

From cultural quarters to creative clusters – creative spaces in the new city economy

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ABSTRACT: Attention to, and investigation of, the phenomenon of cultural and creative quarters is now widespread. From historic city centre and industrial heritage sites, alternative communities and settlements (Miles 2005) to institutional “shopping malls of culture” (Bogner 2001) and digital media and knowledge cities. No longer limited to developed old world cities and historic quarters, the perceived benefits of spatially defined cultural clusters is evident in small and medium sized towns, in fast developing countries and in city-states such as Singapore. Research and conceptual models include “scenes” (Lange 2005); economic models of agglomeration (Porter 2000) and consumption (retail, entertainment, tourism) ‘destination’ clusters; proxy indices of the “creative class” (Florida 2005), and the integration of planning of the creative city project (Landry 2000). These are discussed through the analysis of a survey of creative industry cluster strategies promoted by over 75 cities-regions worldwide, with examples of creative cluster developments and their underlying rationales.

Introduction

This chapter draws on contiguous research studies of policy and practice around the notion of cultural and creative quarters, and their economic cluster formation. In particular publications by the author on: *Cities of Quarters* (Bell & Jayne 2004); *Creative Spaces*

(Evans et al. 2005; 2009); *Branding* (2003; 2006b) and *Creative Tourism* (2006a; 2007).

The phenomenon of collective production in “Marshallian districts” has been evident from pre-industrial artist and crafts-based communities, to contemporary cultural industries quarters in “post-industrial” cities. That cultural industry quarters persist today is arguably counter-factual, given the vertical integration, then disintegration and post-fordist dispersal of production to lower cost areas nationally and globally (Krugman 1991; Harvey 1989), and the supposed placelessness of communications technology and new media practice (Castells 1996; Braczyk et al. 1999; Backlund & Sandberg 2002). But as Gottdiener (2000, 98) claims:

While the information economy progresses to an increasing degree of disembodied spacelessness, the producers of knowledge still require specific locations or spaces to work. In short, our new economy will function in this respect very much like the old one with persisting need for adequate design of the built environment.

Pratt (2000) likewise suggests that the “death of distance” is exaggerated, demonstrating in a case study of new media firms in New York’s *Silicon Alley*, that place and space are still important, as is the value of social interaction. On the other hand the place of production is still important for the experience economy, where tourism and the search for authenticity requires consumers to visit first hand. Quarters in this sense have become sites for exchange, social reproduction and commodification, but no longer confined to local community and trade.

The promotion of cultural industry quarters and workspaces by public authorities – national, local and regional, as well as transnational – has nonetheless gained momentum, not least since local production systems and public sector land-use planning are otherwise seen to be ineffective and vulnerable, by governments and economists, and by geographers and business organisational researchers alike (Simmie 2001; Borja and Castells 1997; Blackburn & Currie 1994). The conservation of listed and other heritage buildings has

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increasingly incorporated economic uses and adaptations, housing cultural and creative industry as well as residential activity. This looks beyond the touristic usage and privatisation of architectural heritage familiar in many historic quarters and heritage cities (Evans 2007). In production terms they represent an anachronistic hangover from traditional craft, cooperative and place-based manufacturing, but at the same time a renewed landscape in contemporary art, new media and advanced services production (Hutton 2000; 2008) as part of the resurgent “cities of culture”. Today, the production of art and cultural goods is decidedly “industry” (again). Workspaces in cultural quarters wear their industrial re-used buildings with pride: Powerhouse, Gasworks, Leadmill, Printworks, Perseverance Works, Foundry and the Arts Factory – are all facility names, whether or not they are actually “producing” (Evans 2003).

Cultural and Creative Clusters

Clusters in the economic sense can be seen as examples of mutual cooperation through informal and formal economies of scale, spreading risk in R&D and information sharing via socio-economic networks; but also as reactive anti-establishment action (*avant garde*, artists’ squats); and as a defensive necessity, resisting control from licensing authorities, global firms, guilds and dominant cultures – artistic and political. The economic factors that contribute to this concentration and proximity include cost-savings in the production chain, cross-trading, joint ventures (e.g. in marketing, IT, R&D, capital investment), reflected in the rediscovery of live-work facilities and the shared workspaces within former industrial zones and buildings. Lifestyle and other synergies are also emerging as pull-factors in clusters of firms in both traditional pre-industrial arts (Lacroix & Tremblay 1997, 52) and in new media services (Backland & Sandburg 2002). These processes have come together in the regeneration of former industrial districts and buildings that served old crafts production (e.g. textiles, ceramics, jewellery/metalcrafts), and which, following manufacturing decline accelerated by offshore production, are being redeveloped for new creative economy and innovation quarters (below).

