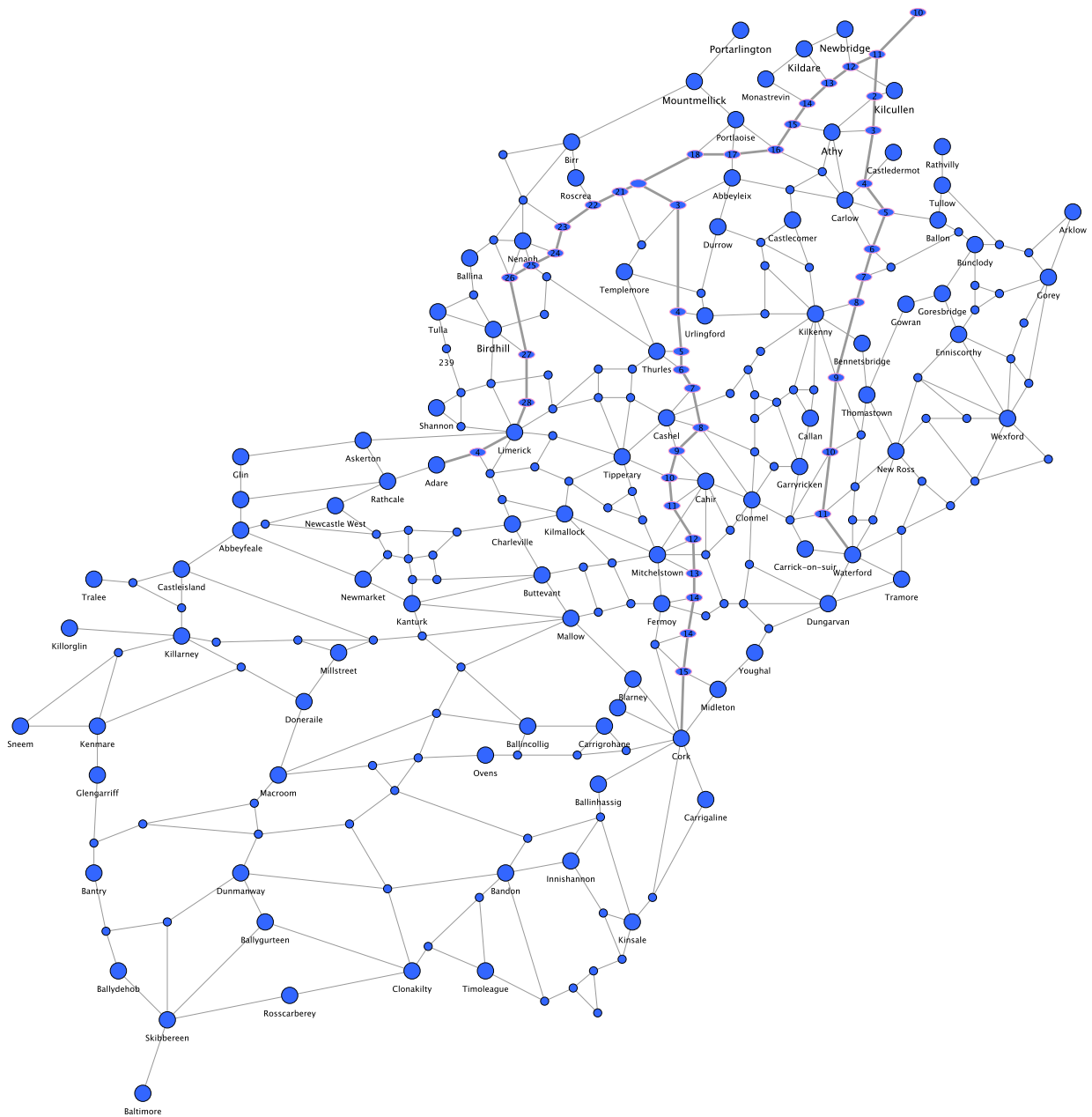
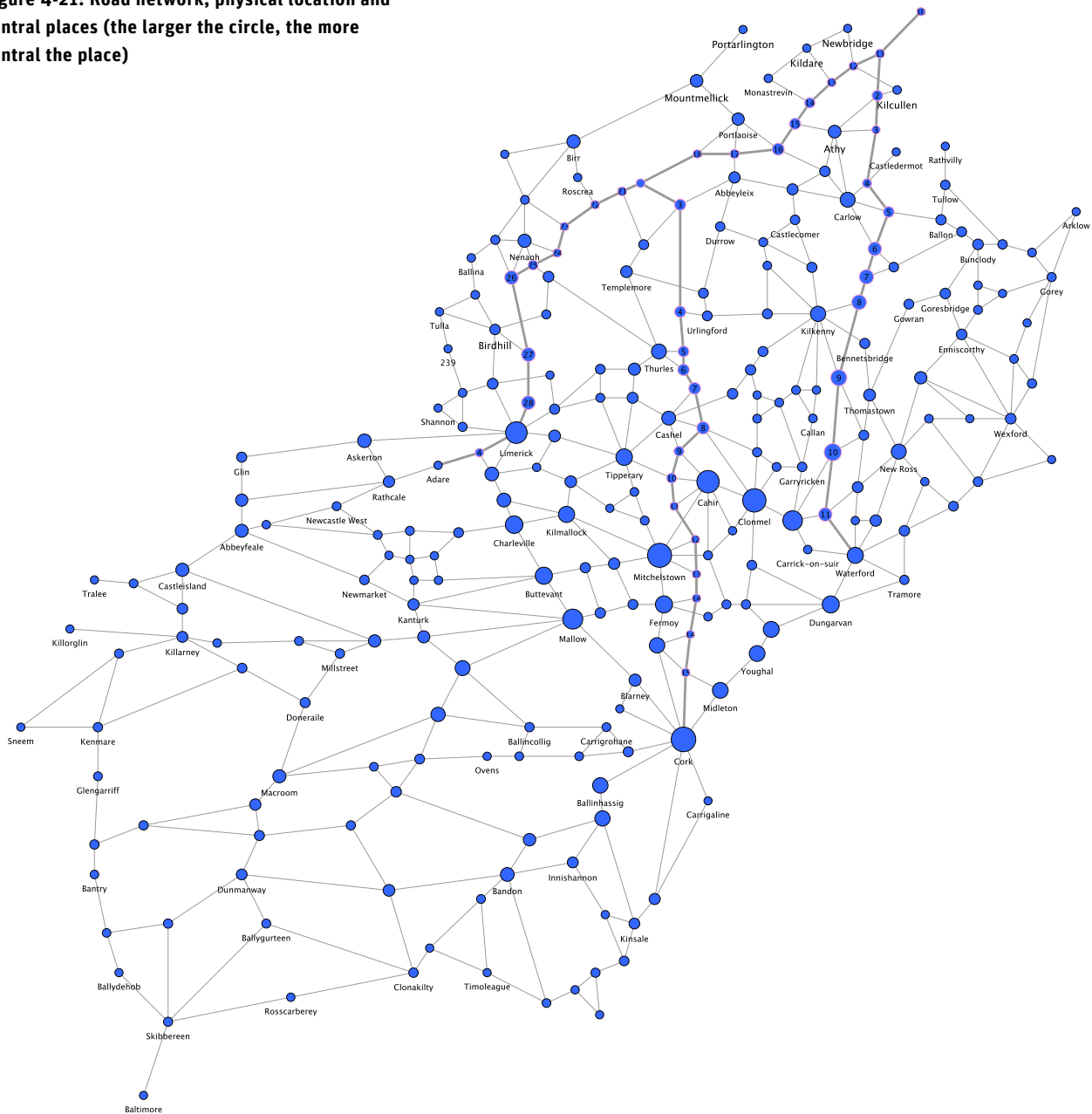


