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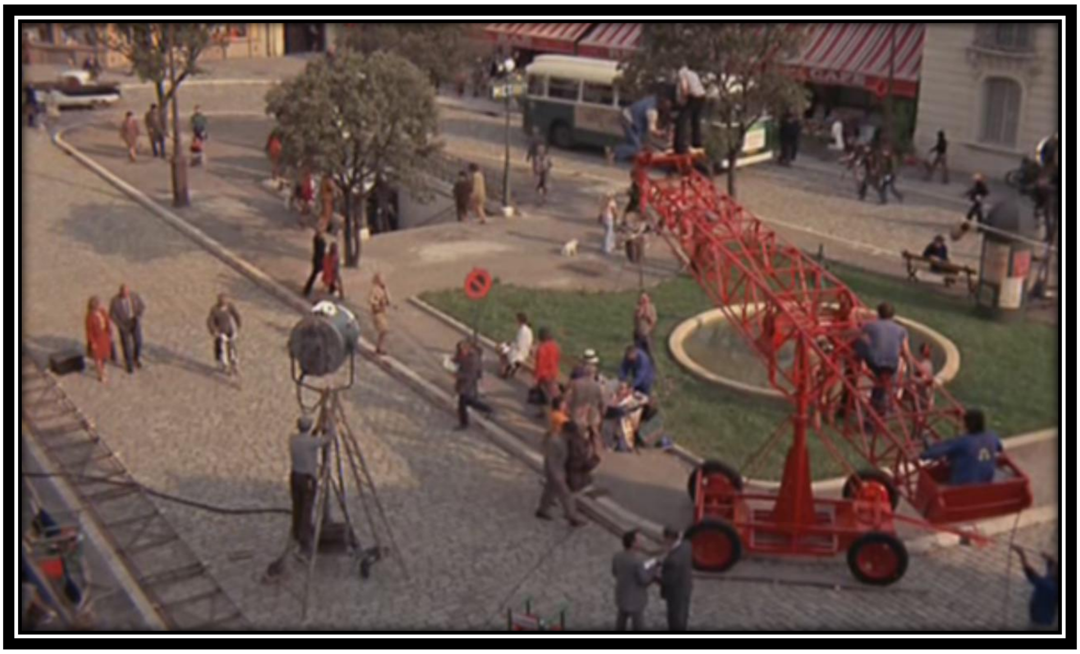

FILM AND MEDIA CLUSTERS IN EUROPEAN CITIES

CASE STUDIES FROM COPENHAGEN, VIENNA AND MADRID

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Cover illustration:

La nuit américaine (film frame), François Truffaut, 1973

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Abstract

This Master's thesis explores the interplay between the film and media industries and cities.

In the first part of the paper the theoretical framework is introduced, with a review of the main literature on the cultural economy of cities, cultural product industries and in particular cultural clusters (focus of this study).

The second part of the thesis includes the analysis of three case studies: Vienna, Copenhagen and Madrid. After looking at what role the audiovisual sector plays in urban development strategies in the three different contexts, the location patterns of film and media companies in each city are investigated with a small-scale survey. The objective is to throw light on the development of audiovisual clusters – looking in particular at what are the advantages of clustering and physical proximity, what networks are created, what is the role of public authorities and what kind of urban environments come about.

Key words

Cultural Industries; Film and Media Industries; Cultural Economy; Regional and Urban Development; Spatial Clusters

Background

The controversial relationship between the domain of culture and the domain of economics has been the primary focus of my academic career. I hold both a Bachelor's and a Master's degree in Cultural Economics.

Cultural Economics (previously also called 'economics of the arts') is a branch of applied economics, which had its 'virtual birth' in 1966, when William J. Baumol and William G. Bowen's book *Performing Arts: The Economic Dilemma* was published (Blaug, 2001:123). Defined by Towse (2003a:1) as 'the application of economics to the production, distribution and consumption of all cultural goods and services', this relatively new discipline is recognized today as a growing academic field, with a specialized international journal (Journal of Cultural Economics) and regular conferences held by the Association for Cultural Economics International.

The study of economic phenomena in the cultural sector certainly does not only interest those scholars who call themselves 'cultural economists'. Indeed, cultural economics shares close ties with other disciplines, among which economic geography, urban economics and urban planning are preeminent examples (cf. Towse, ibid.).

My decision, upon graduation, to apply for a new, equally fascinating and complex interdisciplinary Master in the field of Urban Studies, rested on the desire to explore specific research sectors rarely touched on (though frequently mentioned) within cultural economics. Such sectors include the role of culture and the arts in urban or regional development, location of cultural production and the phenomenon of clustering of the cultural industries.

My aim is to combine the theoretical insights from my work in cultural economics with the newly acquired knowledge in the fields of economic geography and urban research. This combination, in my opinion, enriches and makes the best out of my overall academic experience.

The purpose of this Master's thesis is to investigate the interplay between cultural-products industries and cities. In order to narrow down the scope of the study and turn it into a manageable project, I have selected only one cultural sector to focus on: the audiovisual industry, comprising the fields of film and media. The decision was made according to personal preference, audiovisual products (in particular motion pictures) being of major interest to me.

Building upon both theories developed in the field of cultural economics and the extensive body of knowledge on the cultural economy of cities provided by economic geography, empirical research on cultural (or more specifically, audiovisual) clusters will be conducted in three of the cities in which the 4 Cities Master's program takes place (Copenhagen, Vienna and Madrid). I intend for this study to be comparative in nature.

CHAPTER 1

INTRODUCTION: DOMAIN OF THE INQUIRY AND WORKING DEFINITIONS

1.1 Culture, the Economy and the City

The conjunction of the domain of culture and the domain of economics – a peculiar convergence characterized by a twofold movement involving the commodification of culture on one side and the aestheticization of the economy on the other (Lash and Urry, 1994) – is an observable trend in the contemporary world (at least in high-income countries) and has notable implications for current urbanization processes (see Scott, 1999).

In an era that has been referred to as the latest stage of capitalism (see among others Featherstone, 1995; Harvey, 1989; Jameson, 1992), and associated with the birth of a so-called 'postmodern consumer culture', the status of cultural activities has grown tremendously – they have become a major sector in the urban economy and they have received growing interest and attention from city policy-makers.

Since capitalist restructuring began in the early 1970s – with a shift from fordist mass production towards post-fordist flexible specialization –, in response to the appearance of differentiated consumer cultures and an increasing demand for products with high aesthetic and semiotic value, cities' culture-generating potentials have been harnessed to productive purposes (Scott, 1997).

Pioneering academics first pointed the importance of culture as an industry to enhance local economic development in the 1980s. In the late 1990s the first mappings of cultural industries were compiled.

Since the turn of the century, and in part due to the tremendous impact of the work of Charles Landry (author of the acclaimed book *The Creative City: A Toolkit for Urban Innovators*, published in 2000) and Richard Florida's global best sellers *The Rise of the Creative Class* (2004) and *Who's Your City?* (2008), a true hype has built up around the so-called cultural or creative economy and especially around the concept of the "creative city". Under the influence of this trend, urban authorities have invested more and more in cultural infrastructure and facilities, innovation centers and creativity hubs. These investment are aimed at both enhancing a city's image and competitiveness at the global level and at trying to create an urban environment attractive to the "creative class".

Recently named 'European Ambassador for Creativity and Innovation'[1], Professor Florida enjoys immense popularity among European policy makers and urban planners. Despite the unquestionable appeal and success, however, Florida's theories have received their share of criticism. Disapproval has been expressed by both academics and journalists, who take issue primarily with Florida's use of methodology in his analysis.

In light of these critiques, in the present paper creativity is not treated as a panacea for urban development and economic growth. My intention is instead to consider these issues 'beyond the hype' (see among others Bille, 2009; Hospers and Pen, 2008; Malanga, 2004).

Rather than entering into the discussion between proponents and opponents of Florida's approach, the general objective of this study is to contribute to the understanding (and hopefully the assessment) of the impact of "the creative city" concept on European urban policy. To what extent, in what ways and with what results have ideas that fall under the umbrella concept of "the creative city" been assimilated within European cities, cultural policies and urban development strategies?

This research builds on the premise that culture should matter neither as an end in itself, nor as cultural activities to be supported exclusively for economic purposes. Culture-centric and econo-centric conceptions and value orientations towards the creative city (see Smith and Warfield, 2008) are not necessarily antithetical to one another and the business of culture can potentially be integrated 'into a wider cultural policy' (Brown et al., 2000:450).

Cultural-product industries are an interesting object of analysis in *all* their dimensions – for the outcomes they produce (semiotic and symbolic content) and their organization structure, as 'a key-ingredient of post-industrial, information-intensive economic activity' (EURICUR, 2001:3), and finally for the kinds of (urban) environments they help shape.

[1] See: http://www.creativeclass.com/richard_florida/

1.2 Working definitions

1.2.1 Culture as sector and cultural-product industries

The very concept of culture is by no means easy to master (EURICUR, 2001).

Following Bille and Schulze (2006:1054), culture can be defined simultaneously as 'aspect' (values, norms, traditions…), as 'sector' (a series of genres, commonly including painting, sculpture, architecture, music, literature, theatre, film and so on) and as 'art' (giving an implicit qualitative assessment).

For our purposes, the definition of culture as sector – comprising all firms, institutions, organizations and individuals who work with a range of specified genres – will be adopted, thereby excluding quality valuations of the products (i.e. distinctions between art and non-art) as well as specifying that these genres will be looked at as economic activities (cf. ibid.).

Given these premises, the next step is to delineate cultural-products industries.

Recent developments in and of the cultural/creative industries are illustrated through what Segers and Huijg (2006:1) refer to as an "explosion of terminology": 'cultural industries', 'creative industries', 'creative economy', 'experience industries', 'content industries', 'entertainment industries', 'copyright industries', '(multi) media industries' and so on. Even if we take only the first two labels into consideration, we are confronted with the actual complexity of the issue and what we can call an "explosion of definitions".

As pointed out by Birch (2008), definitions are important because they represent the foundation of the policy fields denoted by cultural production. A differentiation can be drawn between political and academic definitions: while the former tend to be imprecise, the latter arguably provide a better qualitative understanding of the cultural industries (ibid.).

Although scholars have suggested a variety of definitions to date – depending on specific approaches in their analyses and on the objectives they pursue – it is widely agreed that cultural industries comprise those sectors producing goods and services that:

- involve creativity in their production and are associated with cultural, artistic and entertainment value (Throsby, 2001; Caves, 2000);

- embody some degree of intellectual property and are typically protected by copyright (UNESCO[2]; Throsby, 2001; Towse, 2003b);
- their symbolic value and psychic gratification to the consumer are high relative to utilitarian purposes (Scott, 2000; Power and Scott, 2004).

Discussions within the literature mainly concern the question of which sectors should be considered part of the economy of culture and which ones should not: classifications vary considerably.

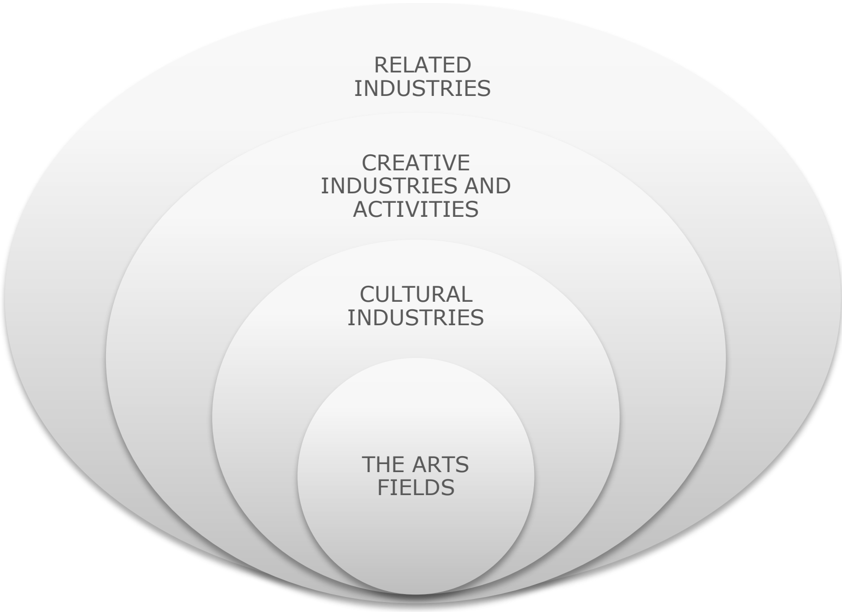
Following a detailed review of national and international approaches, the study "Economy of Culture in Europe", carried out by KEA European Affairs for the European Commission (2006), proposes a new framework, based on the distinction between the cultural and the creative sector and on the idea of the economy of culture as a "radiation process" (ibid., p.53, quoting Marcus, 2005).

The model is centered on "the arts field", which consists of non-industrially reproducible cultural products, like visual arts, performing arts and heritage; around this core, a first circle can be drawn that includes the "cultural industries", industries whose outputs are exclusively cultural, for instance audio and audiovisual multimedia industries, books and press publishing; a second circle widens the model outwards, catching "creative industries and activities" (such as design and advertising) whose outputs are functional but embody some degree of cultural content.

A third circle of "related industries" comprises those economic sectors in which culture and creativity are not essential inputs, but whose products are somewhat related to the previous "circles" (e.g. the ICT sector). This last category is used loosely and is, therefore, impossible to circumscribe on the basis of clear criteria.

[2] See:
http://www.unescobkk.org/fileadmin/user_upload/culture/Cultural_Industries/presentations/Seesion%20Three%20-%20Milagros%20del%20Corral.pdf

Figure 1.1 Model of cultural industries



Source: own elaboration based on KEA (2006) and Throsby (2001)

1.3 Domain of the inquiry

1.3.1 Audiovisual sector

As stated in the background section, in order to restrict the domain of the inquiry – and try to (partially) overcome the aforementioned conceptual confusion – this study takes a closer look at a single filed within the cultural economy: the audiovisual sector.

Audiovisual productions, like film, video and television, are regularly included in cultural industries lists and categorizations, although specific industry classifications under which the products appear can vary significantly. The impossibility of tracing clear contours also derives from the fact that today film- and video-making cannot be distinguished from the various multimedia activities related to them and that derive from them. Furthermore, due to the proliferation of audiovisual communications technologies, the sector is evolving quickly and more and more new products are constantly being developed.

Although the broad term “audiovisual sector” will be adopted in the present paper, the focus will be kept on the industry that has historically represented the core of this panorama: the motion pictures (or film) industry. This industry has since its establishment over a century ago shown interesting interdependencies with urban development issues.

1.3.2 Film and the city

It is well known that cities have always been at the core of economic and cultural innovation (Hall, 1998; Scott, 1997). Not surprisingly, it was in Paris, the “capital of the 19th Century”, that the Lumière brothers screened the first motion pictures, on 28 December 1895.

Within a few years, cinema was beginning to grow into an industry and, alongside this, film production began to shape its own urban environments. Cinematography, in fact, ever since its early days always was organized as ‘city’ (Caneppele, 2008).

The symbiosis between cinema and the metropolis became evident even before the establishment of the “film cities” par excellence (Hollywood, Cinecittà, etc.). As early as the 1910s written descriptions and graphic representations of the most ancient film companies offer evidence of a working environment characterized by the ‘dynamism’ and ‘pulsing life of a metropolis’ (ibid., p.12, own translation).

What McArthur (1997:36) has referred to as ‘the cluster modernity/city/cinema’ has been addressed theoretically both in film studies and urban studies. Discourses on the links between media and geography abound and touch several disciplinary fields, including the subjects of urbanity and aesthetic. The ‘conceptualization of the *cityscape* as *screenscape*’ (Clarke, 1997:1, referring to Baudrillard, 1988), investigations of the relations between cinema and the real and further fascinating theories on the “cinematic city” cannot be given more detailed attention in this work. Instead, I focus exclusively on how the interplay between the film (and media) industry and the city gives rise to “cultural-economic microcosms” (cf. Mommaas, 2004).

1.3.3 Hollywood, the celluloid city

Independently of the theoretical lenses through which we decide to look at the issue, 'no discussion of either "city-films" or "film-cities" can ignore Los Angeles' (Fischer, 2008:14, own translation).

From as early as the 1920s until the present, the supremacy of Hollywood as the most powerful motion pictures production center as well as 'a major urban phenomenon in its own right' (Scott, 2005:xi) has never been challenged.

How and why the film industry reached such mythical status in the Los Angeles area and not elsewhere (most notably New York) is one of the questions that has intrigued economic geographers the most. Why Europe (where cinema was born) never managed to reach a competitive position is another.

The most accredited hypotheses mention favorable climatic and geomorphologic conditions (sunny weather, optimal lighting, abundance of land, multifaceted landscape…), the conflicts between producers and the New Jersey-based Motion Pictures Patents Company (MPPC) that encouraged film makers to move their operation from the east to the west coast (where the enforcing of patents was easier to circumvent) and the circumstances that caused the decline of film production in Europe – in the 1930s and 40s European film industries were converted to the production of propaganda and consequently top personalities in every film-related profession immigrated en masse to the USA.

Other determinant factors in Hollywood's unstoppable success are recognized in the emergence of the "studio system". Contrary to the development paths of cinema in Europe, where clashes of interest kept film production, distribution and exhibition separate, the US market was dominated by a small number of vertically integrated majors, which formed a de facto oligopoly (see De Propris and Hypponen, 2008).

The monopolistic power of these majors was dismantled in the late 1940s, when US anti-trust authorities took action against the collusive marketing strategies (ab)used by the studios to control exhibition chains.

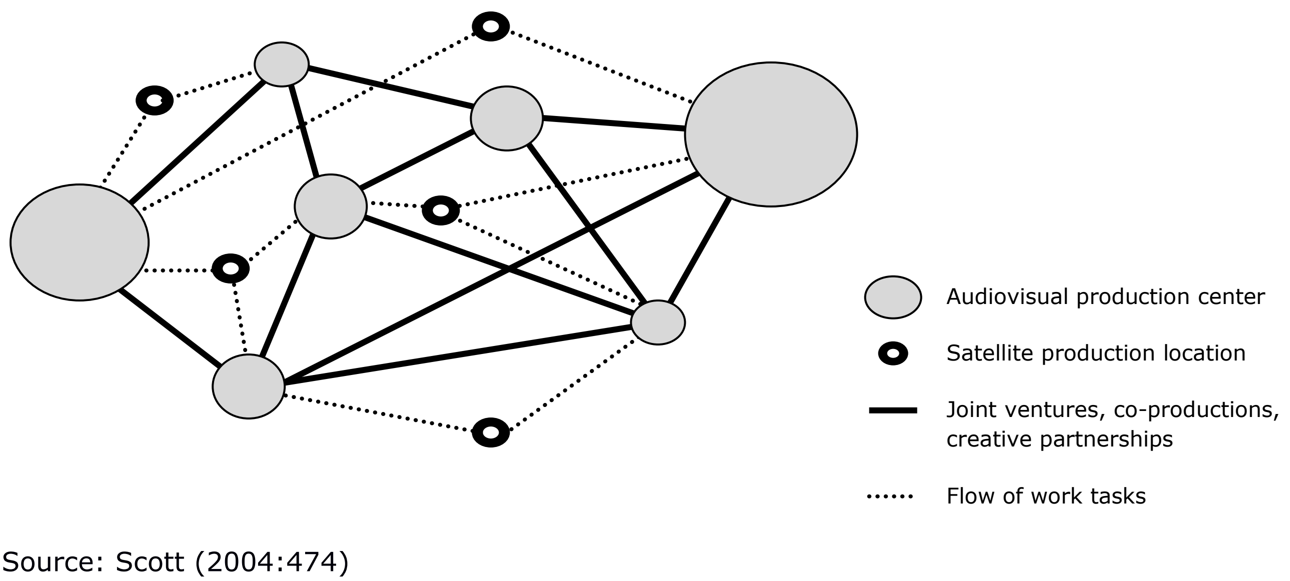
Though threatened by the diffusion of television (which also caused cinema to undergo a radical transformation) and despite the rise of alternatives to Hollywood productions (the so called "New American Film" in the 1970s, or the revival of European cinema lead by the *cinéma d'auteur*), in the 1980s studios regained vertical control over the whole film production cycle. In the age of flexible specialization and de-regulation, Hollywood re-consolidated its hegemony with the transformation of the studios into media conglomerates owned by a handful of large multinational corporations (ibid.).

1.3.4 The 21st Century global audiovisual industry

Today the global audiovisual industry is still subject to Hollywood's supremacy and it is unlikely that this situation will change in the near future. Nevertheless, other important film production centers have been able to maintain competitive positions by controlling distinctive niches in the world market – as examples Scott (2004:475) mentions Bangkok, Beijing, Bombay, Hong Kong, Manila, Seoul, Tokyo, Cairo, Teheran, Berlin, London, Madrid, Paris and Rome.

According to Scott, rather than capitulating to the globalized Blockbuster mentality spread throughout the world by Hollywood productions, other creative agglomerations are consolidating their positions within a 'much more polycentric and polyphonic global audiovisual production system', in which expanding networks of satellite production locations come into being (ibid.).

Figure 1.2 Scott's schematic representation of a hypothesized global production landscape in the audiovisual industries



Source: Scott (2004:474)

Although the three case studies selected for this thesis – Copenhagen, Vienna and Madrid – cannot be seen as representative of Europe as a whole, the general idea behind this work remains researching the current status of the film and media industries in European cities, thereby contributing to the understanding of what position the latter occupy within the globalized audiovisual landscape.

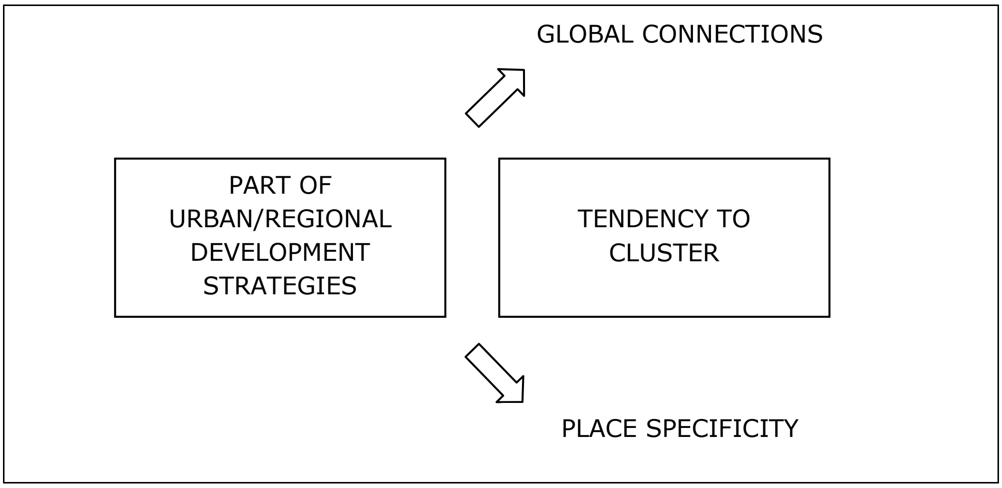
1.4 Research question

To aid in formulating the research question for this thesis, which deals with the interplay between the audiovisual industry and the urban environment, it is useful to look at those trends in cultural-product industries' development patterns in which a "spatial" (geographical) dimension is highlighted.