The development of a high concentration of cultural workers and facilities for public consumption has also been a familiar aspect of theatre-lands and designated entertainment zones such as in the West End, London; Broadway, New York; Rio’s cinema-land, and Amsterdam’s red light district (Burtenshaw et al 1991), but this can also be seen in “non-public” cultural activity which focuses on production separate from distribution/dissemination, such as in London’s Soho (film/media and music post-production) and California’s Silicon Valley (Scott 2000). Versions of agglomeration and cultural industry quarters can be seen (or not, i.e. they are hidden but none the less active), bringing together a range of compatible elements in the particular production chain, whether audio-visual, design, crafts, visual arts or producer services based. For example the artisans villages in the Modena region of northern Italy have played an important part in the areas renaissance since the late 1970s and 1980s, through the flexible production of individual arts and crafts settlements made up of a wide variety of small manufacturers (Lane 1998, 158). These form a network in which companies are competitive with and complementary to one another, in common with small crafts producers in managed workspaces (Evans 2004). These producer zones in turn form a polycentric grid throughout the region, which has ensured their competitiveness over manufacturers (e.g. furniture, textiles, ceramic tiles) in traditional “chaotic” areas, such as in East London (Green 1999). As Scott maintains: “The cultural economy of [late] capitalism now appears to be entering a new phase marked by increasingly high levels of product differentiation and polycentric production sites” (2001,11).

Where cultural producer clusters or industrial districts are long established, their survival and development has also reflected structural changes in production techniques and technology, as well as markets and cultural development in both design and consumption/fashion. This is evident in the profile of cultural production in traditional quarters where new media have replaced print and publishing (e.g. from magazine to web site); metalcrafts and weaving has evolved into multimedia jewellery and textiles production; and painting and sculpture is supplanted by media art and time-based film and dig-

ital media installation – a shift from (hand)craft artisan to designer-maker and producer. The continuity has therefore been in the place and spaces occupied for this activity, rather than the precise forms of creative production themselves, although some residual continuity is still evident in the performing arts, metalcrafts/jewellery and specialist services such as instrument makers, costumiers – skills often passed down through the family, and which have not been so easily automated or “designer-labelled”.

Moreover, where established manufacturing activity requires updating and a more responsive mode to market and consumer demands, secondary or complementary clusters form, which are able to feed the traditional production district and filter design and innovation emanating from art schools and designers. This has occurred in New York (Rantisi 2002), London’s east end and the Nord-Pas de Calais region of France (Vervaeke & Lefebvre 2002), which support a traditional sweatshop design and manufacturing district linked to major retailers, and an inter-dependent but culturally distinct new quarter served by art and designs schools, specialist trendy boutiques and independent designers/makers. The shift in power towards major retailers and the needs of a fast changing market able to respond to fashion trends, and away from manufacturers, is thus enabled by cultural intermediaries and a number of clusters linking traditional and contemporary, and large and micro-enterprise activity. This multi-cluster system has enabled these areas to maintain their share of national production and minimise the post-Fordist fragmentation of the design, production and distribution/consumption chain.

In Nottingham’s Lace Market (East Midlands, England), this fashion and textiles-oriented quarter is embedded in a conservation and regeneration zone in close proximity to the city centre (Crewe & Beaverstock 1998), but this has become more heritage-tourism (including speciality retail) than producer-based. In New York’s Garment district, industrial premises have increasingly been turned into high-end retail shops, with loft living apartments above ground floor – a similar pattern seen in London’s historic Clerkenwell district where light industrial buildings have turned to higher (property) value residential and office use above, and expensive restaurants at

ground level. However, some larger creative workspaces in former industrial/works buildings have survived this commercial gentrification effect, fuelled by more profitable advanced producer services in design and “creative” business services, which are able to pay higher rents (e.g. £35/sq foot). These form part of a geographically wider creative production chain and are made up of Florida’s expansive creative professional class (“knowledge workers”), rather than artists/bohemians and crafts workers.

Figure 1. Clerkenwell Workshops, London. Photo: G. Evans.



Artists studios

One almost iconic type of space for cultural production is the artists/crafts-persons workspace or studio. In London, as in other cities, not-for-profit studio organisations were first established in the early 1970s, for example the ACME and Space Studios organisations which manage over 500 studios in converted industrial properties, often in marginal, urban heritage areas. These include former meat pie, cosmetics and cigarette factories. In Shoreditch, East London a former match factory, Perseverance Works hosts over 50 small firms including a bible factory, model agency and T-shirt printers. As Worpole (1991, 143) observed:

In addition to the performance-based arts, small-scale workshop production is back on the agenda again both in handicrafts and hi-tech cultural forms such as video animation, computer graphics, electronic music, desk-top publishing.