Figure 4-21: Road network, physical location and central places (the larger the circle, the more central the place)



- relatively separate cluster
- The Limerick/Wexford “band” divides into a western area dominated by Limerick and an eastern area dominated by Kilkenny
- Wexford is the centre of a smaller coastal cluster

The visibility of the sector

- 4.17 The craft industry across the five LDC areas varies greatly in terms of visibility. In most areas, an analysis of the locations of makers was characterised by anonymity. In urban areas, apart from galleries and some retail outlets, makers simply blend into the urban fabric. An analysis of 100 makers based in towns revealed that a large proportion had no public-facing evidence of their presence. It is the same picture in rural areas where a similar analysis produced no visible evidence of the activities of makers. No signs, or invitation to watch, participate or buy. It is only where there are established galleries or on craft trails where this situation changes. Even then, craft only seems obvious if you know what you are looking for.
- 4.18 Arguably there is a need for craft to have a higher profile in the landscape and while this might be achieved by signs, there may be benefits in pursuing a more place-

based approach. There are probably many reasons why some makers prefer a cloak of invisibility but a place-based approach could involve building relationships between communities and makers. The promotion of the sector through fairs and events could then become part of civic life instead of being a rather private activity.

Conclusion

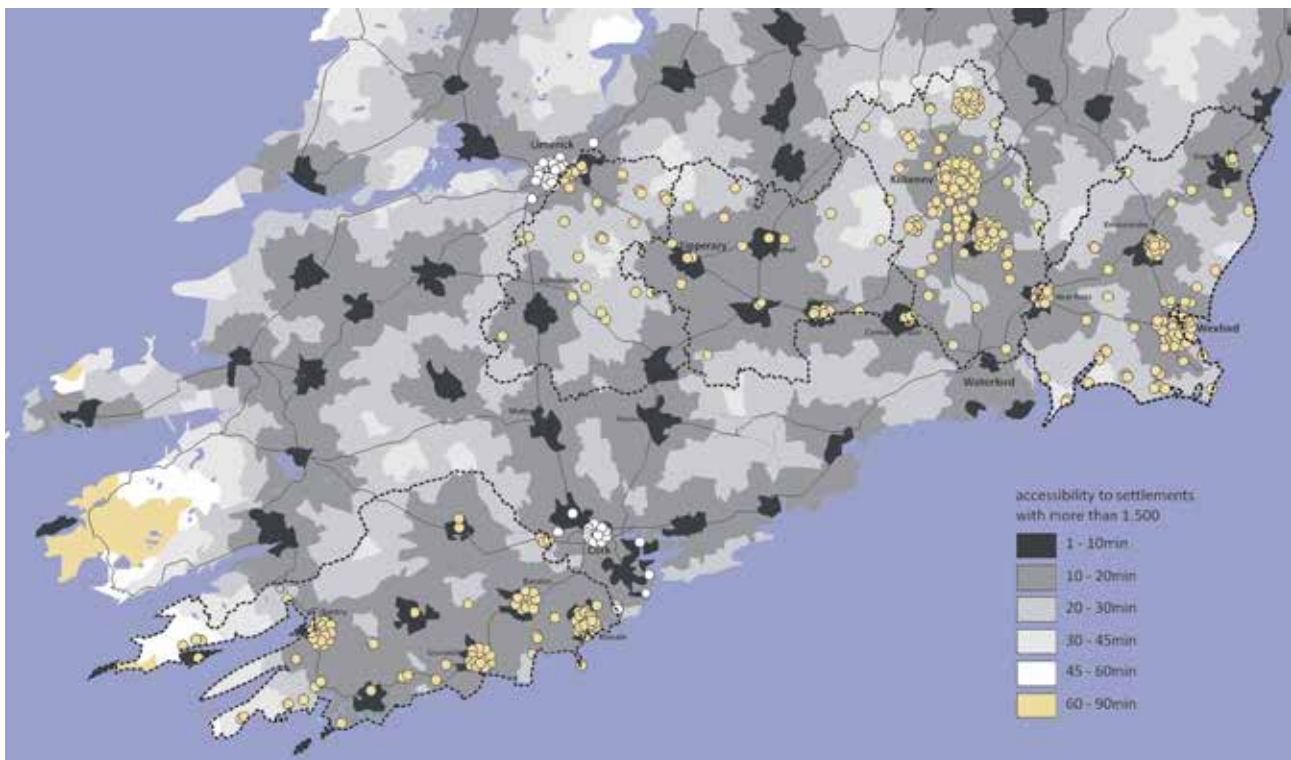
- 4.19 The key messages from this section of the report are:
- we have mapped the location of 695 CCoI-registered designer-makers in the five LDC areas
 - viewed in conjunction with data on craft employment, it seems clear that some areas are more attractive to craft entrepreneurs than others
 - this is a large sample although the CCoI database excludes hobbyists, students and others who are part of the crafts ecosystem
 - focusing on the five areas is useful, although it inevitably offers a partial view
 - analysis of the database shows that textiles and ceramics are the dominant craft forms practised in the five areas
 - the location of craftworkers tends