Elaborating on Power and Scott (2004) and Birch (2008), the latter can be summed up as follows:

- Producers tend to cluster together in geographic space, mainly in big cities;
- Place and production systems are interwoven;
- There is a connection to public authorities' urban or regional development strategies, often linked to revitalization of stagnating areas;
- The industries are globally interconnected.

Figure 1.3 Research framework I



Source: own elaboration

Reordering the selected points (Figure 1.3), we can draw a preliminary framework for the analysis of the interplay between cultural-product industries and cities, and finally formulate the research question as follows:

Within the framework of urban development strategies, how do film and media (or audiovisual) industries clusters originate and develop in the selected European cities?

The research objectives and structure will be clarified in the next chapters, after having presented a literature review and the state of the art.

CHAPTER 2

THEORETICAL FRAMEWORK

As stated in the introduction, this paper investigates the interplay between cultural industries (later narrowed to the audiovisual sector) and cities, while trying to adopt an *interdisciplinary* standpoint.

The present chapter provides an overview on two theoretical perspectives, namely cultural economics and the economic geography of cultural-product industries. This is done to make a preliminary selection of relevant theories, concepts and hypotheses that will consequently be employed in the construction of a thematic guideline for the analysis of the case studies (Part II).

2.1 Cultural economics

Although a convincing theory able to depict the complex interdependency between cultural and economic development still has to be elaborated, the realm of knowledge produced by cultural economics does help to throw light on the role of the arts and culture in urban development and regional growth.

A comprehensive review of the literature on this issue has been provided by Bille and Schulze (2006). In their analysis, placed firmly in economics (consistent with the standpoint of Ginsburgh and Throsby's *Handbook of the Economics of Art and Culture*, the publication in which the essay is included), the two directions of causality in the relationship between regional economic development and development of the cultural sector are investigated.

Since the implications of one direction of causality (the second addressed by Bille and Schulze, i.e. how regional economic growth influences the development of the cultural sector) reaches beyond the scope of the present research, our review will consider the first question only:

What is the contribution of cultural activities to urban and regional economic development?

Following Bille and Schulze, a distinction can be made between short- and long-run effects.

2.1.1 Short-run effects

Short-term spending impacts can be seen in outcomes relating to employment and income growth. The 'transmission channels' (2006:1053) through which these results are achieved – cultural tourism is one example – are also significant indicators.

In the last 30 years a wide range of studies has been carried out in cultural economics – looking at different levels, from the impact of a single institution or event to the cultural life of an entire city, region or state (see ibid., p.1059); economic impact analysis[3] has been the most frequently applied method to measure the effects of the arts on consumption, employment and income.

The reliability of the interpretation of these experiments' results has often been criticized: although many properly conducted studies have shown to be helpful tool in assessing policies and strategies, the methodology remains narrow, as cultural activities generate more (indirect) effects in the long run.

2.1.2 Long-run effects

Longer-run effects are primarily connected to location choice (of both people and enterprises) and the enhancement of educational and creativity values.

New citizens, companies and investment may be attracted to cities with a lively cultural atmosphere. Furthermore, it is widely viewed that different kinds of learning effects are related to a flourishing artistic environment – formation of identity,

[3] Economic impact studies calculate the total impact resulting from the sum of *direct effects* (employment and income generated by the cultural activities themselves in the area), *induced* or *linkage effects* (the spending of visitors on transport, food, drinks, accommodation etc.) and *indirect effects* (multiplier effects associated with direct and induced effects).
TOTAL IMPACT = DIRECT EFFECTS + INDUCED EFFECTS + INDIRECT EFFECTS
where INDIRECT EFFECTS = (DIRECT EFFECTS + INDUCED EFFECTS) x multiplier

(Bille and Schulze, 2006:1058)

creativity, attitudes, job motivation, to name but a few. All of these arguments are used to justify public subsidies to the arts and culture, but the ability to support these arguments with data is even more limited than with short-run effects.

Since it is hard to quantify intangible (non-pecuniary) economic effects, it is not possible to give account of all implications. It is not easy to grasp whether there is correlation between culture and industrial development and innovation; neither is it clear what tangible effects new forms of cooperation between culture and business actually have on the economy.

Despite all these difficulties in tracing out and verifying the effects of culture on economic development, it can still be argued that the enhancement of the cultural environment of a city aimed at increasing social cohesion, civic pride, dynamism, lower crime rates and the like may generate 'long-run externalities with real economic potential' (Throsby, 2001:125, also quoted in ibid., p.1070).

2.2 The economic geography of cultural product industries

The most comprehensive and detailed work I am aware of on the links between culture, the economy and the city is the academic work of UCLA professor Allen J. Scott. Since the late 1980s Scott has presented valuable contributions to the general understanding of the economic geography of the cultural economy. This scholar's perspective is focused on the level of cities, highlighting their role as privileged centers of culture (in forms of arts, ideas, styles, attitudes…) as well as centers of economic activity able to induce high levels of innovation and growth (Scott, 1997:323).

What he refers to as "the cultural economy of cities", which is intertwined with both the cultural geography of place and the economic geography of production, opens up a vast terrain of debate, including issues concerning cultural politics. Indeed, few aspects of contemporary urban life and overall social experience remain untouched by it.

2.2.1 Early practices and concepts

Early signs of awareness of a connection between local economic development and cultural resources made their appearances in the 1980s. This was, in many ways, linked to the emergence of place marketing. Programs seeking to update and redevelop historical and artistic attractions – at first heritage projects and arts funding schemes, and later mass spectacles and events like festivals and carnivals – grew apace and the concept of "cultural planning" became a common tool at the policy makers' and urban planners' disposal.

Those strategies' target areas have mainly been old 19th Century zones or districts that had experienced catastrophic decline following de-industrialization. Their chief aim has been to seek new sources of employment. In Europe, primary examples of cities that went through a complete re-invention based on cultural projects are Manchester, Sheffield, Glasgow and (perhaps most famously) Bilbao.

2.2.2 The cultural economy

Scott's concept of the cultural economy emerges from a 'second generation policy vision' (2004:465) that, in contrast to first-generation practices, is less directed toward urban regeneration and place-selling strategies. More emphasis is instead placed on localized complexes of cultural-product industries.

According to Scott, the cultural or creative economy – which is a facet of the so-called "new economy[4]", in the direction of which the industrial profile of many countries has tilted – constitutes a rather incoherent set of industries that are bound together by distinctive common features (cf. Chapter 1), which are what make them a specific object of study.

Today cultural-product industries account for 'substantial shares of income and employment'[5] (ibid., p.482). Besides their being recognized as a growth sector, they

[4] By this term Scott means 'a collection of manufacturing and service sectors whose operating features involve a high level of organizational and technological flexibility, transaction-intensive interfirm relations, and the production of design-intensive outputs' (Scott, 2004:462).

[5] Towse (2003b:171), in her *Handbook of Cultural Economics*, refers that the cultural industries' share of GDP in most developed countries (where it has been measured) is around 5%. The growth rate of the creative economy also averages about 5% (ibid.). Data collected in the UN Creative Economy Report

tend to be environmentally sustainable and often generate positive externalities, such as enhancing the image and prestige of the areas in which they are located. Sometimes the presence of these industry also improves the places' quality of life. Unfortunately, alongside many successful cases, where depressed industrial sites and run down areas are turned into economically successful cultural quarters, in several other cases attempts to apply cultural strategies to local economic development have (partly or totally) failed. Empirical research shows that there is no recipe for success, since each case is subject to place-specific forces and a set of unique historical and geographical conditions that are impossible to either plan or replicate.

The place-specificity of cultural production is one of the main points emphasized by Scott in his work. Following his analysis, although information and communication technologies facilitate the management and regulation of complex global systems (within which cultural products are often distributed on world-wide markets), the production of cultural goods and services shows a propensity to be 'specialized' and 'localized'.

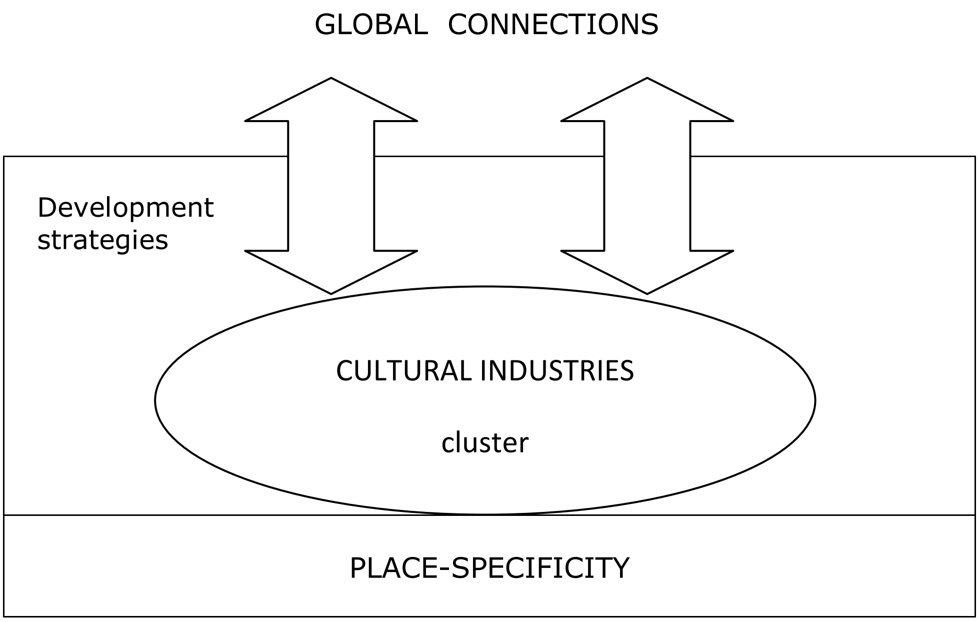
As a result, the geography of culture (like the geography of economic activity) is 'stretched across a tense force field of local and global linkages' (1997:324). Scott firmly argues that the wide heterogeneity of places and context are directing today's globalized cultural sector towards increased diversity, rather than uniformity.

2.3 Research framework

From this review of the theoretical perspectives of cultural economics and the economic geography of cultural-product industries we can now select some guideline concepts and reframe the research question to offer a clearer perspective on the matter. This is shown in the following diagram:

(2008) shows that the creative industries account for 3.4% of total world trade, with an average annual growth rate of 8.7% in 2000-2005.

Figure 2.1 Research framework II



Source: own elaboration

Systems of cultural industries are positioned within the framework of local development strategies – pursuing objectives including both short- and long-run economic effects –, and across a complex interplay of place-specific characteristics and global connections.

As highlighted by both Scott (1996; 2004) and Bille and Schulze (2006:1053), it is of particular interest to look at the question of whether (or not) and why cultural industries agglomerate together in specialized clusters.

The issue of how cultural clusters come into being will be addressed in the next chapter.

CHAPTER 3

CULTURAL CLUSTERS

The study of culture-based models of local economic development read through the lens of "cultural clusters" has recently emerged as a new field of investigation. It has succeeded in attracting the interest of various economic disciplines and, in particular, constituting a new common ground for urban and regional economics, economic geography and cultural economics (Cinti, 2008:70, quoting Lazzeretti, 2003; Mossetto, 1992; OECD, 2005; Santagata, 2002; Scott, 2000; Zukin, 1995). Academic studies rooted in different research fields (including disciplines not related to economics) and political discourses, 'regardless of the differences between their multiple conceptual and analytical frameworks (...) tend to be unanimous in what concerns the role of agglomeration in the development of cultural activities and, explicitly or implicitly, recognize the importance of territorialized dynamics' (Costa, 2008:185). Cultural clusters can therefore be regarded as the point of convergence of a wide variety of contributions. It is for this reason that cultural clusters as specific objects of analysis were chosen to be the main focus of this interdisciplinary Master thesis.

In this chapter, which offers a brief state of the art concerning cultural clusters, most attention will be given to literature that – unlike what Scott (2004:468) refers to as 'Florida's euphoric analysis', or similar misconceptions – has focused on the analysis of the concrete conditions that underlie these phenomena.

3.1 The concept of industrial clustering

First observed and theorized by British economist Alfred Marshall in the late 19^{th} Century, the spatial clustering of different kinds of economic activities is now a well established field of academic research.

Definitions abound (once again), but the essential characteristics of clusters can be summed up as follows:

> Clusters are geographic concentrations of networked firms and associated institutions in specific fields, in vertical and horizontal relationships, which both compete and cooperate (cf. Cooke, 2002; DTI, 2001, quoted in Bassett et al., 2002:165; Porter, 1998).

Independently of the specific industrial field under investigation, the clustering of firms in the same geographic area can (at the most basic level) be understood in terms of transaction costs reduction – i.e. cost efficiency stemming from the localized availability of specialized suppliers, technical and material infrastructure, skilled labor and so on (Bayliss, 2007a).

In fields recognized as part of the "knowledge economy" (one of which is the cultural sector) what seems essential is that clusters facilitate flows of ideas between firms in the same industry and across industries. Physical proximity, which allows frequent face-to-face contacts and improves the circulation of knowledge and information, thus enables professionals to enhance productivity and innovation. Through the interaction of entrepreneurs and workers, networks are built. Transacting does not only apply to commercial linkages but also (and equally importantly) to social interaction. Within 'place-specific communities of interest' (Scott, 2000:18) firms can monitor their competitors and, alongside this, build cooperative relationships. Informal (untraded) relations, based on common rules and shared understanding of problems and objectives are often considered critical to the geographic concentration of innovative industries and activities (Storper, 1995, quoted in Bayliss, 2007a:1263).

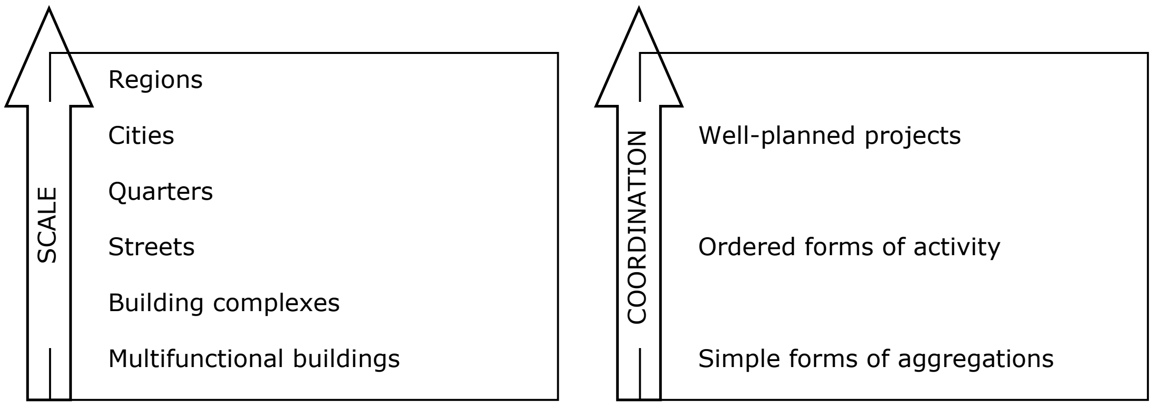
The social construction of 'localized politico-cultural assets such as mutual trust, tacit understandings, learning effects, specialized vocabularies, transactions-specific forms of knowledge, and performance-boosting governance structures' (Scott, 2000:19, quoting Harrison, 1994), however, does not automatically stem from the creation of spatially embedded industrial communities. As researchers frequently point out, the establishment of a thriving cluster is not a development model that can be planned and successful cases more often result from luck, chance and history, rather than from directive policy interventions. For these reasons, it is not easy to pinpoint the essential factors for the formation of clusters associated with the oft-discussed benefits of agglomeration economies and collective learning. Nevertheless, it is widely agreed that policy efforts should aim to create an attractive working environment by supporting educational and (industrial) training programs or through the improvement of local infrastructure (not only technical but also cultural).

3.2 Cultural clusters

The literature offers a broad collection of studies analyzing different strategies aimed at facilitating cultural clustering – identified as models of local economic development. What emerges, however, is an extremely wide spectrum of experiences that are very difficult to compare. The term cultural cluster[6], in fact, refers to a variety of situations that reflect a vast range of potential cultural policy actions, spontaneous initiatives, projects etc.

Although we do not endeavor to find a way to organize and systematize the many issues related to this subject, we can identify two basic categories or "frameworks" within which cultural clusters can be positioned, namely scale and levels of coordination, as graphically described in Figure 3.1.

Figure 3.1 Cluster categories



Source: own elaboration based on Cinti (2008)

A common distinction (linked, but not necessarily corresponding to coordination levels) is made between top-down projects and bottom-up projects[7], and this is an interesting point on which literature is often divided. Besides discussions about the limitations of directive policies and planning actions – common to the development of clusters also outside the cultural sector (see previous section) –, questions arise concerning the level at which urban planners, economic development agencies and private investors should be involved in projects that aim to create autonomous artistic

[6] In some contexts the terms cultural *quarter* and cultural *district* are used.

[7] We define as 'top-down' those plans that are devised by authorities or developers external to the actual participants in the project, normally within the framework of a particular policy or urban development strategy; 'bottom up' projects are those conceived and initiated by actors in the cultural sector itself.

values (cf. Zukin, 1982, 1991, 1992, quoted in Mommaas, 2004:525-528), what the role of the national/local state should be, what model of governance is the most appropriate and, eventually, how a participatory decision-making process and the involvement of the local community can be achieved.

These kinds of questions are, of course, more easily formulated than answered (Mommaas, 2004). Even so, a number of factors have been identified as plausible keys for success (or at least as elements in absence of which weaknesses may arise). The presence of good leadership and good coordination among the different actors and stakeholders involved, networks of cooperation, and links to education and research institutions could be considered as good examples of these factors.

Although no universally applicable formula exists that can simply be applied to a policy or a planning strategy, as pointed out by Mommaas (ibid., p.529) excessive "adhocracy" also has its limitations. The lack of a coherent vision and supporting systems may put at risk the long term survival of a particular cluster.

3.3 Cultural-products industrial clusters

Having chosen cultural-product industries as the object of analysis, we will at this point limit our focus to clusters that result from the spatial concentration of such industries, and develop as sites of cultural *production*[8].

3.3.1 Agglomeration economies and location of cultural industries

In a conceptual study that 'merges economic geography literature and literature on cultural industries', adding to the latter through applying methods of the former, Lorenzen and Frederiksen (2008:155-157) have analyzed the two categories of economic externalities that constitute the basic forces behind clustering: localization and urbanization (see also Trullén and Boix, 2008:213, quoting Marshall, 1890).

"Localization economies" arise from the co-location of firms with similar characteristics. "Urbanization economies" denote the many positive externalities

[8] Most studies agree on making a distinction between 'production' and 'consumption' of culture, although the two are often simultaneously present in cultural clusters (cf. Cinti, 2008).

enjoyed by firms located in an urban environment. All kinds of agglomeration benefits occur in relation not only to the industry and its products, but also to the labor market and to specialized institutions and infrastructures.

By means of these concepts, Lorenzen and Frederiksen (ibid.) first argue that cultural industries cluster to achieve specialization and more quality and variety in their products; secondly, they explain that this primarily occurs in cities because they offer better chances for improvements in term of diversity and product novelty. Consequently, they analyze the interaction effects of urbanization and localization economies: large cities (in particular global and world cities) with more than one cluster with high levels of excellence, attractive to high-skilled labor and with high standards of quality in urban institutions, are the ones where the best results in terms of product innovation – what the two authors refer to as "radical innovation" in cultural production – are most likely to be achieved.

Discussing empirical data giving evidence that employment in the cultural sector is highest in large metropolitan areas, Scott (2004) comes to a similar conclusion. At the same time he underlines that the size of the city is neither a necessary nor a sufficient condition for a flourishing cultural economy. Some cities further down the urban hierarchy of dominant cultural nodes may be able to sustain small but internationally significant clusters of cultural activity as well (cf. Bassett et al., 2002).

3.3.2 Industry structure

Cultural-product industries consist of 'swarms of small producers complemented by many fewer numbers of large establishments' (Scott, 2004:466). As observed by several analysts[9], the sector conforms to a 'contractual and transactional model of production', a model that extends to the employment relation – part-time, temporary, freelance (ibid.). Within an industrial structure in which production is mostly organized into temporary and flexible projects, geographic clustering of cultural-product industries is essential to achieve better project results, as it facilitates networking and increases opportunities for potential collaborations among high-skilled specialized professionals. Furthermore, most types of cultural production are rooted in place-

[9] Scott (ibid.) quotes Caves (2000), Grabher (2002), Kraetker (2002), Pratt (2000), Storper and Christopherson (1987).

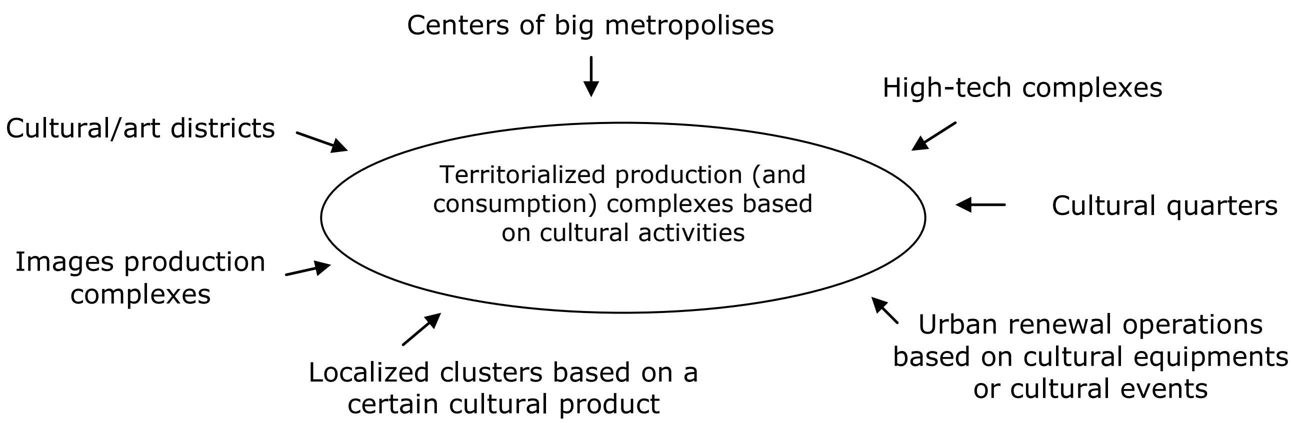
based 'unique communities of workers', in which members' careers are complementary and socially coordinated (Scott, 2000:32-33). Unique communities give rise to unique clusters, quarters or districts, in (usually) well-defined, labeled city areas (see Cinti, 2008) characterized by a specific "image" that sometimes functions as a trademark for the firms and/or a brand for city-marketing objectives.