This long established mode of production has been a growing feature of post-industrial urban development, but one that has attempted to mediate within a largely inhospitable property and entrenched land-use separation and use-value system (Jencks 1996). Some cities have however retained stronger provision and protection for artist workspaces (notably Paris and Munich, Evans 2001), whilst others have developed planning policies which support and recognise the integration of uses, every day living and the cross-trading/production possibilities and attraction for discerning consumers and visitors (e.g. Toronto’s Distillery District). The attraction and availability, albeit transitory, of former industrial buildings also coincided with the shift to large-scale work by contemporary artists. In SoHo, Manhattan lofts averaged 2,500 square feet: “The large windows of cast-iron construction flooded each floor with natural light. Freight elevators provided useful access. Rents were affordable. A perfect prescription for artists. The transformation of SoHo had begun” (Grantz & Mintz 1998, 297). However the Loft Living phenomenon soon turned to a property development panacea, in some respects a re-run of earlier artist quarters. As Wilson (2002) points out in her assessment of the

mythical Bohemian phenomenon in 1920–30s Paris, commodification, gentrification and ultimately heritage tourism succeeded these alternative spaces of cultural exchange and resistance (Miles 2005).

Quarters where cultural activity and intense production congregates therefore draw on differing rationales which have been on the one hand prescriptive, and on the other opportunistic (and sometimes oppositional). The influence of key individuals, whether entrepreneurs, family businesses or artists, is often required to first create and then sustain local networks and facilities, as in the case of artist and designer studio organisations and larger community arts organisations.

The economic, social and cultural rationales for cultural quarters typically located in historic or designated heritage districts, and the newly identified creative (industry) hubs, present quite different responses to the opportunity of clustering, as Table 1 summarises.

Rationales	Cultural Quarter	Creative Industry Quarter
Economic	Local economic development Visitor economy Branding (Evans 2003, 2006b) Zoning Culture and regeneration	City-region economic development Knowledge economy Creative tourism (Richards & Wilson 2007) Production chain Innovation spillovers
Social	Identity Mono-Use Ethnic quarter	Mixed-use and –tenure (Evans & Foord 2009) Diversity (Evans & Foord 2006) Urban design quality
Cultural	Historic preservation Conservation, crafts (skills) Festivals Cultural City	Creativity Design and architecture Showcasing / trade fairs (Evans 2007) Creative City

Table 1. Rationales for Cultural and Creative Industry Quarters.

These rationales are not however necessarily exclusive (although they can also directly conflict with one another), despite their seeming oppositional roots, and some policy initiatives have looked to capturing all of these in conflating social and economic regeneration and environmental improvement through culture (Evans & Foord 2002) – a tall order (Evans 2005). This is seen in government promotion of local cultural strategies and the power of the arts in addressing factors which lead to social exclusion. Particularly in areas of high unemployment, poor health and housing, these areas are often congruent

with ethnic minority and new immigrant communities, as well as entrenched older working class communities whose core employment base has disappeared (docks, manufacturing, printing, mining) and whose skill base finds little value in the new service economy.

Whilst creative clusters located in former industrial districts can co-locate with heritage buildings and sites, this can involve both their replacement with modern buildings and facilities (Poblenou, Barcelona; Fashion City, Ticenes, Milan), or the adaptation of historic buildings with modern extensions and radical internal rebuilding whilst retaining external facades (e.g. El Born, Barcelona, Urban Splash apartments, Manchester and Morecambe). A typology of cultural/creative industry quarters therefore helps in distinguishing their organisational structure and effects, and where spatial clustering of cultural activity encompasses the following production chains. Examples of the linkages – innovation and spatial – between these forms include examples of cultural production supporting performing and broadcast arts in proximity to theatres and studios; retail activity linked to wholesalers, studios and exhibition venues as extensions of production workshops (e.g. furniture, fashion, crafts); and festival marketplaces combining live events, retail and exhibitions.

1. Mono-Cultural Industry Production – vertical dis/integration, e.g. TV/film & music post-production and studios, new media, textiles, ceramics
2. Plural-Cultural Industry Production – horizontal integration, e.g. managed workspaces, visual arts, architecture and design, multimedia, crafts/designer-making, performing arts, arts/resource centres
3. Cultural Production-Consumption – open studios, art markets, e.g. Spitalfields, Whitechapel, E.London), events/festivals (e.g. festival marketplace waterfronts – Baltimore, Barcelona, Toronto, Temple Bar Dublin, Bankside London
4. Cultural Consumption – retail (fashion, computing/electronics), street markets (antique, crafts, food); arts & entertainment venues and quarters, e.g. museum islands, theatre and cinema lands, red light districts, restaurants/clubs/bars.

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Canada

Contemporary examples in Canada include the *Cité Multimedia* in Montreal's redeveloping industrial waterfront district, and the Liberty Hall complex in Toronto. In the King-Liberty area, a liberal approach to change of use was combined with restoration of building facades. Following the closure of former factories and warehouses, the area provided a natural incubator for small enterprises initiated by artists and designers. Low-rent premises were adapted for studios and workshops, including live-work accommodation, sometimes in contravention of planning controls. By the early 1990s, however, there was a significant policy shift away from the presumption that industry and housing were incompatible in close proximity. Rigid zoning for industrial use in the City Plan proved a structural constraint for the emerging strategies for regeneration.

