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Graeme Evans

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Abstract

The paper presents the results of an international study of creative industry policies and strategies, based on a survey of public-sector creative city initiatives and plans and their underlying rationales. As well as this survey and an accompanying literature review, interviews were carried out with senior policy-makers and intermediaries from Europe, North America, Africa and south-east Asia. The paper considers the scope and scale of so-called new-industrial clusters in local cultural and creative quarters and sub-regional creative hubs, which are the subject of policy interventions and public-private investment. The semantic and symbolic expansion of the cultural industries and their concentration in once-declining urban and former industrial districts, to the creative industries, and now to the knowledge and experience economy, is revealed in economic, sectoral and spatial terms. Whilst policy convergence and emulation are evident, manifested by the promotion of creative spaces and industry clusters and versions of the digital media and science city, this is driven by a meta-analysis of growth in the new economy, but one that is being achieved by old industrial economic interventions and policy rationales. These are being used to justify the redevelopment of former and residual industrial zones, with cities utilising the creative quarter/knowledge hub as a panacea to implement broader city expansion and regeneration plans.

Introduction

This article is structured around an introduction to the phenomenon of creative-industries-based new economic development and public policy rationales and benchmarks. The evidence drawn from this investigation points to a high element of policy transfer and emulation, including frequent reference

to creative city and growth exemplars. Limitations of the comparative nature of such cross-national policy analysis and methodological challenges arising are then discussed in the context of this convergence in the nature and location types chosen for policy implementation—where the new economy meets city regeneration at a site-specific level. A discussion of the widening definitions

Graeme Evans is in the Cities Institute, London Metropolitan University, Ladbroke House, 62–66 Highbury Grove, London, N5 2AD, UK. E-mail: g.evans@londonmet.ac.uk.

and quantification of the cultural-creative-knowledge economy traces this process in terms of policy discourses since the 1980s.

A detailed critique of the survey of policy, literature and case studies is then presented. This draws on an international comparative study conducted over a three-year period, including primary interviews and site visits, which focused on creative spaces in so-called creative cities.¹ This provides an analysis of the geographical coverage and city-region concentration, but also examples from emerging cities using the cultural and creative economy as a regional growth strategy for the first time. This analysis considers the scale and scope of the new economy clusters that have been favoured in these ostensibly city and regional strategic plans. The growth imperative is then discussed as it has been used to drive policy intervention and sectoral prioritisation of the creative economy. This is manifested in both employment and GDP contribution to city and national economies, but also in the extent of 'creative class' presence in primarily central-city and city fringe (former industrial) areas. The creative sectors identified for support in these policy and investment plans are further analysed in terms of city cultural and economic prospects and wider economic development and cultural (policy) strategies. A summary of intervention types is then discussed, including enterprise support, property- and area-based initiatives which, again, are common to many city plans, irrespective of their origin. An example of a 12-year creative industries policy programme is used to demonstrate the emphasis on start-up and SMEs—using social regeneration and local economy rationales—at the cost of larger creative sectors which make up the dominant creative/knowledge economy and clusters, and which account for the growth performance which is claimed as the basis for further public-sector intervention. The conclusion draws attention to the paradoxes and methodological issues that such policy

analysis raises, notably the dependency on continued public intervention and subsidy in a new economy with such 'hope value' attached and given the expansive spread of the creative industries, its panacea status. In this sense, both 'cluster' and 'growth' theories and models are being applied without evidence to support their relevance or the scale at which they can be sustainable. This is in contrast to the creative spaces that are the subject of regeneration, which are highly localised.

New Wine in Old Bottles

New industry formations, the 'new', post-Fordist economy, new growth theory and post-industrial urban landscapes—these now-familiar coinages suggest a break from the past both in terms of employment, production and spatial practices, and in urban policy responses that seek to capture, retain and brand the creative 'space'—whether city, district, quarter or 'scene' (Lange, 2005). However, the continuity and change evident in public policy applied to the creative and knowledge economies are also embedded in past practice, industrial economic models and traditional interventions. Production has emerged and evolved often incrementally from crafts, light industrial and mixed-use areas and premises, and still today comprises pre-industrial cultural activity notably performing and visual arts, festivals, crafts and designer-making, and associated live-work, as well as industrial and institutional agglomeration in sectors such as film and media, higher education and manufacturing—for example, design, furniture, fashion and textiles. This encompasses both micro and larger firms in advanced producer services and a range of 'new' media and associated technology and content production (Evans, 2004). The micro-enterprise economy, making up over 90 per cent of all firms in post-industrial cities, is however, only a very partial representation of the new urban economy. In relation to

small-firm clusters that supposedly drive the creative economy 'from below' (Amin, 1997), small-firm (10–40 employees) performance in the introduction of innovation is only 63 per cent of large firms in both industrial and services sectors in Europe,² whilst micro-enterprises typically employing under five people, contribute only a third of total employment and a value-added of little more than half of medium and larger-sized firms (Foord, 2009).

The role of major commercial, public and international enterprises in markets/client portfolios—and governments, city and national, in direct and indirect subsidy—together provide a more complete and telling picture of the new economy. This raises questions of the sustainability of creative cluster and SME-driven growth as a panacea for city and sub-regional economies (Pratt, 2004; Mommaas, 2004; Markusen and Schrock, 2005). A raft of public funding, including national, European (EU) and development aid, supports enterprise, workspace and intermediary development agencies as well as education and training programmes, and administers direct grant and other schemes to these ostensibly 'economic' clusters. As Simmie observes

The cluster idea ... has taken many academics and policy-makers by storm. It has become the accepted wisdom more quickly than any other major idea in the field in recent years ... at the expense of previous explanations and lacking in relevant empirical evidence (Simmie, 2006, p. 184).

This suggests the need for both qualitative research and more robust and relevant data (Wolfe and Gertler, 2004), as well as "improvement of urban comparative theory, the improvement of the design of research projects and the quality of measurements" (Denters and Mossberger, 2006, p. 566). Classifying, measuring and comparing the hybrid new economy is therefore one challenge which

exercises researchers (Pratt, 1998, p. 2004) and policy-makers alike³—one reason for the seduction of indices, league tables and benchmarks that are widely used and cited in international and national ranking exercises (OECD, 2006) and which in turn fuel the policy imperatives to improve performance and achieve creative, knowledge and 'intelligent' city status (PWC, 2005). These include Florida's Creative Class Indices, ICIC's Current Competitiveness Index, Anholt–GMI's City Brands Index, GaWC's Global City Index⁴ and the European Innovation and Euro Creativity Scoreboards, amongst many others.

Policy Transfer and Emulation

Creative city—and 'space'—promotion is therefore a global phenomenon as quasi-scientific policy rationales—heavily reliant upon proxies but light on theory (Pawson, 2006) or hard evidence (Evans, 2005)—are adopted in cities and states seeking to claim their share of the knowledge economy and cultural city ranking (GLA, 2008). These initiatives are largely made up of 'new' science and technology applications: bio/medical/life science, micro-technology, digital design and manufacturing, and a 'pick and mix' selection of cultural and creative industries. The balance struck between these two in strategic policies and plans reflects the relative strengths and comparative advantage in science/knowledge infrastructure that a country and its university/R&D/industry hubs possess, physically and virtually; how far it can attract such advanced production; and how far its focus is more realistically—due to its legacy and state of economic development and geopolitical position—on heritage and the 'pre-industrial' cultural economy (Zallo, 1988). Exemplar university hubs include Silicon Valley (Stanford); Route 128 Boston (MIT, Harvard), Silicon Fen (Cambridge) and art and design institutions in London and New York, with advanced production also associated with emergent regional cities such

as Bangalore, Dublin and Singapore. The heritage/culture-based visitor economy is the most geographically widespread policy priority—not surprisingly, having the lowest entry costs and skills requirements—from St Petersburg to Johannesburg. This conflation of culture and tourism industries is also fuelled by international agency promotion and aid programmes (UNESCO, UNCTAD and World Bank, Evans, 2001b).

Intervention, in the form of public policy programmes and investment incentives in this field, is a prime example of evidence-based policy formulation (Solesbury, 2002). In practice, this manifests itself in rapid ('fast'; Peck, 2005) urban policy emulation linked to competitive city strategies. The use of secondary 'evidence' and rationales, in effect imported as a proxy for endogenous knowledge and resources, is a particular feature of this global policy and advocacy movement. I call this a 'movement' since policy and practice are widely promoted nationally and internationally through specialist intermediaries, *gurus* (Gibson and Klocker, 2004) and centres (government, think-tanks, cultural, university-based), as well as government and agency-sponsored exchange through "interlocal policy networks" (Peck, 2005, p. 767) of conferences, symposia and roadshows.⁵ Socio-political networks are also active through international organisations—for example, Barcelona's leadership the culture group of the 40-city Organisation of Cities of Europe (Balaguer, 2005). The use of comparative analysis, and the nature of 'evidence' and advocacy, warrant comment here, since these directly influence the dissemination of new economy and creative space discourses.

Comparative Analysis

Presenting policy analysis in this international comparative context, framed by fragile macro- and micro-economic data and assumptions

and political (social, cultural) imperatives, must be conditional on both the rationale for intervention in the new economy, as well as the quality of the evidence itself and underlying theory and process (Pawson, 2006; Solesbury, 2002). Thus, whilst the policy convergence and transference are evident, and localised models of policy formulation and intervention appear similar—including built forms and brand themes ('science city', 'creative city', 'culture city'—Evans, 2003)—local conditions and variations such as the historical, social and cultural identities, governance, geographies/scales, should be equally considered in order to avoid falling into a reductive trap of universality at the cost of understanding the particular (Wallerstein, 1991, p. 92).⁶ This is a broader issue for comparative urban studies generally (Denters and Mossberger, 2006)—for example, regime theories (Mossberger and Stoker, 2001; Stoker and Mossberger, 1994), cluster and growth theories (Cooke, 2002; Porter, 2000), path dependency (David, 2000), symbolic and cultural theory ('habitus of location'; Lee, 1997) and the study of particular urban processes such as regeneration in its particular physical form—waterfronts, cultural flagships and mega-events (Evans, 2005).

Versions of these grand and not-so-grand theories are used to justify the promotion and to seek explanations of the new creative economy and its growth prospects and performance. Comparative analysis is also a familiar treatment of these global phenomena, as with the new economy in post-industrial cities. In contrast to the rich or 'thick' case study, the comparative is therefore at risk of a 'thin' and one-dimensional description of what are obviously complexities with plural not universal causations (Pickvance, 2001). As Harrison advises, the study of urban policy requires addressing a number of 'wicked problems' (2000; after Rittel and Webber, 1973). An urban policy or process may exhibit

similar features, rationales and superficial impacts, but the trajectories and lived experiences may vary and, critically, causalities may be unproven or be very different from case to case: “neither comparative analysis nor the case study is quite what it seems” (Pickvance, 1995, p. 53). This is particularly important where policy and policy evaluation uses such evidence as the basis for urban strategy formulation and replication, since cause and effect—using policy instrumentally as a predictive tool—is generally not advisable (Scott, 2000, 2006). This is demonstrated, for example, in the lack of evidence linking creative class clusters with higher productivity and their correlation with inequality and gentrification—but which is also not necessarily causal (DTI, 2004). The shift in comparative urban research towards a “framework rooted in international political economy” (Smith, 1991, p. 39) is reflected in meta-analyses of global cities (Sassen, Taylor *et al.*) and an expansive list of developing cities. However, Abu-Lughod refers to this as a

privilege view from the top, emphasising corporate networks rather than quotidian life and too readily passing over differences in state-specific policies (Abu-Lughod, 2007, p. 400).

This is pertinent here, in the case of inner-city regeneration carried out through ‘new’ economic and associated facility developments with arising divisions, where local and national global competition interests come face-to-face and, in some cases, collide.