3.3.3 Sectors

As we have seen, studies on cultural clusters offer 'a variegated kaleidoscope of the paths of local development based on culture and creativity' (Cooke and Lazzeretti, 2008:xiv).

With a simple but exhaustive graphic elaboration (Figure 3.2) – based on the review of various contributions from a multiplicity of research fields –, Costa (2008:186) gives account of the diversity of territorialized cultural activities.

Figure 3.2 Diversity of territorialized cultural activities

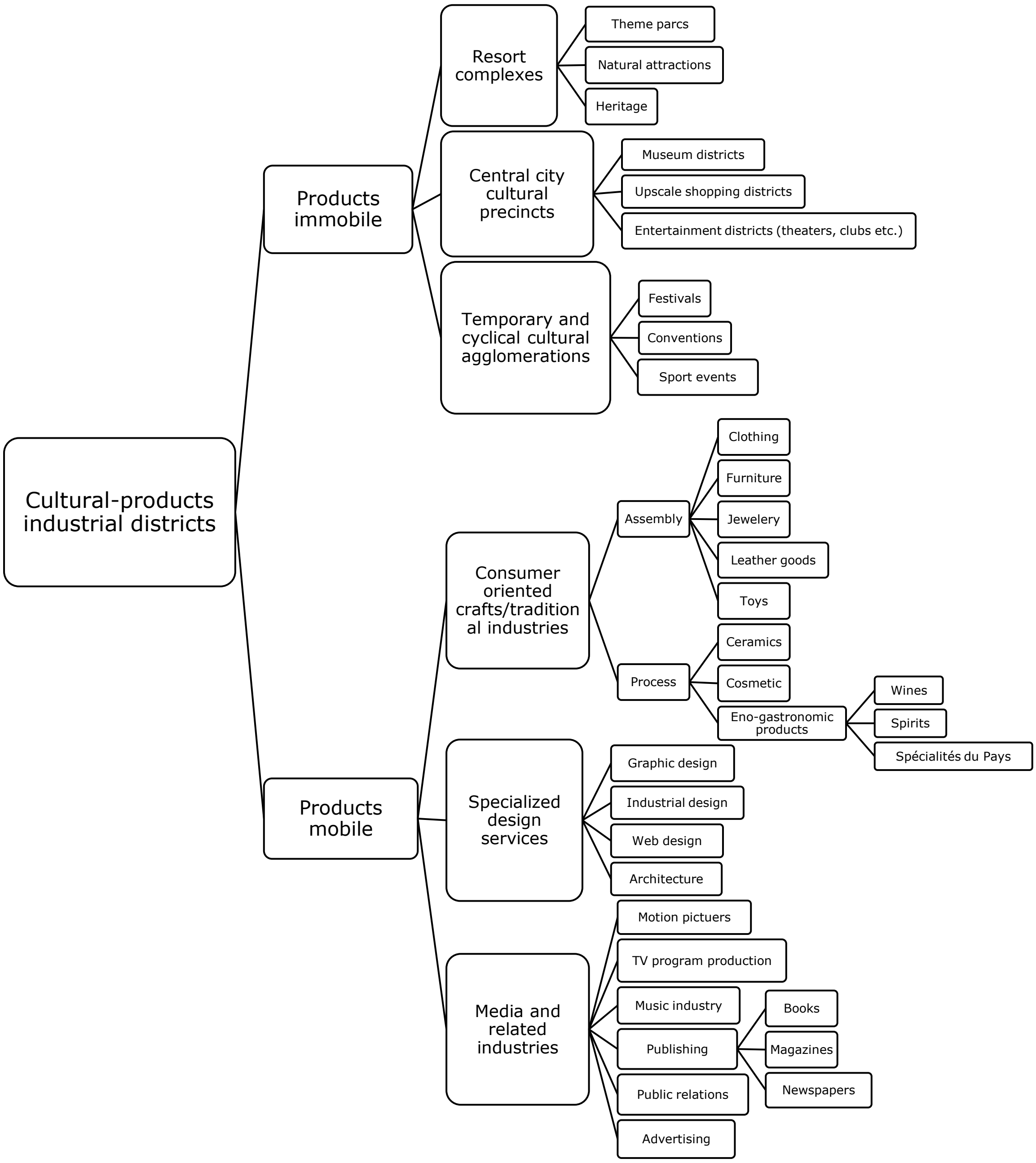


Source: Costa, 2008:186

Similarly Scott (2004:469), after thorough analysis of the literature on districts resulting from the convergence of cultural-product industries around a 'mutual center of gravity', comes up with a list of sectors[10] that he organizes into the following taxonomy:

[10] The sectors and related references quoted by Scott (2004:469-470) are the following:

Figure 3.3 Taxonomy of cultural-products industrial districts



Source: Scott (2004:471)

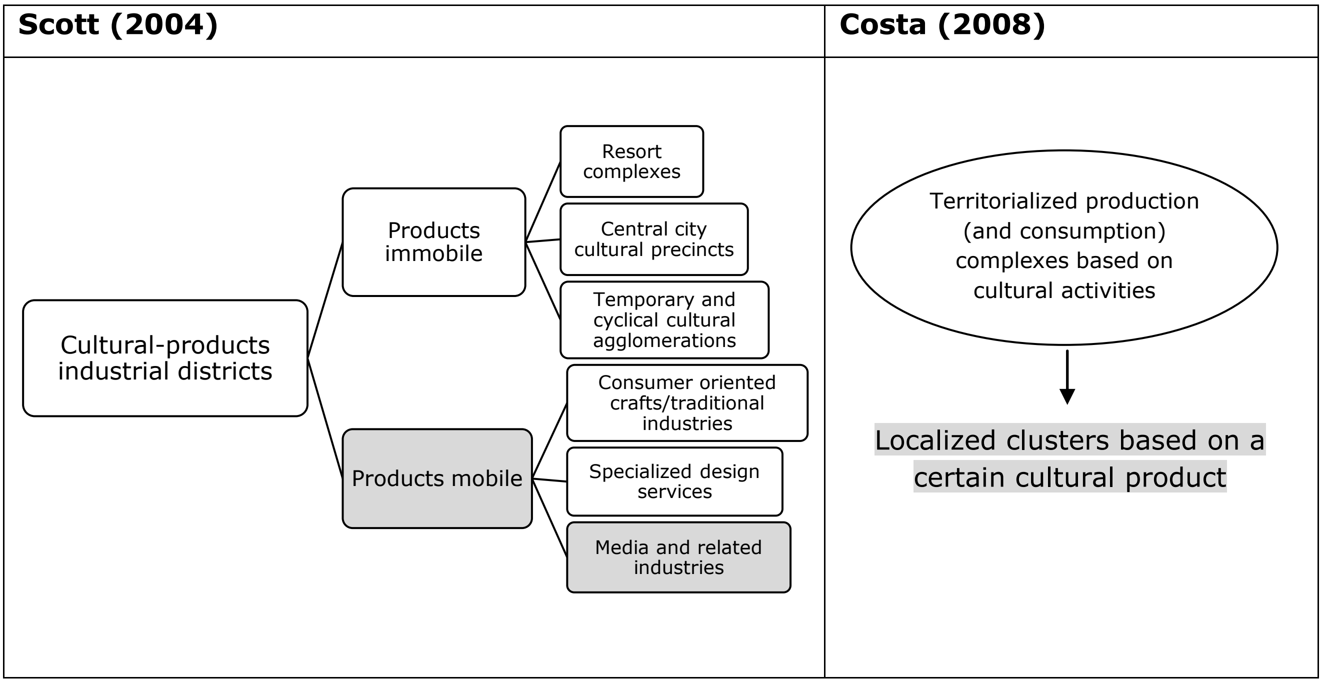
clothing (Pietrobelli and Barrera 2002; Rantisi 2002b; Scott 2002a); *jewelry* (Scott 1994); *furniture* (Scott 1996; Lorenzen 1998; Harner 2002); *fashion retailing* (Crewe 1996; Crewe and Beaverstock 1998); *film and television program production* (Storper and Christopherson 1987; Cornford and Robins 1992; Henriques and Thiel 2000; Bassett, Griffiths, and Smith 2002; Krätke 2002; Scott 2002b); *music* (Hudson 1995; Leyshon, Matlers, and Revill 1998; Scott 1999b; Brown, O'Connor, and Cohen 2000; Leyshon 2001; Calenge 2002; Gibson 2002; Power and Hallencreutz 2002); *publishing of books*, *magazines*, *newspapers*, *comic books*, *…* (Driver and Gillespie 1993a, 1993b; Norcliffe and Rendace 2003); *new media* (Scott 1998a; Brail and Gertler 1999; Cooke and Hughes 1999; Egan 1999; Pavlik 1999; Sandeberg 1999; Yun 1999; Indergaard 2001); *design services* (Molotch 1996; Hutton 2000; Molotch 2002; Rantisi 2002b; Vervaeke and Lefebvre 2002); *advertising* (O'Connor 1991; Leslie 1997; Newman and Smith 2000; Grabher 2001).

It is interesting to note how overlap always exists among the different types of districts, clusters or quarters; additionally, more than one cultural cluster can develop in the same area.

Here we will not enter the discussion on how to order cultural clusters in categorization systems, as the aim of the present research is to conduct a comparative analysis between different cities in relation to one cultural production sector only.

Partially taking inspiration from the two figures displayed above, we can “position” the present study to some extent and specify the criteria on which the selection of the sample for the empirical research is based.

Figure 3.4 Positioning of the research



Source: own elaboration

In each city territorialized agglomerations of companies (and related institutions) are chosen, which:

- Are production (rather than consumption) complexes;
- Clearly focus on the production of audiovisual material or content;
- Occupy a well-defined area within the city that is labeled/named in relation to the cluster’s activities and function (at least partly) as a unity.

3.4 Conclusion

Having reviewed the main literature concerning the nature of cultural clusters and their role in urban growth, the theoretical foundations are now laid for the selection of relevant concepts and hypotheses and, thereby, the construction of a thematic guideline to be used in the empirical analysis of the three case studies (Part II).

First, a preliminary assessment is made (at the scale of the city) of if, how and following what rationale the audiovisual sector is included in local development strategies.

Secondly, the distinct film, media or audiovisual clusters, selected in each of the three cities, are analyzed in detail – observing in particular the (pre)conditions are at the basis of those developments (including which actors and stakeholders are involved), what the advantages of agglomeration and spatial proximity are, what networks are created and what kind of (urban) environments come about.

PART II

EMPIRICAL RESEARCH ON THREE CASE STUDIES

COPENHAGEN, VIENNA, MADRID

CHAPTER 4

Introduction to the empirical research

The empirical analysis of three case studies has been conducted as an attempt to decipher what processes are at the basis of the creation of localized articulations of cultural-product industries (cf. Scott, 2005).

Taking inspiration from EURICUR (2001), the identification of the clusters has a double value: alongside the relationships and networks among operators (advantages of spatial proximity and so on), the “urban planning” dimension (development trajectory of the city) is also investigated (see ibid., p.23).

The case studies analyzed are Copenhagen, Vienna and Madrid.

4.1 Research design and methodology

The general methodology used is qualitative analysis. As previously explained, the study of each case has been carried out in two steps.

First, the analysis is conducted at the scale of the city, trying to address the following sub-questions:

- What position do film and media (intended as cultural industries) occupy in urban or regional development strategies?
- Within this framework, what kind of initiatives are undertaken to support the audiovisual sector and who are the main actors and stakeholders involved?

To address these questions, in-depth interviews have been conducted with key informants in the fields, including local authorities, planners, decision-makers, as well as academics and experts in the audiovisual field.

This material was combined with desk research, dedicated to the analysis of official documents in particular.

In the second stage of the research, a more detailed analysis has been carried out of well-defined areas in each of the three cities, in which film and media companies and related institutions cluster together – areas selected according to the criteria defined in Chapter 3.

The examples chosen are Filmbyen (Film City) in Hvidovre, in the outskirts of Copenhagen, the recently developed Media Quarter Marx in Vienna's third district, and Ciudad Audiovisual (Audiovisual City) planned to be established in Colmenar Viejo, Madrid.

In each cluster the location patterns of film and media companies have been investigated with a small-scale survey.

The methodology employed in the survey was that of semi-structured interviews. This involved using a standard set of questions, but adapting the discussion according to the responses of the interviewees, thus allowing them to freely express their opinions. The aim is to assess the concrete geographical, social and economic conditions and factors that are of relevance in audiovisual companies' location choices and to understand the significance of agglomeration economies, networking patterns and their relations to the institutional context.

The information collected with the interviews was supplemented with extensive reviews of local newspaper articles (see Appendices) documenting the development of each cluster[11].

4.2 Data collection

The questions in the survey covered four thematic areas:

1. information about the company (size, "age", main activities…);
2. reasons for locating in the selected area, advantages of clustering and networking (local and global level);
3. evaluation of the institutional framework;
4. qualitative assessment of the kind of urban environment that has resulted.

[11] In the case of Copenhagen, newspaper articles on the development of Filmbyen were systematically collected by the Municipal Library of Hvidovre from 1997 to 2004. In the case of Vienna the collection used is the one made available by the ZIT (Zentrum für Innovation und Technologie/Center for Innovation and Technology) and comprising both newspaper articles and specialized magazines. In the case of Madrid, where the project Ciudad Audiovisual is still at the planning stage, no similar collection is yet available.

All interviews were conducted face-to-face at the interviewee's workplace, thereby allowing observations of the surrounding environment – very often during the visits I was also allowed to access special rooms and make a tour of the studios and other settings where the different stages of film, video and television production take place.

While in-depth interviews lasted between 40 and 80 minutes, survey interviews lasted an average of 15/20 minutes.

With the respondents' consent, all interviews were digitally recorded; at a later stage they were partly or entirely transcribed and (in cases where they were conducted in a language other than English) translated.

4.3 Data analysis

The analysis of the collected data builds on a study conducted by Basset et al. (2002)[12], in line with which the review of each case has been organized using the following headlines:

- origins and stages of cluster growth
- cluster depth
- local-global networks
- institutional thickness
- current dynamics of change

Each headline further elaborates upon integrating inputs from other authors (in particular Mommaas, 2004).

The following table shows and frames all the elements considered in the thematic guideline.

[12] A research on the natural history film-making cluster in Bristol that besides concerning a sector belonging to the audiovisual industry, is explicitly based on the importance of clusters in urban growth.

Table 4.1 Guideline for the analysis of the clusters

<table>
<tr><td colspan="2">Origins and stages of cluster growth
How did the cluster originate?</td></tr>
<tr><td colspan="2">UNDERLYING RATIONALE AND OBJECTIVES – different actors involved</td></tr>
<tr><td colspan="2">• Autonomous artists and/or producers
• Economic development agencies
• Urban planners
• Private investors
• Local politicians</td></tr>
<tr><td colspan="2">OVERALL DESCRIPTION</td></tr>
<tr><td colspan="2">1. Scale
2. Levels of coordination</td></tr>
<tr><td colspan="2">• Top-down vs. Bottom-up
• Former industrial complex vs. New buildings
• Production-oriented vs. Consumption-oriented
• Art-based vs. Commercial-based</td></tr>
<tr><td colspan="2">Cluster Depth
Intra-cluster collaboration</td></tr>
<tr><td>“HORIZONTAL” portfolio of activities</td><td>“VERTICAL” portfolio of functions</td></tr>
<tr><td>Monofunctional vs. Multifunctional

Services

Leisure elements</td><td>Cultural product:
design – production – presentation/exchange – consumption

Audiovisual product:
production – distribution – exhibition</td></tr>
<tr><td colspan="2">AGGLOMERATION FACTORS</td></tr>
<tr><td>“Hard” factors
• infrastructure
• cheap space
• accessibility</td><td>“Soft” factors
• ambiance and atmosphere
• symbolic value of the place
• visibility and branding possibilities</td></tr>
<tr><td colspan="2">Local-global networks
How is the cluster affected by local and global processes?</td></tr>
<tr><td colspan="2">POSITIONING</td></tr>
<tr><td colspan="2">• In the urban field and in the local context
• At the national level
• At the international level</td></tr>
<tr><td colspan="2">GLOBAL CONNECTIONS</td></tr>
<tr><td colspan="2">Institutional thickness
What institutional structures support the cluster?</td></tr>
<tr><td colspan="2">ORGANIZATIONAL FRAMEWORK</td></tr>
<tr><td colspan="2">• Role of the (local) administration
• Supporting institutions
• Role of education institutes</td></tr>
<tr><td colspan="2">FINANCIAL REGIMES</td></tr>
<tr><td colspan="2">• Public subsidies
• Public-private models
• External support (e.g. European programs)</td></tr>
<tr><td colspan="2">Current dynamics of change
What is the current stage of development?</td></tr>
<tr><td colspan="2">• Ongoing changes
• Prospected future trajectory</td></tr>
</table>

Source: own elaboration based on Basset et al. (2002) and Mommaas (2004)

4.4 Sample selection and limitations

The selection of the sample of cases had to be limited to the range of cities visited and studied in the course of the 4 Cities Master program, and therefore results inevitably biased. Nevertheless, the choice of the three cities is based on a clear reasoning.

The case studies of Copenhagen and Vienna were chosen first. The two cities present interesting common features, both being capital cities of small European countries, with small audiovisual industries. Both cities also have clearly defined film and media clusters embedded in their urban fabrics. And in both cases, due to the small size of the clusters, studying their characteristics and results has proven manageable (considering the limited time and financial resources of a Master thesis project). Besides their similarities, these two cases also present some highly distinctive features that are of value for this comparative study.

The case of Madrid is included in the thesis as an "added case study". The reason for this choice was an interest in placing the two relatively small cases of Vienna and Copenhagen's film and media clusters in comparison/contrast with one of the biggest European players in the audiovisual production field.

In the case of Madrid the selected audiovisual cluster is still at the planning stage. It was therefore not possible to conduct the same analysis as for the other two cases – primary data collection (face-to-face interviews with each company located in the selected cluster).

However, it was possible to work on the case conducting secondary data analysis. In 2008, in fact, a qualitative study was commissioned by the developers, in which about 20 different companies (with a good balance between "traditional" and "new audiovisual") participated in a survey, aimed at understanding the way the idea of the creation of an Audiovisual City in Madrid is perceived among professionals in the field.

Due to the fact that all work on the project Ciudad Audiovisual has been suspended (spring 2010), data has to be treated with confidentiality. Nevertheless, as the questions asked in the interviews by and large followed the same structure as the ones in my own survey, the material made accessible has been sufficient to conduct the research for the case study of Madrid as well, though not in the same level of depth as the other two.

CHAPTER 5

CASE STUDY 1: COPENHAGEN

5.1 Cultural industries in Copenhagen and the experience economy approach

Following a decade of industrial decline and intensifying unemployment, since the late 1980s local authorities and the Danish government have made considerable efforts to enhance Copenhagen's competitiveness and make the city become a major European metropolis (Brenner, 2004). It was with this in mind that Prime Minister Poul Schlüter stated his intention to transform the Danish capital into "the power centre of Scandinavia" (Hansen et al., 2001, quoted in ibid., p.236).

Since the turn of the century, which was marked by the implementation of major infrastructural projects such as the Øresund Bridge and the underground system, Copenhagen authorities have focused increasingly on the development of a post-industrial, knowledge economy. Within this framework, the city has also sought to improve its cultural and recreational facilities in order to promote the region as an attractive cultural and creative hub.

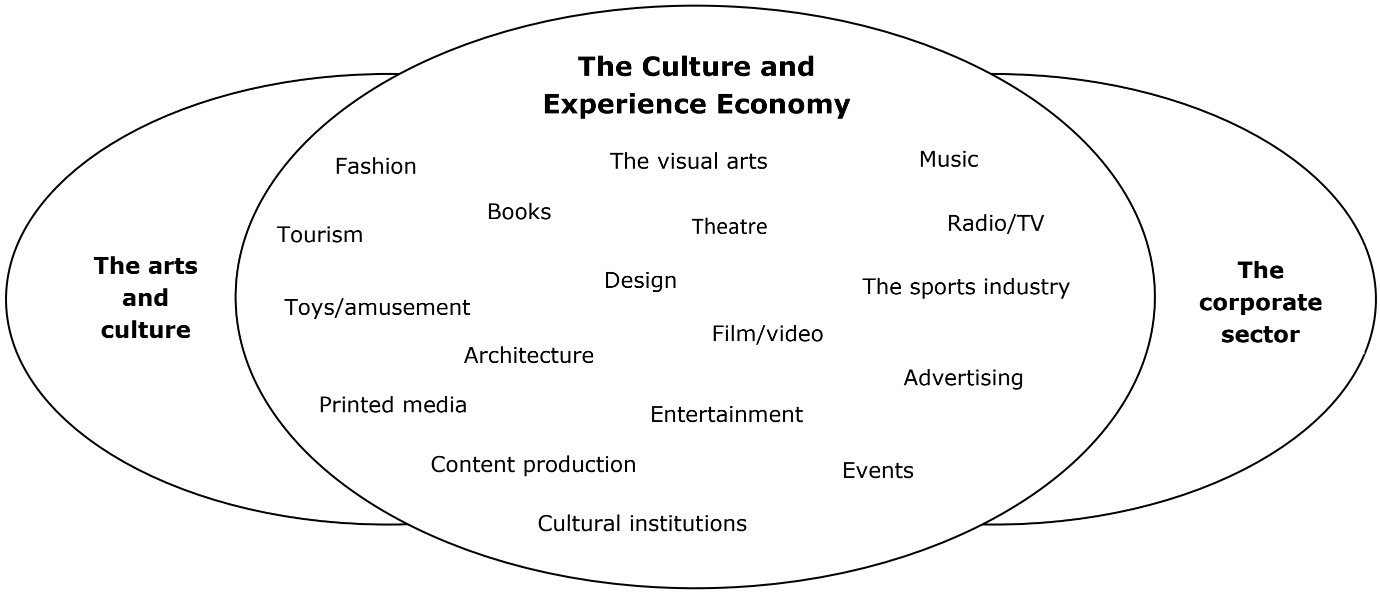
Copenhagen presents an interesting example in terms of the interplay between cultural and creative resources and urban economic growth (Bayliss, 2007b). In fact, Denmark has a long tradition of using culture as an instrument to promote its urban areas. Culture-led economic development initiatives date back to the 1960s and by the 1980s high cultural institutions and flagship projects had already become established features of Danish local politicians' agendas. Those initiatives were primarily aimed at increasing tourism, jobs and trade (Skot-Hansen, 1998, quoted in ibid., p.894). Concrete strategies and white papers on creative industries in Denmark were first formulated in 2000; in the first report[13] the government highlighted the intrinsic value of culture, thus reaching beyond economic arguments. In later papers the rationale of growth and economy has become dominant at the expenses of other societal benefits (see Birch, 2008)[14].