As in the USA and Europe, the recycling of brown-field sites and deliberate creation of mixed land use neighbourhoods on the fringe of downtown, especially those incorporating cultural industries, came to be seen as desirable aims of planning intervention. Flexible leases combined with easy accommodation of physical expansion enabled some to prosper within an artistic community – both resident and mobile. New media industries moved into this area, serviced by bistro-style bars and restaurants, employment increased by over 10%. By 2001 new build condominium apartments in *Liberty Village* had become sought after. The lifestyle advantages of King-Liberty were being promoted strongly by real estate agencies, with strap-lines aimed at passing longer-distance commuters such as: "If you lived here, you'd be home by now!", with parallels to Denver, Colorado's *lo-do* area: "Kiss the 'Burbs G'Bye!".

In Montreal a different approach to the development of creative industries quarters is being pursued. The city-region had been a prime manufacturer in textiles and related production, but as this declined, Montreal had not developed a specific design capability (unlike say Northern Italy and Scandinavia) which could switch to other forms of creative industry, e.g. new media, designer-making fashion and textiles. The refurbishment of former industrial premises in downtown/heritage districts and waterside areas is therefore being

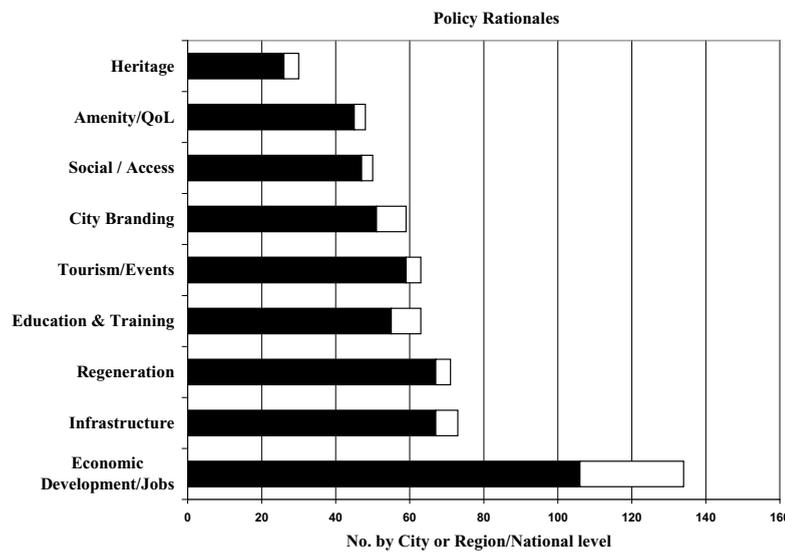
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supplemented with new build premises to house multimedia firms in order to capture this growing activity, as many other post-industrial cities have done. Grants for firms linked to employment encourages growth over a ten year period, but the rentals and lease/purchase costs are at commercial rates. Labour and skills are being supported, rather than premises which has been the model elsewhere (e.g. managed workspaces, subsidised rents/flexible lease terms). The logic in Montreal is that if the firm is successful in developing a service or product which will be competitively financed due to subsidised labour costs, income/profits will be sufficient to pay higher rents and over time increase to attain self-sufficiency once employment subsidies ends.

Creative spaces – policy survey

From our survey (for methodology and framework, see Evans et al. 2005, Evans 2009), policy rationales tended to cover more than one of the following categories (Figure 2), but the dominant objective behind most interventions at city and other scales (e.g. region, na-

Figure 2. Creative Spaces Policy rationales (n=230). Source: G. Evans.



tional) was Economic Development/Employment, followed by Infrastructure, Regeneration, Education & Training, including ‘talent generation’ and support.

Heritage was the least cited rationale for policy formulation, however prime creative quarters and developments were often located in current or former industrial or other urban heritage locations. The heritage element and impacts were therefore not explicit, nor primarily heritage-preservation in intent. In some cases heritage was a benign backdrop based on regeneration and redundant site/buildings and therefore lower land values. In others, heritage added symbolic cultural value, but increasingly heritage sites are being destroyed altogether by new development, in order to house new creative and media ‘cities’ and campuses. This was not limited to buildings, landscape and other ‘monuments’, but also residual communities displaced by property redevelopment, gentrification and crowding out by a mismatch between skills/employment in the old and new industries.

Exception to this understatement of heritage as a creative city policy priority, is apparent in emerging and developing countries and regions. This included a number of East European nation states and cities undergoing post-conflict reconstruction. Here heritage sites were central to identity and national/ethnic cultural rebuilding, both as symbolic cultural icons and also as part of cultural tourism and quarter projects.