- to follow the general pattern of settlement: they are more likely to be in towns and/or close to the strategic roads network
- there is no clear evidence to suggest that the spatial distribution of craft enterprises is notably different from other sectors
- the analysis confirms the pattern observed in the English Lake District of a “diffuse, scattered cluster”, although the tendency to bunch

- together in and around towns may be more marked in the 5 LDC areas
- the most central nodes are based in a triangle stretching from Clonmel to Limerick to Cork
- Clonmel, Cahir and Mitchelstown are the best connected towns in the network
- the impact of makers on the landscape of the five LDC areas is very limited and their visibility to visitors and communities is low

Figure 4-23: Spatial distribution of designer-makers: towns and roads



5. mapping the networks

- 5.1 Our work programme included a **network mapping exercise** which was based on original research into the working connections between craft enterprises and others in the craft ecosystem. We gathered data in two ways:
- by adding questions to the **survey** of enterprises on the CCoI database which was being carried out by Indecon as part of their economic study: we asked respondents to identify the names, locations and types of organisations they work with most, and the survey yielded 73 returns
 - by asking people who attended the **workshops** (see Section 6) to complete the survey and/or add connections to the early results of the survey; this has helped to increase the total number of contacts cited to 280. (see Figure 5-1 below)

187 of the cited contacts are enterprises and other organisations based in one of the 5 LDC areas; 93 based in other areas.

- 5.2 Figure 5-2 shows a **breakdown of the cited contacts**, in two categories: designer-makers (by craft type) and other actors in the network. The former reflects the variety of disciplines in the CCoI database, although individuals working with textiles are under-represented compared with the whole population.

The other actors are more or less equally distributed across galleries, sales outlets, agencies and other services.

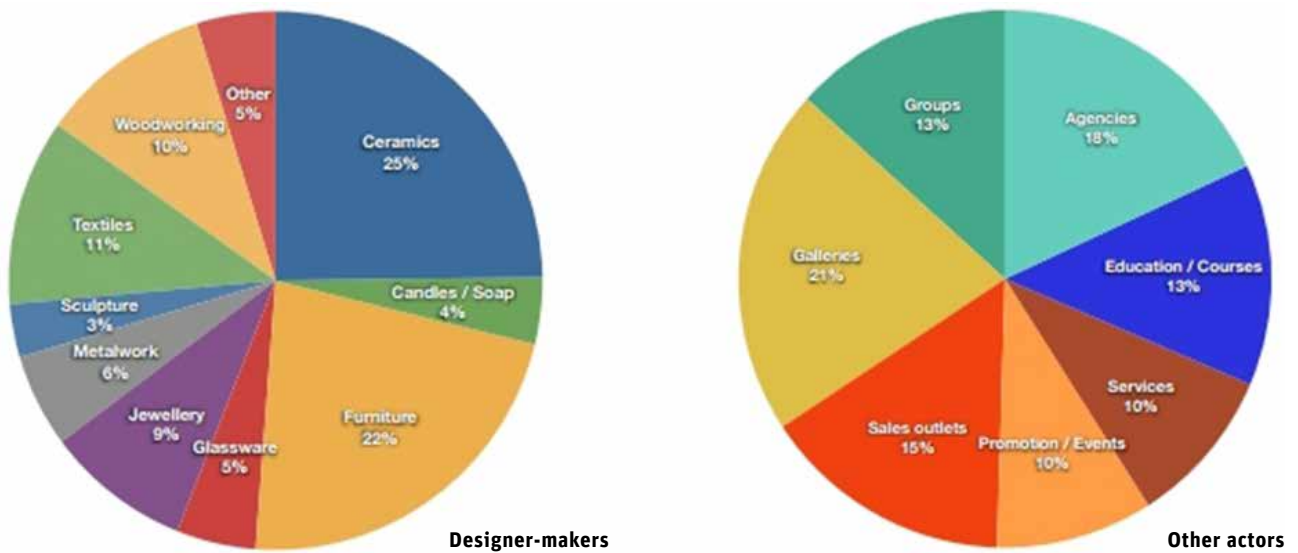
- 5.3 All respondents were advised that the data collected was **confidential and non-attributable**. This had two consequences for how the network map was constructed and displayed:

Figure 5-1: Network contacts cited

Location	Survey responses	Contacts cited	Total contacts
Ballyhoura	2	17	19
Kilkenny	17	17	34
South Tipperary	5	8	13
West Cork	31	49	80
Wexford	18	23	41
Other	0	93	93
	73	207	280



Figure 5-2: Analysis of cited contacts



- respondents could withhold their names: while this would allow them to be positioned in the network in terms of their own contacts, it would also conceal citation by other respondents, potentially causing double representation on the map; these respondents have been excluded - although they may have been cited by others.
- individual respondents are not named, although we have usually identified public bodies.

the ideas and knowledge of a community are transmitted. The reasons for a link developing may be based on friendship, professional knowledge, common interests or trade. The degree of connectivity created by these links is a measure of how the network shares perceptions, values and ideas - what we might commonly call culture.

