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# Questioning the relationship between Advanced Producers Services, the Cultural Industries and Global Cities

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## 1. Introduction

The relationship between culture and cities has always been assumed to be a positive and unproblematic one, from the 'City Beautiful' to 'Cities and the Creative Class', culture gilds the city's lily (Hall 1998; Pratt in press-a). Those writing about modernism discuss the role of the city as creating a critical mass of innovation and experimentation that not only continued to differentiate the city from its hinterland, but to raise cities to a new peak of cultural experience (Bradbury 1991). More recently, it seems that the creative city (Landry 2000), or the urban experience economy (Pine li and Gilmore 1999), has come to epitomise the post-industrial city (Florida 2002c;2004).

Despite the changing nature of culture and cultural production, cultural is still commonly conceptualised as a luxury, an adornment, or somehow superfluous to the 'real' economy of manufacture. However, one argument that explicitly builds upon manufacturing decline (or its relocation) and the rise of the service sector, and, of more precisely, the Advanced producer services (APS) is that associated with the growth of Global Cities (Knox and Taylor 1995; Sassen 2001). Despite the definition of 'service' as being dependent we have come to accept that the financial services industry, for example, is one of the drivers of urban economies. Indeed, the location of headquarters of financial services companies confers 'Global City' status on a location according to most classifications (Friedmann 1995). Of course, the APS that comprise the global city include the common FIRE<sup>1</sup> activities, and also advertising and media activities. Nevertheless, the cultural economy, and other 'services' in general remain characterised as dependent and fickle.

It is perhaps broadly true that the negative role, economically speaking, of the cultural industries was relevant 50 years ago, in the pre-electronic, pre-digital age, cultural production. However, today the cultural industries<sup>2</sup> are big business as well as having a significant symbolic impact. For many it will be a startling revelation that in a global city such as London, the third largest economic sector is the cultural industries (Gla\_Economics 2002;2004). The cultural industries have become an economic force, moreover, it is a group of industries that are still growing rapidly (Dcms 2001; Kea\_European\_Affairs 2006). However, it is important to note that some specific cultural industries

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<sup>1</sup> Finance, Insurance and Real Estate (FIRE) are the core industries of the APS in global cities.

<sup>2</sup> In this paper I will refer to the cultural industries, for the sake of simplicity I will take this to equate with the creative industries and the cultural sector. See discussion elsewhere for a fine grain analysis of the differences between these terms (Pratt 2005).

do not locate in global cities only, or indeed, locate in all global cities<sup>3</sup>. Most cultural industries are biased to the urban, and some industries are only present in a few cities around the world (Scott 2000; Hutton 2004a; Scott and Power 2004; Scott 2005; Hutton 2006). But, as with other industries, we can note a spatial division of production that stretches production chains across regions and nations (Pratt under review-a). Moreover, we can note that parts of some cultural industries cluster in particular neighbourhoods of Global cities. This paper is the first step of an account to explain this pattern of activities, one that does not seem to fit with common agglomeration economies or simple dependency models.

The aim of this paper is to argue that the cultural industries should be understood as an increasingly important part of the urban economy, and, that they should not be simply dismissed as 'consumption' or dependent. I also want to highlight that there are problems characterising the cultural industries as APS. Accordingly, the explanation of the location and role in global cities of the cultural industries need to be carefully considered. The paper is structured around four steps. The first part defines and summarises some of the changes in the cultural economy that have occurred in recent years. The second part specifically addresses the arguments for the location of APS and global city formation. Moreover, it discusses the linkages between APS and the cultural industries. The third part presents evidence from three different cultural industries (film, new media and advertising) as about their location patterns in London. The paper finds that the standard argument does not account for the location of the cultural industries. On the basis of this evidence the fourth part reconsiders the relationship of APS and the cultural industries, and to characterise their relationship to the global city.

## 2. Changes in the cultural industries

Before discussing the changes that have transformed the role that the cultural industries play in cities we need a baseline definition. In parallel to the changing understanding of the cultural industries and their development has been a general discussion of their reconceptualisation. We will return to this issue later. We begin with a normative definition that was used by the UK Department of Culture Media and Sport in their pioneering 'creative industries mapping document' (Dcms 1998;2001). This definition identifies the creative industries as those substantially involved in the production of intellectual property rights, with a focus on creators (see Fig 1).

"Those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property."

