Media Clusters: A Typology for a New Research Discourse
Research Background

Researcher at imec-SMIT-Vrije Universiteit Brussels (Studies on Media, Innovation and Technology)

Since beginning of 2015 - PhD candidate in Communication Science at the Faculty of Economic and Social Sciences @ VUB

Research project: Media Clusters Brussels

A collaborative research project of the three leading universities in Brussels, VUB, ULB and USL-B funded by Innoviris (city of Brussels) and in collaboration with the Agence de Développement Territorial and Société d'Aménagement Urbain (4 year project, till end of 2018).
Firms become:  
- Globalized  
- Digitally networked  
- Autonomous  

Firms operate without borders and location doesn’t matter!

The conceptual idea of cluster research contradicts as the idea puts effort on the importance of location  

Especially for media clusters

Research Context

Real-life examples of media clusters:
"agglomeration of media activities"

Hollywood - world-wide leading film cluster (produce 80% of world cinema’s box office)
Silicon Valley - High-tech cluster (thousand of start-ups, google, netflix, facebook, etc.)
Soho (London) - AV creative cluster (post- and pre-production of AV content, agencies, etc.)

Trends:

1. REGIONAL GOVERNMENTS trying to replicate the success in their own regions.
2. Research interest emerged from different disciplines.
Literature Review

• 1920: ‘Industrial districts’ (Marshall 1920)
• 1970s: ‘New industrial districts’ (Becattini 1990; Sabel & Piore 1984)
• 1990s: ‘Clustering’ and competitive advantage of nations (Porter 1990)
• Other scholars: Eriksson (2009), Krugman (1991), Tallmann et al. (2004), etc.

• 1865: ‘Creative and innovative milieu’ GREMI (Hall 2000)
• 2002: ‘Creative class’ (Florida 2002)
• Today: ‘Media clusters’ (Picard 2008)
• Other scholars: Krätke (2003), Mould (2014), Perrons (2004), Boix, et al. (2012), etc.
The MEDIA CLUSTER concept is:

1. vague
2. divergent
3. multidisciplinary
4. lots of case study research

**WORDING:**


**SCIENTIFIC FIELDS:**

economic geography, strategic management, political economics, urban studies, sociology, organisational behaviour studies, communication studies, sociology, etc.

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

*Martin & Sunley (2003: 19): ‘There is no agreed method for identifying and mapping clusters, […]’*
The research

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

More than 50 existing case studies
Coding for cross-case analysis
Recognizing of patterns

- Rich and valuable insights
- 7 parameters
- FACTORS that drive and characterize

NOVEL TYPOLOGY
The research

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<table>
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<tbody>
<tr>
<td><strong>1. Place</strong></td>
<td>...the geographical scale and local conditions influencing the media cluster's dynamics.</td>
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<tr>
<td><strong>2. Proximity</strong></td>
<td>...the topographical and topological nearness influencing the media cluster's dynamics.</td>
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<td><strong>3. Population</strong></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><strong>4. Profile</strong></td>
<td>...the type of entities and their functions within a cluster.</td>
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<td><strong>5. Path-dependency</strong></td>
<td>...the historic ligation, the origins and historically developed patterns influencing the dynamics of the cluster.</td>
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<td><strong>6. Policy</strong></td>
<td>...the media policy tools from all levels influencing the media cluster's dynamics.</td>
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<td><strong>7. Performance</strong></td>
<td>...the endogenous and exogenous externalities that media clusters produce.</td>
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1. Creative Region

- **Large geographic area** (metropolitan region and capital region)
- 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)
- > 10,000 media firms / x 5 as many people working in media (cluster-sizes = size of the city)
- **Very broad focus** (from publishing, advertising, AV, new media, ICT, creative activities, etc.)

Case studies:
- Amsterdam (Musterd & Deurloo, 2006)
- Singapore (Eriksson, 2011a)
- Berlin (Krätke, 2004)
2. Giant Anchor

- **Focal point** (major institution, e.g. public broadcaster), medium-sized
- Often highest concentration of certain activities in whole country
  - Dependent network that is vertically integrated and relies on resources in cluster
- > 100 media firms / 10,000 people working in media (cluster-sizes = specialization)
- **Strong specialization** (e.g. broadcasting, TV and film, others)
- Efficiency, cost reduction, specialized supply firms, local expertise

Case studies:
- Hilversum (Hitters 2011)
- Manchester and Liverpool (Cook & Johns 2011)
- Leipzig (Bathelt & Boogs 2003)
3. Specialized Area

• **Neighbourhood of metropolitan city or small urbanized area** (stretching to surroundings)
• Often highest concentration of certain activities in whole country
  • Infrastructure and institutions
• **Urban milieu** (like libraries, cultural venues, bars and cafés)
• 10-10,000 media firms / x 5 as many people working in media (cluster-sizes = specialization)
• **Strong specialization** (entire value chain and additional institutions)
• Pooling of skills, knowledge, networks, etc.

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

- Heterogeneous locations
- Strong concentration and communication networks, accessibility to support services, infrastructure, etc. (example movie studios)
- 100-300 plus media firms / x 10 as many people working in media
- Strong specialization

- Strong political influence (location-dependent funding, public institutions)

- Supply network and available expertise
5. Real Estate

- **Building(s) or office space** (10 – 100,000 plus m²) in small or big city
- High density with many firms and many people (networking opportunities, events)
- 10-2000 media firms
- **Strong political influence** (financing, instalment, public institutions)
- Accessibility to services, facilities and networks
- Management

Case studies:
- Dubai Media City (Picard & Barkho, 2011)
- Media Park Hilversum (Hitters, 2011)
- Dublin’s Digital Hub (Vang, 2007)
6. Pooling Initiative

- **Any geographical scale**
- Accessibility to networking and collaboration, services, etc.
- 10 - several 100 media firms
- **Strong political influence** (financing, instalment, public institutions)
- Policy funding and management influence

Case studies:
- Scottish Enterprise (Sövell, Lindqvist & Ketels, 2003)
The typology

Common factor: Geographical scale

International

Regional

Local

Hyper-local

MEDIA CLUSTERS

1. Creative Region

2. Giant Anchor

3. Specialized Area

4. Attracting Enabler

5. Real Estate

6. Pooling Initiative

Common factor: Specialization grade

Highly focused activities
Partly focused
Expensive focus
The typology

1. Creative Region
2. Giant Anchor
3. Specialized Area
4. Attracting Enabler
5. Real Estate
6. Pooling Initiative

URBANIZATION ECONOMIES
AGGLOMERATION ECONOMIES
LOCALIZATION ECONOMIES
ARTIFICIALLY FORMED
Discussion and Future prospects

GOAL: SUPPORT OF RESEARCH AND POLITICS

➢ RESEARCH:
  • 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)

➢ POLITICS (and MCB project):
  • Tackling of specific cluster types
  • Knowing what media clusters drive
  • Finding media clusters in your region
Thank you very much for your attention!

Any questions?

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