In developing country regions in Asia, South America and Caribbean, as well as in some provincial states in the USA, e.g. mid-West, heritage was also a core issue in cultural industries policy. In some respects this represented a rejection of Florida’s creative class (exogenous growth) as opposed to endogenous growth and indigenous cultural development and assets. Celebrating and protecting national and regional culture from the threats of globalisation, free trade and the mechanisms of IPR/copyright, were also evident in lesser developed countries. This was often under the guidance of international agencies such as UNESCO, UNCTAD, who have adopted and promoted the creative industries as a growth sector and development tool, but one that needed to be embedded in local culture, rather than westernised, imported cultural products and value systems.



Figure 3.
Poblenou, before
and after @ Media,
Barcelona.

Photos: 1 & 2. G. Evans;
 3. Lorenz in Evans 2006b.

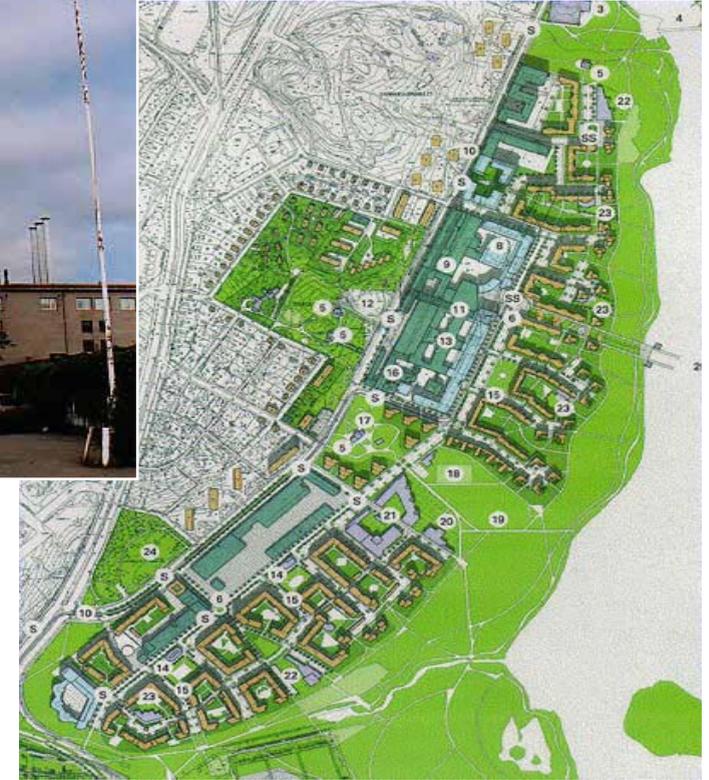


Figure 4.
Arabianranta,
"Helsinki Virtual
Village"

Photos: 1. G. Evans;
 2 & 3. City of Helsinki.

Several city-regional strategies focus on a particular creative sector which is deemed to be clustering (games software and digital media, e.g. Scottish Enterprise), with creative clusters closely associated with particular industries (film/TV, jewellery, fashion, digital media – London, Paris, New York, Dublin) or with the assembly of cultural premises (cultural industry quarters – Sheffield, Amsterdam, Helsinki, Glasgow) or a mixture of the two (Creative Hubs – London). Such cluster-led creative strategies are clearly seeking to address the question of scope (i.e. sub-sectors and clusters, inter-relationships and growth potential) and to develop measurement and promotional tools in order to achieve goals of intervention – both economic and socio-cultural.

There also is a widespread view that creative clusters are a key contributor to a knowledge-based (creative) economy. Creative clusters cut across many different economic sectors and this has been identified as both a strength and weakness – a strength because it implies new inter-sectoral connections and potential innovations; a weakness because lack of coherence makes it difficult to focus policy or measure economic value. However many creative clusters are de facto *cultural quarters* (not economic clusters in the Porter sense) with assorted cultural consumption, heritage preservation and the presence of not-for-profit and public sector organisations. In addition, the organisation of creative and cultural businesses is atypical (lifestyle-based, resistant to traditional growth and profit generation) and so require sophisticated methodologies for capturing cluster-based benefits and innovation, which may include non-traded externalities such as heritage protection and cultural development.

Campus-based extensions and new science and media parks present examples of higher education institutions engaging with the regeneration of industrial quarters, with the creative industry, design or media lab the prime vehicle. Examples include QUT, Brisbane creative precinct and wider south bank regeneration; Pobra Fabra (University of Arts & Design) consolidating its six campuses into one mega-development in Barcelona's Poblenou industrial zone (Fig.3), Humboldt University and Eagle Yard/Adlershof science & media park and village in former east Berlin, Simon Fraser University

media campus in Downtown Eastside, Vancouver, and Helsinki University of Art & Design, Cable Factory and Arabianranta “virtual urban village” (Fig.4), adjoining the manufacturing district (Arabia ceramics factory).