Figure 1: The UK definition of the creative industries, DCMS (1998)

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<sup>3</sup> There is no definitive data, but anecdotal evidence and what we know of the organisation of these industries suggests such a pattern.

In this sense it corresponds to a long history of artistic occupational measurement that arts bodies have completed in the past (O'brien and Feist 1995); what is new is that the creative industries definition intended to capture those working in the commercial as well as public sector. The detailed semantics of debates about the terms creative and cultural industries, need not concern us here. The definition identifies 13 distinctive industries comprising the creative industries (see Table 1); this points up the fact that the DCMS definition used industrial classifications rather than occupational classifications. It is an approach that has been copied widely and has come to underpin the recent interest and debate about the role of the creative industries. The most recent analysis have points to the fact that the creative industries contribute 3.1 % of employment and 2.6 % GDP in Europe (Kea\_European\_Affairs 2006).

<b>Activity</b>
Advertising
Architecture
Arts and Antiques
Crafts
Design
Designer Fashion
Film
Leisure Software
Music
Performing Arts
Publishing
Software
Television & Radio

*Table 1: The 13 industries included in the DCMS (Dcms 1998) definition of the creative industries*

In part, the DCMS mapping document was responding to changes in the cultural industries, in policy and in practice; in large part it was seeking to establish a clear benchmark of the definition, and contribution, of a sector of the economy that had not been measured before. It has not been measured because it was not perceived to be sufficiently important, it was not measured as there was no data formally collected on it (hence rendering it invisible to statisticians), and it was not measured because it was a new industry that had not really existed when most industrial classifications were devised (Pratt 2001). Hence, the 'discovery' of the size and relative contribution to national economy, let alone the urban economy, has come as a surprise, one that policy makers are now responding to.

The traditional role envisioned for culture in the city has been the promotion of arts and culture: a 'cultured' city. A more explicit policy has been to promote urban tourism via heritage tourism, or cultural tourism (Richards 1996). This is most commonly the policy that is referred to as 'cultural policy', and it is a notion that has been supported by European nations. This notion has become

important and has yielded some interesting studies of the multiplier effects on the economic life of cities, for example, in relation to museum visits (Scanlon and Longley 1984; Myerscough 1988). Urban managers have sought to leverage consumption via tourism associated with existing heritage, or live or currently artistic heritage. A popular strategy has involved building flagship cultural institutions, which both advertise and promote a cultural activity, which, particularly through their spectacular architecture, create new visitor attractions and support urban branding (Pratt 2000a; Pratt in press-a). The latter has been allied to the attraction of foreign direct investment either through attracting key managers, or key workers (Florida 2002a;b). Finally, as has already been noted there has been the emergence (albeit statistically disguised<sup>4</sup>) of the cultural economy as evidenced by, although not exclusively represented by, the film, music and television industries. This trend has been amplified by what some have referred to as the 'culturalisation' of the whole economy – that is, the use of design or fashion to differentiate products (Scott 2000; Pratt in press-b).

In summary, there are two themes in the relationship between culture, the city, economy and society that we can point to here. First, that policy-making has shifted from the more idealist end of the spectrum to a pragmatic economic instrumentalism. Second, that the direct value of economic activity in the cultural economy has grown, such that it now plays a leading role in many urban economies. The question thus arises: how are we to think of this activity? In social, or economic, instrumental ways at the margins of economic activity? As simple cultural instrumentalism of direct state investment? Or, as a new economic sector? This paper continues by exploring the nature of the relationship of the cultural economy to the APS and the rest of the economy. A key notion worth exploring is the degree of dependency or autonomy that the sector has from either the 'global cities nexus', or other local economies of the city. It begins by examining the existing normative framework for analysis.

### **3. Traditional research agendas**

As Sassen (2001 chapter 6) crisply summarises, the relationship between global cities and producer services rests on three legs. First, the dispersal of production from the economic and spatial core. Second, the functional and spatial concentration of management and regulation functions; a process that itself has agglomeration effects. Third, that services have a role in transforming economic activity more generally, and the concentration of such expertise favours those cities and regions where it is located. The literature on global cities suggests that the financial sector, or Sassen's FIRE industries, are the core of the advanced producer services. Two questions fall out of this argument relevant to both London and the media: first, which industries comprise the advanced producer services; second, are there specific intra-regional locational factors for the advanced producer services?

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<sup>4</sup> Again, data on activities in the urban cultural economy are hampered by inappropriate taxonomies and the fact that the data is simply not collected.