Nonetheless, whilst being conscious of the limitations of the cross-national comparative and the importance of variations in context, including the definitions used and industrial sectors and formations which apply in each case, the convergence evident in the rationales and models used by cities for the new creative economy is inescapable: from Singapore to Seoul and from Dundee to

Durban. This is the case even where cities reject the creative industry mantra in favour of cultural identity and heritage, and where Florida’s ‘Creative Class’ are both welcomed and rejected. Within a year or so, the Mayor of London’s Creative London commission and new agency (Creative London, 2004) had been replicated by a roll-call of Creative New York, Creative Amsterdam, Create Berlin, Creative Baltimore, Creative Sheffield, Design Singapore, Design London and Creative Toronto, to name a few. A similar expanding list of cities claim the ‘Science’ and ‘Knowledge’ City tags (for example, Barcelona, Berlin), including cities located in the same region (for example, Leeds, Sheffield and York, in Yorkshire, and Manchester and Liverpool, in North West England). Meanwhile, dozens of cities are investing and leveraging millions of dollars in large digital media city districts and variants in industrial-scale facilities—for example, Poblenou (Barcelona@22), Fashion City and World Jewellery Centre (Milan), Orestad (Copenhagen), Digital Corridors (Malaysia), Digital Media City (Seoul) and campus-based science/R&D and creative precincts in Brisbane (QUT, South Bank), Berlin (Adlershof), Helsinki (Arabianranta) and Toronto (MaRS)—see later (Evans *et al.*, 2005). These ‘spaces of invention’ have pre-saged a “new generation of biosciences buildings built as a result of massive private and public funding ... attract[ed] through their rhetorical capabilities” (Thrift, 2006, p. 292). Some, such as in Milan, are highly speculative and dependent upon major property investment which may never materialise. On the other hand, those that are built upon former cultural facilities or part of mixed-use regeneration schemes that are more integrated with city plans and with multiple stakeholders, appear more robust and viable. Where rapid expansion through property-led projects, such as in China, looks to fast-tracking cultural districts and industrial parks

without a substantive creative element or direction, this has led to a

rash of unplanned spaces with spray-on creative facades; [where] very little innovation occurs because the development is driven by real estate speculation (Keane, 2008, p. 185).

These science and media complexes are also located in both inner urban, city fringe and former industrial districts, in many cases producing displacement and gentrification of incumbent residents, including artists and established crafts industries and, in consequence, radical impacts on their urban landscapes and existing cultural production clusters and industrial heritage (Scott, 2006; Evans, 2005). Paradoxically, given this policy transfer and emulation, they are also being undertaken without consideration of the impact from other cities and regions and their major facility investments, or a risk assessment around issues of sustainability (for example, dotcom crash, global recession). Imperatives and opportunities for co-operative advantage (Cooke, 2002) are also overlooked in many of these policy initiatives, even where regional and transborder clusters offer more growth and innovation potential than the smaller city region—for example, Copenhagen Capital and Oresund,⁷ London and the South East (Evans, 2008), and the Berlin and Brandenburg regions (Evans and Witting, 2006; Kratke, 2002). Scott's earlier warning

As the experience of many actual local economic development efforts over the 1980s demonstrates, it is in general not advisable to attempt to become a Silicon Valley when Silicon Valley exists elsewhere (Scott, 2000, p. 27).⁸

is apparently being ignored in favour of the heady prospect of growth.

The New Age of Enlightenment: From the Arts to the Knowledge Society

As well as securing regional competitive advantage, a key element or 'vision' of these

policy instruments and intervention programmes is their perceived social and environmental benefits and externalities through realising 'hope values' (land and labour markets, innovation and skills), trickle-down effects and improved quality of life—and their manifestation at a local level. This is consonant with area-based regeneration, business improvement districts, heritage and conservation and zoning strategies, which neatly attempt to square what are fundamentally global strategic growth (meta-) arguments driven by national, supranational and city-regional authorities, with local impacts and governance implications (Cooke, 2002; Storper, 2000). Thus the new industry formations are said to bring a tangible cultural 'value added' to deprived communities, as well as to feed the knowledge economy with innovation, 'buzz' (Bathelt *et al.*, 2004) and its hunger for content—as the new knowledge industries are rationalised, based on IPR rather than the cultural/creative value chain (Pratt, 2004; Evans, 1999). The 'old' arts and *cultural* industries are now subsumed into, or are a subset of, the *creative* industries (Work Foundation, 2007)—a reversal of the relationship which traditionally located the arts at the core, supplying cultural commodities and then non-cultural spheres, such as tourism, advertising and design services (Marcus, 2005). This surrender of the arts economy is also notable in plans for the new economy, for instance in Montreal

There is a disturbing absence of culture in the new visions for Montreal as a 'City of Innovation' and 'Knowledge City'. Cultural activities, and the innovative energies they embody and develop, are incorporated into these visions and plans. In general, it appears that cultural and heritage activities and resources are recognised and valued insofar as they attract the scientists, and other knowledge workers the city is recruiting. However, cultural activities are not seen as part of the knowledge and innovation milieu itself (Duxbury, 2004, p. 1; and see Chapain, 2005).

This is reflected in creative industries economic mapping exercises (DCMS, 1998, 2001) that count an antique market trader, but exclude a dance teacher (Evans, 1999).

Thus the creative industries, as defined and widely replicated, are now seen to comprise

those industries that have their origin in individual creativity, skill and talent and which have the potential for wealth and job creation through the generation and exploitation of intellectual property (DCMS, 1998/2001, p. 5).

This universal, capitalistic measure also reflects the shift from culture, and cultural industries as instruments of the nation-state (such as broadcasting, arts and heritage), to the more global creative industries (Cunningham, 2002). In this sense, they are more open to trade and exchange, in contrast to protectionist and utilitarian national culture, thereby positioning the creative industries 'at the crossroads between the arts, business and technology' (UNCTAD, 2004). However, it should be remembered that the economic importance and contribution of the 'Arts' to national and regional economies had been introduced as long ago as the late 1970s in North America and from the mid 1980s in Europe (Evans, 2001a, p. 140). This included city-regions (Toronto, Ontario; Liverpool, Merseyside; Port of New York/New Jersey; Greater London) that extended the largely subsidised arts, museums and associated cultural tourism sectors and the arising job and income multipliers, to the emerging cultural industries. These formed the growth base for the early cultural industries strategies that were to be adopted in many of these same cities and which others followed. The association between quality of life, amenities and inward investment/firm relocation was also established in these early studies (Myerscough, 1988),⁹ this has resurfaced in the work of Florida (2002) and other creative city advocates (Landry, 2000; Nichols Clark,

2004) who emphasise the value of 'tolerant', 'open' and vibrant places attracting and retaining the new creative and 'knowledge' workers (Drucker, 1999 and see Storper and Manville, 2006, and Nichols Clark, 2004, on the 'amenity city'). This more recent widening of the cultural and creative industries to a knowledge economy incorporating the arts, has therefore been facilitated by this earlier seminal economic argument, or 'turn', where previously the exchange value and economic impact of the arts had been both denied and resisted (Abbing, 2002; Becker, 1976; Bourdieu, 1993; Adorno, 1991).

International Survey of Creative Industries Policies

In order to assess the extent of policy formations and rationales, a literature search—including a call for policy documents, strategies, publications and reports via city government, economic, cultural departments, agencies and other networks—was undertaken during 2005–07 and updated in 2007–08. The extensive body of advocacy material was largely discounted unless underpinned by some evidence in terms of research and/or data, although even here, the frequent references to exemplars and models, notably notions of the creative class, culture-led regeneration and the digital-knowledge society, reflect the extent of the *zeitgeist* and policy transfer market. The line between advocacy, campaigning, political and policy formulation is therefore blurring, with the former frequently featuring the latter as 'meta-evidence' (Pawson, 2006) to justify policy and resource decisions. Interviews were also carried out with representatives from economic, culture, information and communications ministries and agencies (and combinations/variants of these portfolios) at city/region and in some cases national and international levels—EU, UNESCO, UNCTAD. Interviews

and site visits were also carried out in the case study cities of Barcelona, Berlin, Copenhagen, London, Glasgow, Sheffield, New York and Toronto, including with city and regional policy-makers and politicians, creative industry development agencies and facility managers. These interviews further interrogated the implementation and underlying rationales of current creative economy policies and strategies, as well as progress and measurements used to evaluate policy interventions.

This global scan also snowballed via international conferences and direct communication with research centres and city agencies identified through academic, policy and supranational networks such as the OECD (2006), UNESCO, European cultural and economic networks and international institutes for economic development (IED), cultural economics (ACEI) and other membership bodies. This review encompassed original policy documents, strategic plans and critiques as well as evaluation and impact studies and research publications on this theme. Literature was abstracted and archived in a web-based relational database using a framework to analyse the key policy rationales, the scale/area of coverage (city, region, country, site), leadership—for example, city mayor (PWC, 2005)—creative economy sectors and the policy and resource interventions and mechanisms proposed. Over 80 cities/city-regions produced some explicit policy or strategic plans in the creative city/industries field (a total of 235 cases)—whether headlined as such, or as part of wider knowledge economy or sectoral strategies—within 35 nation-states across all major continents.¹⁰ Cities therefore dominate in policy and strategy intervention, and whilst national policy and programmes are evident, these are generic, not location-specific and, as Hartmann observes

the role of cities and local government in Creative Industries governance is not receiving attention in the discourse of international

institutions (UNESCO, EU), [cities] are the main actors (Hartmann, 2008, p. 76).

Notable for their lack of coverage were Italy (with the exception of Milan, Lombardy region and Florence) and France (Paris and Lyon). The published evidence and discourse are dominated, not surprisingly, by capital and regional/provincial cities, and creative city exemplars; these also feature in smaller city/town and creative industries and related policy initiatives which are often driven by regional and, in smaller countries, national policy—for example, in the UK (Jayne and Bell, 2006; Jayne, 2005). The following analysis and critique therefore draw primarily on the comparative survey and documentary content analysis including literature used to support these and other commentaries on city policies and interventions. This includes economic and employment data and other evidence, such as commissioned evaluation and impact studies, as well as site visits and personal interviews. The analytical structure used to present this evidence in a comparative framework, as noted earlier, has therefore been reliant upon grounded theory to investigate the creative city/industry policy phenomenon and particular rationales and political economic trends that have emerged.

Geopolitical Creative Economies

Whilst economically advanced regions produced the highest proportion of policy and strategic planning documents—40 per cent from western Europe, 25 per cent North America—15 eastern European cities also featured, including smaller and provincial cities, and similar number from Asia and Australasia, where national/regional-level policy formulation was more common, as well as the intraregional level—for example, Indian Ocean and the Carribean (CARICOM). Collective policy initiatives are also evident in the Nordic countries (NORDEN, 2007;

DMEBA, 2003). Familiar cultural capital and creative city exemplars were also the most active in both the range and depth of creative industries strategies which were also more integrated with city development and regeneration plans, notably Barcelona (by far the most active in this sense and the most cited by others—from Montreal and Madeira), followed by San Francisco/Silicon Valley, Los Angeles and New York. However, St Petersburg produced more cases than its US counterparts, due in part by its participation in several European cultural and creative industries programmes which stimulated policy actions. This also applied to reunifying Berlin and other German city/lander, and also to Cape Town, Durban and Johannesburg, South Africa's three creative city hubs. Here, culture-based regeneration projects and sectoral initiatives in film and fashion have been identified as part of city-regional economic development and area regeneration (for example, Newtown and Mandela Bridge, Johannesburg).