Spaces for consumption, including those that are consumption-production based (such as showcasing, fairs, cultural quarters – e.g. Milan, Barcelona) also become prime strategies to capture inward investment and spending. Where structural change occurs (political, technological) such as in transitional and restructuring cities, opportunities arise for new infrastructure and innovation (e.g. Berlin's high-speed bandwidth cabling and international creative milieu, post-1989) and low cost entry conditions (e.g. land, labour) – but this dynamic state is unlikely to be sustained. Cities such as Singapore have moved from low-cost producer (e.g. clothing, semi-conductors), to a knowledge-based, highly skilled/educated, and (more) open society. This includes a growing visitor economy based on heritage (e.g. shop-houses), arts and entertainment flagships, and on investment in higher education and digital media facilities. Intervention has been highly instrumental, from the centre, but targeting key industrial sectors, international operators (e.g. Lucas Films), partners (e.g. universities) and regional tourism markets. In Singapore, as in other regenerating cities using creative cluster policies, new entertainment districts and facilities (e.g. Esplanade on the Bay), are co-located or co-terminus with existing heritage and cultural districts (Chang 2000).

Themes that also emerged from this study include the scale and maturity of the cluster; the depth of interconnections between enterprise, education and research and development hubs; and the degree of public-private sector cooperation in creative industry strategies and other related policy instruments. Collaboration between creative industries is increasingly important, but collaboration also between the creative industries and other sectors.

Clusters of different scales

The scale of a cluster is said to relate to the distance over which information, transactions, incentives and other interactions occur (Porter 2000). The scale of creative cluster operation, synergy and markets

are increasingly important in securing growth. Creative city and industry strategies encompass, or at least aspire to address, all scales – from Transnational, National, Regional, City/Region and Local/Neighbourhood. However, from closer inspection of city-regional policies in this area, many focus on quarter or site based developments and clusters, albeit within a city-wide framework or network (e.g. hub and spoke, polycentric clusters, retail trails/tours). This includes the prospects for growth and transferability (model/exemplar) to other areas and cities, but also the flexible specialisation that such concentration of symbolic and economic capital is felt to offer. This is reflected in the privileged position that such growth clusters occupy in policy and investment programmes, and in their use as brands and images in city promotion.

The stage in the cycle of cluster development is one way of evaluating the strength and robustness in responding to growth and change. Creative industries clusters are found to be embryonic in many conventional business cluster evaluations. However, it is evident here that creative quarters are not conventional business clusters and additional factors are critical to their development and form. In particular the intersection of production-consumption-policy intervention has shaped creative cluster development. Four levels of development for the creative sector can be identified as follows (Table 2).

Where the cluster strategy operates within a more liberal, entrepreneurial regime (e.g. in terms of planning regulation for land-use/premises) at the local level, attempts have been made to identify specific activities with a critical mass of activity, e.g. visual artists (New York), designer-makers (Lace Market, Nottingham), music (Tilburg, Netherlands) and to devise appropriate interventions to support or develop a creative cluster. This has been particularly important for the cultural industries within or emerging from the subsidised arts. These local clusters have been identified either through practitioner advocacy or policy intervention. They can also arise around venue and building-based projects, e.g. museum quarters in Vienna and Utrecht, and workspaces, such as the Chocolate Factory, north London.

Stage of Evolution	Definitions
1. Dependent	Creative enterprises developed as a direct result of public sector intervention through business support, infrastructure development for cultural consumption and finance to SME and micro creative enterprises. Public subsidy required to sustain the cluster. Limited and under-developed local markets.
<i>Examples</i>	UK creative industry quarters, e.g. Sheffield CIQ, arts venues St Petersburg Creative Industries Development Centre; regional film centres (FIW, Filmpool Nord, Film I Skane) – Sweden Digital Media City, Seoul; Tokyo's multimedia, video games and IT sectors; Taipei creative industries development Developing country regions – Pacific Asia, S.America; European (ERDF/ESF) programmes
2. Aspirational	Some independent creative enterprises and/or privatised former public sector cultural enterprises in place but limited in scale and scope. Underdeveloped local markets and limited consumption infrastructure. High levels of public and institutional boosterist promotional activity.
<i>Examples</i>	Creative Precinct, Brisbane; The Digital Hub, MediaLab – Dublin Mixed cultural industries – <i>Westergasfabriek</i> , Amsterdam; popular music – The Veemarktkwartier, Tilburg; Media cluster – Leipzig Digital media – Singapore West Kowloon Cultural Centre Development – Hong Kong Creative Gateway, King's Cross; and City Fringe – London
3. Emergent	Initiated by growing number and scale of creative enterprises with infrastructural investment from the public sector. Developing local and regional markets. Visible cultural consumption, internationalisation of market reach
<i>Examples</i>	Product design, architecture, digital media – Barcelona Film/TV – Glasgow
4. Mature	Led by established large scale creative enterprises in specific industries with established subcontracting linkages and highly developed national and international markets. Business to business consumption. Arms length public intervention.
<i>Examples</i>	Film/TV – Los Angeles Fashion and furniture design/production – Milan; fashion – New York

Table 2. Stage of Creative Cluster Development.