5.5 A **craft culture** might be **local** – for example where the links are based on proximity and social interaction. Or it might be based on shared professional interest across a wide, even international area - a **community of practice**. There is evidence that the craft culture in the study area takes both these forms, although **local** networks are

Culture and networks

5.4 Social networks comprise the **links between people**. It is through social networks that

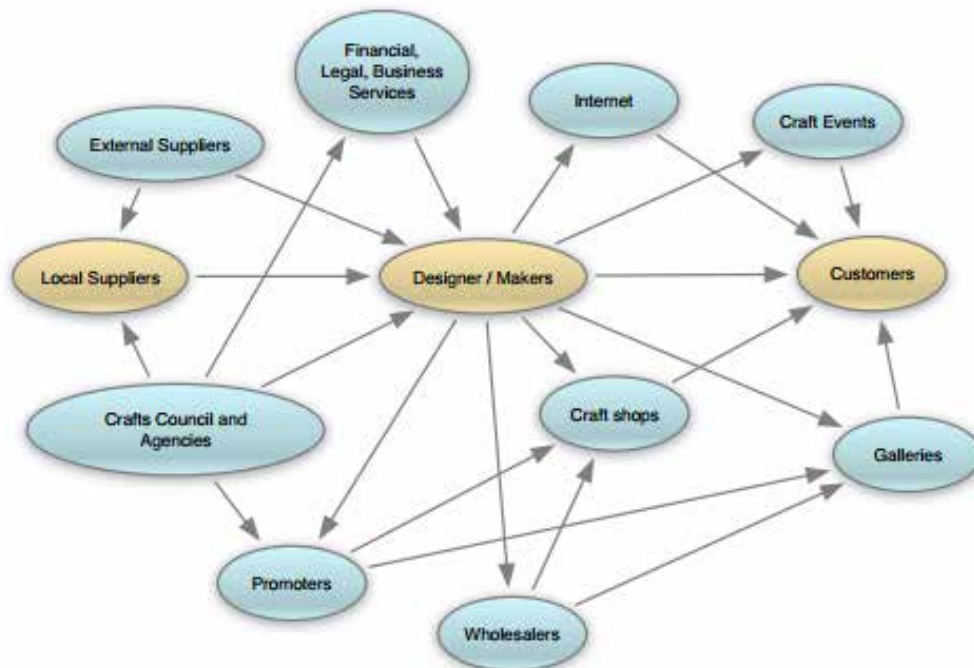
more important. Many of the craftspeople surveyed have national and international links through training, the markets they address or their country of origin. At the same time they expressed an attachment to their locality and the surrounding countryside as a source of inspiration and authenticity.

craft ecology which were revealed by the survey and the workshops. The process is centred on designer-makers: they source materials from local and other suppliers. Their finished product is sold to customers through channels including wholesalers, galleries, shops and online sales. A number of agencies support this process through education, training and the provision of business advice. The level and quality of available support services will affect the performance and sustainability of craft enterprises.

Network and Process

- 5.6 Craft culture reflects a web of functional relationships as well as shared values. Figure 5-3 shows the **components of the**

Figure 5-3: Various components of a craft ecology





The Network Map

5.7 How strong are the craft networks in the study area and how do they relate to localities? Figure 5-4 shows the **network map** generated from the questionnaire returns and additional information gathered at the workshops. All the enterprises and agencies that participated are shown as nodes, together with all the other enterprises and agencies that they cited in their responses.

5.8 The links represent the connections cited. Data analysis software arranges the map and separates the nodes into clusters based solely on the pattern of connections cited by respondents. We can identify **patterns of connection** including:

- the **clusters of organisations** that work together: for clarity, we have shown the clusters in their relative geographic positions
- the **organisations most likely to influence** the network: each node is given a score showing how central it is in the network pattern⁴

5.9 The map shows includes all the identified contacts, with the exception of those

⁴ This is an assessment of the potential of the node to influence the network. It is possible that a node with few links can be very influential, or that a node with many links is in such a poor position that it exerts very little influence.

that have been suppressed for reasons of confidentiality. A total of **249 nodes** are shown, including contacts outside the five LDC areas. Some of the latter are in neighbouring localities, others in Dublin and other more distant parts of Ireland, and some overseas. The nodes are **colour-coded** by organisation type; the size of each dot is a measure of its **centrality** in the network.

5.10 Even though the data gathered was not exhaustive, the results show a **good level of connectivity** across the map. On average, each enterprise/organisation shown on the map has reported about six connections, mostly with other craft enterprises in the area or local agencies.

5.11 The results shown suggest a pattern of **distributed networks** with relatively few “central places”. CCoI is by some distance the most significant node in the network in terms of both the number and importance of linkages. Other local and county-level organisations also emerge, together with a number of important galleries and education/training providers and some highly networked designer-makers. The top 20 centrality scores are shown in Figure 5-5.