In several regions, joint city initiatives sought to capitalise on a diverse range of industry strengths and growth sectors, within a national or regional/state enterprise framework, such as Portland-to-Seattle (10 cities); Scotland (6 cities), Berlin/Potsdam/Babelsburg/Brandenburg, Core Cities (6 English cities) and creative city 'twinning' by Sydney–Melbourne–Toronto; Manchester–Sheffield; and 'Creative London' with 'Creative Toronto'. Thus, while major cities with highly concentrated creative production, institutional and consumption levels and policy sophistication lead, this focus and phenomenon are becoming widespread and are being adopted and, in some cases adapted in smaller cities (Jayne and Bell, 2006), towns and nations—both established and emergent. This is reflected in particular in the creative sector and art form focus which feature in such policies (see Table 3) and a more cognate approach to cultural and economic policy. Even here,

however, national and regional policy imperatives and rationales are evident and take-up is uneven. In some cases, there is tension between national and city creative policy priorities, such as in Denmark and Copenhagen, where cluster and national sectoral programmes both duplicate and conflict with city-regional creative industry strategies (Evans, 2008, p. 10). As Jayne summarises in the case of England

Implementation of a creative-industries agenda at the regional level in the UK is at best patchy ... a lack of strategic planning, best-practice models, and empirical research to guide policy-makers (Jayne, 2005, p. 537).

This might come as a surprise in view of the extent of policy coverage and the importance given to creative city and industry advocacy and supporting 'evidence'. However, this is also an example of the meta-analysis developed in dominant "urban cognitive-cultural economies" (Scott, 2008, p. 766) applied inappropriately in terms of the scale and capacity of towns and cities with few of the conditions required to develop and sustain a significant and competitive creative economy, apart from local cultural quarter and small-firm clusters.

The sectoral approach, where several creative industry sectors or clusters are prioritised for support, can be distinguished from the macroeconomic approach taken by some other cities, which cite the general creative industries as a whole, or knowledge and science city clusters where the emphasis is on infrastructure and generic content industries, typically associated with software/high-tech and related biomedical/health and life sciences university hubs. Those cities and regions using culture and creativity as an economic development tool for the first time (as opposed to cultural and social development), more closely ally their cultural heritage and arts with the cultural industries, placing importance on indigenous and local culture,

and its protection from the IPR regime and the threat of commodification through uncontrolled globalisation and world trade. Not surprisingly, these examples are drawn from cities in developing regions, with the influence and policy framework coming from UNCTAD (2004) and other international development agencies, such as UNESCO's Creative Cities Network (2005). These agencies are able to articulate (and validate) the global culture and world creative industries meta-themes. There are also tensions evident between city-regional authorities who promote creative and knowledge city status through economic-led cultural policy and local authorities and municipalities who are wedded to cultural development and access objectives for their arts and cultural policy and programmes.¹¹ This includes some mid-West US cities who characterise their creative economy in cultural heritage rather than creative class terms.

The majority of policies in this field emanate from cities and city-regions with a minority (less than 10 per cent) solely at national level, particularly in smaller nation-states (such as islands), including city-states and 'satellites' such as Singapore, Hong Kong and Taiwan. As an indication of the interest shown to the creative and knowledge sectors in the development agenda, World Bank, UNCTAD and regional policy and research initiatives have also featured in this survey—for example, from South American, Asian and east European regional policy and international programmes. Developing country and city interest is also driven by a response to, or rather a defence from, the deleterious impacts of 'free' world trade, in particular legislation such as the General Agreement on Trade in Services (GATS) including producer and creative 'services' and intellectual ideas (patents, copyright and IPR). Following the introduction of GATS in 1993, lesser developed countries had already opened up over 50 per cent of their

communications and 100 per cent of their tourism sectors to external competition (Page and Davenport, 1994). At the same time, these developing economies look to exploit the opportunities of their lower-cost advantages in cultural goods production, such as textiles, electronic components and printing, and from the perceived market in the growing knowledge economy, including health science and back-office services, as well as from exploiting their own cultural and creative assets and indigenous heritage (for example, Bollywood, cultural tourism, crafts, 'fair trade'; see Evans and Cleverdon, 2000). World Bank interest in this sector not surprisingly follows the global trade regime

Products and output that is protectable under intellectual property law. The most significant creative industries are software, multimedia, video games, industrial design, fashion, publishing and research and development (World Bank, 2003).

Developing countries, as well as some provincial states elsewhere (like the US) distinguish, however, between the *creative* industries that derive value from copyright and distributing creative content and the *cultural* industries that generate creative content in a local cultural context through literary, visual and performing arts. Cultural industries thus "use creativity, cultural knowledge and intellectual property to produce products and services with social and cultural meaning" (UNCTAD, 2004).

Scale of New Economy Clusters

The scale of creative economy clusters considered in many of these strategies is, however, indeterminate, political administration-defined or targeted at development areas and zones. In a few cases, they formed part of, or were linked to, spatial strategies and plans, particularly regeneration zones and nodes—for example, Barcelona's new 'extension', London's 10 'creative hubs' (Figure 2)

and Malaysia's 'digital corridors' and the Kuala Lumpur 'hub'. In contrast to established regional industrial clusters, these new economic areas were highly localised—neighbourhood and 'cultural district'—and, in some cases, sub-regional in scope where multiple or polycentric clusters and networks were evident. Very few were genuinely regional in scale, often in established manufacturing sectors. With the exception of small states, such as Singapore and Taiwan, national-level strategies, as opposed to general economic policies, were rare, but emerging in some geographically peripheral areas, notably in Scandinavia, Scotland and New Zealand, prioritising digital content, media/film/TV sectors. Transnational and economic clusters tended to be evident only in existing global industry sectors such as film/media and related sectors—for instance, in California and in Denmark/ south Sweden (Oresund, 'Medicon Valley')—and in strong regions not directly exhibiting new economy clusters, but rather, established cultural production activity such as furniture, textiles and ICT/multimedia technopoles in Rhine-Ruhr, northern Italy, Ile de France and Munich-Bayern. Wider city-regional growth and scales of cluster operation therefore present the more robust contemporary economic model—for example, south-east England's growth in creative industries employment is higher than London alone, with the rest of southern England (ROSE, excluding London) accounting for 37 per cent of UK creative employment compared with 30 per cent in London (GLA Economics, 2006b, p. 13). This is in contrast to more localised inner urban centres that are the attention of sub-regional policies and regeneration intervention, and new economy cluster promotion. Here, employment and population growth are taking place, but this is relatively small in absolute terms and in many cases is both fragile and transient (Nathan, 2005; Nathan and Urwin, 2005).

As well as scale, the stage in the cycle of cluster development is another way of evaluating strength and sustainability. In business cluster analysis, the stages of development are identified as embryonic, established, mature and declining, based on levels of employment and output, the depth of interfirm linkages and the significance and reach of business and consumer markets.¹² Creative industries clusters are found to be embryonic in many conventional business cluster evaluations (Evans and Foord, 2006b). However, from this survey it is evident that most designated creative clusters are not conventional business clusters and additional factors are critical to their development and form, notably local area regeneration, conservation/heritage, cultural tourism and related visitor economies. Most identified clusters are emergent and still dependent on public expenditure for subsidy (of premises and core staff), procurement and promotion—and critically, on larger firms and institutions for clients. They are also predominantly neighbourhood and small area in scope—even where they form part of city sub-regions, they appear to exhibit poor connectivity in terms of labour market movement and markets (Evans *et al.*, 2005; Foord, 2009).

Creative core. Semantics and epistemology are also a particular issue in this field, given the arts–culture–creative-knowledge continuum and cross-cultural interpretations (Mossberger and Stoker, 2001). In particular, the shift from the arts, heritage and cultural industries towards (but not universally) the creative industries—and from the cultural and creative city to the wider knowledge city—and the spatial representation in cultural quarters, creative clusters, media parks and science 'cities' (Cooke and Lazeretti, 2008). Since the lens through which policy is being assessed here is primarily an economic development one—albeit with major non-economic externalities attached—this has required

particular attention to definitions and classification of sectors and sub-sectors used to define the cultural and creative industries in employment and production terms (Foord, 2009; Cunningham and Higgs, 2007). Together with the nature and geographical scope of clusters which feature highly in these policies and the economic indicators used to justify public investment and intervention. The latter are presented within a global, regional and city growth scenario—whether real or aspirational in each case—and for the city-region, the main unit of focus this for comparative analysis, this also confirms their dominance in terms of employment and production concentration, and therefore their creative city status. Table 1 summarises employment concentration in the creative industries in selected cities, as defined and (self-) reported in each case (i.e. ‘like for like’). Since national and city classification systems and sectoral definitions vary, and data capture of the hybrid new and old economic

activities now represented by the creative industries are not consistent, cross-national and city comparisons of employment and GDP are not reliable, but do present an indication of the relative size and growth of the sector (Table 2). Recent city strategies and evidence draw upon more in-depth primary research into the creative economy, not reliant upon national administrative data alone to capture small-firm and sub-sectoral distinctions. These increasingly reveal spatial distributions and density analysis in GIS format, notably in creative industry mapping studies of Amsterdam, Berlin, London, Toronto and Zurich.

This concentration is even more apparent at the sectoral level—in the case of London for instance, location quotients of 2 or more in music, arts, leisure software and publishing and over 3 for advertising (GLA, 2006b). Moreover, within these creative cities, firm location is highly concentrated in central/CBD and city-fringe areas in proximity to major institutions—particularly broadcasting, university campuses and facilities; for example, the Museum Quarter, Vienna; Arabianrata, Helsinki; Vancouver’s Downtown Eastside; and QUT’s Creative Precinct, Brisbane—with a high degree of connectivity and co-location. For example, Figure 1 shows London’s highly concentrated map of creative industry firms and employment. This contrasts with the ‘creative hubs’ which are the subject of public regional development support programmes, primarily located in areas with a lower proportion of creative employment and firm activity, but coinciding with several key regeneration zones, such as the City Fringe and Stratford in east London; Deptford in south-east London; and Haringey in north-east London (Figure 2).

The redistributive and regeneration objectives behind this creative hub policy—to the exclusion of existing and larger creative industries and locations—typify many interventions and strategies by city governments.

Table 1. Employment concentration in creative industries by city

<i>City</i>	<i>Location quotient</i>
New York	3.7
Rio	3
Vienna	2.8
Berlin	2.7
Barcelona	2.6
Amsterdam	2.3
Auckland	2.1
Paris	1.8
Montreal	1.7
Copenhagen	1.7
London	1.6
Dublin	1.5
Toronto	1.4
Manchester	1.4
Glasgow	1.2
Rotterdam	1.06

Note: location quotient = percentage of city/percentage of national employment in creative sectors (1 = national average). See Table 2.

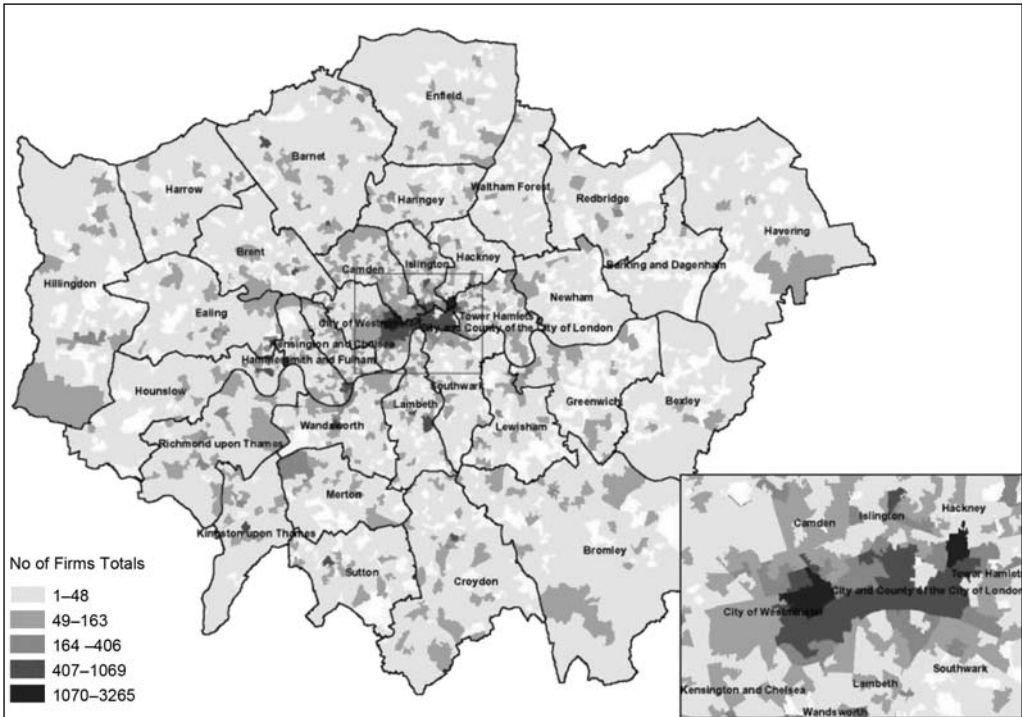


Figure 1. Creative industries firms in Greater London

Source: Foord (2009).