[13] *Danmarks creative potentiale – kultur- og erhvervspolitisk redegørelse* (2000), published by the Ministry of Culture and the Ministry of Economic and Business Affairs.

[14] In her analysis Birch (2008:129) adds that the shift towards a dominating economic instrumentalism in the promotion of the cultural industries in Denmark reflects the political shift from a social democratic lead government to a conservative-liberal one.

Compared to other countries, the government's culture-led development strategies in Denmark address a broader range of sectors than what is commonly included in the "creative industries". The definition adopted also encompasses sport, tourism, toys and theme parks, existing within what they call the "experience economy" – an economy emerged from the fusion of culture and the corporate sector (Danish government, 2003:8).

Figure 5.1 The Culture and Experience Economy



Source: Danish government, 2003:8

As Bayliss (2007b) has underlined, several explicit references to Richard Florida's discourse can be found in the visions of the main bodies responsible for the governance of the city. Examining the policies of HUR (Greater Copenhagen Authority) and the Municipality of Copenhagen – the two main bodies responsible for the governance of the city –, it becomes clear that culture and creativity are considered key ingredients in the most recent development strategies for the Danish capital; those ideas are supported by data on the growth potential of the creative sector, which is set very high compared to total growth in the remainder of private industry[15], together with the assumption that culture attracts people and investment (ibid.).

[15] Between 1992 and 1998 turnover in the cultural sector rose by 29%, compared to 15% in the remainder of private industry (Kulturministeriet & Økonomi- & Erhvervsministeriet, 2003, quoted in Bayliss, 2007b:895).

5.2 Film in the Danish experience economy

Regarding the role of the audiovisual sector in Copenhagen's development strategy, it is interesting to note that Copenhagen Capacity, the Danish Capital Region's official inward investment agency, alongside its three main sector tracks Cleantech (sustainable energy industries), Medtech (medical industries) and Headquarters (localization of headquarters of foreign companies in the area) also operates in the field of Entertainment, with a clear focus on film, television and video games. In fact, Region Hovedstaden (Capital Region of Denmark) regards film- and computer games industries as important targets for further development in its 2007 business development strategy[16].

The privileged position film occupies in the Danish creative economy has historical roots. Denmark has an long tradition in film-making, which dates back to 1906, when director and producer Ole Olsen founded Nordisk Film in Valby (Copenhagen). Thanks to his exceptional managerial and marketing skills, Olsen succeeded in making the Danish film industry famous worldwide during cinema's silent era. The arrival of talkies interrupted this early "golden age", until a new genius, Lars Von Trier, brought Denmark's cinematic culture back into the international spotlight in the 1990s. Von Trier is note for initiating the avant-garde filmmaking movement Dogme 95 and directing masterpieces like *Breaking the Waves* and *Dancer in the Dark*.

Such international recognition, reflected in the many awards received, is impressive considering the size of the country. These achievements generated great enthusiasm among politicians and people in the cinema world, who unanimously declared Danish film to be a *stor succes* (big success).

Thereafter, the question arose of whether or not the sector had also reached a high degree of success in economic terms. In a detailed study on film in the Danish experience economy, based on both a micro- and a macroeconomic analysis of the industry, Wümpelmann (2008) has shown that in contrast to the optimistic claims within the public debate Danish film cannot rightfully be described as successful. Despite its high growth rates and visible potential for further growth, the film industry

[16] Film and games are identified as high growth potential sectors – up to 2018 film is expected to show an yearly growth rate of 5.8%, while games around 9%. Copenhagen Capacity's objective is to create 3,000 new creative jobs in these fields within a period of 10 years (Copenhagen Capacity, 2008).

contributes very little to the Danish economy (less than 1% of BNP[17]) and also in terms of export achievements are modest (CBS, 2005).

As explained in the theoretical section (Chapter 2), however, direct effects such as wealth and job creation are not the only indicators to look at in regards to investment in cultural activities. In tune with this, Copenhagen Capacity continues to work towards the development of a strong film and entertainment sector for the potential generation of indirect (economic) effects, like improving the city's image and attractiveness.

The present research looks at film in the Danish experience economy from a different point of view, focusing on one distinctive side of the Von Trier-led golden years of Danish cinema: the creation of Filmbyen (Film City) in the town of Hvidovre, around the famous director's production company Zentropa, and known as a "hub of Danish film creativity" in the outskirts of Copenhagen (see KEA, 2006).

5.3 Cluster analysis: Filmbyen, Hvidovre

I. Origins and stages of cluster growth

The town of Hvidovre (main center of the Hvidovre Kommune) is a suburb of Copenhagen located south-west of the capital city. The area has been severely hit by de-industrialization, with an enormous decrease in working places in recent decades (Sverrild, interview CPH3). The Municipality of Hvidovre also suffers from a poor image, in part because its population is characterized by relatively low levels of education and income. Problems also exist in relation to its sizable number of immigrants, pertaining particularly to issues of integration.

As historian Poul Sverrild has pointed out (ibid.), if this working class municipality gains access to the 21st Century, it will be by means of new industries. The cultural industry, which appears to have the highest growth potential in the coming years, is particularly essential to Hvidovre's transformation.

> The "creative class", those who have more ideas than money, they usually conquer romantic industrial areas. It is a trend you can see all over Western Europe. In Hvidovre we only could use the military barracks [of Avedørelejren]

[17] Bruttonationalprodukt (gross national product).

for this purpose because the rest of the suburb, built in mid-20th century and characterized by prefabricated concrete blocks, has not been romanticized yet (ibid.).

Avedørelejren is a former military camp situated between the town of Hvidovre and one of the Finger Plan's *grønne kiler* (the green areas between the finger-shaped development axes of Copenhagen[18]). The site dates back to the 1890s, and was abandoned by Danish military forces in 1992 (see Hvidovre Kommune et al., 2009).

Shortly after the military's departure, in 1993, Københavns Amt (Copenhagen County[19]) and the Hvidovre Kommune established an initiative group charged with the assignment to prepare a draft proposal for the future use of the camp.

Avedørelejren consists of a series of buildings gradually constructed in the first half of the 20th Century. It was originally designed by architect Helge Møller in a National Romantic blend of styles and follows a plan inspired by the Kastellet in Copenhagen (Hvidovre Kommune, 2005). The area covers 277,000 m² in total, 32,000 m² of which is occupied by the tenement (Københavns Amt, 1999). After a working group consisting of representatives of the Ministry of Environment and Energy, the Defense Construction Service, the Danish Forest and Nature Agency, the Copenhagen County and the Hvidovre Municipality decided that Avedørelejren's built part should be converted from *landzone* to *byzone* (from a rural to an urban zone), the development of concrete ideas on the future of the vacant quarter began.

Local authorities and, in particular, the Mayor of Hvidovre Britta Christensen wished to turn the military camp into a "creative milieu". They saw an urgent need to give space to artistic and cultural activities in the municipality.

When Christensen learned in 1997 that Zentropa, the important film production company founded by director Lars von Trier and producer Peter Aalbæk Jensen, had withdrawn from the plan to establish a film city in Sydhavnen[20], she contacted Aalbæk immediately. Aalbæk's ambitious idea involved not only finding a new space for motion pictures production, but also creating a hub for the Danish film industry as a whole. Founded in 1992, by the mid-1990s Zentropa had reached critical visibility at

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[18] More precisely, the green zone in question is the one located between Roskildefingeren and Køge Bugt-fingeren.

[19] Since the Municipal Reform of 2007 Denmark's traditional counties were replaced by larger regions. Today Københavns Amt is part of Region Hovedstaden (Capital Region of Denmark).

[20] Sydhavnen (The South Harbour), also called Kongens Enghave, is a district in southern Copenhagen.

the international level, especially after the groundbreaking Dogme 95 movement was conceived in 1995. The arrival of Aalbæk and von Trier was seen, therefore, as a unique opportunity for this problematic area to acquire a new image and to boost the reputation of the municipality of Hvidovre.

At the time of the aforementioned activity, a controversial discussion was also underway concerning plans to house 3,000 political refugees from Kosovo. More specifically, Avedørelejren's barracks were being considered, despite their visibly poor safety conditions, as a possible option for locating some of the people. Hvidovre authorities opposed this plan, arguing that the site was not suitable for housing purposes and that the refugees would find more welcome in a less problematic area, such as the municipalities at the northern edge of Copenhagen. Despite facing bitter criticism, the Municipality of Hvidovre acquired Avedørelejren in the spring of 1999; in the same year Zentropa purchased the first 5,300 m² of the old military camp and one year later the remainder of the so-called *gule by* ("yellow city") – the upper part of the site, occupied by plain buildings where military education once took place (see Map 1 in Appendix 1).

'It was also chance that gave us the opportunity to move here (...) to one of the suburban ghettos', declares Aalbæk in a short movie about Zentropa. Unlike most film companies, which usually occupy fancy neighborhoods in big cities, 'where you sip cappuccino' (ibid.), they opted for Avedørelejren's run down barracks, making a clear aesthetic statement coherent with the ideas expressed in the Dogme concept.

Von Trier was looking for a military atmosphere, in 'military decay' style; the company was shaped as a 'guerrilla network', inspired by Mao Tze Tung. They appreciated feeling cut free from the world and having the space and possibility to create their own working environment. Their declared intention also included the application of an industrial approach to film making, thus bringing together machines and employees and filling this relationship with art.

Consistent with the hypothesis advanced by Poul Sverrild, the yellow barracks were "romanticized" to the point where they became attractive to representatives of the creative class.

Following Zentropa's successful relocation, another important Danish film production company, Nimbus Film, also purchased a building and moved to Filmbyen. Subsequently, Zentropa began to rent out some of its space to small companies –

mainly film or TV-related businesses and institutions with different degrees of independence from Zentropa itself.

As stated by Niels Bald (survey interview), one of the first producers to move to Avedørelejren, the original plan was to create a film city five time as large as it currently is, eventually expanding into the "red city" (the lower part of the camp) as well; a sort of "Danish Hollywood" as local newspapers titles often referred to Filmbyen, or rather "Anti-Hollywood" as Von Trier and Aalbæk might prefer.

II. Cluster depth

Filmbyen is dominated by Zentropa, which has established itself as the leader of the project and is the owner of most of the buildings. Consequently, there is a strong focus on film in the activities at Filmbyen, while television plays a relatively minor role. Increasing attention, however, is given to new media and some companies and institutions not directly related to film are also present.

Zentropa is organized along the lines of a "small Universal Studios": facilities for all stages of production and post-production are present in the area and are also at the disposal of other companies. Activities related to distribution take place as well. What is still missing at Filmbyen is the third component of the film production chain, exhibition. Although many plans have been put forward by both Aalbæk and the municipality to open a cinema also accessible to the local population, this has yet to prove feasible (primarily due to the financial difficulties of running a cinema in the long term).

No commercial services have been established in the area, with the only exception being the area's main meeting point, the restaurant Messe.

The large majority of the people interviewed in the survey stated that physical proximity is essential for people operating in the audiovisual field. Among the advantages, cost-savings were frequently mentioned, alongside possibilities for social interaction, which is good for the development of new ideas and exchanging knowledge. Those networking activities, though, especially at the informal level, seem most likely to occur among people working in the same company, rather than shaping an overall system of interconnection and cooperation.

As far as appreciation of the specific kind of environment created in Filmbyen is concerned – decentralized and relatively isolated, and shaped with the declared intention of creating community spirit – there is no consensus. From the analysis of the survey it appears clear that the weaker the connection to Zentropa, the lower the degree of satisfaction with the area and the higher the skepticism about the extent to which the old military camp can actually be described as a creative settlement. Smaller independent companies often distance themselves from Zentropa's rhetoric of Filmbyen as a "family"; yet this does not seem to give rise to conflicts and the environment is certainly more friendly than competitive. Companies do often join forces (very often with their closest neighbors), share resources and develop common projects.

The decision to locate in Filmbyen for non-Zentropa companies does not depend on rent prices (as offices are not cheaper than in the city center), but rather on personal connections, the ability to access infrastructure and equipment and, in some cases, the perceived advantage of getting an address in Filmbyen to gain visibility.

Most interviewees see the distance from the city as a major disadvantage (people with children and other family obligations in particular); the limited accessibility of Hvidovre by public transport and, most importantly within Danish culture, by bike (with the exception of young employees who bike to work considering it as a way to do exercise) was also stressed. Most respondents reach Hvidovre by car every day, in part due to the excellent availability of free parking space in the area. A few also mentioned accessibility problems in relation to their customers.

Although no data is available to monitor all renters over a number of years, it appears that small companies make short stays at Flimbyen. Above all, this reflects the characteristics of an industry organized around temporary projects, ad-hoc teams and the frequent failure of small businesses.

III. Local-global networks

Situated in the outskirts of Copenhagen in a clearly defined settlement, Filmbyen constitutes a kind of island that has limited interconnections not only with the city but also with adjacent neighborhoods. Despite the good intentions expressed by both Zentropa and the local authorities in the early stages of the area's development, little interaction with the local population has been initiated. Looking at the companies and their activities, it is clear that most of them operate in a network that reaches into the whole city of Copenhagen, even though they are substantially self-sufficient in terms of infrastructure – Filmbyen most commonly provides services to companies located elsewhere, rather than requesting services.

Zentropa is the largest film production company in Scandinavia and over the years it has expanded well beyond the Danish national borders[21], having establishing its own production units (mostly 100% owned) throughout Europe – the most active centers being Norway, Sweden, Poland, Germany (Berlin) and Spain.

The intention declared by its originators from the beginning was to turn Filmbyen into a major film production center, at least at the European level. Enormous effort was made in the initial years to bring the site international visibility; for instance, by attracting international stars.

Alternatively to what most often occurs in Europe, where co-productions are very popular in film and television, Zentropa rarely co-produces outside of its own network of subsidiaries. In the words of Noemi Ferrer (survey interview), 'it is like having a daughter abroad instead of looking for friends' and this helps the company take advantage of ideas exchange between different countries, while avoiding potential misunderstandings.

More generally, for most of the companies it is the international scale that is the target for any issue concerning finance (e.g. the European programs MEDIA and Eurimages) and distribution (obviously, given the limited size of the Danish market).

IV. Institutional thickness

The main institution dealing with film in Denmark is the Danish Film Institute (DFI), a government agency responsible for supporting and conserving cinema culture in the national interest[22]. With its department for 'Production & Development' and the unit 'New Danish Screen', the DFI provides funding for films through a system that includes a Film Commissioner Scheme (100% support) for films of artistic merit, and a

[21] Source: http://www.zentropa.dk/about/historie

[22] See: http://www.dfi.dk/English/Service/AboutDFI.aspx

40/60 Scheme for productions with potential for public appeal.

Survey respondents appeared quite satisfied with the money the government invests in supporting cinema and it is widely viewed that subsidies for Danish film are absolutely essential to its survival.

While the DFI primarily focuses on the cultural aspects of cinema, Copenhagen Capacity (mentioned above) considers film as an industry and its work involves enhancing the sector's contribution to economic growth. Unlike other sector tracks, trying to attract foreign companies to Copenhagen for the Film and Entertainment division of the agency is not realistic. Instead, Copenhagen Capacity seeks to enhance the film, television and computer games industries' economic performance by providing companies with expertise and know-how. Activities are organized to improve networking among professionals, the main objective of this being the creation of a *cluster* (at the geographical scale of Greater Copenhagen).

Most interviewees were informed about Copenhagen Capacity and its initiatives and most of them had positive opinions about this kind of approach to support the sector. Nevertheless, some doubts were raised concerning tangible effects of the overall project. Likewise, none of the respondents indicated that they feel they are working in a cluster at the level of the city.

A third institutional framework to be considered is the Hvidovre Municipality. As previously explained, in the early stages of the development of Filmbyen cooperation between local authorities and Zentropa could be described as very fruitful. This is reflected in the numerous prizes awarded to the neighborhood development project for its urban planning and design qualities (Thøgersen, interview CPH4). Moreover, in the initial period of development the interests of the various stakeholders were integrated into a constructive balance between a top-down and a bottom-up approach. The role of Zentropa was so essential, however, that we can also speak of an "Aalbæk-Von Trier effect" at the basis of the establishment of this dynamic film district.

More recently these dynamics have begun to show weaknesses. Having accomplished the purpose of attracting creative businesses to Avedørelejren (and avoiding having to house political refugees in the area), local authorities left Filmbyen in the hands of Zentropa. In time, a line of demarcation between the "yellow city" and the "red city" (see above) was drawn, visible also in spatial terms. As a result, a feeling of unity is no longer perceivable.

Apart from the foundation of a film school for young people, called Station Next, no solid link has been established with major educational institutions in Copenhagen. Furthermore, in recent years guided tours in Filmbyen for students or other visitors have ceased and the site is not included in major tourist guides and websites (instead visitors are directed to the nearby Circus Museum).

V. Current dynamics of change

In recent years Zentropa has faced a period of crisis, largely linked to the radical transformations which are taking place in the audiovisual sector as a whole. Technological change at an unprecedented speed has revolutionized the way in which film and media are produced and distributed. It is still unknown what the consequences of digitization will be and related problems of copyright infringement linger as well.

The film sector in Denmark does not yet seem prepared to distribute content on the digital market and companies have experienced problems adapting to new developments and audiences' needs. According to many respondents, the generous financial support provided by the DFI has served to "spoil" the industry, with film companies today focusing more on acquiring subsidies than on either creating content for their audiences or enhancing their competitiveness in the market.

In 2008 Zentropa was saved from bankruptcy by the intervention of Nordisk Film, which purchased 50% of the company. Since 2009 the crisis has deepened and Zentropa has been forced to initiate a more comprehensive phase of restructuring – cutting expenses by moving production to other countries and firing about half of its employees. Many of the smaller companies have difficulties earning enough profit to pay their rents, and the crisis is now visible in the whole Filmbyen: many renters have moved away or are waiting for an opportunity to leave. In general, many employees have become critical of Zentropa's anarchistic milieu and its practices that (according to some journalists) "resemble a sect".

Recognizing his responsibilities in not having been able to manage Zentropa's 1990s sudden (and probably exaggerated) success in the long run, Aalbæk has recently abdicated from the company's leadership. Although nobody doubts that the "Aalbæk-

Von Trier effect" was a chief determinant in the Danish film golden age in recent decades, it now appears clear that excessive reliance on their exceptional personalities and extremely peculiar visions is not sustainable. The network of personal alliances they created has weakened, as the overall quality of their productions has begun to decrease and box-office successes have eroded dramatically.

Nevertheless, not all companies located in Filmbyen have been impacted negatively by this crisis and some businesses are even flourishing. Despite the uncertainties about the future, many people are still optimistic. Some view the current stage of development not as a stage of decline, but as a situation in which 'Copenhagen is simply back to normal' (Simonsen, survey interview) after the Dogme years.

Whether they like the "Zentropa way" or not, most respondents agree that it is still important to work in a place characterized by a community feeling. This is because physical proximity and face-to-face contact in the field (especially for the production of feature films) remain valuable even in an era where a large proportion of the work is done in cyberspace with communication occurring by means of the Internet.

Local authorities are not overly pessimistic about the future of Filmbyen and have stated that, in the case that Zentropa moves away or ceases to exist, they will simply have to work up a new development plan. In any case, as pointed out by Sverrild (interview CPH3), Aalbæk and Von Trier 'will forever have left an impact on the area'.

Whether or not Filmbyen can be regarded as a "successful story", part of Danmark's cultural history has been written in Avedørelejren[23].

[23] See also Thomas Vilhelm's book *Filmbyen* (2007).

CHAPTER 6

CASE STUDY 2: VIENNA

6.1 Vienna: a cultural capital

With its world-leading orchestras, important institutions in all artistic fields, an urban fabric characterized by numerous architectural masterpieces, a dynamic and diverse creative industry, prestigious universities and research institutes, Vienna is 'first and foremost a cultural capital' (EURICUR, 2001:360). This richness and outstanding quality in the cultural offer gives Vienna its attractiveness.

Most Viennese cultural institutions, including those with commercial potential, are heavily subsidized: this is intended as part of a long term strategy for keeping up the city's reputation – i.e. it is an investment in intangible assets such as image and quality of life. Although some problems exist (in Vienna as in any other European city) related to bureaucracy, lack of coordination and the like, good and visible results are evident. The well-known development of the Museum Quarter in 2001 (see ibid.) is a fine example.

Vienna made its entrance into the new millennium under the brand of "cultural metropolis" and it did so reassembling the clichés of its glorious past[24]: within the cultural sector, efforts have been made to rejuvenate and modernize tradition[25], while recent strategies aim at excellence in a wider spectrum of knowledge-intensive sectors, such as biotechnology, IT and multimedia.

Besides the direct economic effects of cultural tourism, the creative production sector is also acknowledged today for its job generation potential – it is estimated to employ 14% of the city's labor force (Kulturdokumentation et al., 2004:21).

As pointed out by Oliver Frey (interview VIE2), the works of Florida and Landry (see Chapter 1) have certainly been read by urban planners in the city administration and the discourse on creativity has had a visible impact on Vienna's urban development strategies in recent years. Evidence of this can be found analyzing the city planning

[24] Gerhard Hatz, introductory presentation of the city of Vienna at the 4 cities board meeting in Brussels, 14 November 2008.

[25] In the field of music, for example, the Viennese electronic music scene has been steadily growing in the last decades.

department MA18's publication *In Zukunft Stadt – In Zukunft Wien*[26] (2009) on the future of Vienna: the word 'creativity' is used extensively and in various domains – ranging from artistic professions and their role in the urban economy, technology and innovation, competitiveness of the city at the international level, quality of life etc.; direct reference to Florida's "3Ts" (Technology, Talent and Tolerance) can be found as well (see Thomas Madreiter, head of MA18, in ibid., p.25).

Through his extensive research on the city of Vienna, urban sociologist and planner Frey (interview VIE2) argues that despite its enormous potential and reputation, when it comes to urban planning and renewal (use of the arts and cultural activities to reinforce the urban structure, use of creativity as a motor for urban regeneration etc.) the Austrian capital cannot rightfully be described as a "creative city", because the structure of the city remains conservative. In comparison to other European metropolises, Vienna exhibits a lack of tolerance for spontaneous generation of creative milieus and self-organized ways of reusing the space, as the administration always seeks to be in control of these kinds of initiatives.

On the contrary, in terms of supporting professionals active in the creative industries with the aim of promoting economic growth, the "Viennese way", lead by the funding organization Departure[27], is acclaimed at the international level as a best-practice model. Within Departure, Vienna's creative industries are considered 'part of a comprehensive urban economic policy'[28] and data on the results are rather impressive. The system secures the economic sustainability of cultural productions: with a total funding of 16.9 million Euros, triggering private investments of 67.7 million Euros, at least 1,244 jobs are secured or created[29].

[26] *In Zukunft Stadt – In Zukunft Wien* was published by Magistratsabteilung 18 – Stadtentwicklung und Stadtplanung in occasion of the homonymous exhibition on the future of Vienna organized in the Wiener Planungswerkstatt in 2009.