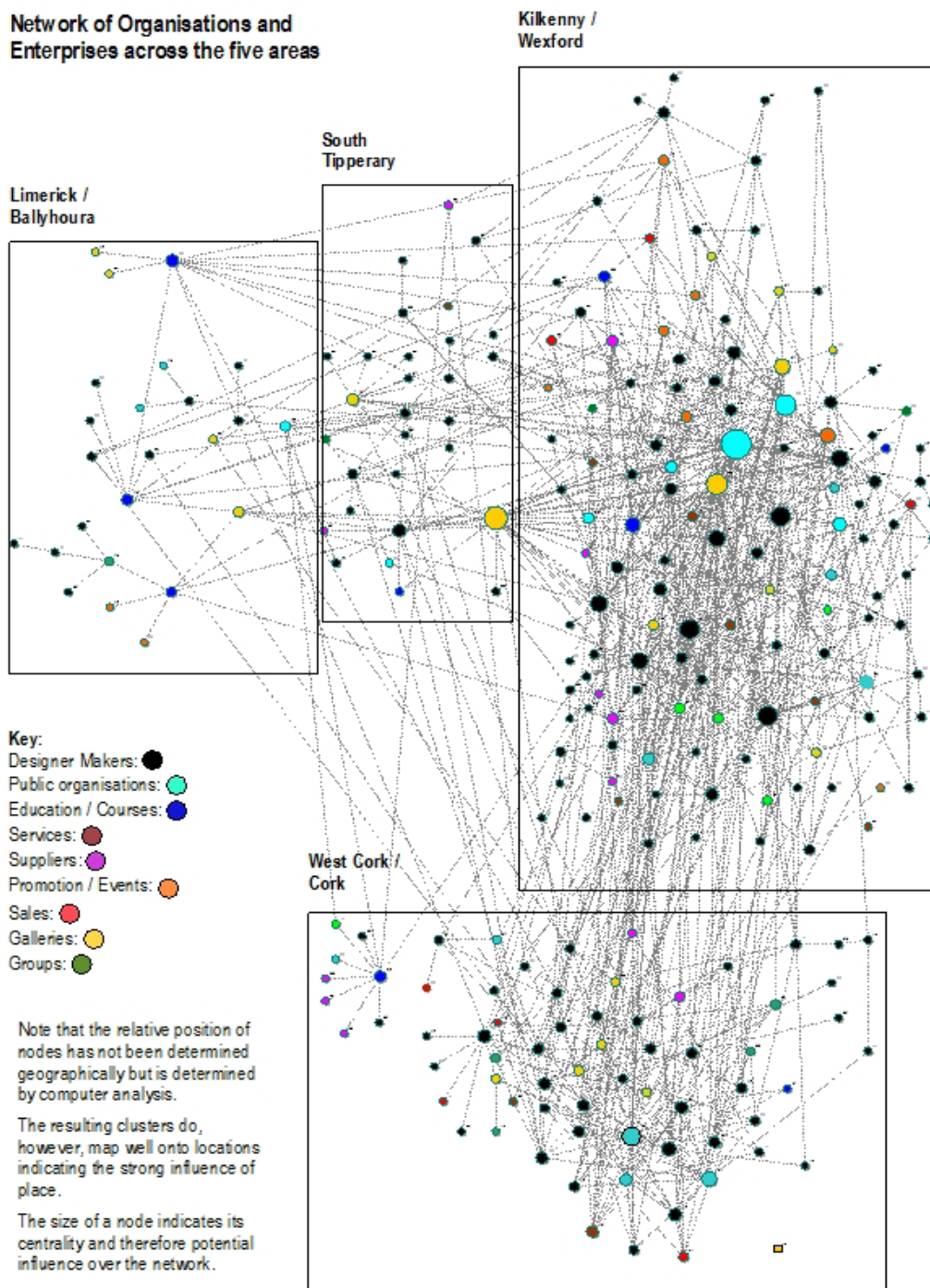


Figure 5-4: Craft networks in the five LDC areas



Figure 5.5: Top 20 centrality scores

1	Crafts Council of Ireland	11	Limerick Ceramics Network
2	Craft Granary, Cahir	12	Ceramics designer-maker, Kilkenny
3	Designer-maker spanning the Kilkenny/Wexford and West Cork/Cork clusters	13	Royal Dublin Society
4	Kilkenny Enterprise Board	14	West Cork Development Partnership
5	Candle maker	15	Blue Egg Gallery, Wexford
6	Ballyhoura Development Ltd	16	Sales outlet, Wexford
7	Doneraile Restoration and Training Centre	17	Woodworker, Cork
8	Limerick School of Art and Design	18	Course provider, Mayo
9	Narrow Space Gallery, Clonmel	19	Galleries (unspecified)
10	Textile designer-maker, Wexford	20	Pottery, Wexford

5.12 The map also provides useful **geographic information**. The analysis shows that the networks tend to be **local** rather than **communities of interest**. It is hard to trace functional clusters – for example, between jewellers and wood turners, but the map provides ample of evidence of the tendency of actors in the crafts sector to interact with other local enterprises (irrespective of discipline), galleries and agencies. There is some evidence of downstream supply chain linkages (to galleries and shops) but evidence of upstream linkages (to suppliers of materials and technical services) is fragmentary.

5.13 We have adjusted the map to reflect the **geographical distribution of the networks** across the five areas. It should be noted that the result is only an approximation: the locations shown are not precise, and each box includes the most common “out of area” nodes. The geographical clusters generated by the software do not correspond precisely to five LDC areas. There were strong linkages between (i) Ballyhoura and Limerick, (ii) West Cork and the rest of Cork, and – especially – (iii) Kilkenny and Wexford, and these have been mapped accordingly.

5.14 The big picture emerging from the map is of a combination of **local, regional and national connections**. The connections are most dense in and between Kilkenny/Wexford and West Cork/Cork, reflecting the larger population of craftworkers in those areas and in our sample.

5.15 The **richest data** relates to the **Kilkenny/Wexford** and **West Cork/Cork** clusters:

- **Kilkenny/Wexford**: a large and densely connected local cluster, reflecting the influence of CCoI as a locally located national body as well as a provider of professional/post graduate training. There is also a high degree of recognition for Kilkenny Enterprise Board.

- **West Cork/Cork:** the network map reflects a tightly knit craft community at the local/county level, albeit well-connected to CCoI and others in the Kilkenny/Wexford cluster.

are clearly considered to be important actors by many.

5.16 Data for **Ballyhoura/Limerick** and **South Tipperary** are more sketchy, although they confirm the significant role of the LDC and education/training establishments (in Ballyhoura), and galleries (in South Tipperary).

5.18 The top **centrality scores** for each LDC area are summarised in Figure 5-6. They show the importance of influential/well-connected designer-makers as well as agencies, galleries and education/training providers.