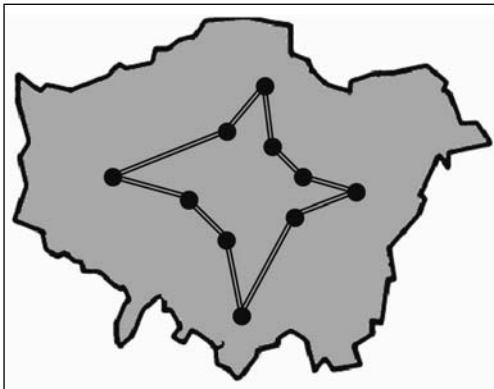


Figure 2. Creative hubs in Greater London

Source: London Development Agency (2005).

Potential for economic and employment growth in these new areas often relies on a small number of local actors and ‘hubs’—a university or specialist art/design college or programme, cultural venues and some retail activity as a basis for a visitor economy,

and underused industrial buildings for workspace conversion. Other examples include Birmingham’s Jewellery Quarter, Salford’s MediaCityUK, Copenhagen’s 10 Creative Zones (Evans, 2008), Glasgow’s Merchant Quarter and Digital Media City, and Amsterdam’s Westergasfabriek district (Evans *et al.*, 2005). However, cluster and innovation growth require connectivity with established producers and intermediaries, and with markets and consumers/visitors from a wider area, but the propinquity that engenders innovation spillovers and ‘knowledge exchange’ is also absent from these localised creative hubs. Their potential to create employment within the creative industries themselves lacks credibility and hard evidence. From the perspective of the UK ‘Media City’ model

unless demand factors are met, there may be overcapacity of the wrong type of premises

and the wrong mix of occupiers—there is no hard evidence that outputs and outcomes will be achieved—building-based approaches may be overly concerned with that nation/region neglecting wider markets and networking (Ramage, 2008, p. 152).

In London's City Fringe ('hub'), public investment in jewellery, fashion and product design has targeted the highly skilled and entrepreneurs in locations that are not linked with or open to the sub-region's more deprived areas and unemployed residents whose skill and cultural capital base have little or nothing to offer these sectors (and vice versa). Moreover, existing activity and sites, such as textiles production and wholesaling, which have served this sub-regional community, have also suffered from rising rents and property regeneration (including from higher-value creative services), as well as from cheaper imports (compare with Poblenou, Barcelona). Employment growth, fêted in the 1990s (Table 2) has since proved more fragile in the creative industries that have been prioritised in these economic policies (see later), particularly in residual cultural production. Public-sector interventions to encourage economic development and growth are therefore not contributing to the social regeneration objectives, even though these are explicit rationales for public investment and political support for such policies, as in this case (CFP, 2004; Bagwell, 2008).

In Europe and the US, for example, the downturn in creative industries employment between 2000 and 2004 is attributed to the 'business cycle' (in London; see GLA, 2006b), the fallout from the dotcom crash (in the US and Europe) and to reductions in consumer and public-sector spending, (in Berlin; see Evans and Witting, 2006). Creative-sector contraction also exceeded that of other sectors—for example, in Zurich, where employment declined by 7.8 per cent (2001–05) in the creative sector, compared with 5.4 per cent in financial services and 3.7 per cent for

the region as a whole (Soendermann and Weckerle, 2008). This questions the growth story underlying public investment and intervention, but also raises another factor emerging from the new economy—that of jobless growth. Whilst creative-sector employment has faltered and declined in key centres in recent years, for example, in the UK, the Netherlands and the US (DCMS, 2005; MEA, 2006; Americans for the Arts, 2005), the number of creative industry *firms* has increased—both micro-enterprises and larger firms where, as a result of mergers, acquisitions and out-sourcing, overall employment has decreased. This may presage a second wave of structural adjustment—following the earlier fall-out from new technology, low-cost imports and institutional rationalisation; for example, through independent and offshore production, in labour-intensive sectors such as printing and publishing, music, IT, fashion and textiles, broadcasting and allied equipment supply—a case of 'creative destruction' (Schumpeter, 1942). Job losses in creative *occupations* (rather than larger firms) appear to be occurring in cities such as Amsterdam, Berlin and London, amongst the celebrated, footloose creative class (GLA, 2006b; Evans, 2006a). In reality, it appears that consumers and corporate and public-sector budgets are the variable factor, with close correlation between spending in some sectors (such as advertising and financial services) and the creative economy (graphic design, film and printing) (GLA, 2006a). Despite the advocacy, causal links between creative clusters (milieu and producers) and improved innovation and competitiveness, have proved to be elusive (Simmie, 2001, 2006; DTI, 2004; MEA, 2006).

The importance of consumption in sustainable new economies, although apparent (Fine and Leopold, 1993; Scott, 2001), receives least attention in either policy or research, in contrast to the emphasis on production and infrastructure (Figure 3). This is despite its

critical importance in terms of international markets and networks, and in cluster and new economy models (Porter, 1995; Simmie, 2004, 2006; Krugman, 1991). Exceptions are tourism and branding (Figure 3); however, these are generally perceived as competitive city and place-making strategies, rather than giving attention to the visitor economy and related services required to actually support and grow these activities. In this case, consumers actually visit the places of production, including cultural quarters and attractions, an increasing number of which coincide with existing cultural production quarters, including residential and 'live-work' areas. However, it is clear that these are judged and celebrated by their proponents in cultural, heritage and local 'endogenous' terms such as property and local trade (Jayne and Bell, 2004), rather than in macroeconomic market terms. In practice, however, exogenous growth is represented by international hotel, restaurant and retail chains and related property investment in areas undergoing culture-led regeneration (Evans, 2005; Hutton, 2008), resulting in high levels of economic leakage and local disbenefits.

Crowding-out is also not a binary public-private, new-old economy phenomenon but, within the creative economy itself, shifts between sectors and higher-value land use and capitalisation can be seen to damage the existing cultural infrastructure and economy (Evans, 2005; Hutton, 2008). In one of the most extreme cases and a symbol of the dotcom goldrush, the South of the Market (SoMa) area of San Francisco saw an influx of over 200 companies within a 2-square-mile radius of South Park

We were experiencing the highest residential eviction rates in the country, entire blocks were being completely evicted ... Rents simply got way too high. A lot of creative people—architects, engineers, and graphic designers—moved out of the area entirely. They were part of the culture of the city, and now they're gone

(Berger, 2002, p. 71; see also Evans, 2005; Solnit and Schwartzberg, 2000).

This pattern is also occurring in more established cultural production quarters and districts in London's city fringe (see Pratt on Hoxton, in this Special Issue) and in east London as the London 2012 Olympic redevelopment takes effect; in gentrifying Barcelona (El Born, Raval and Poblenou; see Casellas and Pallares-Baraba, in this Special Issue); and Mitte and Kreuzberg, Berlin (Lange, 2005; McRobbie, 2004; Evans and Witting, 2006). The displacement cycle of Manhattan artists/studios first highlighted in Zukin's *Loft Living* (1988; Rosler, 1994) is a now-familiar post-industrial city phenomenon (Evans, 2001a) and live-work artists who relocated to Brooklyn and Williamsburg are now experiencing the same residential property pressures (Schuerman, 2007), whilst distribution and production activity in the garment and printing industries are being increasingly marginalised and crowded out of their core city locations (Keegan and Kleiman, 2005; Rantisi, 2002; and see Indergaard on Lower Manhattan, in this Special Issue).

Another observation in these creative cities is that—despite small levels of population growth in some inner-city areas which had been in long-term decline—due to a combination of new migrants, key workers and 'loft-dwellers' (Nathan and Urwin, 2005)—higher population, housing and employment growth are taking place in the outer metropolitan areas (Evans and Witting, 2006). For instance, in Barcelona, employment growth in the decade between 1991 and 2001 in 'knowledge' sectors (culture and information, arts and entertainment) was two to four times higher in the outer metropolitan area than in the city itself (Lasuen and Baro, 2005). The exemplar compact city is outgrowing its creative core, with most residents now commuting out of their area for work (Evans, 2006b).

City Growth¹³

The prime catalyst for the identification and promotion of creative industries and wider knowledge industries has been their growth performance and potential during the 1990s and into the new century. Critically, these underpin policy interventions and are typically measured in terms of three quantitative indicators: employment; the proportion contributed to national and regional economies' gross domestic product (percentage of GDP); and gross value-added (GVA), normally measured as sales/turnover per employee (Table 2). City growth is therefore measured in terms of absolute job and wealth creation, and in comparison with the economy as a whole and, importantly, relative to other industrial sectors. This is a significant and symbolic shift, since the creative and knowledge sectors are now commonly cited alongside mainstream industrial sectors in national (and more so) and in city-regional economic strategies, and in international regional area and global trade forecasts (Evans and Foord, 2006b).

The World Bank (2003), for instance, estimated that the combined creative industries represented 7 per cent of employment and annual growth rates of 10 per cent between 2000 and 2005 (UNCTAD, 2004; Wu, 2005) and these rates are widely quoted in national and regional policies. In Europe (EU25 members), the cultural and creative sector is conservatively estimated at 2.5 per cent of all employed (KEA, 2006). Until now, these sectors and their precursor cultural industries have been of minority economic value and of primarily parochial interest, being more concerned with local cultural clusters and districts, or allied with established activity such as tourism and the contribution of design in manufacturing (such as textiles) and producer services (such as architecture). In global city rankings, only single sectors such as 'media' and 'advertising' feature in terms of their dominant share of international

trade and headquarter activity (Taylor, 2005), rather than as a cultural industry or part of a wider cluster. World city ranking exercises had begun to incorporate cultural and creative competitiveness into their comparisons in the early 1990s (Comedia, 1991; LPAC, 1991), again with reference to the earlier economic impact of the arts studies and 'quality of place' advantages for otherwise footloose industry location.

These also introduced the notion of the competitive advantages of the cosmopolitan city through its multilingual and multicultural *diasporas* bridging the advanced producer services economies with those of the emerging markets (Sassen, 1996; Sassen and Roost, 1999; Fukuyama, 1995) and which today drive both the growth prospects, especially from China and India, and competition within the creative and knowledge economy itself. Links are anticipated as a result of synergies between the large and micro firm, such as two-way innovation spillovers between the 'street' and corporate headquarters and therefore between consumption and production (Thrift, 2006; Marx, 1973) through new consumption and product modes and media. For example, in music, digital media, food and fashion: 'from catwalk to high street', and through city place-branding. Together, these present the contemporary 'take' on the creative city and a national 'design-led', knowledge society, but also one which can be made tangible and visible in production and consumption spaces (Pratt, 2000; Hutton, 2000, 2008). These are therefore the target of city economic and regeneration policy and promotional programmes, including trade shows, showcasing and festivals simultaneously celebrating and marketing a city's cultural offer and trade—in fashion, furniture, design, IT/games and music, etc. (Evans, 2007; GLA, 2008).