[27] Departure Wirtschaft, Kunst und Kultur GmbH (established in 2003) is an initiative of the City of Vienna. An enterprise of the Vienna Business Agency.

[28] Source: http://www.departure.at/jart/prj3/departure_website/main.jart?rel=en&content-id=1169655784476&reserve-mode=active

[29] Source: http://www.departure.at/jart/prj3/departure_website/main.jart?rel=en&content-id=1169655778618&reserve-mode=active

6.2 Film and media in Vienna's creative economy

Having re-established its central position in Europe, 21st Century Vienna is attempting to become an internationally renowned center of technology and R&D. Adding to the well-established artistic and cultural tradition, the Austrian capital has discovered new forms of creative expression, and in particular the growth potential of the media industry (Claus Hofer, head of ZIT, in Capacity, 2006:9).

In 2000 the ZIT (Zentrum für Innovation und Technologie/Center for Innovation and Technology) was established, a 100% subsidiary of the Vienna Business Agency, which serves as the 'technology promotion agency' of the city[30]. ZIT does not only provide direct subsidies to creative companies, but also infrastructure and support in the innovation process (Enichlmair and Borsdorf, 2006:241).

At the head of this vast project is Deputy Mayor and City Councilor of Finance Renate Brauner (quoted in Vollmann, 2009:126, own translation), according to whom:

> The media economy has shown a positive development in the last years in Vienna. About 2,000 companies employ more than 50,000 people. (…) We focus on supporting the many young and creative companies with high innovation power. Because the right infrastructure builds the basis for economic growth.

Consistently with Brauner's ambitious vision, Vienna is today investing extensively in know-how, knowledge and excellence, with the aim of becoming a 'mediametropolis' (see ZIT, 2009:16); taking advantage of its position in the enlarged European Union, the city should become 'a major hub for Central and South-Eastern Europe' and initiate synergies inside the CENTROPE[31] Region (ibid., p.17).

The concrete outcome of Brauner and the ZIT's new strategy for the future of Vienna's media scene is the establishment of the Media Quarter Marx, a new spatial cluster of media-related companies[32]; a project for which key words are "digitalization", "crossmedia" and "convergence".

Following the words of expert Michael L. Joroff (Massachusetts Institute of Technology, invited for a panel discussion on the potential of the Media Quarter Marx in May 2009), good paradigms to follow for the creation of a media city can be found in

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[30] See: http://www.zit.co.at/en/allgemeines/about-us.html

[31] CENTROPE is the border region between the Czech Republic, Slovakia, Hungary and Austria.

[32] The scope of what is referred to as media sector is vaguely defined. In general, the focus are television and new media, while film plays a minor role.

Salford (near Manchester), Helsinki, Seoul and Dubai. The development of a clearer strategic vision, rather than a fixed Master Plan, is strongly recommended. As factors for success, Joroff mentions a broad coalition between managers and politicians, an appointed mediator/integrator with decision-making power and the prevalence of a passionate attitude among all stakeholders in the project.

The development of the Media Quarter Marx, a project that 'underlines Vienna's image as a city of creativity' (Thomas Bauer, in wieninternational, 2007), is analyzed in the following sections.

6.3 Cluster analysis: Media Quarter Marx

I. Origins and stages of cluster growth

Historical Background

The St. Marx area, whose roots go back to the Middle Ages, has a rich history: before it became one of the 13 *Zielgebieten* ("hot spots") of Vienna's Urban Development Plan 2005 (Stadtentwicklungsplan STEP 05) it went through several transformations: from pest house to hospital and even to brewery. Since the second half of the 19th Century it had been dominated by the presence of a slaughterhouse that safeguarded the food supply to the Viennese population at a time in which the city was growing very fast. Having been badly damaged during the Second World War and reconstructed thereafter, the quarter was developed into a modern meat processing center during the 1960s and early 1970s. In 1998, after structural problems had necessitated the closure of the slaughterhouse, the Erdberger Mais project was launched with the aim of redeveloping an area seen as highly strategic[33] (Enichlmair and Borsdorf, 2006).

At the outset, the brownfield area belonged to the city of Vienna. More precisely, it was managed by a number of agencies and institutions all belonging to the city but independent from one another – i.e. St. Marx was not administered by one single actor.

[33] As a precondition for this development the metro line U3 was extended from the Schlachthausgasse to the new Simmering terminal.

What Kristina Wrohlich (interview VIE1) has referred to as 'the first, brave move' towards the redevelopment of this brownfield site was made by the German pharmaceutical company Boehringer Ingelheim, which decided to locate its Research Institute of Molecular Pathology (IMP) in St. Marx. When the biomedical research center opened its doors in 1988, the foundations were laid for the development of Austria's largest Life Science center – also thanks to the cooperation and financial support of the city of Vienna through the ZIT. In the years that followed private investors[34] began to buy land in St. Marx, which is now owned by several stakeholders.

By the turn of the century the Campus Vienna Biocenter was already well established, internationally recognized and expanding. Between 2000 and 2004 the Deutsche Telekom erected the T-Center just a few meters away, a spectacular office building for its Austrian corporate headquarters, giving St. Marx a new landmark.

Within the framework of the large-scale Erdberger Mais project, the developers decided to emphasize biotechnology, telecommunications, and more recently the media sector in the sub-area St. Marx (Schandl, quoted in Enichlmair and Borsdorf, 2006:233). As stated by Wrohlich (interview VIE1) it is advantageous to develop an area of the city around a theme. At the same time it is advisable to opt for multiple sub-themes, rather than concentrate on a single focus – making sure to keep a certain degree of flexibility in case one sector fails to succeed.

The decision to locate the Media Quarter Marx, the new "nerve center" of Vienna's media industry (wieninternational, 2007), at the heart of the modern office and technology center that was already emerging in the former abattoir, is commonly regarded positively.

Media Quarter Marx

The first step towards the development of the Media Quarter, MQM 1 (see Map 2 in Appendix 2), occurred in 2003 in the Maria Jacobi Gasse 2, when two Viennese film producers converted one of the listed brick buildings of the slaughterhouse area into a *Mediazentrum* (media center).

[34] For instance banks like the Raiffeisenbank.

The city of Vienna intervened in support of this initiative shortly thereafter, applying the successful model already tested in the nearby life science cluster to the field of media (Claus Hofer, in Capacity, 2006:9).

In the first building the entire available space (2,200 m²), comprising seven studios (with size between 30 and 63 m²) and all kinds of modern equipment, is fully rented out. Popular TV shows like "Wilkommen Österreich" (ORF) and Barazon (TW1) are produced there. Up to 40 hours of live-TV productions are broadcasted daily to seven different countries.

With the refurbishment of the former administration building of the slaughterhouse, the so-called Parteiengebäude III (also under monument protection), another 1,200 m² were made available for media companies (MQM 2, completed in 2009).

In 2007 the Media Quarter Marx Errichtungs- und Verwertungsgesellschaft mbH was founded. At present, within the framework of a public private partnership between the ZIT (40%) and the private partner VBM Beteiligungsmanagement GbmH[35] (60%), new development plans (MQM 3) foresee the construction of a new building at the end of 2010 (see ZIT, 2009; Gansrigler, 2008). The complex will become Austria's largest Media center, with a total of 35,000 m², at the heart of which a TV studio that is 500 m² large and with 14 meter high ceilings. The total amount invested in the center is 57 million euro.

Neuland[36]

The site is promoted by the ZIT as *Neuland* (new land), meaning new ground for creativity and creative entrepreneurship, with a concept that goes beyond the effectiveness of the technical infrastructure. The idyllic place is described as "undiscovered" (unexplored), "unknown", "exciting" and of course well-known to all creative people, because it is a place in which new ideas are to be developed.

The promotion strategy focuses on the following highlights:

[35] A group of private investors around Adolf Wala, previous president of the National Bank (ZIT, 2009).

[36] ZIT, *Wann haben Sie das letzte Mal Neuland entdeckt?*, MQM Brochure, see: http://www.zit.co.at/upload/medialibrary/MQM-Broschuere_Druckversion.pdf

- Office space and infrastructure with the best technology and the best architecture.
- Good surrounding environment: what once was no-man's-land has today a new image with the T-Center, the Campus Vienna Biocenter etc..
- Accessibility: the site has a good connection to the city center and the airport and it is accessible with all means of transport.
- Networking: creative people need to work in physical proximity to each other. The creation of a multiplicity of creative professions is also recommended (quoting Josef Andorfer, media maker[37]).
- International level as objective. Vienna should not fear the comparison with other German speaking media hubs such as Munich, Berlin or Cologne.

II. Cluster depth

The idea behind the establishment of the new Media Quarter is to welcome media companies of all disciplines. Besides offering them office space, film- and TV-studios, post-production facilities, up to date technological equipment and so on, the ZIT intends to build the right environment for media professionals to interact and work as a unity.

Despite the fact that the largest component of the cluster (MQM3) is still under construction, approximately fifteen to twenty companies are already working in the renewed brick buildings of the former slaughterhouse. At present, the primary focuses are TV-program production and broadcasting, but a range of other activities exist alongside these, with increasing attention given to new media and innovation-oriented businesses.

At the heart of MQM there is the technical and personnel service providing company MARX Media Vienna, which is at the disposal of all networking partners in the area or elsewhere. The studio space is also used as an exclusive event location.

For the moment, the companies are served by only one restaurant (Restauration St. Marx[38], opened only for lunch), but the opening of new services, both in the gastronomical sector and in the fields of culture and entertainment are foreseen in the

[37] Ibid., p.6.

[38] The restaurant is popular also because it is owned by Karin Resetarits, Member of the European Parliament 2004-2009.

near future.

Adequate infrastructure to guarantee the accessibility of the site has not yet been developed. The large majority of the people traveling to St. Marx reach it by car, especially those who work in live broadcasting during the night. The absence of direct public transport connections is seen as a problem for the moment, but improvements are foreseen for the near future. Most complaints are related to the site's lack of visibility, which makes it difficult for clients to find it. This problem, though, will be solved with the completion of the new building.

A large majority of the interviewees expressed very high levels of consensus towards the concepts outlined in the Neuland strategy, in line with which they highlight the importance of physical proximity among companies, to achieve cost efficiency.

Most companies consider the choice to locate in St. Marx to be an investment for the future, as rent prices in MQM are relatively high (comparable to the first district) and the infrastructure is not yet at their disposal. For some CEOs behind the decision there is also a willingness to express their consensus with the city of Vienna's strategy and take concrete action within the creation and strengthening of the cluster – 'I moved here also for a clear sign of supporting this area' (Markus Andorfer, survey interview).

In the words of Matthias Euler Rolle (survey interview):

> We were in the 19th district, it's also a kind of media cluster over there because you have radio stations, press (…). Media cluster is also there, but for me the future is here.

Survey respondents consider themselves to be "pioneers" in the Media Quarter Marx and proudly feel that they are part of a place that grows together with them. Another frequently mentioned positive aspect of the site is the unique combination of old and new, tradition and modernity, which creates an inspiring environment to work in.

As pointed out by Günter Unger (survey interview), 'at the moment everything is still missing' (*im Moment fählt noch alles*). Nevertheless, the cluster is seen as a work in progress, which in time will meet their expectations. Networking between companies already occurs frequently, as people know each other well.

It is generally agreed that clustering of all activities in the same place is the best way to strengthen the audiovisual industry in a small country like Austria.

Respondents unanimously agree on the necessity of frequent personal contact (easier while working in the same buildings, no need to schedule appointments telephonically etc.) among media professionals for the planning of innovative projects.

Thus far, the area does not function as a labor pool of skilled professionals; it works instead as a meeting place for free-lancers in search for employment in different companies or projects.

III. Local-global networks

Located in the third district, the Media Quarter Marx occupies a favorable and central position in the city of Vienna. The proximity to the motor way and to the airport is highly appreciated by both professionals who have to travel often and international partners and clients.

As far as the surrounding environment is concerned, connections and interaction with either the Campus Vienna Biocenter or the T-Center are practically non-existent – only exception (mentioned in the interviews) is the use of the cafeteria in the T-Center.

A brief set of short interviews (conversations) with local residents and shopkeepers, collected by Doris Lipptsch and published in Capacity (2006), has shown that there is not high awareness about the development of a technology center and creative milieu in the St. Marx area. There is general agreement, however, on the need for the renewal and modernization of the neighborhood. Moreover, there are now plenty of expectations towards bringing new life to the old slaughterhouse area – including greater potential for local commerce.

Most companies in the cluster are part of a network of contacts that reaches the other federal states in Austria and also exists at international level, especially in terms of distribution activity (Turkey, Switzerland, Canada, and more), but sometimes also related to production activities (mainly Germany).

For most experts, contrary to the big hopes expressed in promotional campaigns, Vienna will never truly compete with German media cities like Munich, Cologne and Berlin, because the Austrian media business is and remains too small.

IV. Institutional thickness

The Media Quarter Marx is part of a large scale project of brownfield redevelopment in the third district. With the implementation of this creative milieu, the spatial ‘negative lock-in’ (resulting from the obsolescence and closure of the slaughterhouse St. Marx) is being turned into a ‘positive lock-in’ (see Hatz, 2008:316): media companies cluster together and create networks, enhancing Vienna’s image and competitiveness at the international level.

The mission of the ZIT is to intervene where the private sector cannot meet the demand for technical infrastructure and office space in the city of Vienna. ZIT distinguishes between itself and ordinary real estate companies. Its intentions go beyond the construction of suitable buildings with the most modern equipment, for they are focused more on the development of *thematisch orientierte Standorte* (thematically oriented sites).

In the survey, each interviewee was asked to comment on a sentence often used in the public debate on the Media Quarter Marx: ‘*Die Stadt Wien hat sich entscholssen, Medien und Creative Industries zu einem neuen Schwerpunkt zu machen*’ (the city of Vienna has decided to put a new focus on media and creative industries, own translation).

Among the respondents, levels of satisfaction with the ideas of Renate Brauner and the work of the ZIT are (at this stage) very high. This interest of the authorities in the promotion of media professionals was especially welcomed by small companies. Most respondents also state that ZIT did a good job promoting the place. Some refer to the *Neuland* concept, and the idea behind it – seen as both traditional and modern and, as said by Mascha Ohlwein (survey interview), ‘very Austrian in a way’, – is appreciated.

As explained by Nemeth and Andorfer (survey interviews), the Austrian media sector has long been dominated by the monopolistic power of the state television. Therefore young professionals who could not access employment in the ORF (Österreichischer Rundfunk, Austrian national public service broadcaster), or who did not want to adapt to its conservative structure, were forced to move to Germany or elsewhere to start their career. Today the new engagement of the city of Vienna to support innovation in the media sector allows for the creation of new audiovisual businesses in Austria, independent of the ORF. On the other hand (a critical comment added by Andorfer, ibid.), faced with this comprehensive system of support, companies risk over focusing on requesting services and neglecting the development of their own business plan and efforts to make themselves competitive in the international market. More crucial than the city hall's supporting initiatives is the recognition of private, independent media producers at the legal level; in Austria this occurred very late and improvements are needed to enhance competition and dynamism in the sector (ibid.).

V. Current dynamics of change

In January 2009 Alexander Wrabetz, the general director of the ORF, informed the daily newspaper Österreich of concrete plans to move the headquarters of the dominant player in Austrian broadcasting from its current location, Küniglberg, in the 13th district Hietzing, to the Media Quarter Marx. According to Wrabetz, being part of St. Marx's media cluster would offer them the best economic perspectives. Mayor of Vienna Michael Häupl had already argued in front of Vienna's city council for such a relocation of the ORF one month before.

At the same time, ORF is also considering disposing the 6 stages studio lot of Filmstadt Wien (known as the Rosenhügelstudios[39]) so that the Viennese film industry could also be relocated to St. Marx.

Other companies that are exploring a possible transfer to MQM include the Viennese private broadcaster ATV[40] and the Styria Medien AG[41].

All interviewees fully agree that moving both the ORF and the film industry to St. Marx would be highly desirable for the future development of the cluster, to strengthen its position and to increase the diversity of creative professionals on the spot.

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[39] Those studios, in use since 1921 and in which most of the popular "Viennese Films" of the 1930s and 1940s (with Willy Forst, Paul Hörbiger, Hans Moser, Paula Wessely and others) were shot, were bought by ORF for TV productions in 1966. In the early 90s, when the broadcaster no longer used them, the stages risked to be turned into a shopping mall. Rescued at the last minute by the private Management Company Filmstadt Wien Studio GmbH, the space was extensively renovated and reopened in 1996.
Source: http://www.filmstadt-wien.com/

[40] ATV is the largest commercial television station in Austria.

[41] Styria Medien AG (founded in 1869) is one of the leading Media Groups in Austria, Croatia and Slovenia. It incorporates along with others, 9 daily and 17 weekly newspapers, 15 magazines, 15 customer magazines, more than 40 magazines in Croatia, Slovenia and Serbia, 2 supplements, 15 online services, 2 radio and 3 TV programs and 9 book publishers.
Source: http://www.styria.com/en/styria/?PHPSESSID=b3d4b9d53f11cff297b1d72a459e4be9

Nevertheless, as most respondents point out, this is 'a political issue' that brings some controversies. Even if, on one hand, clustering produces agglomeration economies and positive externalities, on the other hand the displacement of companies and institutions rooted in other parts of the city could lead to serious difficulties and even the creation of new problem zones within Vienna. The relocation of the ORF, for instance, would result in the creation of a new, potentially problematic brownfield zone in the 13th district. The current location of the ORF is at risk of abandonment and decay, due to the fact that the Küniglberg building is obsolete. Furthermore, the edifice (designed by Roland Rauner) is listed, hence possibilities for reuse of the building are limited.

Judging from an online search of recent newspaper articles[42], the debate is entrenched within the political sphere at many different levels, and this includes stakeholders outside Vienna. Bitter criticism has been raised by architect Gustav Peichl, who has condemned the decision to relocate the ORF as a move enforced by politicians and circles of powerful investors for purely commercial interests. At the core of these accusations is the presumed intention to remove the monument protection status of Rauner's building.

At the scale of Vienna, the current trend of 'island urbanism', very advantageous in theory, risks resulting in 'a fragmented patchwork of disconnected, often unfinished, parts within the urban area' (Novy et al., 2001 and Oswalt, 2006, quoted in Hatz, 2008:316). Around *Neuland* St. Marx, there remain stagnant urban zones like the Aspanggründe area, which are still waiting for a feasible redevelopment plan.

Within St. Marx, the construction site for the new building (MQM3) is proceeding more slowly than was foreseen. Plans to integrate MQM into city life, avoiding turning it into a 'Mediaghetto' (an intention expressed in the press), and in particular to develop ideas for the future use of the Rinderhalle[43] (the Cattle Market Hall of the former slaughterhouse), are still under discussion. Moreover, doubts have been expressed concerning the development of St. Marx into an inner city lively spot – as some newspaper articles read, 'many colorful buildings' do not make a modern technology

[42] See list in Appendix 2 (v.).

[43] The Rinderhalle is another striking landmark in the area. The building is one of the last examples of 19th Century wrought iron construction and it is under monument protection. Renewed in 2005, the space should become a recreation or cultural center for the high-tech campus. Last acclaimed initiatives have been Rupert Huber's piano concert and a red light installation, both in 2006.

quarter, nor can a building project alone create urbanity and city life.

With the purpose of turning current ‘fragmentation’ into an harmonic ‘composition’, as well as starting enhancing the visibility and identity of this charismatic place, in February 2009 the city marketing agency Neu Marx was founded (its office is located inside the Media Quarter Marx).

Whether the tale of the Media Quarter Marx – which for the moment seems a case of self-fulfilling prophecy – is truly “a successful story” will only be determined after completion of MQM 3 and in the years to follow.

CHAPTER 7

CASE STUDY 3: MADRID

7.1 Cultural/creative industries in Madrid

Following Pareja-Eastaway et al. (2008), creative and knowledge industries in Spain account for 2.4% of the country's GDP, 3% of employment, and show high growth rates in terms of number of companies, number of jobs and turnover. Compared to leading economic sectors (i.e. the construction sector), creative activities cannot be said to be of foremost relevance; their contribution to regional economies throughout the country (preeminently in the metropolitan regions of Madrid and Barcelona) is steadily increasing nevertheless.

As explained by Carlos Alberto Martins (interview MAD3), culture has always been important for the city of Madrid in terms of promotion. In order to compete with most other important Spanish cities, which have an easier time attracting tourism due to their close proximity to the sea, Madrid has always invested significantly in cultural infrastructure (museums, theaters, cinemas…). It has also successfully branded itself through a very diverse set of activities, including for instance gastronomy and football (ibid.).

Recently in the Autonomous Community of Madrid several policy initiatives have been aimed at developing the so called knowledge or creative economy. These initiatives have come especially from the two main actors involved in supporting cultural/creative industries as motors of economic growth in the city: PromoMadrid and Madrid Network.

PromoMadrid[44] was created in 2004, with the aim of supporting the regional economy at the international level, attracting and consolidating foreign investment and promoting the brand image of the city (PromoMadrid, 2010:7). This regional government-owned company has a Culture Industries Department (focusing on film, television and music), which promotes those industries worldwide by supporting companies in the main international markets (ibid.). Cultural industries are considered to be good examples of a 'combination of economic strength and innovation', and are

[44] PromoMadrid, Desarrollo Internacional de Madrid, S.A., was established by the Madrid Regional Government in collaboration with the Madrid Chamber of Commerce and Industry, CEIM, the Madrid Confederation of Employers and Industries-CEOE, and the Madrid Savings Bank Caja Madrid.

said to 'underline Madrid as the artistic hub of Spain' (Madrid Film Commission, 2009:45).

Operating with a different perspective, Madrid Network focuses on innovation and technology, an effort to position Madrid as one of the ten most advanced regions in the world[45]. Put into operation by the Instituto Madrileño de Desarrollo (IMADE, Madrid Institute for Development) to strengthen the city's knowledge economy, the foundation Madrid Network has so far developed a number of high-tech clusters and scientific parks that promote the sectors identified as economically strategic in the region[46], one of which is the audiovisual industry.

7.2 The audiovisual industry in Madrid

In Spain, territorial distribution of audiovisual companies is strongly determined by path dependency: most film and television companies are located in the Madrid metropolitan region[47], which has the strongest tradition in motion pictures production and video-related activities and has, given the presence of the national public television studios, attracted many private companies in recent decades (see Pareja-Eastaway et al., 2008; Gámir Orueta, 2005).

Today more than 70% of the Spanish audiovisual productions[48] are created in the capital region. Also in terms of quality, the majority of international prizes and awards have been handed to companies and professionals based in Madrid (Martins, in PromoMadrid, 2010:5).