5.17 In order to test the **significance of CCoI and the local development companies**, we generated network maps that excluded those organisations:

- CCoI is the best connected, most central player in the network map, and excluding it from the map reduced the density of connections significantly. Without CCoI, the local clusters are still intact, but diminished. There might, of course, be other consequences for the sector if CCoI support were reduced or withdrawn.
- Similarly, removing the LDCs from the map leaves the local clusters intact but reduced in terms of the volume and density of connections; the local craft culture is not wholly dependent on LDCs or other agencies but they



Figure 5.6: Top 5 centrality scores by LDC area

Ballyhoura		West Cork	
1	Ballyhoura Development Ltd	1	Local designer-maker
2	Limerick School of Art and Design	2	Doneraile Restoration & Training Centre
3	Limerick Ceramics Network	3	West Cork Development Partnership
4	Local metalworker	4	Local woodworker
5	Adare Gallery	5	Local jeweller
Kilkenny		Wexford	
1	CCoI	1	Local textile designer-maker
2	Kilkenny Enterprise Board	2	Blue Egg Gallery
3	Local candle maker	3	Local sales outlet
4	Local ceramics firm	4	Local pottery
5	Local furniture maker	5	Local ceramics designer-maker
South Tipperary			
1	Craft Granary, Cahir		
2	Narrow Space Granary, Clonmel		
3	Local textile designer-maker		
4	Local woodworker		
5	Local jeweller		

Conclusion

5.19 This analysis is consistent with the evidence (from the literature review and the workshops) that the crafts sector benefits from a **sociable, supportive, well-connected milieu**. Practitioners and enterprises have working relationships with each other, with galleries and shops, with education and training providers and enterprise agencies. In some cases these relationships shade into ties of friendship and mutual support. What emerges is a system of interdependency

of the type identified by Scott (2010) in the English Lake District. It is further corroboration of the proposition that, in the crafts sector, **place matters** and is, indeed, of fundamental importance. The crafts sector operates in a complex, fluid “ecosystem” which is founded, though not exclusively, on place and community.

6. key messages from the workshops

- 6.1 The four **workshops** held in March 2013 were facilitated jointly by Indecon and WMUD.⁵ All CCoI members in the five LDC areas were invited to attend, together with representatives of CCoI, LDCs and other local agencies and the education/training sector. A total of 73 people attended over the four days.
- 6.2 Indecon ran sessions to generate a **SWOT analysis** for the sector. For the purposes of our study this revealed that the crafts community considers the reputation of Irish design to be a particular strength, especially when combined with concepts like “indigenous”, “culture”, “heritage” and “tradition”. By contrast, networking (or the lack of it) is perceived to be a significant weakness, and it is also considered to be one of the most important opportunities for future development.
- 6.3 The sessions facilitated by WMUD revealed near-unanimous agreement that, **in the crafts sector, place matters**, although it was not the only factor or even the most important. Nevertheless, attendees told us that they and their peers were attracted to particular localities by factors including:
- **natural beauty**, especially coastal and mountain scenery
 - places which already **attract large numbers of visitors**
 - the opportunity to **engage with local craft traditions and skills**
 - proximity to centres of specialist **training and education**
 - access to **suppliers of materials and services**
 - access to specialist **retail and gallery outlets**
 - the presence of **like-minded people**, including other craft workers
 - strong social, cultural and business **networks**
 - the opportunity to experience a new and different **lifestyle**
 - a **friendly, welcoming local community**, and
 - supportive **cultural, tourism and enterprise agencies**.
- 6.4 We asked delegates to name the places in Ireland that they considered to be most closely **associated with craft production**. Dublin was recognised as having the greatest concentration of designer-makers, galleries and other infrastructure. In rural Ireland, the broad consensus was that the key locations are **West Cork and Kilkenny**. In both cases, this is a relatively modern (late 20th century) phenomenon but crafts are now sufficiently well-established in both areas for people to talk in terms of a “craft tradition”. They represent two different models, with West Cork’s crafts renaissance

⁵ The workshops were held at Clonakilty, Castletroy, Horse & Jockey and Wexford.



West Cork workshop, 12/03/2013



Wexford workshop - 15/03/2013



Kilkenny and South Tipperary Workshop - 14/03/2013



driven at least in part by migration from the rest of Ireland and overseas, while the State and other institutional players (for example, KDW, CCoI and post-graduate education/training establishments) have been influential in Kilkenny. Other significant locations include Sligo/Leitrim, Galway and Donegal, where traditional crafts have now been complemented by an influx of creative entrepreneurs. Limerick and Tipperary were both cited as a places which have a strong crafts offer without enjoying a great deal of public recognition.

architecture and a rich heritage and culture. Some places are renowned for these qualities, others less so, although an enterprising, can-do culture can help to even out the differences. Nevertheless, it is hard to avoid the conclusion that, in terms of competitive advantage, **some places are more equal than others**. Despite this, many areas promote themselves as craft destinations.

6.5 Places may be more or less generously endowed with natural beauty, fine

6.6 Delegates explored the ways in which **place influences their work**, for example:

- the landscape is **a source of inspiration**
- they use **locally-sourced materials**

Ballyhoura workshop, 14/03/2013





- local **topography** and the colours of sea and soil are reflected in their work
- they drawing on **local history and tradition**.

6.7 Place quality matters but the appetite for the spartan lifestyles experienced by craft pioneers in the 1960s and 70s seems to have diminished (Ospina, 2011). Designer-makers, like other entrepreneurs, need the right **business** infrastructure: high-speed broadband, reliable postal services and utilities, and affordable workspace are considered to be essential requirements: people are attracted to remote locations, but only if they are accessible.

6.8 People who had moved to an area to set up a studio or workshop described the pull factors that had attracted them, but many participants described themselves as **local residents** who had always lived in the area; others already had a connection with the locality, such as family ties or previous visits. The crafts sector includes a large number of mobile practitioners, but for others location is a given, not a matter of choice.

6.9 It was suggested that overseas visitors want to “buy Irish”, while Irish consumers – and some specialist collectors – are interested in particular localities and the **provenance** of the product. There was broad agreement

that many customers – Irish or international visitors - are **buying a story** about the place, the producer and the community when they purchase a craft product. This may not be their only or even their primary motivation, but it is undoubtedly important. Delegates told us that consumers value:

- products that reflect **local history and traditions**
- the opportunity to take away **memories of a place**
- opportunities to **meet and engage with makers**
- products made from **locally sourced materials** which are perceived to be “authentic”
- the sense that buying a local artist’s work **supports the local community**

6.10 We also asked delegates to discuss **the benefits that the craft sector brings to the local economy**. Key messages included:

- the strong links between **crafts and rural tourism**
- the contribution of crafts to a strong **local brand**
- local economies benefit from the presence of a diverse range of craft **skills**
- direct and indirect **job creation**
- **income** generated locally is spent locally
- maintaining and providing an outlet for

traditional craft skills

- local communities are encouraged to **look outward** and engage with the wider world.