Examples of city policy promotion at the neighbourhood and cultural district scale include:

- Designer makers – Hackney, East London; La Defense Cedex, Paris
- High-tech, multimedia and design – Republique Innovation, Paris
- Heritage district/former craft production – Museumquarter, Vienna; Clerkenwell and Spitalfields, City Fringe London; Jewellery Quarter, Birmingham; Lace Market, Nottingham
- Fashion – Tricinese quarter, Milan
- Cultural attractions/museum quarters – South Bank, London; Centenary Square, Birmingham
- Mixed cultural industries – Westergasfabriek, Amsterdam
- Popular music – The Veemarktkwartier, Tilburg
- Performing arts – Theatre Quarter, Utrecht
- Multimedia and design – Art and Design City, Arabianranta, Helsinki
- Cultural industries, designer makers, fine artists – Kaapelitehdas/Cable Factory Helsinki
- Multimedia – The Digital Hub, Dublin
- Integrated creative/cultural production districts – CIQ, Sheffield; City Fringe, London; and planned: Poblenu @22 MediaCity, Barcelona and MediaCity, Salford, UK

Such interventions have resulted in the formalising of group identities and networks of business support, showcasing and marketing – such as designer-makers, *Hidden Art*, East London/Open Studios; Ateliers d'Art de France, Paris – and identities of shared place based on the assembly of premises and facilities, for example visual arts and designers in Glasgow's Merchant City.

Issues

From this evidence, a number of recurrent issues have emerged from the creative spaces-industries-city nexus. The range of approaches to creative industries and creative spaces, raises a number of questions.

These are summarised here and need to be considered in future policy development and evaluation, not least since fast policy transfer (Peck 2005) is now the *de rigiste* approach in this field.

Creative and 'Non-Creative' enterprises and occupations – does it matter?

Much creative enterprise and creative city policy makes an implicit distinction between creative and non-creative activity. Making a special case for creative industries may overlook the potential of innovative linkages between 'non-creative' economic sectors and creative activity – evidence suggests that links with and clusters near to ICT, biotech, health/medical, manufacturing and tourism can enhance growth – all industry is (potentially) 'design-led'.

The creative economy is rapidly becoming a proxy for the knowledge society economy, making it hard to distinguish creative process, inputs and policy interventions. There is also a risk of overstating the impact of the creative industries' contribution to wider economic processes and the domination of digital technology in creative content and applications. This also has implications for employment, training/skills, and enabling innovation and funding mechanisms.

Competitive advantage – serial replication of digital media and Creative City strategies – are they all sustainable?

Creative cluster and enterprise strategies are beginning to be replicated, especially those linked to the content and production associated with digital media – from Dundee to Durban; Seoul to Singapore. It is often assumed that the advanced economies of the North will continue to develop their specialised role in the Knowledge Economy while low cost production/manufacturing is lost to developing and transitional economies of the South. However there is much evidence of investment in skills development, higher education, research and development, and in the knowledge sectors in these countries (e.g. India, China, S.E.Asia).

There is therefore a risk of complacency over the reliance on comparative advantage strategies (e.g. in Europe, North America). This also reveals the need for shared awareness of global competition –

and a need to build on competitive advantage based on distinction/ niche markets and a diversity of creative clusters, the links between ideas/design and manufacturing, as well as the diverse histories/heritage of cosmopolitan cities.

How can the impact of gentrification on sustainable creative spaces be mitigated?

The role of culture and creative industry-led renewal and regeneration, in raising property values and rents, attracting cultural consumption and promoting city living, is clearly evident whilst gentrification arguably underlies the creative class agenda and at worst, exacerbates social and racial divides (Nathan 2005; Montgomery 2005; Peck 2005).

Gentrification and property-led regeneration are a universal phenomenon and criticism of much culture-led regeneration (Evans 2005). At the same time, the new economy is also creating new social divisions with lower skilled, poorly paid service workers providing the labour for many of the non-creative jobs that service the creative sector. Claims for the distributive effects of creative strategies (social, economic and physical) generally lack evidence of impacts and benefits. Examples of good practice in this regard are rare and therefore need greater attention and nurturing. Campus based regeneration projects (above) also risk displacement and a failure to engage with disadvantaged communities who are subject to radical restructuring of the landscape and local economies. Universities in this sense are the “stormtroopers of gentrification” and risk creating exclusionary, mono-use spaces, disconnected from the communities in which they are located (e.g. MIT and Harvard, Stanford/Silicon Valley, and underway in Barcelona, Milan and London King’s Cross).

How can the establishment of small to large firms and institutions within creative industries quarters be facilitated? How can the innovative connections between micro and larger firms and public institutions be brokered?