The audiovisual industry in Madrid is 'broad, diverse, and counts on highly qualified professionals' (Esperanza Aguirre Gil de Biedma, President of the Region of Madrid, in Madrid Film Commission, 2009:14); its structure is solid, thanks to a complete

[45] Source: http://www.madridnetwork.org/network

[46] The clusters and platforms are: Aerospace and Aeronautics, Audiovisual, Automotive, Biotechnology, Security, Finance, Logistics, Health and Wellbeing, Tourism, Graphics and Communication, Sustainability and Renewable Energy, Spanish Language. The parks are: Tecnoalcalá, Tecnogetafe, Tecnoleganés, Tecnomóstoles, Parque Empresarial de Innovación Norte, Tecnotrescantos Bioparque.

[47] In the beginning of the 20th Century the center of Spain's film industry was Barcelona, but during the the 1920s Madrid imposed itself as the national cinematographic capital (Riambau and Torreiro, 2008).

[48] Spain is at present the third most active European country in terms of audiovisual productions, after Great Britain and France. Source: http://www.septima-ars.com/esp/paginas/industria.php

infrastructural base – production and post-production facilities, technical services, studios, laboratories etc.

Madrid's cinematographic culture enjoys international recognition, for both its creative and technical excellence. Many national and foreign masterpieces of cinema history have been filmed the Region of Madrid[49] – famous works of Spanish directors Luis Buñuel, Pedro Almodóvar and Alejandro Almenábar, including *Viridiana*, *Volver*, *The Others*; or important international films like *55 Days at Peking* (Nicholas Ray), *Doctor Zhivago* (David Lean), *Spartacus* (Stanley Kubrick), *The Bourne Ultimatum* (starring Matt Damon), to name a few.

Today, not only feature films, but also short films, television shows, documentaries, music videos and commercials are shot and produced in the Community of Madrid. And alongside traditional sectors the industry has embraced some of the latest technological trends – the so called "new audiovisual", including video games, interactive content, telecommunications etc.

In 2007 the non-profit association Cluster Audiovisual de Madrid (Madrid Audiovisual Cluster) was founded within Madrid Network[50], with the aim of establishing close relationships between companies, in order to develop cooperative projects and boost their creative potential. Cluster Audiovisual has 33 partners (July 2010), including 8 institutions and 25 innovative companies.

Beginning in 2003 the Madrid audiovisual industry has also received support from the Madrid Film Commission, a non-profit technical audiovisual organization. Beside the need to undertake tasks required of any other film commission – i.e. facilitating the work of all audiovisual professionals, mediating contacts among producers and public authorities, processing shooting permits, promoting the Madrid region as a filming location…– the Madrid Film Commission is also one of the founding members of the network Capital Regions for Cinemas (CRC), together with Paris-Ile de France Film Commission, Medienboard Berlin Brandenburg GmbH and Roma-Lazio Film Commission.

[49] As pointed out by Samuel Castro (interview MAD1), Madrid is an ideal city for shooting movies, because it is versatile and offers a very diverse set of locations (both interior and exterior, both urban and natural).

[50] Through the Department for the Economy and Technological Innovation (Consejería de Economía / D.G. Innovación) and within the framework of the region's Technological Innovation Plan 2005-2007.

Established in 2005 at the Cannes Film Festival, this coalition of European capitals unites the four cities' enormous creative potential and enhances their competitiveness in the international market. Meetings are organized each year in the most important international film festivals in the four countries[51] and the goal is developing co-production projects, advantageous for financing and distribution.

In the words of Olivier René Veillon, head of the Ile de France Film Commission, 'CRC agreements offer each partner access to the other film partners' markets and play an essential role within the European film industry'[52]. As explained by Castro (interview MAD1), this has been a very significant step forward for both Madrid and the European film industry as a whole.

7.3 Cluster analysis: Ciudad Audiovisual

I. Origins and stages of cluster growth

On December 3rd 2009, in a talk outlining the primary objectives of Cluster Audiovisual (introduced above) for the coming years, Aurelio García de Sola, vice president of Cluster Audiovisual and Chief of IMADE, accompanied by Pedro Pérez and Fernando de Garcillán, president and general manager of Cluster Audiovisual de Madrid, presented their plans for creating an "Audiovisual City" in Madrid to more than 300 guests from the sector.

Ciudad Audiovisual remains in the planning stage. The concept, however, has been elaborated by the foundation Madrid Network in cooperation with the Madrid Institute for Development IMADE since 2008.

The selected location is the town of Colmenar Viejo, where since 2006 an ambitious project has been underway to develop a Knowledge City (Ciudad del Conocimiento), a large-scale "technopolis", which Ciudad Audiovisual would become part of.

An attempt to concentrate audiovisual professionals in a dedicated district in Madrid had actually already been made at the beginning of the 1990s, when the Ciudad de la Imagen was created in the municipality of Pozuelo de Alarcón (15 kilometers from

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[51] Berlinale, Festival Internazionale del Film di Roma, Festival de Cannes and Festival de San Sebastián.

[52] Source: http://www.medienboard.de/mbmedia/9/c/e5cb886f96a2ab64237ebec8963a88.pdf

Madrid). This project was lead by the public company Arpegio (Gámir Orueta, 2005:194). Today, this site hosts a building complex where the offices of several important audiovisual institutions are located (including among others the Madrid Film Commission, the Federation of Spanish Audiovisual Producer Associations FAPAE, EGEDA[53]). Nearby there are also the ECAM film school, television stations (like Telemadrid and La Sexta) and some other audiovisual production companies.

As pointed out by Fernando de Garcillán (interview MAD4), expanding Ciudad de la Imagen to accommodate the development of a new audiovisual city would make sense, but of the site lacks the available space that would be required. Furthermore, Ciudad de la Imagen (built as a business park) is known more as a site of real estate speculation than as a site of integration among audiovisual companies and institutions.

Behind the new Ciudad Audiovisual in Colmenar Viejo lies the intention to create something different both from Ciudad de la Imagen and other Spanish audiovisual clusters, such as Ciudad de la Luz (Alicante). In fact, interviewees unanimously regarded the development patterns at these particular sites as models to avoid.

When asked to name good examples to follow, survey respondents tended to refer to US models, favoring the structure of Silicon Valley over the model of Hollywood.

II. Cluster depth

The main idea behind the conception of Ciudad Audiovisual is to create a geographic nucleus comprising companies, education/training and research institutes.

In general, the survey has shown that the concept has been received very positively by professionals. Among the benefits expected by interviewees are cost efficiency (achieved sharing infrastructure and expenses), close contacts allowing immediate feedback, and the creation of synergies. Physical proximity is considered essential for stimulating cooperation among different actors and thereby enhancing the competitiveness of the sector at the national and at the international level.

Building an Audiovisual City in physical (material) terms, though, is not considered a

[53] EGEDA is the collecting society that represents and defends the interests of audiovisual producers in Spain.

necessary condition for strengthening the network as a unity at the conceptual level, but rather the other way around: the idea of the cluster itself – well rooted and established in the pursuit of clear objectives addressing the needs of the industry – has to come before its material expression.

In the words of one respondent:

> You cannot start building a house from the roof. For that we already have the Ciudad de la Imagen.

A number of mistakes to be avoided have also been mentioned. First of all, Ciudad Audiovisual should not become a *burbuja* (bubble). Preferably, it should be a place opened to everybody – not excluding those companies not (or not yet) involved in the project. Secondly, all companies should be seen as equally important (for instance, independent of their size) when it comes to either decision making or developing ideas.

As far as physical proximity is concerned, alongside many (the large majority) positive opinions, a number of respondents have also pointed out some related risks and potential difficulties. For large companies, such as the big television networks typically located in the outskirts of Madrid, the displacement of their entire operations and workforce could prove to be extremely problematic. Small businesses fear 'industrial espionage' from other companies (while developing creative ideas) and 'brain drain' related to the increase in labor mobility. Some companies also express concern about a possible 'isolation from reality' (losing contact with the external world) and the limitations related to being only in contact with people from the same professional sector.

Nevertheless, it is widely agreed that solutions to all these problems can be found – providing an appropriate system of incentives, promoting flexibility and openness, creating a good balance between privacy and social interaction etc.

Suggestions have been made related to the physical appearance of the city. The good accessibility of all its components and between the different components – buildings, leisure areas, parks… – is considered to have foremost importance; infrastructure should be modern both in terms of technological equipment and aesthetics. Architecture should be sustainable, with good acoustics, and flexible. Additionally, companies should be given the opportunity to participate in the design process.

IV. Local-global networks

As previously mentioned, the site chosen for the creation of Ciudad Audiovisual is the town of Colmenar Viejo, about 30 kilometers from the center of Madrid.

Despite the fact that improvements will need to be made in public transport connections, the area is likely to meet respondents' expectations – relative proximity to the Barajas airport, accessibility of open space for outdoor shooting etc.

Closeness to a nearby town, where essential services would be provided, is considered desirable; on the other hand, the idea of including dwelling unities inside Ciudad Audiovisual is seen as a disturbing element, unless those would be meant for people working there, students or interns. Nevertheless, most respondents would like the area to be open and dynamic (with activities going on also at night) and generally hope that the citizens of Madrid also participate actively in the new development.

The creation of a localized audiovisual city in Madrid is commonly considered the basis for strengthening the entire system, with the primary objective being the achievement of better results in the international market. Consolidation of the cluster in a geographic setting is therefore complementary (not in conflict) with its positioning at the global level.

Within the planning process, particular attention is given to companies that exhibit contacts and visions that reach beyond the Spanish national borders[54]; increasingly, attempts will have to be made to attract foreign investment and encourage co-productions.

The current levels of both projection and promotion of Madrid's audiovisual sector are considered weak; significant improvement is desired in relation to the industry's international visibility and prestige. The majority of the respondents agree that more efforts have to be made to increase export activities. They do not perceive the necessity of creating a "brand" around the audiovisual city; nevertheless, the internationalization of the products is considered fundamental – the potential for accessing the Latin American market, for instance, should be thoroughly exploited and, in general, a more competitive position should be reached within the different Spanish-speaking contexts.

[54] The analysis of the results of the survey shows that companies working in the "new audiovisual" tend to be more internationally oriented than traditional ones like film and television.

In the words of one respondent:

> We are in the center, in the capital city, but you need to think more of the language as an opportunity, and not think much about the Community, as the Community does not have much economic significance especially for the audiovisual world; the audiovisual world is international. To build an audiovisual city for the Community of Madrid is a good idea, but I think the main thing is generating an idea for the world.

III. Institutional thickness

The support of important public bodies (not only Cluster Audiovisual but also the Comunidad de Madrid[55] as a whole) is considered vital, both to provide the project a solid basis and to lend it the right credibility. The cluster should, therefore, not exist as a 'spontaneous agglomeration' of companies. The network should instead develop around a centralized management (*órgano gestor central*) that would be in charge of its coordination – at least in the initial stages of development or until the conditions are established for self-coordination among the different actors – and manage legal and economic frameworks. It has also been recommended that the project should be conceived with an eye to the long term, thus avoiding upheaval related to political activity, changes of government etc.

What companies and institutions request from authorities primarily amounts to financial support – in the form of advantageous rent prices and eventual help and assistance in selling currently owned office space –, but also includes the provision of adequate transport facilities and services like restaurants, parking, security, sport, recreation etc. Some have also indicated their desire for the organization of open days, forums, congresses, round table discussions and so on, with the purpose of facilitating contacts and the exchange of information and ideas.

A situation of equilibrium should be achieved, where each participant would have the same rights and the same duties within a 'concrete and effective program'.

[55] Responsibility would be divided as follows: Cluster Audiovisual would be in charge of controlling interaction and cooperation among the companies, while the Community of Madrid would coordinate all links with external bodies and guarantee the project's stability.

V. Current dynamics of change

As of spring 2010 all works on the project Ciudad Audiovisual have been suspended due to the lack of financial resources; planning activities are expected to restart before 2012.

A minimum of four to five years will then be necessary for the project to become a functional part of the Community of Madrid, and thereafter a few more years until companies begin moving to Ciudad Audiovisual – a costly step that requires, as a necessary precondition, the creation of clear and visible advantages for the displaced companies (de Garcillán, interview MAD4).

CHAPTER 8

COMPARATIVE ANALYSIS OF THE CASE STUDIES

8.1 Definitions and figures

Before comparing and discussing the findings of the qualitative study, it is necessary to consider the ways in which the audiovisual industry has been defined in official statistics and documents and the manner in which numbers and figures are provided for each city (Table 8.1). This will provide a more solid framework for understanding the origin of the audiovisual clusters featured in this thesis. A thorough treatment of definitions of the audiovisual sector is crucial, because they represent the basis for all arguments urging the provision of support to the industry.

Table 8.1 Definitions and figures

	COPENHAGEN	**VIENNA**	**MADRID**
Total population Country[56]	5,540,241	8,375,290	46,745,807
Total population City[57]	1,660,092	1,698,822	6,386,932
Data source	Copenhagen Entertainment[58](2010)	Kulturdokumentation, Mediacult and WIFO[59] (2004). ZIT (Berndt et al., 2009)	Cluster Audiovisual de Madrid[60] (2009)
Definition: sectors	Film and games	All activities related to film, video, television and radio ZIT: all media	Audiovisual as 'macro sector', divided into "traditional" and "new audiovisual"

[56] Sources: official national statistics, latest update available. See: http://www.dst.dk/; http://www.statistik.at/; http://www.ine.es/

[57] Ibid.

[58] Having identified problems in relation to lack or inaccuracy of data in national statistics, an up-to-date register of the size of Copenhagen's audiovisual industry is currently being compiled as part of the project Copenhagen Entertainment. The project, launched in 2008, is anchored in Copenhagen Capacity and it is financed, among others, by the European Regional Development Fund. Data shown in this table has not yet been published (courtesy of Henrik Søndegaard, Copenhagen Entertainment).

[59] Researchers appointed by the City of Vienna, MA 27 (EU strategies and economic development), the Filmfonds Wien and the Chamber of Commerce Vienna. Data shown is from 2001.

[60] Data provided is from 2007.

Definition: categories	Only production ('core business' on which the entire audiovisual industry is dependent)	Manufacturing and reproduction Content origination Exchange	Content production Telecommunications
Nr. of companies	309	795 Data ZIT: 2,000	717
Employment	1,912	22,089 Data ZIT: 50,000	30,600
Turnover (Million Euro)	291.9	422.7	8,800

Source: own elaboration

Taking a closer look at the data displayed in Table 8.1, a number of discrepancies and problems emerge – e.g. in reality, the size of the audiovisual industry in Vienna is comparable to the one in Copenhagen, but in these figures it results ten times larger in terms of employment, and even having a higher number of companies than the case of Madrid. Confirming the commonly expressed criticism of creative industries researchers, statistics are ill-suited to the task of providing a precise account of the economic contribution of cultural sectors. The primary source of inconsistency lies in the manner in which the industries are categorized. As it is the case here, different databases use different categorizations, and this makes international comparison unfeasible[61]. The limited reliability of quantitative data was one of the reasons behind the choice to use a qualitative approach in this empirical research[62].

8.2 Film and media in urban development strategies

In each of the three cities analyzed in this work considerable efforts have been made in recent decades at the policy level to tap creative potential. Actions have been undertaken to support cultural-product industries, devoting areas to the creative

[61] Even if only national level figures are taken into account, the data is not always reliable for various reasons: the industrial sectors are difficult to demarcate due to their fragmented nature and use of part-time labor; sometimes figures are not provided by the national statistic offices but instead by the companies or branch organizations themselves; vague definitions are used in some reports, which may result in figures that are intentionally overstated to justify policy intervention.

[62] The clusters taken as object of analysis (see next section) actually consist of only a very restricted percentage of the total number of audiovisual companies in the cities.

economy. As outlined in previous chapters, film and media, both as economic sectors and as cultural products, can be used in a variety of ways in cities' development strategies. In the three cases, despite certain differences, the ultimate objective remains the same: enhancing the city's competitiveness at the international level. Judging from existing discourses on cultural/creative industries promotion it is clear that, in terms of audiovisual productions, each city seeks ways to brand itself as a "center" (film or media hub) – in the three cases presented here, respectively of Scandinavia, the CENTROPE region and Ibero-America. Furthermore, film and media are used regularly in city marketing strategies, including city slogans and logos (emblematic of postmodern urbanism).

8.3 Analysis of audiovisual clusters

The question of *why* film and media clusters have evolved or are evolving specifically in the cities of Copenhagen, Vienna and Madrid falls beyond the limited scope of this thesis – a thorough comparative analysis of a much larger sample of cities would be required. In all three cases, however, the existence of urbanization economies – consistent with the theoretical explanation advanced by Lorenzen and Frederiksen (2008, see Chapter 3) – has been vital. Hence in each country's audiovisual industries, activities have tended to concentrate in the largest city (in all three cases the capital city)[63].

In this paper we concentrate on the question of *how* dedicated city areas (labeled in relation to audiovisual productions) that have been sites of clustering of film and media companies and institutions originate and develop.

Figure 8.1 provides a schema of the main actors (in italics), forces and strategies that form the basis of the development of each of the three selected audiovisual clusters Filmbyen, MQM and Ciudad Audiovisual.

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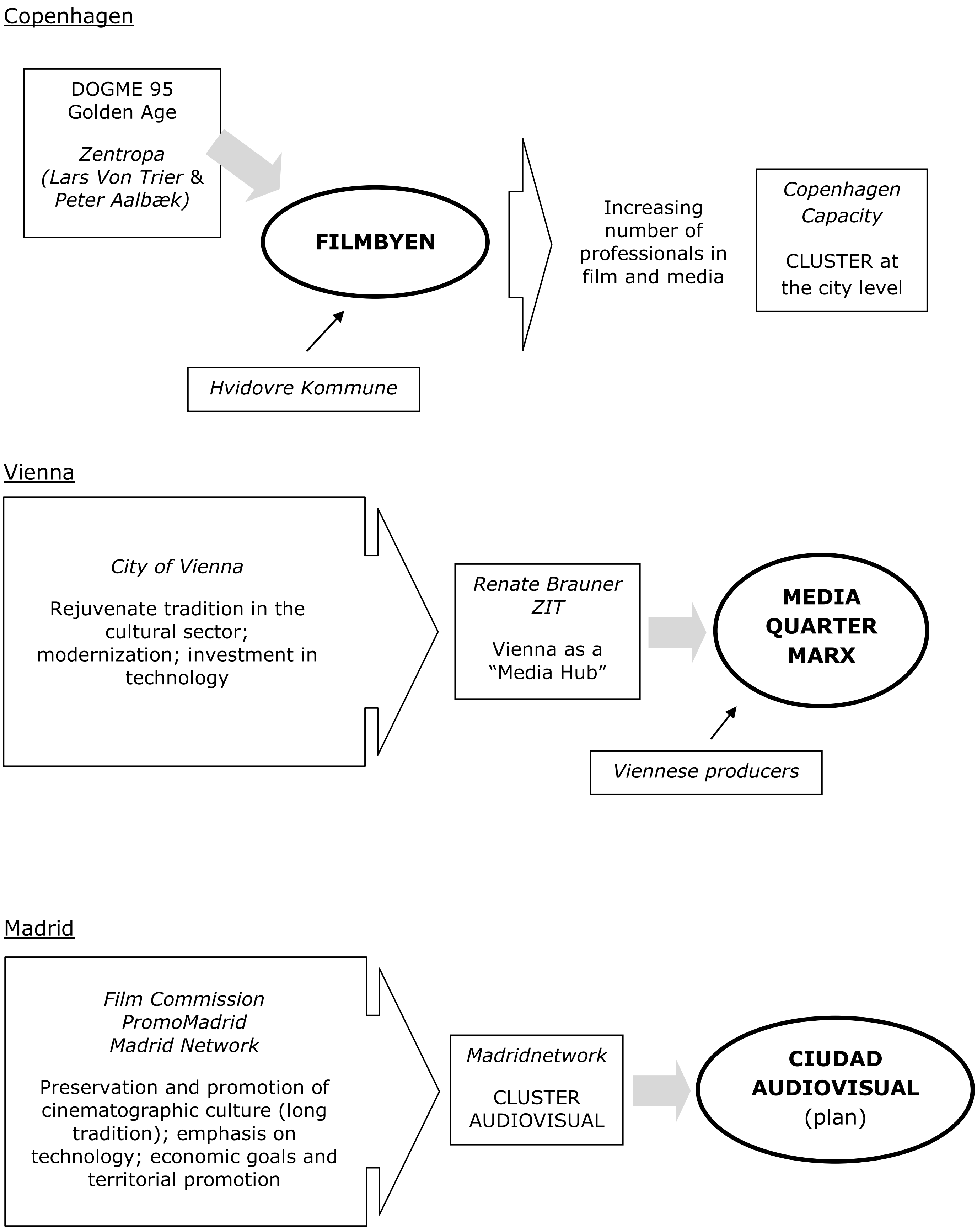
[63] Some arguments supporting these statements have been provided in the literature or by interviewees. According to film and media expert Anne Jespersen (interview CPH2), concentration of activities in the capital city are "natural" in the case of small countries. Regarding the case of Spain, literature sources explain that, although competition with Barcelona always was very strong throughout history, in the end the audiovisual industry concentrated in Madrid, one of the primary reasons being the presence of state television.

Figure 8.1 Clusters evolution I



Source: own elaboration

The figure shows that in the cases of Vienna and Madrid the clusters originate from top-down strategies of enhancing the sectors' competitiveness. The urban districts MQM and Ciudad Audiovisual have therefore been developed as the material expression of concepts elaborated ex-ante, primarily by city authorities[64].

The case of Copenhagen is different. The increase in attention given to the film production sector has in fact occurred *posterior* to the foundation of Filmbyen, which originated primarily from the initiative of Zentropa following the breakthrough of the Dogme movement. If this had not happened, there is a good chance that audiovisual products would have remained marginal in the Danish "experience economy". Moreover, Copenhagen Capacity might have chosen to focus on a creative sector other than film for the establishment of a *klynge* (cluster) at the scale of the city[65].

Attention should also be drawn to the fact that cultural clusters (however defined) do not exist as static unities and, therefore, must be evaluated as dynamic historical processes (Figure 8.2).

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[64] The private initiative of the two Viennese producers who first settled their operations in St. Marx is also noteworthy. Arguably though, those actors' role is more likely to explain the choice of the specific location (area inside the city of Vienna), rather than the actual formation of the cluster, lead by the ZIT. The same can be said in regards to the role of Hvidovre Kommune in the establishment of Filmbyen.

[65] A clarification has to be made on the ambiguity surrounding the word 'cluster' and its use. Definitions always refer to a geographic area, but in practice rather than specific territorialized settlements (intangible) webs of connections at the scale of the entire city or metropolitan region are described. For consistency to the literature (see Chapter 3), in this paper the term 'cluster' is adopted in relation to the far more narrow agglomerations of audiovisual companies and institutions Filmbyen, Media Quarter Marx and Ciudad Audiovisual.

Figure 8.2 Clusters evolution II

FILMBYEN

Dogme 95 | Origins of Filmbyen | Stage of growth | Stage of decline (need for repositioning)

1995 2000 2005 2010 2012

MEDIA QUARTER MARX

New focus: media | Stages of growth

MQM 1 | MQM 2 | MQM 3

1995 2000 2005 2010 2012

CIUDAD AUDIOVISUAL

Foundation Cluster Audiovisual de Madrid | Planning stage | Expected construction

1995 2000 2005 2010 2012

Source: own elaboration

8.4 Comparative analysis of survey results[66]

The main findings of this empirical study are presented in the following table.