Against a backdrop of continuing manufacturing decline and fragile or saturated financial services and property sectors in the 1990s—preceded by Asian economic crises

and recessions in the West—the ‘new economy’ had also been seen to outstrip sluggish national and city economies and other sectors, with impressive growth rates and the promise of further growth (Table 2). This is a heady prospect for regional economic development and policy-makers who seek to reposition and secure growth in a competitive post-industrial world. Size therefore matters in industrial economic strategies and reporting. The first challenge in analysing and critiquing this growth and policy imperative is the hybrid and selective nature of what constitutes the creative and now knowledge (or ‘information’) economies, as distinct sectors and sub-sectors with production and/or consumption linkages—supply chain, innovation, markets—and that might be the subject of public policy intervention and investment. This therefore rests not only on the growth potential in both existing/resurgent industries, and on attracting the ‘creative class’ in order to encourage innovation and attract FDI and tourism trade, but also on the evidence of market failure to justify specific public interventions and to achieve this growth potential in order to improve efficiency of the market (GLA, 2006a), thereby: “leading the way for other sectors by positioning creativity, innovation and flexible business practices at the heart of economic change” (NESTA, 2003, p. 4). Again growth is envisaged, not just in terms of the narrow economic/employment measure, but in terms of distributive and social benefits—social inclusion, unemployment, area regeneration—and even in cultural benefits which endow the creative industries with reaching the parts of urban communities that other activities cannot, or can no longer, reach (Evans, 2005; Landry, 2000).

Table 2 summarises the employment and growth rates attributed to a selected group of cultural and creative industries at international, regional and national levels, together with the ‘creative cities’ that have also focused on these sectors. These economic indicators

are repeatedly cited to support policies and strategies, including their performance against the national economy as a whole and other industrial sectors. Where available, the definition used and the source of these creative clusters are noted, including where the concept and classification¹⁴ have been based on external ‘models’. The most cited source arises from the creative mapping exercise carried out by the UK government’s Culture Ministry (DCMS) in 1998, repeated in 2001 and refined further in terms of a cultural and creative industries product chain system (CIPS; see Pratt, 2004; DCMS, 2004). Although widely acknowledged, other countries and cities have amended and supplemented the coverage of sub-sectors, particularly in IT/computing/software, non-specified content (IPR/copyright) industries and, in some cases, the retention of cultural activity which was largely excluded by the DCMS—i.e. the subsidised/mixed-economy arts sector.

Whilst revealing convergence and variations in sectoral descriptions, the employment rates cited in these policies and strategies are significant, particularly at city level. However, in most cases they are still relatively small—less than 10 per cent and in many cases less than 5 per cent of city employment and GDP (Copenhagen and Vienna are notable exceptions as ‘big cities’ in ‘small’ countries of 5.5 million to 8 million population each). It is the *growth* rates recorded and forecast that signal the importance attached to what are an aggregate of small (and small-firm) sub-sectors of the creative and knowledge economy, applied to a very low base figure. Thus, whilst design and creative industry firms show much faster growth than other sectors of the economy, this is still a very small sector in absolute terms. What has exaggerated the importance of the creative economy has been the conflation of a range of disconnected ‘creative occupations’ in employment not directly associated with cultural or creative

Table 2. Economic contribution and growth in creative industries, as defined

<i>Country and city</i>	<i>Percentage of total employment [percentage GDP]</i>	<i>GDP or employment growth (time-period) and target</i>	<i>Sectoral definition</i>
<i>Austria</i>	5%/9% of a ll firms [1.8% GDP]	2.8% GDP (1999–2003); Growth target of 14 000 firms/45 000 jobs by 2010	Cultural heritage, performing arts, audio-visual enterprise, visual arts, publishing, interdisciplinary activities cf. classification systems: Australia (ANZSIC), NACE (Austria), CIPS (UK–DCMS, 2004; Pratt, 2004)
<i>Vienna</i>	14%	6%	
<i>Denmark</i>	12% [7% private sector]	Employment 29% (1992–98); 2.35% (1997–2000)	Fashion, visual arts, music, books, theatre, radio/TV, print media, architecture, design, film/video, advertising, edutainment, content production, events, cultural institutions, tourism, toys/amusement and sport industries
<i>Copenhagen</i>	16%		(‘Experience Economy’)
<i>Finland</i>	4% [3.1% GDP]	11.1% GDP (1999–2003)	Cultural industries/economy—activities of a whole spectrum of arts, plus magazine and book publishing as well as entertainment electronics
<i>Helsinki</i>	8.5% [9% GDP]		cf. European comparator cities/city-regions (Helsinki)
<i>France</i>	3.5% [3.4% GDP]	7.1% GDP (1999–2003)	Nomenclature d’Activities Françaises (cultural economy; Scott, 2000)
<i>Paris</i>	6.3%	–5% (1992–97)	
<i>Ireland</i>	2%	4 × employment and 6 × revenue (software Industry) (1995–2002)	Focus on ‘digital content industries’—animation, film, broadcasting, interactive media, web design, music, graphic design
<i>Dublin</i>	3.1%		cf. Northern Ireland and Scotland’s cluster definition and enterprise approach
<i>Germany</i>	3% [2.5% GDP]	6.6% GDP (1999–2003)	Art market, literature, print and publishing, architecture, advertising,
<i>Berlin</i>	8%	7% (1998–2002); (–6.6% 2002/03)	audiovisual sector, software and telecommunications, music sector, performing arts and entertainment
<i>Netherlands</i>	2% [2.7–3.2% GDP]	Creative occupations 34% (1996–2004); 50% in big five cities	cf. classification system: NACE, and DCMS and Vienna
<i>Amsterdam</i>	6.9% [4.1% GDP]	5.7% (1996–2002); decline 2003–05	Creative business sectors encompass the arts and cultural heritage, media and entertainment, as well as creative business services (B2B), design, architecture, computer games and advertising
<i>Rotterdam</i>	3.2%	8% (1996–2003)	

<i>Scotland</i>	5.71%	4.8% (1999–2001)	DCMS definition (above) plus computing; three clusters prioritised:
<i>Glasgow</i>	7%	22% (1999–2001); growth target 10% per annum	digital media; music. film/TV cf. CIPS and DCMS (UK)
<i>Spain</i>	1% [Catalonia] [2.3% GDP]	9% GDP (1999–2003)	Knowledge sectors: information and cultural industries: publishing, film and video, recording, radio, TV, Internet, telecoms; professional scientific and technical services—architects, engineers, information, marketing, human resources, public relations, public services; arts, entertainment and recreation—performing arts, artists, museums and historic and heritage institutions, amusements and gambling
<i>Barcelona</i>	5.5–8%	8% GDP; growth target to double % GDP by 2010	Advertising, architecture, visual arts, design, film and video, software and multimedia, music, performing arts, publishing and TV and Radio cf. DCMS
<i>Switzerland</i>			
<i>Zurich</i>	7.5%	–4.9% (city), –7.8% (metro ‘canton’ region) (2001–05)	Music, books, art, design, crafts, press, broadcasting, architecture, performing arts, software/games NOGA, cf. NACE
<i>UK</i>	4.3–5%; 7% of all firms [6.8% GDP/7.3% GVA]	9% (1997–2001); 6% (1997–2003)	Advertising, architecture, art and antiques market, crafts, design, designer fashion, film and video, interactive leisure software, music, the performing arts, publishing, software and computer (DCMS)
<i>London</i>	8%	CIPS 29%/5% per annum (1995–2000); growth target: jobs 40%, GDP 52%, GVA 22% (2004–10)	cf. Creative Industry Production System (CIPS) and Regional Cultural Data Framework (DCMS, 2004)
<i>Manchester, NW Region</i>	3.5%	Employment 40% growth (1998–2002); 47% increase in GVA	Digital/ICT sector in Greater Manchester
<i>Cardiff</i>	3.5%	Employment 53.7% growth (1991–2005)	ICT, film, TV, new media, print and publishing
<i>Canada</i>	3.1%	6% (1991–2004); 3 × overall job growth	Visual and performing arts, literature, music and sound recording, advertising, design, digital media, film and TV, publishing, software, broadcasting
<i>Toronto</i>	4.4%	2.4% per annum (1990–2000)	Super-creative core - education, training, library, arts, design, entertainment, sports and media
<i>Montreal</i>	5.1%		

(Continued)

(Table 2. Continued)

Country and city	Percentage of total employment [percentage GDP]	GDP or employment growth (time-period) and target	Sectoral definition
USA	2.2%; 12% in wider IPR sector'	7% (1997–2001)	Museums, visual arts and photography, performing arts, film, TV and radio, design and publishing, art schools
New York City	8.1%	13% (1998–2002); 2 × overall job growth	Advertising, Film and Video, Broadcasting, Publishing, Architecture, Design, Music, Visual Arts, Performing Arts. cf. DCMS and CIPS
Australia	3.8% [2% GDP]	Employment growth 2.6% (1996–2001); 5.7% (1995–2000)	Six inter-related sets—music composition and production, film, TV and entertainment software (including animation and computer games),
Sydney	3.9%		performing arts, writing, publishing and print media, advertising, graphic design and marketing, architecture, visual arts and design (Queensland)
Brisbane	2.4%	1.4% (1995–2000)	DCMS definition plus IPR/Content (copyright) industries
Queensland	1.8%		Advertising; software and computer services (including leisure software); publishing; television and radio; architecture; design; designer fashion; music and performing arts; visual arts (arts, crafts and antiques) cf. DCMS.
New Zealand	2.4%	2.5 × national growth	
Auckland	5.1% [6.3% GDP]		Creative industries a diverse sector, which includes screen production, television, music, design, fashion, textiles and digital content
Brazil	1%	Growth target to double % GDP by 2012	Creative industries include a broad scope of economic and cultural activities at the core of which is artistic expression, innovation and knowledge-based occupations. Nurturing creative industries will contribute to a variety of sectors leading to improved economic well-being for the society as a whole. Cultural industries are also key agents for transmitting social values and creating national and regional identities
Rio	7%		Three clusters prioritised: arts (performing, museums, galleries, cultural tourism), media, and design. cf. DCMS
Singapore	3.4% [3.3% GDP]	13.4% (1986–2000); Target to double % GDP by 2012	In 10–15 years the 'Asian Creative Industries hub'; in 20–25 years a 'Global Creative Industries hub'
Shanghai	[6.6% GDP]	17% (1999–2003); Target 10% of GDP by 2010	Products and output that are protectable under intellectual property law—software, multimedia, video games, industrial design, fashion, publishing and research and development
World Bank	7%	10% (2000–05)	

Notes: Other growth rates and proportion of employment in the cultural and creative economy: Sweden 10% (10% of total employment; 5.3% of GDP; 12% of total employment); Latvia (4.4% of total employment, 4% of GDP); Europe (EU25) 3.1% of total employment, 2.6% of GDP.

Sources: Evans *et al.* (2005), NESTA (2003), UNCTAD (2004, 2008), EU (Marcus, 2005), MFA (2006), KEA (2006).

industry sectors (Florida, 2000; Markusen and Schrock, 2001). For example, design engineers in car manufacture and a host of professional services and scientific professions, from 'creative' accountant to software 'architect' (*sic*). Aggregating a selection of these creative groups with creative industries themselves produces employment shares of 25–30 per cent of total workforces in the US, Belgium, Finland and the UK, 18 per cent in Germany and 13 per cent in Italy and Portugal (Florida and Tinagli, 2004). A recent review of the cultural economy in the Netherlands estimated that creative occupations represented as much as 47 per cent of all employment (MEA, 2006, p. 17) and 40 per cent in Denmark (Andersen and Lorenzen, 2005). On this basis, growth rates in these creative (class) occupations were highest in Ireland at 7.6 per cent (1995–99), compared with under 2 per cent in other European countries and the US. From the early 1990s, Ireland's software/IT industry, including its role as offshore producer and back-office 'call centre', has grown in employment and sales at two to four times a higher rate than the rest of the economy. However, the withdrawal of MIT's Medialab Europe initiative in Ireland in 2005 suggests that importing the knowledge economy requires substantial public investment (Euros 40 million by the government) and is not guaranteed to succeed. In this case, corporate sponsorship and income targets were not achieved and further subsidy from the Irish government was not felt to be sustainable. This was the second offshore MIT Medialab venture to fail (the first in Bangalore in 2003).