Strictly speaking, advanced producer services provide critical intermediation between production and consumption (Marshall and Wood 1995), or, the extension of production into consumption (Walker 1985). Beyond the FIRE group the usual list includes accountancy and management consultants, plus design and advertising (Beaverstock, R. G. Smith et al. 2000); additionally Sassen (Sassen 2001) cautiously points to new media, and Kratke (Kratke 2003; Kratke and Taylor 2004) to media.

The general notion of producer services' role in economic development is underpinned by the assumption of their role as intermediaries between consumer services and manufacturing. Indeed, they are viewed in the world cities literature as 'basing points' (spatial and organisational) for the global economy. Such an argument implies evidence of interaction rather than simply location.

Thus, the research hypothesis points to the need to explore the balance of internal trade and linkages to external ones, with the expectation that the latter is more important than the former. Second, that one might find dependent producer services that provide inputs to local production (for local or global markets). If we consider the case of the cultural industries we may expect three types of finding. First, that they are dependent on local upstream production links, or, second, that they are nodes in an international production system. Third, that they are simply dependent on the growth in consumer spending of the city. Only in the second case might the cultural industries be classified as advanced producer services

In terms of the general literature on advanced producer services the picture is not very clear. Coe and Townsend (Coe 1998; Coe and Townsend 1998) examining producer services in the Outer Metropolitan Area of London failed to identify linkages at the local level, or strong local social networks (see also Gordon and Mccann 2000). In some ways, this might be expected, as the London region is being characterised as a global city location in, and with, which international linkages that are critical. This is an argument that does not concur with the general literature on agglomeration economies that are sometimes used in tandem to support the nature and location of industries (or services) in global cities. Agglomeration economies imply economies of scale and minimisation of transactions costs (usually associated with movement of goods, but sometimes of 'untraded' knowledge 'spillovers') (Amin and Thrift 1992; Amin and Thrift 1994; Storper 1997). Thus, if there are few inter-linkages apparent then agglomeration economies would appear not to be the prime explanation of clustering.

On the other hand, numerous studies of aspects of the financial services suggest a rich social and cultural embeddedness, despite the shift to on-line trading activity (Amin and Thrift 1992; Leyshon and Thrift 1997; Mcdowell 1997). There is evidence that perhaps financial services are different to other advanced producer services. However, Sassen (2001 : 147) makes the important point that further differences within producer services may be confounding such analyses, she points in particular to the case of media

activities. Thus, we might consider the cultural industries may also be a special case that is not covered by the general theory.

#### **4. The special case of the cultural industries**

There are a couple of a priori reasons of expecting a degree of exceptionalism in the position of the cultural industries in global cities. First, that media covers many activities from film, to radio, television and new media; they all have different regulatory and organisational dynamics, as well as unique markets. Second, it is difficult to conceive of exactly in which way media is an 'intermediate' service? And, for what? One might, for example, make such a case for advertising being intermediate stage between producers and consumers; indeed, it is a paradigmatic advanced producer service of world cities.

However, research on the organisation of advertising shows clearly that it does not conform to a Hymer-like organisational form (Hymer 1976). Although it has an international presence and networks, it is in fact strongly bounded by national markets. Moreover, the organisational structure is that of triple agency structures in each market place (so that firms can 'compete' against one another in single product markets. If an agency cannot act for a products competitors in an oligopolistic market it must limit its potential share). Furthermore, advertising agencies have a relatively vertically disintegrated practice (Grabher 2002; Pratt 2006). A second line of argument has been explored recently by researchers looking at the locational clustering of advertising in cities; here organisational forms, especially the preponderance of project working, and project companies, has given rise to strong co-locational benefits in competition for labour (Grabher 2001; Grabher 2004). In addition, there is also evidence, echoing that of the financial services, of local knowledge and reputation playing an important role in labour market and firm participation in networks. In this case these agencies are 'world class' but may be physically small and not a member of one of the five big 'groups' (Pratt 2006).

In a second case film might be assumed to fit the paradigmatic case well. But, generally, film production comes from an individual source, Hollywood for example, and is distributed internationally. Trade data on film illustrates this well (Office\_of\_National\_Statistics 2005; Office\_of\_National\_Statistics 2006). There is a stronger case for film to be seen more as equivalent to manufacture with the distributors playing the role of local service agents. Within the industrial model of film there has been considerable debate about the relocation of film production (so-called runaway production). But once again, once has to look closely at the film value chain for evidence of the significant and vital added value of post-production as opposed to location shooting work. Again, in the case of film it is difficult to see the model of advanced producer services, or a simply dependent activity on urban consumption growth.