[66] Given the fact that Ciudad Audiovisual is still at the planning stage, in this section the analysis will primarily focus on the cases of Filmbyen and Media Quarter Marx.

Table 8.2 Survey results

	FILMBYEN	**MQM**	**CIUDAD AUDIOVISUAL**
Label	Film City	Media Quarter	Audiovisual City
Stage of development	Decline	Initial (growth)	Planning
Position in the city	Hvidovre Periphery	3rd district Center	Colmenar Viejo Periphery
Prior situation	Brownfield: old military camp	Brownfield: slaughterhouse	-
Recycling vs. New construction	Recyclng	Recycling & new building (in construction)	New building
Scale	Street	Building Complex	Quarter
Levels of coordination	Weak	Well-planned	-
Top-down vs. Bottom-up	Bottom-up	Top-down	Top-down
Focus	Film	Media	Audiovisual
Leadership	Zentropa	ZIT	Madridnetwork (Cluster Audiovisual)
Finance	Private	PPP	PPP
Number of companies	20 to 25	Circa 15	-
Location factors – hard	Zentropa’s infrastructure	Infrastructure provided by ZIT	-
Location factors – soft	Atmosphere: rhetoric of “Zentropa’s family” Address in Filmbyen	Atmosphere: combination of old and new MQM brand	-
Services	Restaurant Messe	Restaurant Marx Restauration	-

Source: own elaboration

8.4.1 Location patterns

In line with the theory, survey results have shown that in all three contexts audiovisual activities are based on networks of small businesses that seek to cooperate rather than compete. Companies consist mostly of a core of one or two people. The majority of the work is performed in ad-hoc teams involving creative input from different fields of expertise and a number of free-lancers. The importance of informal networks is also evident. Within the context of both Vienna and Copenhagen, the sentence 'we all know each other' came up frequently, indicating the importance of informal interaction in these cities' audiovisual clusters.

An interesting feature of businesses in the film and media sector is their relatively precarious structure, related to the high level of risk associated with the distribution of audiovisual content. As in other cultural production fields, CEOs (especially in the most artistically-oriented segments of the motion picture industry) are primarily driven by motives other than maximizing their companies' profits. In fact, in some cases they are prepared to put all their properties at stake to finance their projects.

Based on a somewhat similar logic, the motives behind companies' location patterns do not necessarily conform to economic reasoning. In the case of both Filmbyen and the MQM, soft factors (often non-economic factors) are more likely to explain the settlement of audiovisual companies in those specific places. There is also general agreement among those surveyed that the working environment and atmosphere of the workplace have an impact on the interaction among creative workers and can also affect the quality of what is produced.

Another aspect Filmbyen and MQM have in common is that they have both made use of vacant areas – an abandoned military camp and a defunct slaughterhouse. In both cases this involved more than the typical advantages of brownfield redevelopment projects[67]; the sites' "rough" and bohemian atmosphere (cf. Mommaas, 2004), compatible with the creation of emotionally charged environments, is highly appreciated among interviewees, most of whom also saw the possibility to "shape their own environment" as something extremely positive.

As Mommaas has pointed out (ibid.), cultural clusters are likely to develop in former industrial complexes or derelict land, although the building of new sites is also not uncommon. This is what is currently occurring in Vienna, where maximal use of available space in the brick edifices of the former slaughterhouse necessitates the

[67] To name but a few advantages, brownfield redevelopment is more sustainable than greenfield development, as wastage of open countryside is reduced and suburbanization processes slowed down; reusing buildings instead of constructing new ones can also be more sustainable and reduce overall costs; furthermore, brownfield renewal encourages industrial heritage preservation (see among others CLARINET, 2003; Grimski and Ferber, 2001).

construction of a new adjacent building to meet the expanding needs of the MQM and to host more companies (already on a waiting list). As we have seen, combination of old and new, history and modernity, is a concept much appreciated in Vienna and adopted in the promotion of the St. Marx area. In contrast, Ciudad Audiovisual in Madrid will involve an entirely new development. As survey results show, this path of development is also valued by audiovisual professionals. Many of them expect to work in modern-looking surroundings with the most up-to-date technology and infrastructure available.

8.4.2 Between the local and the global

One somewhat controversial issue related to the development of audiovisual clusters is the effect these kinds of "creative milieus" have on the neighborhoods they inhabit.

The analyzed cases show that (in both planning and initial stages) the idea of creating a mixture of dwelling, working, leisure and culture in or around the clusters is often brought up in debates among stakeholders, together with the wish to bring "city life" to the areas – especially when the plans are part of revitalization strategies for brownfield zones. In turn, local authorities hope for "lively" and "vibrant" quarters to develop spontaneously.

This was certainly the case in Copenhagen. Unfortunately, the numerous efforts made by the municipality of Hvidovre in cooperation with Peter Aalbæk did not bring the expected results. Similarly in St. Marx, in spite of the many ideas currently at work in the neighborhood, visible traces of these have been scarce. In both cases the sites are abandoned at night and during weekends; the respective restaurants (Messe and Marx Restauration, the only viable commercial activities inside the districts) only survive due to special agreements with the companies.

One could question whether or not externalities of this kind (economic and social) are actually of any relevance within the development patterns of audiovisual clusters themselves. Given that improvements in the quality and diversity of their output remain the primary interest of cultural-product industries, any other activity (see for instance the discussion on the possible inclusion of dwellings in Ciudad Audiovisual) can be seen as a potential disturbance.

Although the three analyzed clusters are relatively segregated from the rest of their respective cities, none of them functions as an isolated system. In each of the cases, the creation of localized settlements is not contradictory to the global positioning aims of the industry. Rather, territorialized clusters are considered a means to strengthen the cities' competitiveness at the international level.

Given the nature of audiovisual products, international positioning depends on the reach of the language market. Each city studied here is, therefore, faced with different challenges and opportunities[68].

Companies in the three clusters are all connected into an international network of contacts, partnerships etc., but this primarily occurs at the European level – with few exceptions, like MQM's daily broadcasting to Canada, or, in the Madrid case, connections with extra-European extensions of the Spanish-speaking world.

In all analyzed discourses (interviews, survey responses, written documents…) Europe is the main point of reference (often described in terms of the EU). The world leading audiovisual cluster in Hollywood is rarely mentioned[69]. Companies and institutions either don't feel the need compete with Hollywood, or do not consider it as a model to be imitated (cf. Labrada, 2009).

8.4.3 Institutional framework and lesson learned

In the cases analyzed, public intervention in support of the audiovisual industry is considered a foremost necessity. Looking more closely at the clusters, all things considered, the feedback directed towards public authorities' work (in Copenhagen and Vienna) indicates broad satisfaction.

In general, this study has presented some of the strengths and weaknesses, advantages and disadvantages of both a top-down and a bottom-up approach to cultural cluster formation and development.

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[68] The Danish language, spoken by less than six million people, is a disadvantage for the Copenhagen audiovisual industry, but companies react to this problem setting international targets (often producing in English), or can rely on the support of the Danish Film Institute (responsible for preserving cultural diversity and therefore encouraging national productions in Danish). For Vienna and Madrid, other countries (or foreign minorities) speaking German or Spanish are simultaneously potential clients and competitors.

[69] Or, as in the case of Copenhagen, it is mentioned as something to oppose.

Of particular interest is the case of Filmbyen, the origins of which cannot be fully understood without taking the highly contingent factors of Dogme and Zentropa into account – what we have called the "Aalbæk-Von Trier effect"[70]. As previously explained, despite the unquestionable achievements of these charismatic personalities (bringing international attention to Danish cinema), excessive dependence on a single actor, together with weakened ties to the local authorities, has proven insufficient (in some ways even detrimental) in guaranteeing the sustainability of the cluster in the long run.

In Vienna and in Madrid, where there is minimal reliance on either exceptional personalities or visible leaders among the companies participating in the projects, more initiative is given to bodies appointed by the city. These bodies are faced with the tasks of supervision, guidance and coordination. Due to the fact that these two clusters are still in their early stages of development, a thorough valuation or quality assessment is not possible at present.

[70] A comparable situation can be found in Rotterdam's OMA/Rem Koolhaas-led development of an architecture cluster (see Kloosterman and Stegmeijer, 2005).

CHAPTER 9

CONCLUDING COMMENTS

In this research, an attempt has been made to conduct a sector-specific comparative study on cultural-product industries clusters. This has involved analyzing localized settlements of film and media companies and institutions in the cities of Copenhagen, Vienna and Madrid.

Foremost, it should be stated that even after the analysis was limited to one specific typology of cultural cluster and one single cultural production sector, outcomes are still highly context-specific. The clusters studied here encompass different development patterns, actors, different kinds of shaped environments and so on. Nevertheless, the research findings also allow for the delineation of a number of general trends, which will hopefully contribute to existing knowledge on cultural-product industries clusters.

As far as the role of film and media in cities' development strategies is concerned (first part of the research question), this study has clearly shown that in each of the three cities the audiovisual sector occupies a significant position within current processes of cultural/creative industries promotion. Although differences exist, especially in terms of the manner in which public bodies and institutions are involved in these processes, in each of the three cases arguments are primarily economic – highlighting the branch's growth rates in particular – and are part of broader agendas linked to the so-called knowledge- or information society.

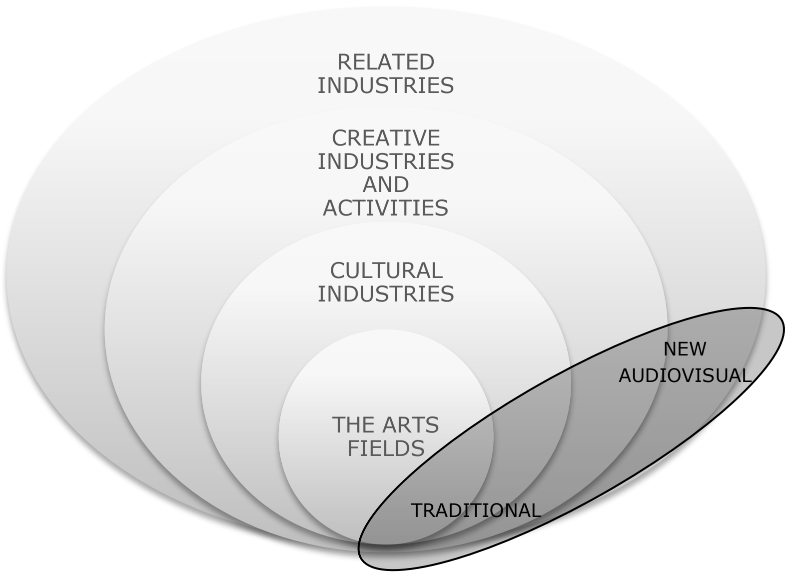
Looking more closely at the establishment of audiovisual clusters within each city (core of the research question), the results of the surveys can be summed up as follows. Although it is common knowledge that virtual communication is opening up new ways of exchanging information, distributing content, building networks and so on, personal (face-to-face) contact and the "local level" remain essential in the audiovisual sector. Accordingly, public authorities have sought to encourage networking among audiovisual professionals. Nevertheless, the establishment of designated city areas specifically designed to provide this close physical proximity for audiovisual companies and institutions does not appear to be a foremost priority. Instead, public authorities have concentrated on cluster building at the conceptual level.

The creation of audiovisual "cities within the cities" may rise from a desire to give the cluster concept material expression in a district dedicated to film and media production – as in MQM and Ciudad Audiovisual –, but it may also be the result of independent initiatives – as in the case of Filmbyen.

An interesting matter that has risen in the course of this research is the gauging of "success" in regards to a specific film or media cluster. The purpose of this work has been to argue that, due to the key role played by non-monetary transactions and informal networks, quantitative figures such as the number of companies or standard parameters of growth and employment are insufficient indicators for the accurate appraisal of these developments. Audiovisual clusters are physical entities affecting a precise location within a city and each contains a unique history and evolution trajectory. This must be documented and analyzed against the broader cultural context of a city or region, and providing an historical perspective is also vital.

In conclusion, this study gives grounds for reflection on the present development of the audiovisual sector as a whole; changes that are also reflected in the spatial organization of the industry. Looking back at the model of cultural/creative industries classification (Chapter 1), the audiovisual industry can arguably be seen as a sector that "stretches" from the core to the outer circles – with traditional products (especially motion pictures) being pulled towards the center of the model, and the so-called new audiovisual products expanding outward towards the "related industries".

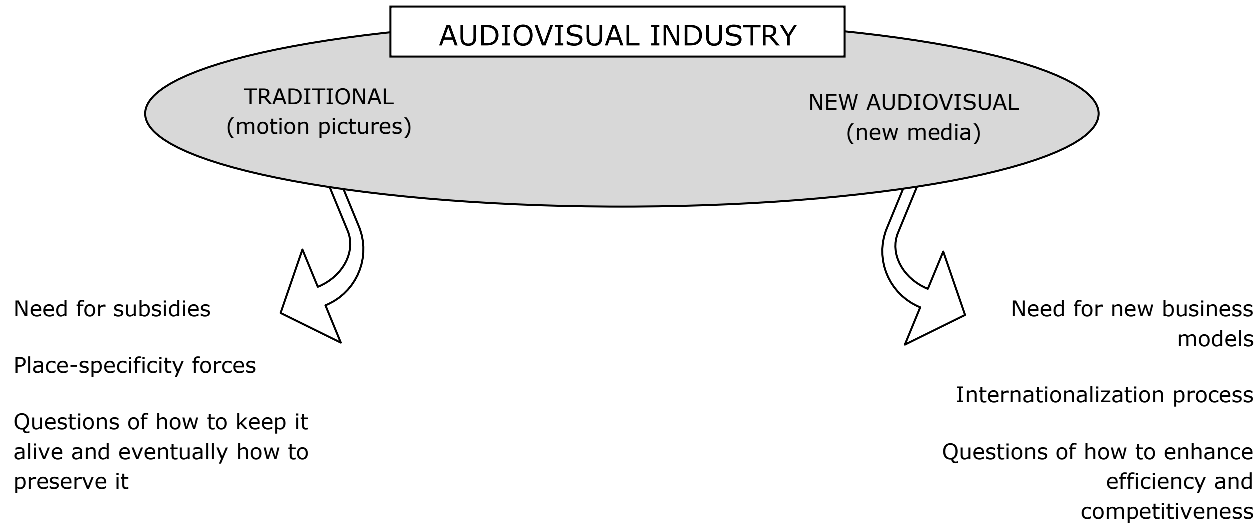
Figure 9.1 Position of the audiovisual sector in the model of cultural industries



Source: own elaboration

It is impossible to trace clear contours, especially considering that industrial classifications vary considerably and that the sector as a whole is ill-served by statistics (see Chapter 8). Nevertheless, it can be argued that different production focuses often follow different logics, have different requirements and manifest themselves in different spatial terms.

Figure 9.2 Audiovisual industry model



Source: own elaboration

The three clusters analyzed in this study, each having a different focus, are positioned in different ways. In the case of the Filmbyen cluster, space and the built environment also reflect an artistic movement, aspects of place-specificity are more pronounced and the site forms an important part of the city's and the country's cultural history. Media Quarter Marx and Ciudad Audiovisual, in contrast, are more focused on technology and meeting current and future challenges in the media industry.

A key question that remains refers to the manner in which audiovisual clusters should be maintained and how they should be developed further. In some cases the sites' cultural interest (historical, architectural…) could become an issue and debate could likely enter the realm of heritage preservation[71].

[71] This could be an interesting starting point for further research, directed to a thorough analysis of spatial impacts of technological changes in the audiovisual sector over the last century, and including a more comprehensive mapping of "spaces of cinematography" in cities – expanding in the domains of film heritage and industrial archaeology.

9.1 Final remarks

This master thesis began with a brief excursus on the increasing attention both public actors and scientists are dedicating to the use of cultural resources in urban planning and the role cultural-product industries play in urban economic growth. Beginning at the turn of the century, we have witnessed the birth and growth of a myth around the concept of the "creative city"; a hyped up discourse that has spread throughout the western world and even affected developing countries (especially in Asia) under the aegis of the UN.

More recently scholars in numerous disciplines have offered critiques of those concepts, which have generally taken aim at the 'common misperception that cities prosper as people of the creative class (…) gather' (Sasaki, 2010:S4). Within this debate, contributions from cultural economists have underscored the necessity of looking beyond catchy growth figures commonly placed in the foreground. They instead emphasize the risks and extreme fluctuations in market success that characterize the cultural economy.

The film and media industries (focus of this work) have distinctive economic characteristics. In the words of media economist Gillian Doyle[72], productions in those sectors are more often than not "investments in failure". This statement does not imply that resources are being used inefficiently, but that we must devote energy to seeking out alternative paradigms.

This line of reasoning serves as an essential basis for a correct investigation of film and media production clusters, not to disillusion the "economic hope" cultural clusters represent, but for a correct appraisal of those objects of analysis' tangible and intangible aspects that have to be understood, appreciated, managed and (eventually) preserved.

[72] Said at the ACEI Conference Copenhagen 2010, President's address, 10 June 2010.

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APPENDIX 1

Case study Copenhagen

i. In-depth interviews

ii. Map and list of companies in Filmbyen
(as listed in the website www.filmbyen.com in December 2009)
Images credits: courtesy of Hvidovre Kommune, own adaptation

iii. List of survey participants (companies and interviewees)

iv. Reviewed newspaper articles I
Collection: Hvidovre Kommune, Municipal Library

v. Reviewed newspaper articles II
Collection: DFI Library

vi. List of documents Teknisk Forvaltning

In-depth interviews Copenhagen

December 2009

CPH 1

Marie Ørum Schwennesen

Business Development Manager

Copenhagen Capacity – Film and Entertainment

CPH 2

Anne Jespersen

Professor in Film and Media Studies

Copenhagen University

CPH 3

Poul Sverrild

Museum Director

Historiens Hus, Hvidovre

CPH 4

Karsten Thøgersen

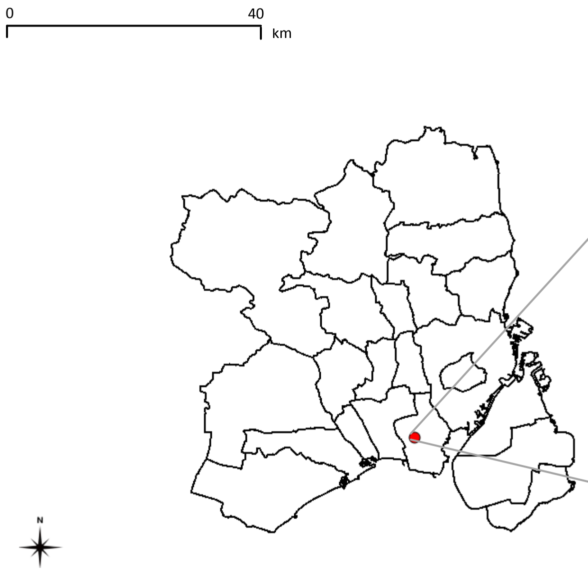
Urban Planner

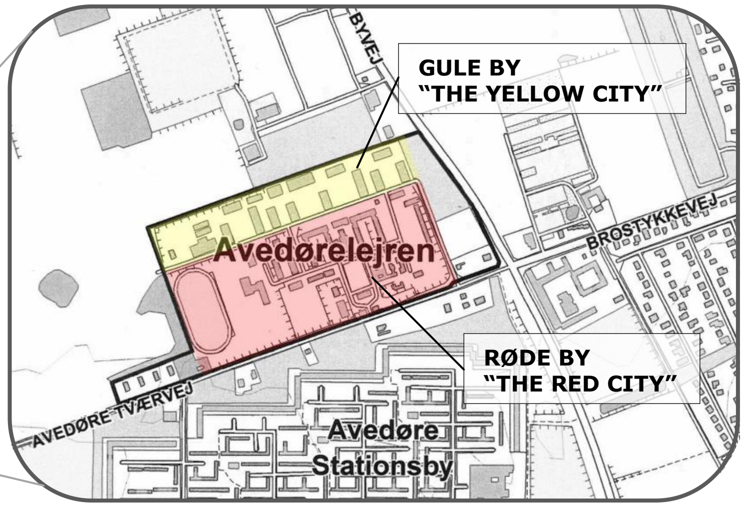
Hvidovre Kommune, Teknisk Forvaltning

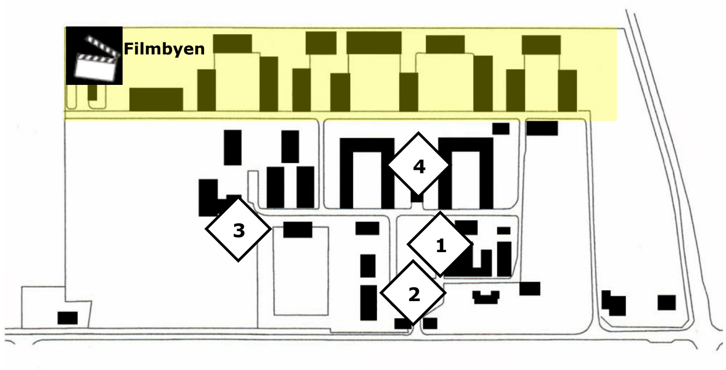
CPH 5

Trine Bille

Coordinator research project "Creativity, Competence and Competitiveness in the Danish experience economy", conducted by researchers associated with imagine... Creative Industries Research Centre at Copenhagen Business School







1. Restaurant Messen
2. Circus Museum
3. Station Next
4. Apartment buildings

ZENTROPA

Mainstream	Klippegangen	Electric Park	EF Rental	Music
SOUND	POST-PRODUCTION	DVD PRODUCTION	RENTAL FACILITY	MUSIC SERVICES

Zentropa RamBUk & Zentropa Games	Trust Nordisk
PRODUCTION COMPANIES	FILM SALES

Nimbus
FILM PRODUCTION

Græsted Film & Fjernsyn
FILM & TELEVISION

Bald Film
FILM PRODUCTION

Movieurope
FILM DISTRIBUTION VOD

K2
COMMUNICATIO NPR EVENTS

Zeitgeist
FILM PRODUCTION

Station Next
FILM SCHOOL

Think Tank
FILM POLICY

WORKZ
CREATIVE CHANGE AGENCY

Fox Media
FILM TELEVISION MEDIA

Picture This
ENCODING RECORDING GRAPHICS EDITING

Wise Guy
FILM & TELEVISION

Monopolet
ADVERTISEMENT COMMUNICATION

MAP 1 **Filmbyen** – Hvidovre, Copenhagen

Survey Filmbyen: list of companies and interviewees

December 2009

Response rate: 67%

Zentropa

Nina Rostock, PA for CEO Peter Aalbæk Jensen

Noemi Ferrer, international finance

Lars Dela, technical manager

Timm Daniel Cini, 3rd year student at Zentropa's 3-years training program

Legal Department / TrustNordisk

Emil, assistant of Frederik Stege

Klippegangen

Signe Rørne, head of post production

EF rental

David Medina, head of "lightning"

Mainstream

Eddie Simonsen, sound director

Electric Park

Morten Bundgaard, managing director

Nimbus Film

Claus Thobo-Carlsen, head of administration

Bald Film

Niels Bald, CEO

Fox media

Robert Fox, producer/director

Zeitgeist

Søren Juul Petersen, producer/CEO

Picture This Film

Claus Vedel, producer/CEO

Movieurope

Marianne Højgård Jensen, content editor

WORKZ

Grith Okholm Skaarup, head of communication & marketing

Station Next

Trine Jakobsen, course coordinator

Review of newspaper articles

Part I

Articles collected by the municipal library of Hvidovre Kommune

Focus: Zentropa and Filmbyen (1997-2004)

29 Oct. 1997 'Visionen fra Zentropa', in Hvidovre Avis.

06 Nov. 1997 'Hollywood i Hvidovre', in Politiken (by B. Themsen).

23 Dec. 1997 'Avedøre som dansk filmby', in Morgenposten Fyens Stiftstidende.

14 Feb. 1998 'Store visioner I nedlagt kaserne' and 'Zentropa vil lave filmby', in Politiken (by F. Alban).

15 Aug. 1998 'Grønt lys for dansk filmby', in Århus Stiftstidende.

15 Aug. 1998 'Grønt lys for dansk filmby', in Vejle Amts Folkeblad.

15 Aug. 1998 'Grønt lys for dansk filmby', in Ekstra Bladet.

15 Aug. 1998 'Hollywood i Avedøre', in Morgenavisen Jyllands-Posten (by J. Høyer).

15 Aug. 1998 'Klar til filmby I Avedøre', in Berlingske Tidende (by I. Carstensen).

30 Aug. 1998 'Grønt lys for dansk filmby i Avedøre', in Aalborg Stiftstidende.

26 Jan. 1999 'Zentropa lokomotiv for ny dansk filmby', in Aalborg Stiftstidende (by L. Andersen).

27 Jan. 1999 'Lokomotiv for dansk filmby', in Midtyllands Avis (by L. Andersen).

27 Jan 1999 'Mange forhåbninger til ny bydel' and 'Store vækstmuligheder', in Midtyllands Avis (by M. Josias).

27 Jan. 1999 'Zentropa vil være lokomotiv for filmby', in Frederiksborg Amts Avis (by L. Andersen).

28 Jan. 1999 'Danmarks svar på Hollywood', in Aktuelt (by L. Andersen).

28 Jan. 1999 'Store forhåbninger til ny bydel ', in Aktuelt (by M. Josias).

30 Jan. 1999 'Zentropa starter selskab for nutidskunst', in Viborg Stifts Folkeblad.

10 Feb. 1999 'Her skal Trier og Vinterberg bo', in Hvidovre Avis.

10 Feb. 1999 'Ny dansk guldalder i Avedøre', in Jydske Vestkysten Esbjerg (by L. Andersen).

06 Apr. 1999 'Store planer for militærlejr' and 'Museum for 600.000 hundeejere', in Morgenavisen Jyllands-Posten København (by N. Ditlev).

