Untangling media clusters: Towards a new typology
The research question

Governments push more and more at a regional and local level the development of the media industry --- they use the concept of MEDIA CLUSTERS

But in academia many fundamental questions about the phenomenon are not answered yet:

How can different media clusters be classified to make media cluster research more comparative?

Paris ≠ Silicon Valley
Hollywood ≠ Nashville
Soho (London) ≠ Berlin
Bollywood ≠ Salford

• Abundance of case studies
• Suppositions in the field
• Ignoring convergence and digitalization
Research background and context

The methodology

More than 40 existing case studies from literature (and existing typologies)

Cross-case analysis

Recognizing of patterns

- Rich and valuable insights
- 7 P framework
- FACTORS that drive, characterize and are shared

NOVEL TYPOLOGY
## The methodology

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<table>
<thead>
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<tbody>
<tr>
<td>1. Place</td>
<td>the geographical scale and local conditions influencing the media cluster’s dynamics.</td>
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<td>2. Proximity</td>
<td>the topographical and topological nearness influencing the media cluster’s dynamics.</td>
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<td>3. Population</td>
<td>the scale of the cluster in quantity of entities and concentration / relevance for the place linked to the development phase of the cluster.</td>
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<td>4. Profile</td>
<td>the type of entities and their functions within a cluster.</td>
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<td>5. Path-dependency</td>
<td>the historic ligation, the origins and historically developed patterns influencing the dynamics of the cluster.</td>
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<td>6. Policy</td>
<td>the media policy tools from all levels influencing the media cluster’s dynamics.</td>
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<td>7. Performance</td>
<td>the endogenous and exogenous externalities that media clusters produce.</td>
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The novel typology

1. **Creative Region Model**

Characterizing factors:

1. **Large geographic area** (metropolitan region and capital region)
2. Density of agglomeration in specific parts of city, from there to the periphery
   - Infrastructure and institutions
   - **Urban milieu** (like libraries, cultural venues, bars and cafés)
3. > 10,000 media firms / x 5 as many people working in media (cluster-sizes = size of the city)
4. **Very broad profile** (from publishing, advertising, AV, new media, ICT, arts, creative activities, etc.)
5. Policy is not determining factor
6. Historically strong industrial locations that shifted towards the service sector
7. Performance results have been heterogeneous

Case studies:
- Amsterdam (Musterd & Deurloo, 2006)
- Singapore (Eriksson, 2011a)
- Berlin (Krätke, 2004)
2. Attracting Hub (Giant in the middle)

Characterizing factors:

1. **Focal point** (major institution, e.g. public broadcaster), medium-sized cities with strategic location

2. Often highest concentration of certain activities in whole country
   - Dependent network that is vertically integrated and relies on resources in cluster

3. > 200 (around 500) media firms / 10,000 people working in media (cluster-sizes = specialization)

4. **Strong specialization** (e.g. broadcasting, TV and film, others)

5. Highly influenced by **politics**

6. Strong lock-in effects at their location

7. Efficiency, cost reduction, specialized supply firms, local expertise
The novel typology

3. Specialized Centre

Characterizing factors:

1. **Small districts and large cities** (stretching to surroundings)
2. Often highest concentration of certain activities in whole country
   - Infrastructure and institutions
   - **Urban milieu** (like libraries, cultural venues, bars and cafés)
3. 50-500 plus media firms / x 5 as many people working in media (cluster-sizes = specialization)
4. **Strong specialization** (**entire value chain and additional institutions**)
5. Policy influences through institutions
6. Historically cheap areas (warehouses, manufacturing then bohemians)
7. Supply network and available expertise

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Case studies:
- Soho, London (Nachum & Keeble, 2003)
- Saint Pauli, Hamburg (Plum & Hassink’s 2014)
- Toronto (Britton and Legare 2005)

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C.F. 1. CREATIVE REGION MODEL
The novel typology

4. Studio Complex (Attracting Facilities)

Characterizing factors:

1. **Movie studios** and surroundings (normally close to big city / offers technical and hardware equipment)
2. Strong concentration and communication networks
3. 100-300 plus media firms / x 10 as many people working in media
4. Strong specialization (entire value chain: post-, pre production, distribution, studios)
5. **Strong political influence** (location-dependent funding, public institutions)
6. Strong lock-in
7. Supply network and available expertise

Case studies:
- Potsdam (Krätke, 2002)
- Trollhättan (Achtenhagen, 2011)
- Pinewood/Shepperton (Goldsmith & O’Regan, 2003)
The novel typology

5. Media Park

Characterizing factors:

1. **Building(s)** (10,000 – 100,000 plus m2) in small or big city
2. High density with many firms and many people (networking opportunities, events)
3. 100-2000 media firms
4. Can be specialized but must not be

5. **Strong political influence** (financing, instalment, public institutions)

6. Indifferent path-dependency

7. Performance results have been heterogeneous

Case studies:
- Dubai Media City (Picard & Barkho, 2011)
- Media Park Hilversum (Hitters, 2011)
- Dublin’s Digital Hub (Vang, 2007)
The novel typology

6. Incubator / Lab

Characterizing factors:

1. **Common office or building** (1,000 – 6,000 plus m2 with facilities) in small or big city
2. High density (networking opportunities, events)
3. 30-100 plus media firms
4. Can be specialized but must not be

5. **Strong political influence** (financing, instalment, connections to big enterprises or universities)
6. Indifferent path-dependency
7. Performance results have been heterogeneous

Case studies:
- TBC
The novel typology

7. Cluster Initiative

Characterizing factors:

1. Whole regions, cities or countries
2. Proximity dependent on scope (Consultation, collaboration with industry representatives)
3. Population can be very different
4. Can be specialized but must not be
5. Strong political influence (financing, instalment, public institutions)
6. Indifferent path-dependency
7. Performance results have been heterogeneous

Case studies:
- Scottish Enterprise (Sövell, Lindqvist & Ketels, 2003)
Factors of commonality:
(Factors that have been found in every case and deemed as very important in literature)

1. Geographical scale
   e.g. Dubai Media City vs. Northwest of England

2. Specialization grade
   E.g. Nashville vs. London
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Drivers:
- Urbanization economies
- Talen attraction
- Network with big enterprise
- Infrastructure
- Direct support
- Office space

Overlap:
e.g. Hilversum as
1. Attracting Hub
2. Media Park
3. Incubator
4. Specialized Centre
Conclusion

Discussion and Future prospects

- **Typology enables:**
  - More in-depth analysis methods for identifying clusters (going beyond location concentration measures)
  - Comparative analysis in the research field (going beyond mere suppositions in the field)
  - Political guidance and research guidance (Knowing your cluster type and its drivers and find best practices)

**Limitation:**
- Many case studies focus on AV
- Epistemological foundations of authors

What about Print Clusters?
Smaller cities often neglected in research?

More research and testing needed in the future!
Thank you very much for your attention!

Any questions?

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