Moreover, the conflated creative industries are skewed by disproportionately high employment and turnover in audio-visual/digital media, print and publishing and software/computing activity, in contrast to low employment totals in the more cultural (arts and crafts) 'thin air' activities (Leadbetter, 2000). Significantly, even where studies link

high levels of creative class occupation with high performance and growth indices, the exception is technology-based employment which showed, in the case of the UK, "no association with the location of the creative class" (Clifton, 2008, p. 79). Even in design-led cities such as Barcelona, while design, architecture and publishing (Spain's publishing capital) represent over 60 per cent of total *cultural industries* employment, the expansive information and media sectors employ over half of all the much larger *creative knowledge* sector workers in the region. By extending the creative to the knowledge economy, ICT overtakes the cultural industries and is more widely dispersed than the cultural cluster which is concentrated in two or three of Barcelona's central districts (Evans, 2006b). In further examples, Zurich's software/games sector accounts for 38 per cent of total sales within the city-region's creative economy, three times that of the next-highest sector; in Berlin, over 50 per cent of all creative sector employment and GVA is in 'media'—print/publishing, audio-visual/film/TV and software communications sectors, with the figure reaching over 75 per cent in London's creative sector, where 71 per cent of national TV production hours are concentrated. Underlying growth and growth prospects are therefore represented by a minority of 'creative' production activities in established commercial areas (for example, Soho, central London, TV/film studios, west London—see Figure 1), but which are less spatially linked to the creative clusters and spaces that are the subject of local (new) economic development ('creative hubs', see Figure 2).

Policy Rationales

The declared policy and strategy rationales, based on our survey, often covered more than one category (see Figure 3), but the dominant objective behind most interventions was 'Economic development and employment'—'new' and retained/protected jobs being the

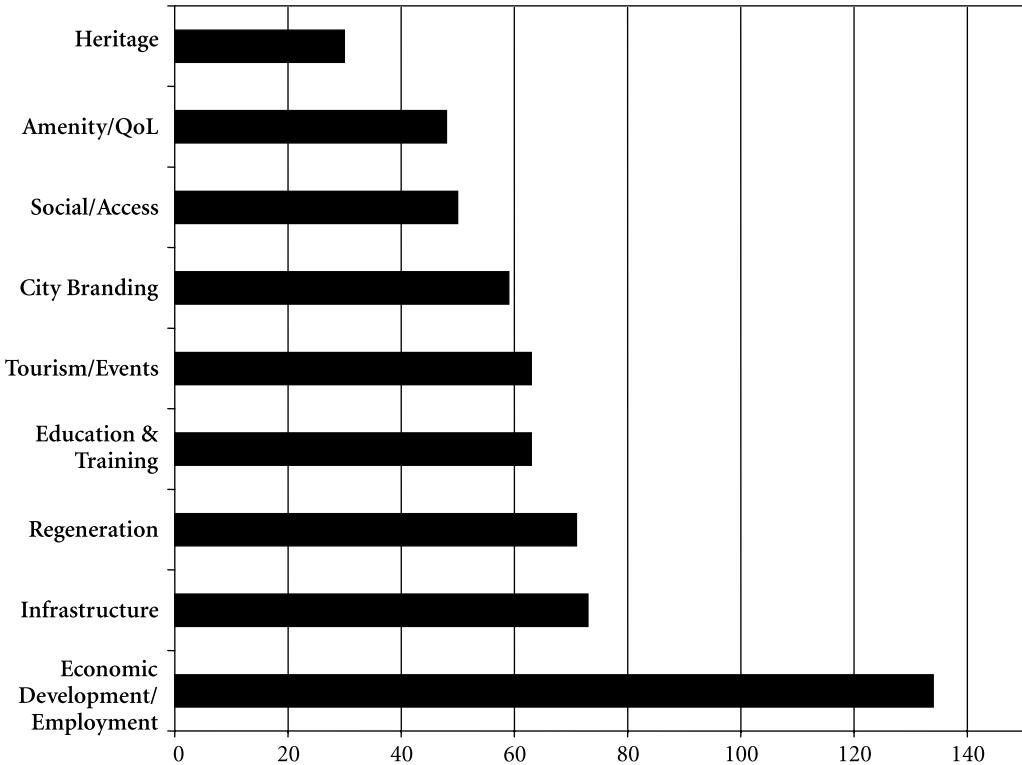


Figure 3. Policy rationales

prime measure—followed by ‘Infrastructure’ (transport, ICT), ‘Regeneration’, ‘Tourism/ events and branding’, ‘Education and training’ including ‘talent’ generation and support. ‘Social/access’ and ‘Heritage’ featured least in the reasons and benefits claimed for creative industry policies. Where they were the target of intervention—in developing countries and re-emergent east Europe—this was in terms of retaining cultural identity, diversity and ‘heritage’ in a reaction to what was perceived as the élitism and divisive nature of the ‘creative class’ and the threat of commodification from IPR/copyright regimes. In these cases, the creative district and quality of life benefits were to be available to ‘all’. However, the social inclusion imperative was commonly allied with the economic and employment growth prospects offered by the new economy, with initiatives and public programmes supporting skills, training and enterprise support for

underrepresented groups in the creative and knowledge sectors.

A stark fact in the exemplar creative cities and local clusters, however, is the coincidence of economic and social inequality. For example, Florida’s Inequality Index (2003), based on the gap between high- and low-income residents, ranked creative cities such as San Francisco, New York, Los Angeles and Boston high on this index, likewise London. A similar conclusion was reached in the UK Trade Ministry’s assessment of the creative class: “Openness is highly associated with levels of inequality” (DTI, 2004, p. 14). A majority of New York’s designated creative and cultural industry workers originated from outside the state (Americans for the Arts, 2005), whilst the proportion of Black and ethnic minority workers employed in London’s creative sector is only half of their share of the city population as a whole (Evans, 2006a). The proportion of

Asians working in London's music industry has also declined in recent years, despite targeted policy programmes (LDA, 2003; Evans, 2006a), questioning the 'cosmopolitan competitive advantage' argument, or at least, the distributory benefits that supposedly ensue from innovation spillovers and employment opportunities in the creative industries.

From this perspective, exemplars of the knowledge cluster look less appealing—for example, Silicon Valley, California. Whilst its collaborative and competitive edge is less related to traditional community and family structures—such as in polycentric production crafts clusters in Emilia-Romagna, northern Italy (Lane, 1998)—innovation is enabled by a different form of imported (social) capital in terms of tacit knowledge transfer (Bathelt *et al.*, 2004), the distribution of risk-reduction in uncertainty (Cohen and Fields, 1999; Saxenian, 1994) and what Saxenian (2002) refers to as the 'brain gain'. However, with a large migrant population in the county (37 per cent foreign-born), including first- and second-generation Hispanic (25 per cent of the population) and Vietnamese, who 'service' this knowledge economy, Silicon Valley firms are not strong supporters of either the community or cultural programmes generally and remain in industrial parks on the city fringe. Most are new firms—exceptions being the long-established Hewlett Packard and the more recent Google with mid-West founders and a transient and different set of migrant workers (for example, from south-east Asia). This 'plug-n-play' place, ranking high on Florida's 'Tolerance' and 'Inequality' indices, is judged to be neither socially cohesive nor a vibrant—in fact a 'dull'—place in which to live (Kriedler, 2005). A further irony is the digital divide in access and ownership of ICT—in California, Latino young people are half as likely to have computer access at home: 36 per cent compared with 77 per cent of US-born non-Latinos (Fairlie *et al.*, 2006). Cultural policy initiatives here have focused

on arts education in schools, rather than culture-led regeneration. However, in keeping with elsewhere in North America, the cultural flagship continues to be favoured and receives most attention and resources—for example, in California itself, with the Yerba Buena Center for the Arts (San Francisco), MOCA (Los Angeles) and SJMA (San Jose), as well as in Toronto ('C\$billion dollar babies') and New York (Brooklyn Academy of Music, new art museum redevelopments at MOMA, Manhattan, and Dia, New Jersey) (Gertler *et al.*, 2006a, 2006b).

Creative Sectors

Table 3 summarises the creative sectors that are the subject of the policy and strategy interventions reviewed. These were self-defined in each case, reflecting cultural systems (for example, arts and cultural policy and funding) and the sectoral/cluster priorities and the depth of policy analysis undertaken. This appears to rest on the extent to which the creative and related sectors (for example, fashion) and sub-sectors (for example, designer fashion) selected for intervention and investment were based on existing capacity, or on aspirational and global growth prospects and technology transfer. This aggregation of creative sectors featuring in strategic policies and plans also combines cities and regions at differing stages in sectoral and creative industry policy maturity.

Film/TV is therefore—surprisingly as an 'old' cultural industry—the most frequently supported sector, followed by the generic 'Arts'—normally performing and visual arts linked to the visitor economy and culture-led regeneration. The next sectors to be prioritised include Music, Media and design, Architecture, Fashion, then to a lesser extent, Publishing, ICT, Cultural tourism, Crafts and, lastly, Advertising. Production-based sectors that had been the larger employers in terms of firm size and total number of jobs within the cultural industries—notably textiles in

Table 3. Creative sector

<i>Sector</i>	<i>Percentage</i>
Film/TV/animation	15
Arts	14
Music	13
Media	12
Design	9
Architecture	7
Fashion	6
Publishing	6
ICT/tech	6
Tourism	4
Crafts/jewellery	4
Advertising	4
Total	100

fashion; printing in publishing; and audio-visual services and manufacturing—have been usurped in these policy priorities by design and media activity. Film/TV encompass both industrial, state and commercial sector activity, as well as aspects of new digital media, which explain its high occurrence. This includes cities attracting film location and supporting production investment as a low-cost alternative to prime studio and locations. For example Prague's streets displace 'Victorian London' (Evans, 2007); Vancouver and Toronto undercut Hollywood; modernisation and diversification of existing studio and production complexes can be found in, for example, post-unification Berlin and the Babelsburg region (Kratke, 2002; Evans and Witting, 2006); and the hi-tech digital production facility such as Lucas Films has relocated its digital animation facility to Singapore. Transitional and emergent states also use cultural production in sectors such as film/TV and traditional arts and heritage to reassert or promote the cultural identity of the new nation-state or ethnic group (for example, eastern Europe, Catalonia, South Africa).

Art form and cultural practice also influence this sectoral trend—for example, the growth in animation (linked to digital graphics)—as

well as structural changes in the industry, public and private, such as digital, cable and Internet TV and deregulation. Some sectors continue to be afforded protection from competition under GATS and UNESCO 'cultural exception' agreements—for example, audio-visual and film. ICT/technology including software ('leisure games') on the other hand are surprisingly less commonly cited as a priority sector in these public policies. However, digital media and other creative practices increasingly incorporate technological applications and interfaces, notably in film/TV and music, and in materials—for example, technical textiles, laser cutting and rapid prototyping in product and architectural design. The creative product is therefore still identified with, rather than the creative technological process itself.

Creative Clusters or Sectors?