6.11 While most of the people we have spoken to agree that, in the crafts sector, **place matters**, most designer-makers were at pains to stress that creativity, aesthetic quality and technical excellence are even more important. In Ireland, as in every country, there is a market – among visitors and home nationals – for products, whether traditional or contemporary, in an explicitly national idiom. But, given the cosmopolitan

nature of the craft community in Ireland, it is hardly surprising that many makers eschew “Celticness” in favour of a more contemporary or international aesthetic. Nevertheless, our consultations suggest that many of these still acknowledge that local landscapes and traditions are in some way reflected in the forms and colours of their work.

6.12 Whether or not place influences the work, directly or indirectly, the connection between **crafts, rural tourism and local economic development** is universally (though



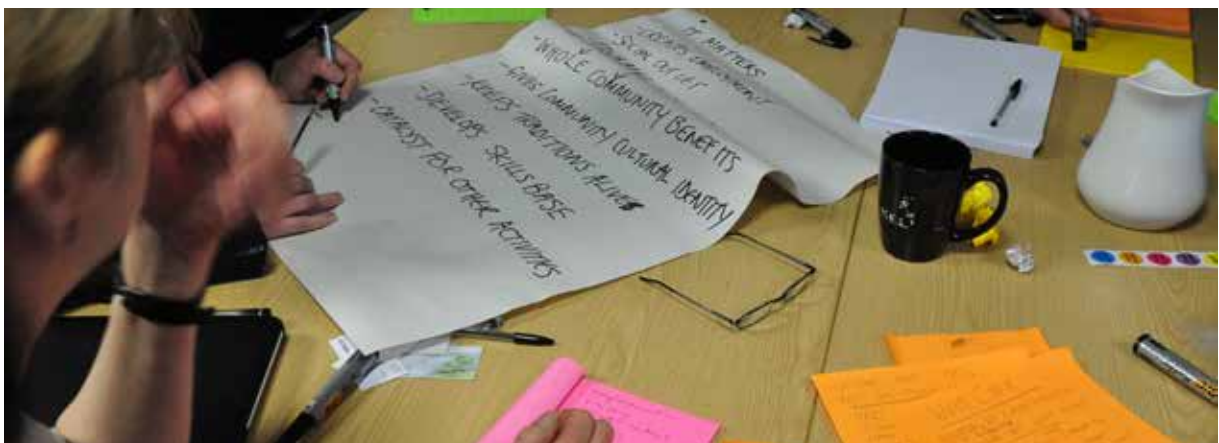


sometimes grudgingly) acknowledged. In many areas, crafts are an important part of the visitor experience: studios, craft shops and galleries are important attractions, and many tourists purchase original work as a souvenir of their visit. Cultural tourism, to which the crafts sector makes a major contribution, is prized because it is associated with discerning, high-spending visitors.

Conclusion

6.13 The **key messages** from this section can be summarised as follows:

- our workshop attendees confirmed that place matters – it's not just a matter of natural beauty, craftspeople are also attracted by access to specialised education/training, galleries and like-minded people
- West Cork and Kilkenny are recognised as Ireland's pre-eminent centres of craft production, but other locations have emerged
- as craft destinations some places are more equal than others, but some basic requirements need to be met: high-speed broadband, postal services and utilities
- tourists and domestic consumers are buying a story about the place, the producer and the product.



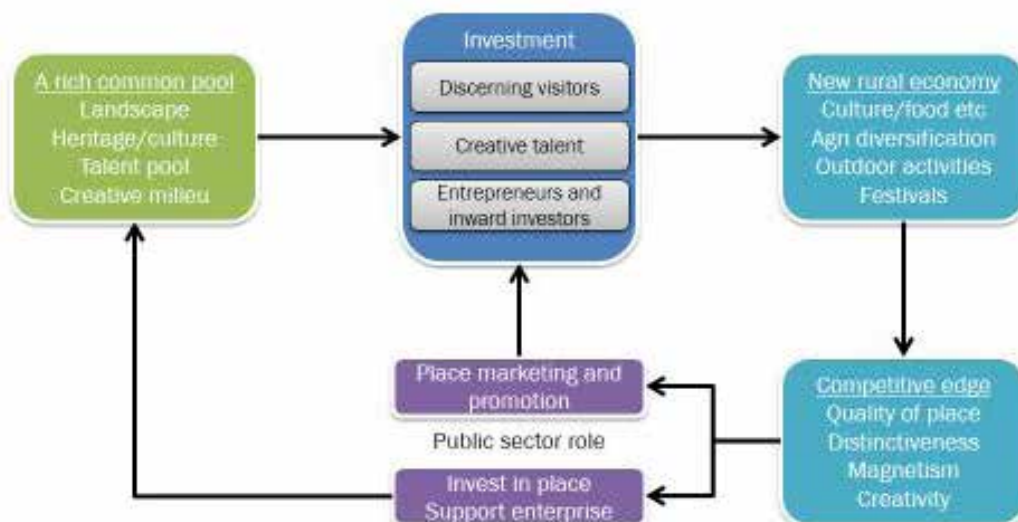
7. conclusions and recommendations

7.1 The literature review has highlighted the contribution of the crafts sector, in Ireland and elsewhere, to the development of the **modern, post-agrarian rural economy**, especially tourism. The other elements of the study have provided some corroboration for this proposition. It was a key theme of the workshops, with many participants acknowledging the role of crafts in the cultural tourism market. The popularity of open studios and galleries was recognised, although some makers admitted they were ambivalent about the former. Galleries and shops feature in the network maps discussed in the previous section, and the GIS analysis confirmed a tendency for designer-makers to cluster in popular coastal towns.