The atypical structure of creative industries sectors, with a very few large enterprises and a large number of SME and micro enterprises:

52 90%+ of all firms in Europe, raises questions about the sustainability

of intervention policies and, in particular, cluster policy. Large firms and public institutions embed and solidify cluster development providing business and opportunities for micro firms.

Without established and networked larger firms, clusters are likely to remain underdeveloped and fragile. It is often the relationship between large firms and smaller enterprises that produces innovation (NESTA 2006). At the same time, institutional finance is not geared towards the micro-enterprise or cluster and the distribution of risk and value chains operating within the creative industries. The scenario is one of a high level of public funding dependency (national, EU), – particularly of intermediary support agencies – but of an ostensibly growth sector!

Is the Higher Education (HE) sector sufficiently understood and recognised for its roles in R&D and talent generation?

There is a growing recognition that the Higher Education (HE) sector is an important agent for developing creative skills and fostering talent. There are increasing examples of some major campus and other HE developments linked to R&D/digital media and innovation & technology development. However there seems to be little understanding of how HE and the creative sectors can work together.

There is student growth (especially in arts & design, overseas student markets) producing cases of over supply of graduates in some places (e.g. Barcelona); and little understanding of the skills and R&D needs of creative firms and practitioners. Course development, content and quality are not always consonant with industry and end-user needs (e.g. product design). The role that HE plays in facilitating talent and enterprise development needs to be addressed, as are the transparency of R&D funds, financing, venture capital and ownership/IPR emerging through joint ventures.

Public – Private relationships/models. What works and what doesn’t?

Many creative policy and strategy statements advocate public-private partnership. However, there is little detailed evidence of how these partnerships operate and under what conditions. Private-public co-operation is a cornerstone of cultural policy and creative clus-

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ter strategies. The changing balance of public and private partners emerges in cultural policy and IPR debates and is a contested area in many transitional economies.

Evidence of governance and regulatory frameworks is needed for comparison and transfer of best practice. This particularly concerns HE R&D, venture and other capital investment and delivery structures around enterprise support, workspace and property development. The involvement of artists and creative industry firms, large and small, in policy development, governance and economic development programmes also requires working models of good practice since this element is often absent in the more dependent/emerging creative clusters.

Conclusions

The cultural industry quarter models now promoted as key elements of urban regeneration and place-making strategies in cities worldwide, tend to neglect both the historic precedents and the symbolic importance and value of place and space. The conflation of commodification and globalisation processes, manifested in fast policy interventions (Peck 2005) and ubiquitous case study analyses, flatten what are diverse histories and political economies in the vernacular of cultural spaces.

Where they locate and draw on a manifest authenticity and inheritance of former cultural activity and production – whether symbolic or economic through a residual labour market, higher education hubs, specialist skills and locational advantages – a more sustainable model can result. This includes better integration with adjoining areas and neighbourhoods and land uses, and a greater sense of ownership of quarters by stakeholders. Use of the quarter as a prescriptive divide-and-separate tool by urban designers and planners is likely to produce resistance and rejection, and risk producing ghettoisation or sterile heritage zones. Mixed use (Evans & Foord 2009), incorporating a diversity of social, economic and flexible building uses – when environmentally well-managed and well-designed – presents a workable model of living quarters, rather than museumified quarters. These are also more able to adapt to cultural production and

workplace changes, as well as social changes (e.g. demographic, cultural, family size etc.).

How cultural industry quarters have evolved and survived in differing political and cultural regimes can however offer clues to how and if they may be developed in the future (and more importantly, how existing ones may be supported). Issues of sustainability – with culture claimed to be its “fourth pillar” (Hawkes 2001) – are evident in terms of how the new economy and commodification of these spaces impacts on traditional cultural quarters and heritage, and how old industrial production quarters have been transformed from heritage sites to post-industrial creative quarters.

Planning and zoning approaches, including heritage-based protection also bypass or under-value economic and cultural inter-action, focusing on the built environment and fabric, but ignoring what goes on inside and between occupants and their constituencies, which include social, educational and cultural and trade networks and “users” (Lefebvre 1974). These are often hidden, existing in memory, as well as in the finer grain of cultural exchange, whether through the production chain, or through informal networks and synergies that produce the creative clusters in the first place. Without these externalities, clusters are little more than an arbitrary concentration of economic activity or heritage legacy, with little value added or comparative advantage to ensure a viable local production system, let alone opportunities for innovation and wider impacts.

As well as a focus on the micro-spatial scale incorporating the anthropological and the architectural structures, images and identities which underlie clusters (Kockel 2003), the relationships between production quarters and other economic flows within the city and beyond – between the micro, meso and global production chain that now operates – will need to be explored if clustering is to retain much *cultural* value and distinctiveness. As Knox (1996, 117) put it:

We need detailed biographies of cities that set local change in global context ... to examine the significance of particular cities as sites for the construction of new cultural identities and political discourses and new processes of political and cultural transformation.

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