The collective nouns used to identify these economic activities are also applied interchangeably, which confuses the notion of a cluster as both a geographical and an economic concept (Malmberg and Power, 2006). In many cases, these refer to co-location/proximity, not to viable economic clusters. 'Industry', 'sector' and 'cluster' therefore refer to various groupings in policy statements and strategies. At a regional level, both industry and cluster are used—for example, in Scotland, 14 key *industry* groups are listed, one of which is 'digital and media industries' (others include textiles, tourism and microelectronics). The creative industries strategy is then detailed in terms of *clusters*, prioritising digital media, film/TV and music which are distributed across the key regional cities, the largest—Glasgow and Edinburgh—Silicon Glen, and Dundee, formerly known for its 'jam, jute and journalism', but now trading on producing an early computer game success, 'Grand Theft Auto', as well as biotech and university R&D facilities. In less than five years, this university has doubled in size. The Scottish film industry

is also influenced by the quota system requiring (through public licence obligation) regional production commissioning by TV companies, such as the BBC and Channel 4. In North West England, Greater Manchester identifies service, public and knowledge-based *sectors*, with Manchester its designated ‘Science City’ and ‘Knowledge Capital’. The latter sector is represented by several key sub-sectors: biotech/health, digital industries, a separate creative industries sub-sector, and environmental services. Within these regional strategies, the role of the public sector (including higher education) is significant in employment, investment and policy terms, rather than the business cluster-led economic development associated with Porter’s growth theory. Where specific industry links to growth policy are evident, these still draw on public institutional collaboration and investment—for example, the Kulturo incubator complex in Turku, west Finland, supported by Nokia and a Finnish innovation fund and start-up programme; and film, fashion and design industry (for example, automotive) joint ventures in California’s higher education/R&D sectors.

Creative industries highlighted for support therefore reflect either the national tradition and focus on cultural consumption/reception and art form, or the production process, technology and media. In the more developed strategies at city-region level, creative clusters are prioritised often targeting the ubiquitous ‘design’, generic or sectoral (for example, fashion, furniture/interiors), ‘digital media’ (including film/TV/animation, graphics) and ‘arts’—specific sectors associated with cultural rather than economic ‘capital’, such as music in Glasgow, performing arts in Singapore and visual arts in Berlin. This represents in one sense a compromise between creative/knowledge economic growth policy and residual cultural policy, but rationalised also in economic terms. For example, Singapore’s positioning as ‘Global City of the Arts’ and investment in major

cultural facilities (Chang, 2000) as well as conservation/heritage districts (Ho, in this Special Issue); Scotland’s live music and festival tradition linked to its tourism strategy; and the role of visual and public art and design in city and higher education renewal such as in Barcelona, Berlin and Helsinki through architecture, art market/galleries and a university campus, together with associated housing development.

Where cities promote creative industries that are not currently reflected in their economic and employment profile and market share, the risk may be high. This is the case in Barcelona’s backing of its €80 million digital media campus (@22) in the industrial district of Poblenou (Casellas and Pallares-Barbera, in this Special Issue). Fulfilling regeneration and city expansion objectives post-1992 Olympics, the city’s strength in architecture, product design and visual arts is at odds with this particular version of the new economy and with local community sentiments (Kriznik, 2004). Evidence of an oversupply of design graduates in Barcelona (Evans, 2006b), as in London and New York, is perhaps an early warning, particularly since the city’s art and design university is relocating all of its current six campus facilities to the site as part of this massive development (Lopez, 2005). This is mirrored in London with the relocation of the largest college of the University of the Arts to the King’s Cross/St Pancras railway lands development. Another example is the Orestad extension to Copenhagen, with a linear array of modern architectural offices and retail blocks, new schools and housing, and the relocated Technology University and Danish broadcasting facility. Here, the ‘retro-fitting’ of cultural animation and activity more associated with run-down buildings and areas is sought by the developers who now admit that: “smooth planning of infrastructure does not do the trick of creating real life in new built dwellings” (iBYEN.dk; in Evans, 2008). Intervention is therefore needed to attract

artists and other creatives to settle and work there by allowing them to use selected premises without charge in return for their contribution to the animation of the area through public performances and workshops. Where campus-based R&D activity is co-located with established production and incubation facilities, the potential synergies between art, design and science appear more robust—for example, ‘Media City’, Eagle Yard Adlershof, Berlin (Humboldt University) and Toronto’s Medical and Related Science centre (MaRS), a joint hospital/health trust, university and city/provincial government initiative. How these large institutional complexes will relate to and seek access from creative micro-enterprises and individuals is, however, unclear and, as yet, untested. Moreover, the majority of public programmes are directed at organisations not creative entrepreneurs. As Hall documented at length (1998), successful culture cities manage to retain their creativity only by “constantly renewing themselves. Or rather, cities don’t do that; their people do. But they only do so in a particular creative (or innovative) milieu” (Hall, 2005, p. 5).

Types of Intervention

Analysis of these policies and strategic plans groups creative economic initiatives into one of six broad categories. These encompass, in order of priority and frequency: property; business support services; grants and loans; fiscal/tax schemes; and infrastructure—physical and soft. Soft infrastructure includes ICT (i.e. fast broadband), education and training and the support of networks and marketing. For a fuller exposition of these, together with examples from policy and programme interventions, see Evans *et al.* (2005) and Foord (2009) and Gertler *et al.* (2006a, 2006b, 2006c). These intervention types are not exclusive—the more developed strategies, often based on a 10-year plan (as in Amsterdam, Barcelona, London and Singapore) combine

or integrate several of these—but they provide a profile of the main trajectories of intervention and the mechanisms being used to promote and support creative cities and economies. This notion that the creative industries are ‘different’ from other economic sectors and industrial processes has led to the creation of specialist creative or cultural industries development agencies (CIDAs) and enterprise support programmes, as well as facilities such as incubators and managed workspaces. However, as the policy analysis confirms, the mechanisms used follow traditional forms. Many of these are familiar types of economic development intervention, often directed at start-ups or SMEs, indicating both the similarity of enterprise needs across sectors and perhaps a lack of understanding of what difference ‘creativity’ (in product and/or process) makes to an enterprise or local economy. A frustration felt by public economic development officers and agencies interviewed is the antithetical approach to ‘growth’ by start-up and even established young entrepreneurs in the creative field, which creates a dispersion of fragile and transient micro/sole-trader enterprises that do not conform to business growth models or modes of intervention (Balaguer, 2005; Evans, 2008; NESTA, 2003). This is also of concern in inner-city regeneration where positively impacting on worklessness and improving employability and skills are prime policy objectives and rationales for public investment. If the new creative economy is unable (or unwilling) to generate employment or spend on support services locally, this formula is obviously flawed.

The CIDA model also reflects a lack of faith and trust in traditional enterprise agencies, such as chambers of commerce, which neither reflect the age and lifestyle profile of creative entrepreneurs, nor possess the understanding required to support the new IPR, design and experience-led knowledge economy and its fluid human, financial and cultural capital

formation (NESTA, 2006). These ‘arms-length’ intermediary agencies are still largely controlled and financed by city and regional government, and act as the focus for policy promotion and implementation, for example, the Barcelona Culture Institute (ICB), the UK regional CIDAs, Design Singapore and the Danish Design Centre. Industry associations may have minority representation on these organisations and their policy and funding programmes, but their main activity is that of promotional events (such as fashion weeks, design fairs) and networking, rather than in mainstream enterprise development and investment programmes; these activities are also highly subsidised by city authorities, including the promotion of creative ‘business’ clusters (Bagwell, 2008). However, in cities where the creative industries are viewed as either a sub-sector of the knowledge industries, or just one element in economic development, this role tends to be retained within city and inward investment departments—for example, in Berlin, Manchester, Helsinki and Riga. In England, this role is increasingly taken by regional development agencies (RDAs), but within a *dirigiste* national policy and funding framework.

Intervention in practice. An example of sustained support for the creative industries and how these interventions work in practice, is provided by an evaluation of European regional development (ERDF) programmes targeting this sector over a 12-year period in London (EKOS, 2006). This is also a case of convergence and pragmatic alignment of European, national, regional and sub-regional policy interests, manifested at a very local level. London had developed its creative industries policy from the mid 1980s under the then Greater London Council (GLC, 1985) and which had survived several political regimes, to be re-energised in 2004 by the new Mayoral Creative Industries Commission and a new

delivery unit of the regional economic development agency (*Creative London*; LDA, 2003). Regional support of this sector formed part of European Regional Development Funding (‘Objective 2’) targeted at assistance areas, for which several districts qualified in the early 1990s (as northern and other areas of the UK, Ireland and southern Europe had already done; see Evans and Foord, 2000). Three successive rounds (1994–96, 1997–99, 2000–06) totalling £143 million of EU and national funding were allocated to a variety of creative industry projects. Nearly 80 per cent of this was directed to city-fringe/inner east London areas (‘hubs’; see Figure 2)—the prime regeneration zone and recipient of successive urban regeneration programme investment since the 1980s (including the inner London Docklands). Most projects were delivered by the third sector (for example, CIDAs), not by public or private/industry organisations. The spread of projects comprised 50 per cent business advice and community support, 30 per cent accommodation, 10 per cent community and cultural facilities, 8 per cent training and only 1 per cent business finance.

What is significant about these types of initiative in relation to the new economy, is that they have been directed predominantly at supporting start-up and SME creative enterprises, with only a very few directed at the expansion and growth of established creative firms, or at higher-level interventions (for example, innovation, advanced technology) and even fewer at fostering business-to-business markets beyond the creative industries—where the higher growth potential lies through convergence and content innovation.¹⁵ The impact on firm performance—turnover, employment, innovation—suggests that those with the highest take-up of support (i.e. training, business advice) exhibit the poorest growth and improvement (Foord, 2008), with subsidised workspace used as shelter for uneconomic firms. However, incubator

units, studios and digital media centres continue to feature highly in creative quarter developments and strategic plans linked to area-based regeneration, whether industrial re-use or new-build facilities. Given the fragile employment and markets involved in these small-firm clusters, these ubiquitous economic development initiatives rely heavily on blind faith in the growth prospects of the creative and knowledge economy and in their role as catalysts of regeneration and innovation.

In terms of the sustainability of policy-led economic development, it is also worth noting that many of the creative industry development agencies and programmes have remained reliant upon public subsidy for over 10 years, in Europe, they are dependent upon regional development (ERDF) as well as national regional assistance funding. Long-celebrated cultural industry quarters and agencies such as in Sheffield and Liverpool (Moss, 2002; Mommaas, 2004; Evans and Foord, 2006a) show little sign of breaking this dependency, in contrast to the endogenous growth that governments proclaim for the new creative economy and the language of strategic policy statements: 'win-win benefits' of the 'virtuous circle' offered by new technology, productivity, consumption and competition gains. Jayne (2004, p. 208) provides a "corrective to the rather rose-tinted picture often drawn of the role and significance of the creative industries for future economic and cultural well-being", from his vantage-point of post-industrial Stoke-on-Trent, where

Substantial funding has supported creative industries development initiatives for the past fifteen years. However, the impact of this development on the regeneration of the city has been minimal ... the result of flawed creative industries strategy, and associated failings of the city to overcome its spatial and economic structural conditions so as to compete in an urban hierarchy dominated by post-industrial and middle-class consumption cultures (Jayne, 2004, p. 208).

Conclusion

The creative economy, in its knowledge and content incarnations, encompasses designer products, 'experiences' and services that have captured increasing proportions of consumer surplus through 'distinction' (Bourdieu, 1993) and by reducing the economic price sensitivity between luxury and basic or functional goods, particularly in clothes, food, household/housing, entertainment and recreational services. A dual form of commodification and industrialisation is thus created—both material reproduction and the use of communications networks which themselves provide commodification possibilities. These range from the sublime—'smart textiles' delivering controlled drug dosage to the wearer—to the ridiculous—a frog ringtone for a mobile phone—and from ubiquitous icons of convergence, such as the iPod, to 'walk-my-dog.com' at the height of the SoMA dotcom venture capital frenzy. The shelf-life of the products and places of the new economy can therefore be short and short on substance, or can transform values to multimillion-dollar capitalisation—for example, the 'shareware' video website 'YouTube' acquired by Google for US\$1.6 billion in shares, a case of company valuation based on 'fuzzy metrics' (Deloitte, 2004). Global forecasts estimate that the value of convergence in the media and telecommunications industries will generate US\$1 trillion by 2010 (Deloitte, 2005).