7.2 Figure 7-1 is our attempt to capture the **new rural development model** in a stylised, graphic form:

- some places have a **rich common pool** of assets - landscapes, heritage, culture and tradition – as well as, in some cases, a creative milieu founded on talented individuals
- this common pool helps to attract **investment** in a variety of forms: discerning, high-spending visitors come to the area to experience its special qualities; talented individuals are drawn to it as a place to live and work; and investors and entrepreneurs recognise business opportunities
- this contributes to the emergence of

Figure 7-1: Place, creativity and the rural economy





a **new rural economy** founded, among others, on tourism and creative industries: crafts, culture and food coalesce and complement the natural environment; festivals and other events exploit these cultural assets

- in this new model, **competitive advantage** is based on place quality, distinctiveness and the “collective magnetism” (Scott, 2010) exerted by numerous related microbusinesses
- **public sector intervention** may take a variety of forms, including: (i) place marketing and promotion, and (ii) investment in the common pool – for example, in the built environment, conservation of natural landscapes or business development.

7.3 The model provides the **rationale for LDC support** for the crafts sector and other creative/cultural industries. In line with the spirit of “conglomerate interdependency” (Scott, 2010) the value of this group of industries lies not so much in the (admittedly modest) contribution of individual enterprises as in their collective effects. They complement, reinforce and amplify each other, and provide powerful narratives for place marketing and tourism promotion.

7.4 The literature and our own experience in rural development both suggest that some places are **more richly endowed with cultural and landscape assets** than others. So, for example, West Cork’s combination of natural beauty, a distinctive culture and heritage and a long-established creative community added up to a rich common pool that was attractive to designer-makers and others as well as tourists (Ospina, 2011).

7.5 The relative presence or absence of cultural and landscape assets is a material consideration for local development agencies and others considering the case for treating crafts and other creative/cultural sectors as an **economic development priority**. As in West Cork, the presence of a deep common pool or a long craft tradition may make a persuasive case for focussing on crafts. Other priorities may be more appropriate elsewhere, in places where the chances of success may seem more remote. But this does not preclude action in places that are less well-endowed: Kilkenny is the best example in Ireland of state intervention to create a crafts infrastructure; Leitrim was identified at the workshops as a successful example of public sector support for the cultural industries.

- 7.6 There are no hard and fast rules, but **our first recommendation is that local development companies and other local agencies should use the framework in Figure 7-1 to assess the relative strengths of crafts and other creative/culture sectors in their areas.**

The results of this analysis should inform decisions about strategic and operational priorities by helping agencies to appraise the likely costs and benefits of intervention and the prospects of success.

- 7.7 The study has shown that the **geographical distribution** of craft enterprises and related organisations tends to follow the general pattern of settlement, with bunching in and around towns and around main roads. As a general rule, it is more likely to be fruitful to observe these patterns – and any evidence of clustering – than to try to influence them. The exception might be projects to promote the development of dedicated craft studios in particular locations. However, our fieldwork suggests that **more could be done to promote the visibility of the crafts sector in key locations like seaside resorts – and this is our second recommendation.**

Our fieldwork and online searches using Google Maps such that, even in areas with a relatively dense concentration of craft enterprises, this may not be apparent to visitors. We have seen some excellent craft

directories and print/online craft trails and this may be best way to proceed in some cases. But there is also a case for raising the profile of the sector by signposting studio premises and increasing the number of brown direction signs for craft galleries and studios.

- 7.8 The other area of interest emerging from the study is the **role of networks** in strengthening the sector. There is a growing interest in the role of networks in a range of social and economic processes, although it is not always easy to measure either the effects of networks or the effectiveness of measures to support them. Network effects are by definition indirect. They may be based on links that express cultural value, regional identity, social capital, and so on. The problem is that the causal link between the initiative and the result is not always clear and the precise effect is difficult to estimate.

This does not mean that investment in highly networked situations is ineffective: viral marketing, for instance, uses the power of networks to create a buzz about a product or service using an array of channels.

- 7.9 The network mapping exercise revealed a number of issues/potential weaknesses. **Our third recommendation is that action should**



focus on addressing these weaknesses, which include:

- over-dependence on public sector agencies and organisations such as CCoI and LDCs
- limited evidence of functional/supply-chain linkages
- strengthening Ireland's links with the international designer-maker community and global markets

7.10 We have identified some **specific actions** that might be considered:

- **Network weaving** is the process of facilitating new connections across a network through both online (peer to peer networks) and offline methods (events, local workshops, etc); this will require training for craft enterprises in the use of peer to peer online methods. Extending the reach and density of networks will help them more durable and resilient in the face of shocks.
- The **sharing of resources** by enterprises and organisations could be explored as a way of reducing costs of equipment, transport and administration and ways of doing this should be explored by the local development agencies. This will open up new fields of local network collaboration, possibly including the creation of craft cooperatives.
- Holding an invited event for potential **network ambassadors** who would seek to engage others in the network and initiate online action such as social reporting - blogging, tweeting and online publishing. The aim should be to create and promote a “peer to peer” network of crafts related enterprises and agencies that allows communication directly between members rather than through a central hub. This will require technical support and design in its early stages.
- Peer-to-peer networks could also be used to promote and raise awareness of the use of **technology** in the craft sector as well as:
 - developments in the wider international design and crafts communities
 - areas of common interest across the whole of Ireland
 - shared explorations of technique
 - shared sales methods and potential markets
 - cultural added value - “revealing the hidden stories behind the craft object and its maker”

- calls for assistance to support unexpected surges in customer demand

7.11 Finally in relation partly to the invisibility of the craft network and the potential benefits of an increased profile, it would be useful to consider **promoting local community and business** collaboration. An obvious starting point would be to develop this in locations which show a high degree of centrality in the transport network combined with existing uses that have high network centrality.

7.12 This report represents a considerable amount of research into the craft sector in the five LDC areas. We are grateful to these bodies and to the Crafts Council for Ireland for their assistance with this study and we hope that it will serve as a great asset in the development of the crafts sector.



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Comhshaol, Pobal agus Rialtas Áitiúil
Environment, Community and Local Government



WMUD

Willie Miller Urban Design
20 Victoria Crescent Road Glasgow Scotland G12 9DD
+44(0)141 339 5228 +44(0)141 357 4642 +44(0)7799 066100
wim@williemiller.com www.williemiller.co.uk