13 Apr. 1999 'Nyt liv til ældre erhvervsarealer', in ErhvervsBladet (by J. Hansen).

21 Apr. 1999 'Bygger dansk Hollywood', in Bygtek (by M.C. Hansen).

08 May 1999 'Alle kan være med i Avedøre', in Berlingske Tidende (by S. Anker Madsen).

12 May 1999 'Avedøre har taget sin del af flytningene', in Sydkysten Nord.

17 May 1999 'Dans med von Trier', in Aalborg Stiftstidende.

01 Aug. 1999 ‘Drøn på i drømmefabrikken’, in Politiken (by D. Hygum Sørensen).

04 Aug. 1999 ‘Danmarks eneste festival med film i fri luft’ and ‘Zentropa søger hjælpere’, in Hvidovre Avis.

24 Sep. 1999 ‘I dag åbner filmbyen i Avedøre’, in Morgenavisen Jyllands-Posten København (by J. Høyer).

07 Dec. 2000 ‘Europæisk filmcentrum i Avedøre’, in Børsen (by S. Kræmer).

19 Nov. 2000 ‘De unge slak til filmene’, in Politiken (by L. Thorsen).

16 Feb. 2001 ‘To år med mobil biograf i Filmbyen’, in Morgenavisen Jyllands-Posten København (by J. Høyer).

13 Jun. 2002 ‘Jeg har lært at elske Lars’, in B.T. (by S. Johansson).

15 Jun. 2002 ‘Lars er stadig min bedste veninde’ and ‘Høy cigarføring’, in Politiken (by H.J. Møller and by A.R. Jensen).

10 Jul. 2002 ‘Hvidovre – en god filmkulisse’, in Hvidovre Avis.

17 Dec. 2003 ‘Biograf på vej i Avedørelejren’, ‘Når pengene ruller, ruller filmene’ and ‘Biografen – sådan skal den indrettes’, in Hvidovre Avis.

17 Mar. 2004 ‘Avedørelejrens Kino er pt. navnet’, in Hvidovre Avis.

15 Sep. 2004 ‘Ny ventetid for biografen’, in Hvidovre Avis.

27 Oct. 2004 ‘Fejlplaceret biograf’, in Hvidovre Avis.

Part II

Articles collected by the library of DFI

Focus: Zentropa (December 2009)

02 Dec. 2009 ‘Patienten dansk film’, in Morgenavisen Jyllands-Posten (by M. Enggaard).

02 Dec. 2009 ‘Ålen fyrer sig selv’, in B.T.

03 Dec. 2009 ‘Dansk film tvinges til flere fyringer’, in Børsen (by S.B. Nielsen).

03 Dec. 2009 ‘Sådan følger Zentropa kapitalistens ABC’, in Politiken (by N. Lunde).

03 Dec. 2009 ‘Zentropa fyrer 40 medarbejdere’, in Politiken (by C. Zemanova, A. Søndberg, T. Benner).

Documents

Københavns Amt (1999), Den fremtidige anvendelse af Avedørelejren, Regionplantillæg Regionplan 1997, Nr.6.

Stig L. Andersson Landskabsarkitekter (1999), Analyse og plan for Avedørelejrens fremtid.

Hvidovre Kommune Teknisk Forvaltning (2000), Avedørelejren, Lokalplan 430, tillæg nr. 3 til Kommuneplan 1995-2005.

Vejdirektoratet (2007), Avedørelejren. Bygningspræmiering og priser.

Hvidovre Kommune Teknisk Forvaltning (2008), Erhverv og boliger i Filmbyen i Avedørelejren, Lokalplan 466 (Forslag).

APPENDIX 2

Case study Vienna

i. In-depth interviews

ii. Map and list of companies in Media Quarter Marx
(list provided by ZIT, February 2010)
Images credits: courtesy of ZIT, own adaptation

iii. List of survey participants (companies and interviewees)

iv. Press review
Collection: ZIT

v. Additional online search of newspaper articles

In-depth interviews Vienna

February 2010

VIE 1

Kristina Wrohlich

Marketing & Communication

ZIT

VIE 2

Oliver Frey

Assistant Professor

TU Wien Department Raumplanung, Institute of Sociology for Spatial Planning and Architecture

VIE 3

Thomas Berndt

Real Estate & Business Location Development (Life Sciences & Media)

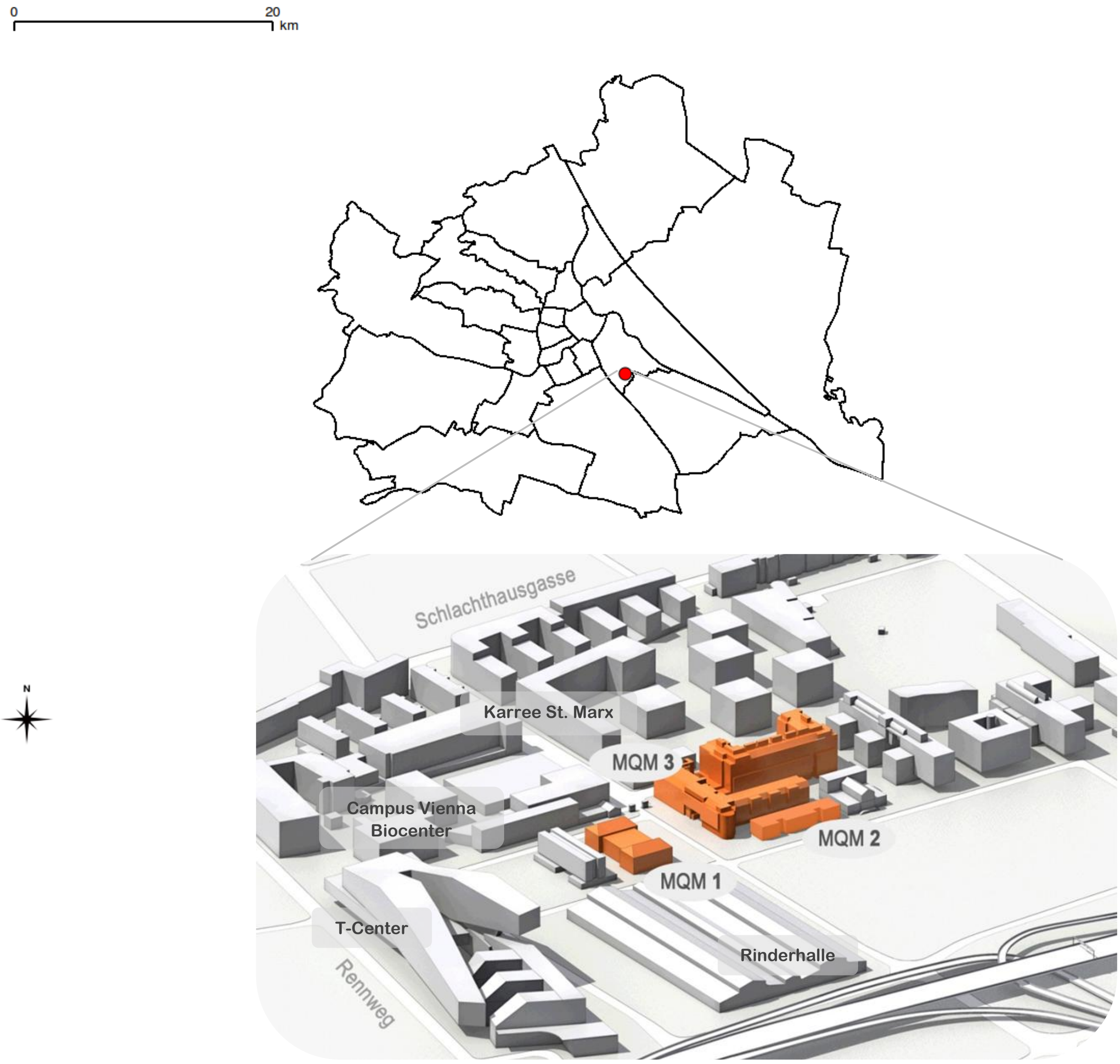
ZIT

VIE 4

Michael Kochwalter

Managing Director

City Marketing Agency Neu Marx



MQM 1

Marx Media Vienna GmbH
TECHNICAL AND PERSONNEL SERVICE PROVIDING

Mass Response Service GmbH
TV- AND FILM PRODUCTION

ON-MEDIA TV- und Filmproduktion GmbH
FILM AND TV PRODUCTION

Marx Restauration GmbH
RESTAURANT

MQM 2

Entertainment Quarter GmbH
ENTERTAINMENT MUSIC PROMOTION MANAGEMENT

ER+ Euler-Rolle Media GmbH
MEDIA PRODUCTION AND COMMUNICATION

MMKmedia GmbH
LIVE BROADCASTING

MARKAND Media GmbH
FILM AND TV PRODUCTION
VIDEO ON DEMAND

Global Communications GmbH
WEB TV

Die Stadtwerkstatt GmbH
DESIGN PLANNING CONCEPT REALIZATION

Neu Marx Standortmarketing GmbH
TERRITORIAL MARKETING

Vienna Film Commission
SUPPORT TO FILM PRODUCTION IN VIENNA

MAP 2 **Media Quarter Marx** – Vienna

Survey Media Quarter Marx: list of companies and interviewees

February 2010

Response rate: 75%

MARX Media Vienna GmbH

Martina Koch, general manager

mass response Service GmbH

Mascha Ohlwein, director marketing and media sales and member of executive board

Global Communications GmbH

Thomas Nemeth, CEO

MARKAND Media GmbH

Markus Andorfer, CEO

Entertainment Quarter GmbH

Günter Unger, CEO

ER+ Euler-Rolle Media GmbH

Matthias Euler-Rolle, CEO

Vienna Film Commission

Marijana Stoisits, managing director

ZIT Zentrum für Innovation und Technologie GmbH

Thomas Berndt, spokesman

Neu Marx Standortmarketing GmbH

Michael Kochwalter, managing director

Press review

Collection: ZIT

Focus: Media Quarter Marx

(date not available) 'Netzwerk für Kreativwirtschaft', in economy Nr.59, p.27.

June 2004, 'Kreativ wie wir: labor und ich AG', in Capacity, Ausgabe Nr.4, p.6.

9/10 April 2005, 'Wir bauen nur, was Private nicht tun', in Der Standard, B3.

May 2006, 'St. Marx', in Capacity, Ausgabe Nr.6, p.16.

12 July 2006, 'Neues Leben im alten Industrieviertel', in Kurier, p.11 (by U. Brühl).

August 2006, 'Viele bunte Bilder', in Bau- und Immobilienreport.

September 2006, 'Bauboom in St. Marx', in Wien.at, p.8.

26 September 2006, 'Gegen „Wildwuchs" und Werbesteuer', in Die Presse, p.24 (by I. Wallnöfer).

December 2008, 'Schauplatz St. Marx' and 'Die Produktive Spannung der Gegensätze' (p.3); 'Roads to St. Marx' (pp.4-5); 'Open Space' (p.6); 'St. Marx' (pp.8-11); 'Paris-Wien' (p.14); 'Leben und arbeiten in St. Marx' (p.16), in Capacity, Ausgabe Nr. 8.

31 January 2009, 'St. Marx: Live vom Schlachthof', in Die Presse, p.9 (by U. Weiser).

22 May 2009, '„Media Quarter Marx": Geeigneter Platz für ORF', in Der Standard.

31 May 2009, 'Schlachthof statt Manhattan', in Die Presse, p.14 (by M. Marits).

5 June 2009, 'Konvergenz im Schlachthof' and 'Schauraum für Kreative' (p.20); 'Komplett vernetzt in Sankt Marx' (p.32), in Horizont Nr.23.

July/August 2009, 'Creative Community', in Wien live, pp.125-128 (by K.P. Vollmann).

Additional online search (June 2009)

1130.vienna.at: http://1130.vienna.at/news/om:vienna:bezirk:1130/artikel/zieht-der-orf-nach-st-marx/cn/news-20090127-09275970

derStandard.at: http://derstandard.at/fs/1220458245842

Die Presse.com: http://diepresse.com/home/kultur/medien/447408/index.do and http://diepresse.com/home/kultur/medien/455854/index.do

APPENDIX 3

Case study Madrid

i. In-depth interviews

ii. Map

iii. Conceptual and physical plan (basic lines)

In-depth interviews Madrid

April 2010

MAD 1

Samuel Castro Hansson

Responsible for communications and international relations

Madrid Film Commission

MAD 2

Irene Ortega Barranco

Director of Communication

FAPAE Federación de Asociaciones de Productores Audiovisuales Españoles

MAD 3

Carlos Alberto Martins

Cultural Industries Manager

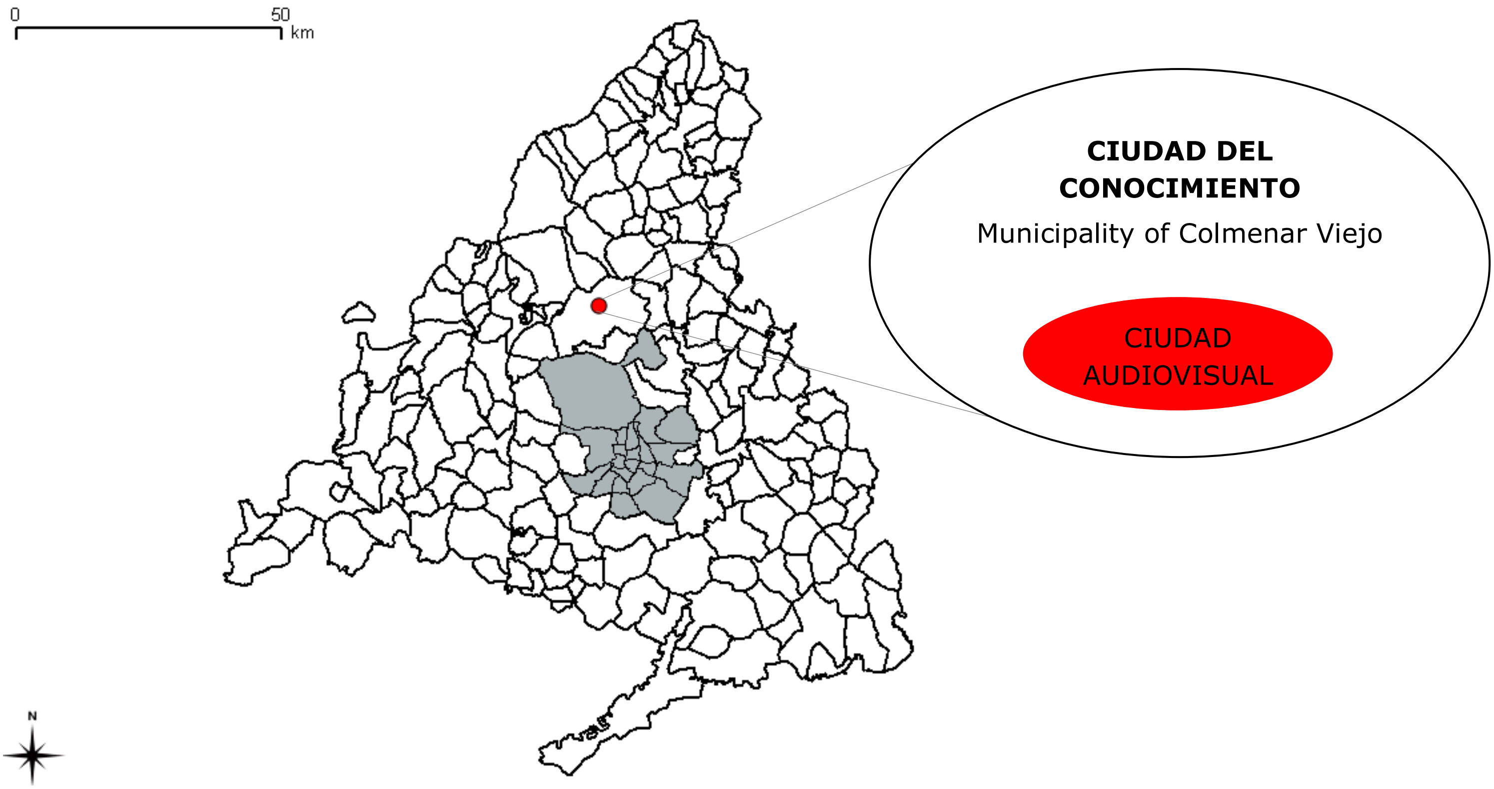
PromoMadrid

MAD 4

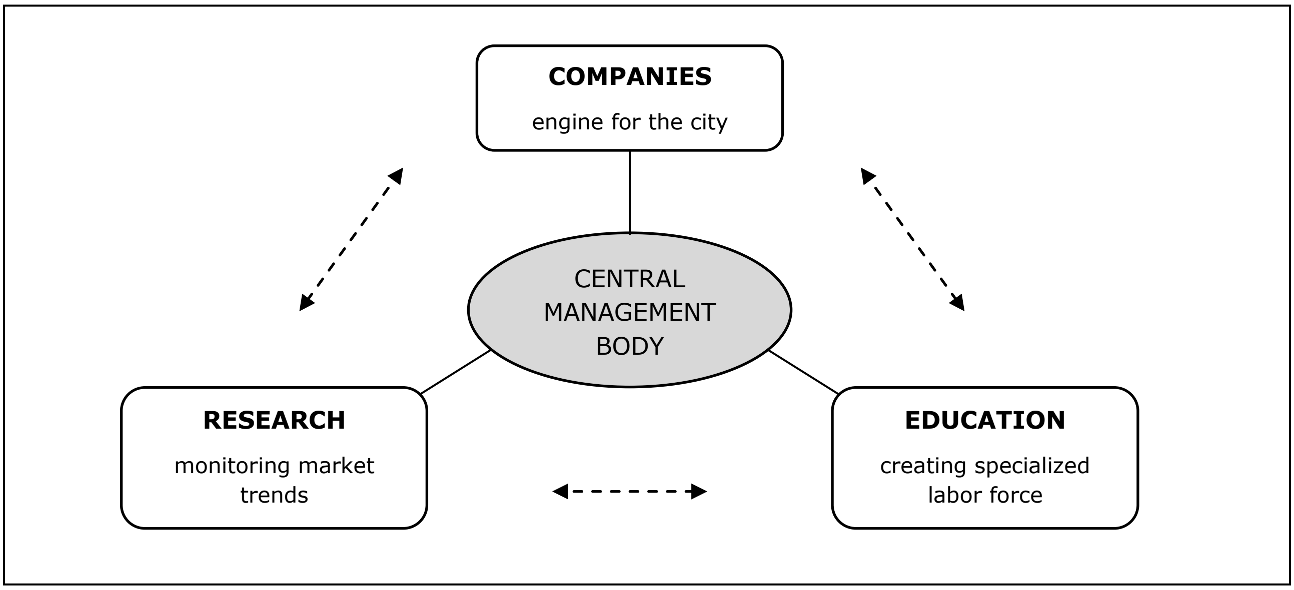
Fernando de Garcillán Prieto

General Manager of Cluster Audiovisual de Madrid

Madrid Network



Plan of Ciudad Audiovisual: *conceptual*



Plan of Ciudad Audiovisual: *physical*

INDOOR SPACES	OUTDOOR SPACES	SERVICES
• Offices • Film and television sets • Recording and dubbing studios • Animation studios • Testing laboratories • Conference rooms • Cinema • Meeting rooms • Multifunctional building	• Parks and gardens • Wide streets and avenues • Zones for exterior shooting • Metro, tram, bus, train, heliport… • Parking	• Restaurants and cafeterias • Day care • Sports halls and gym • Hotels • Apartments to rent • Leisure and entertainment areas • Low firms and consulting • Commercial area (shops) • Student residence

MAP 3 **Ciudad Audiovisual** – Colmenar Viejo, Madrid