Recent work by has highlighted the local and global nature of film production networks (Coe 2000;2001). Bathelt and colleagues (Bathelt, Malmberg et al.

2004; Bathelt 2005) refer to it as local buzz and global pipelines. There is a sense in which cities are being 'basing points' for an international industry as the APS argument suggests, but the social relations of the organisation of production (at both a micro- and a macro-scale) are very uneven and complex, and certainly seldom equate with the head/branch office ideal type of a trans-national corporation.

Finally, we can turn to a third example, that of new media. There have been remarkably few studies of the location and operation of new media work; much of the literature focusing on the (disproven) hypothesis of the footloose and virtual character of the industry (Pratt 2000b;2002; Hutton 2004b; Indergaard 2004). Again, what is striking is the distinctive and strong clustering effect in a few centres across the world. Clearly, new media products are not those that suffer from large transport costs and hence a major argument for urban agglomeration is undermined. Research has again pointed to significant labour market issues, work organisation (project working), and the significant knowledge exchange, reputation and networking of workers (Jarvis and Pratt 2006; Pratt 2006). In the case of London, for example, world city hypotheses would see new media as dependent on the financial services and hence sub-contractors for those industries. The research evidence does not support such an interpretation, with companies not trading with financial services, but, leading a transformation of the media sector, a role that has helped to maintain London's position in these markets (O'sullivan 2002; Hutton 2006; Pratt under review-b).

Thus, we are led to the conclusion that media, and other cultural industries, may have a relatively autonomous role in global cities. It is certainly questionable that the cultural industries are simply dependent. The evidence suggests that the cultural industries may in fact play a more 'propulsive' role. As Sassen (2001: 148) observes, "...it is yet another instantiation of the importance of agglomeration effects and the more complex notion of place as crucial to the most advanced sectors of our economies". The media, and broader cultural industries, are global, but local; they are services, but require and mediate production of intellectual property and an infrastructure (playback equipment) that stimulates manufacturing. In this relatively autonomous sense it seems reasonable to hypothesise that media and the cultural industries more generally do indeed have local linkages linked to specific social and labour market factors.

## **5. Discussion**

The evidence with respect to the cultural industries does suggest that the APS/Global City hypothesis is not entirely applicable to the cultural industries; we have to agree with Sassen's judgement that the relationship is more complex. In part, the evidence presented above highlights rather problematic issues with the classification of industrial activities and issue that has bedevilled service industry researchers for a long time (Walker 1985); arguably the cultural industries are an extreme case of this phenomenon. These issues concern the relationship between production and consumption (Pratt 2004b), and whether it makes conceptual sense to separate them out



into 'services' and 'manufacture' as they are clearly related. Recent work on the nature and organisation of production, especially in respect to innovation has highlighted the co-construction of both production and consumption, hence questioning the notion of a simple one-way dependency (that underpins much urban economics from Economic Base Analysis onwards). The example of the cultural industries is perhaps a more complex case than others, but it certainly points up some weaknesses of such normative and generic conceptualisation and measurement of industrial activities. On one hand, data is simply not collected on some businesses (for example, the cultural industries), or aspects of business (for example, the computer games industry). On the other hand, such data is used to justify the inferior contribution of the cultural industries to the economy. It is very apparent that with digitisation that much of the value created by the cultural industries is in invisibles such as royalties and intellectual property rights; items that are poorly represented by traditional statistical agencies. Accordingly, analytical frameworks should be revised.

It is for these reasons that a shift has occurred in the conceptualisation of the cultural industries for this type of analysis in favour of a production chain framework where the focus is with the interrelationships and organisation of activities, as well as value added (Pratt 1997;2004c). Production chain, and organisational network analyses point the way to wards a more satisfactory conception of the cultural sector, and also, toward a better understanding of the relationship between the cultural sector, advanced producer services and global cities (Pratt 2004a).

Research has pointed to two spatial aspects of the cultural industries. First, they are not evenly distributed across the world, or cities, but are in fact concentrated in a small number (many, but not all, of which are world cities); moreover, they are concentrated in particular neighbourhoods of these cities. As noted above, researchers have pointed to the complex embodied nature of cultural labour markets and the role of knowledge exchange, fast turn over and extreme competition (Jeffcutt and Pratt 2002). Added to this is the complex organisational character of many cultural industries. First, that there are significant differences within organisation of production, and of the institutional forms of cultural industry markets. Thus, it is difficult to make generalisations and more attention might be paid to particular industries.