The importance of IPR and copyright protection in the valorisation of cultural products and services is fundamental, with a growing policing effort world-wide to enforce and extract the 'rights' of ownership (if not necessarily of producers/originators). The outlawing of material and the exchange of 'illegitimate' material and ideas are a necessity in this regime. This has parallels in the control and commodification of spaces for creative production and cultural consumption—such

as alcohol, live entertainment and dancing venues—leaving the once-self-sufficient Rave (dance/music), artists' squats (pre-loft dwellers), art and street markets and independent retailers (such as booksellers), to gentrification and rent-seeking processes. Capturing this particular shift from use value to exchange value is therefore represented in the production/consumption spaces that bring the symbolic and city economy together 'glocally'. The creative quarters of cities historically have emerged organically from cultural producer and fringe workshop areas with lower land/rents and looser controls, such as licensing, planning and 'policing'—from craft guilds in the City of London and the bohemian quarters in Paris and New York (Wilson, 2003; Wedd, 2001; Evans, 2001a), to the garages of Silicon Valley and squats of Berlin today (Shaw, 2005). Recreating and accelerating the new economy through technocratic planning, regeneration and policy intervention have, however, required rapid learning by governments and investors that relies on evidence and policy models to minimise risk, justify resource allocation and secure the economic advantages and returns that the knowledge society supposedly offers.

Talking-up and conflating the creative into knowledge economies and occupations as illustrated through this policy analysis, is increasingly problematic and counter-productive—as the rationales and evidence become strained and an economic downturn takes effect, unevenly. This weakens the credibility within government economic and investor communities (DCMS, 2006; NESTA, 2006), as this version of the new economy is seen to produce hollow promises for resident communities and enterprises. It is these local actors ('stakeholders') who supposedly drive city economic renewal and growth, through business enterprise-led clusters (Bagwell, 2008; Porter, 2000); however, non-local public and larger institutions control the policy

and investment and regeneration agendas. This is also at odds with industrial and trade networks which cling to their sectoral associations, specialisms and markets—in film/TV, architecture, publishing, product design, hotels and theatres, etc.—and associated vocational training and business support needs; these do not easily translate to area-based economic development and 'cluster' concepts and models. As Jayne points out from the UK perspective

Current creative-industries policy is overly dominated by an inadequate cluster agenda (and its evidential base) that fails to elaborate fully how the creative industries operate ... and fails to account for the ways in which people consume products and services (Jayne, 2005, p. 554).

In terms of urban policy, viewing both micro and meta-critiques together in context and in terms of the linkages between local and political economies—and between large firms, institutions and local economies and enterprises—might therefore be seen as a more valuable contribution to the discourse and requisite methodologies; less so, yet more cluster 'concepts' and explanatory creative occupation (class) and industry (employment) configurations. It is the interpretation and impact of policy models that arguably provide the fine-grain understanding of how the new economy is translated in these urban creative spaces and 'knowledge cities', including how far they are indeed new and economic

A creative city cannot be founded like a cathedral in the desert: it needs to be linked to and be part of an existing cultural environment. We need to appreciate complex interdependencies, and not simply use one to exploit the other (Pratt, 2008, p. 35).

From this comparative perspective, novelty in policy responses—between creative industry and urban policy and between cultural and economic policy—is still lacking in imagination

and is over-reliant upon unproven (or non-transferable) models of intervention and employment growth. This is most apparent from this survey in the confusion between regional (including transborder) industry-based economic policy and cluster-based approaches and sectoral interventions—and urban policy directed at area and community-based social and economic regeneration. This fundamental weakness can be traced to the fragile foundations on which the creative industry and associated creative city growth predictions have been based and on fuzzy notions of creative class, innovation and cluster processes and benefits. Policy transfer in this case has also been accelerated by the lack of alternative strategies and sustainable growth options in these post-industrial cities, attracted by the celebrated exemplars and visions of a ‘digital city’ utopia. The more favoured policy trend of ‘place-making’, on the other hand, may need to consider both distinctiveness and integration within the city and wider region in terms of accessibility, connectivity and cultural development, if the current phase of inner-city regeneration is to have much resonance with the cultural and creative economy itself, in its new and old forms and functions—where

local policy builds on the historically developed unique particularities of the city and considers the creative sector in relation to the broader urban economy rather than as distinctive clusters (Trip and Romein, 2009, p. 216).

Notes

1. The research originated in a study commissioned by the London Development Agency (Creative London) and Metropolitan Toronto and Ontario provincial governments (Culture and Economic Development ministries), led by the author and Meric Gertler, University of Toronto. This was supplemented by participation in an OECD Territorial Review of Copenhagen (2008).
2. See Eurostat (2007). Micro-enterprises employing under 10 persons (most creative enterprises employ less than 5) are not included in the survey, which therefore overstates small-firm innovation in this sector.
3. According to the Cultural Ministry in the UK

The classifications used by international convention for official statistics do not accurately reflect the structure of the Creative Industries. As such it is difficult to capture the full extent of the activity in the Creative Industries (DCMS, 2005, p. 1).

Likewise, in Europe: “statistical tools are not appropriate and available statistics are scarce. Statistical tools do not enable the cultural and creative sector to be captured properly” (KEA, 2006, p. 4). This has fuelled and given license to a confusing range of ‘estimates’, statistical reworking and industry/occupation groupings used by agencies and researchers seeking to expand or target particular elements of the creative and knowledge economy and attributed employment.
4. Globalisation and World Cities Study Group and Network (www.lboro.ac.uk/gawc/).
5. ‘Cultural observatories’—national (Europe) and regional cultural consortia (RCOs, England); international networks, for example, UNESCO Creative Cities, EU-CIRCLE; Creative Clusters network (www.creativeclusters.co.uk); the Competitiveness Institute (ICIC, Harvard, US; Barcelona, Spain); the Knowledge Foundation (Sweden); cultural ‘think-tanks’—Comedia/DEMOS, Institute for Public Policy Research, Work Foundation; and the Urban Age ‘road-show’—London School of Economics/Deutsche Bank (London, New York, Shanghai, Beijing, Johannesburg, Berlin).
6. The waterfront and mega project featured in several presentations at the ISA World Congress (Durban, 2006) Research Committee (RC21) on Regional and Urban Development—from Bilbao, Toronto and Helsinki, to Istanbul, Singapore and Vienna. A consensus and cultural pessimism pervaded these examples of ‘bad’ regeneration, with the presumption by the group/convenors that their familiar form (capital, architecture and function) was universal and ‘global’, and not mediated,

distinguished or experienced differently by their local and cultural characteristics and legislative systems (governance, planning, land use). Underneath their superficial similarities lay distinct city histories, trajectories and impacts, and also examples of resistance. This is an example of the meta-analysis and 'conflation through comparative' urban studies analysis I refer to here.

7. Whilst Oresund—bridging Skane/Malmo in Sweden with Zealand/Copenhagen in Denmark—is widely promoted and cited as the successful knowledge/life-science/IT and design regional cluster—emulated in Manchester/North West England (Williams *et al.*, 2006) and elsewhere (OECD, 2003, 2006), Copenhagen dominates the creative city discourse and policy (for example, Mayor's Creative Forum) and resists the wider regional growth opportunity—Copenhagen is generally not enthusiastic about the Oresund co-operation according to opinion polls (Evans, 2008).
8. 'Silicon somewheres' (Florida, 2002; in Hospers, 2003, p. 154).
9. As in Myerscough's earlier survey of the factors encouraging middle managers to relocate, a study of Dutch cities found that the aesthetic qualities valued and associated with a higher share and growth in the creative class were historical buildings and access to natural environments, not the gay scene, 24-hour club and café culture, or ethnic diversity (Musterd and Deurloo, 2006).
10. Cities and regions—Western Europe: Flanders (Belgium); Copenhagen, Jutland-Ringkobing, Viborg (Denmark); Helsinki, Turku (Finland); Paris, Lyon (France); Berlin, Leipzig, Munich, Potsdam and Babelsburg, Brandenburg, Hamburg, Stuttgart and North Rhine-Westphalia/Rhine-Rhur (Germany); Dublin (Ireland); Florence, Milan and Lombardy (Italy); Amsterdam, The Hague, Rotterdam, Tilburg, Utrecht (Netherlands); Oslo (Norway); Lisbon, Porto (Portugal); Barcelona, Bilbao and Catalonia (Spain); Stockholm, Trollhattan and Nordic/NORDEN region (Sweden); Zurich (Switzerland); Birmingham, Bolton, Bristol, Glasgow, Huddersfield, London, Manchester, Nottingham, Sheffield, Shetland, NE and NW England/Merseyside (UK). Eastern Europe: Mostar (Bosnia); Bucharest (Bulgaria); Budapest, Pecs (Hungary); Liepaja, Riga (Latvia); Vilnius (Lithuania); Izba (Poland); St Petersburg (Russia); Belgrade, Novi Sad, Uzice (Serbia); Zilina (Slovakia); Istanbul (Turkey); Ljubljana (Slovenia). North and South America: Austin, Boston, Blue Ridge, Chicago, Denver, Detroit, Los Angeles, Maine Memphis, Minnesota, Montana, New Jersey, New Oklahoma, New York, Orleans, Paducah, Philadelphia, Portland, Providence, Salem, San Diego, San Francisco, Seattle, Silicon Valley, Washington DC (USA); Montreal, Toronto, Quebec, Vancouver (Canada); Rio, São Paulo (Brazil); Caribbean (CARICOM). Africa: Cape Town, Durban, Johannesburg (South Africa); Zanzibar. Australasia: Auckland, Christchurch, Wellington (New Zealand); Brisbane, Gold Coast, Melbourne, Sydney and New South Wales (Australia); South-east-Asia: Singapore; Digital corridors (Malaysia); Hong Kong, Beijing, Shanghai, Tianjin, Hangzhou, Shenzhen (China); Bangalore, Rajastan and Indian Ocean (India).
11. In a survey of Danish municipal cultural policies, only 18 per cent identified 'economic development' as the primary aim of their culture-led regeneration strategies (versus social development) and fewer Copenhagen municipalities prioritised economic development compared with other regions (Bayliss, 2004). Cultural activities seen as important at the local level rated traditional arts and heritage amenities, such as libraries and museums, higher than creative industries. The Copenhagen Capital Region and national policy, however, promote

Culture. as an increasingly important tool in regional competition to attract workers, tourists and investment ... companies' creativity, new thinking, imagination and play must be constantly promoted ... this requires a greater degree of co-ordination between cultural and business policy (Ministries of Trade and Culture, Denmark, 2001).
12. These stages are used by the UK Department for Trade and Industry (DTI, 2004); however, others use agglomerating, emerging, developing, mature and transforming to note the life

- cycle of cluster development (IKED, 2004; and see www.isc.hbs.edu).
13. 'City Growth', loosely based on Porter's model, has been adopted in the UK (DTI) as a cluster-based strategy to regenerate inner urban areas in term of social and economic/employment activity (Bagwell, 2008). In London and other City Growth areas, creative clusters have been prioritised and also associated with regional creative 'hubs'. Growth and cluster models are therefore conflated in these initiatives.
 14. Standard Industrial Classification (SIC 2003); International Standard Industrial Classification of All Economic Activities (ISIC 2002); Classification of Economic Activities in the European Community (NACE 2002); General Classification of Economic Activities, Switzerland (NOGA); North American Industrial Classification System (NAICS); Australia and New Zealand Standard Industrial Classification (ANZSIC).
 15. The content industries account for 75 per cent of the gross value added (GVA) produced by the creative industries sector in the UK (TSB, 2008).

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