It is one of the characteristics of the cultural industries that they are heavily concentrated in the hands of a few trans-national companies who are able to generate huge monopoly profits (Hesmondhalgh 2002); this is counter balanced by a myriad of often self-employed content creators. Clearly this particular heirarchical structure has an impact on the location of cultural industries in world cities.

A further complicating factor is the fact that global city and advanced producer services roles are based upon a Hymer model, with clear vertical integration and hierarchy in decision making such that there is a clear division between 'control' and 'production' functions. It is clear that divisions of this character do exist in the cultural industries but they are complex, obscured, and sometimes

dominated by, other factors. The first aspect of this is the very tight feedback between production and consumption and, control and production, that may reduce the possibility or effectivity of governing at a distance. The preponderance of social networks and close coupling of cultural industries is evidence of this (Bathelt, Malmberg et al. 2004; Storper and Venables 2004; Asheim, Coenen et al. in press). The second aspect is that many cultural industries are regulated (either in terms of distribution, sale or intellectual property) on the basis of national markets. Thus, the particular forms of national market may require a different degree of participation and autonomy from producers.

This leads us back to a critical point, can we see the cultural industries as an intermediate or dependent service? This is clearly an issue for further work; however, we raise the issue here as it is germane to the role that different industries, such as the cultural industries, play in global cities. As we have noted, this is an increasingly pertinent question as the cultural sector plays a greater role in urban and international economies.

These issues touch not only on basic economic models, but also policy making. The role of cultural industries in world cities has thus far either been relatively neglected or relegated to a support role. As noted above, the cultural industries are empirically important in many cities. However, policy makers are still primarily engaged in a debate and policy formation around the notion of cultural industries as peripheral or dependent; or, as a 'honey pot' with which to attract key labour, or prestigious investment. What we are seeing is that the cultural sector can be used in this way, and without a doubt does play such a role. However, it is not the only one, and perhaps in some cities it is not the most important one. This new role concerns the economic vitality of the industries. Here it becomes more important than ever to examine the relationships that flow in both directions between the APS and the cultural, sector. Moreover, we need to further examine the nature, organisation and functioning of the cultural industries as industries rather than as instruments of a social or economic multiplier. The implication is a thorough reconceptualisation and analysis of the cultural industries, their role and locational characteristics (locally and globally). In particular, analyses will have to move beyond measuring co-location and into measuring flows not only of material goods, but of non-material and un-traded knowledge. This is a challenging research agenda. This will involve a more subtle analysis of the process and outputs of the sector, the changing markets and institutions (as well as the diversity within the sector). For example, London benefits considerably from film production, and particularly post-production expertise. Why is this activity in London, what are the weaknesses, what might cause them to leave? What incentives might be appropriate or effective to strengthen them, or make them stay? What impact would it have on other sectors, and what linkages are there to the rest of the urban and national economy?

## **6. Conclusion**

The aim of this paper has been to explore the role of cultural industries in global cities, with particular reference to accounts of the APS. We have noted that the cultural industries do not seem to fit this role. In particular, they benefit considerably from local agglomeration economies (except, that these appear not to be economic or traded in character, but rather social and untraded). It seems to be very difficult to explain the location and operation of the cultural industries in global cities with respect to traditional frameworks because the cultural industries are characterised by some unusual organisational forms: project working, networks of micro-enterprises and freelancers, an oligopolistic market structure, and a very quick product turnover.

Moreover, the cultural industries do not seem to function as simply dependent or intermediaries. It is difficult to identify what they mediate between, and, they are not simply driven by consumer expenditure. The close relationship between producers and consumers and the rapid turn over of markets governed by fashion rather than price is very complex. The subject clearly needs more research.

Nevertheless, it is clear that the cultural industries are playing an increasingly important role in urban economies. As conceptualisations and data collection are improved a fuller picture is emerging. We can note that in cities such as London the cultural industries are already major players in the economy, and, unlike most other sectors of the economy, they are still growing. There is a significant trade in exports as well as internal production. This role is quite different to the way that the cultural industries have previously been characterised or understood; that is, as an instrument to attract investment in other parts of the economy. This point underlines the fact that a deeper understanding of the relationship of the cultural industries to all cities, and global cities in particular, is urgently required.

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