ABSTRACT

Media clusters can be broadly defined as agglomerations of media-related activities within a certain location that bring advantages to the local media industry. Successful examples of localized media activities include Hollywood, New York, Soho in London, Berlin, Bollywood and Tokyo. Inspired by the success of these places governments increasingly foster the development of the media industry at local and regional levels. For example, in 2013, the Government of the Brussels Capital Region identified the cultural and creative industries (CCI) as a key sector for the growth and sustainability of Brussels’ metropolitan economy. As a result, the Government proposed the restructuring of the neighbourhood Reyers with the aim to develop a media cluster, calling the project mediapark.brussels. This dissertation with the title “Agglomerating media activities in the city – Media cluster development in Brussels and beyond” aims to create the knowledge necessary to support media cluster development. While there is a sizeable body of scientific literature on industry clustering often with a focus on design-intensive and high-tech industries, the clustering of specifically the media industry has received in comparison little attention. In addition, the media industry has distinctive features differentiating the industry from other industries. This includes for example the production of intangible and experience goods, like content and media services, the dependence on creative processes, and the strong collaborative nature of media production. It is due to the lack of specific literature and the aforementioned particularities that there is no consensus among scholars why media activities agglomerate. The research question of this dissertation is: why do media activities cluster?
The dissertation is composed of (stand-alone) academic publications that are interlinked while each contributes to accumulating the knowledge necessary to answer the research question. First, a literature study (chapter 2) is presented that structurally analyses and groups existing media and CCI cluster literature into four main approaches, showing how research silos are formed: the clustering and agglomeration approach; the creative city and creative class approach; the creative governance and urban planning approach; and the media city and global hub approach. Based on this differentiation, a call for more interdisciplinary research in the field is made, that brakes existing research silos. Following this call, an analysis framework is developed (chapter 3), that is built on both industry and media cluster research, that unites several heterogeneous approaches. The framework integrates seven parameters (place, proximity, population, profile, path-dependency, policy and performance) and three media cluster entities (media organizations, workers and communities). It is argued that this framework can guide future research by presenting key variables for analysis. This framework is then used to analyse existing case studies of media clusters (chapter 4). It is reasoned that one of the most fundamental issues when researching media clusters is the comparability of the phenomenon. The case studies have been grouped to find a novel typology for media clusters: the creative region, the giant anchor, the specialized area, the attracting enabler, the real estate and the pooling initiative. Then a framework is developed to define the media industry (chapter 5) and to give a step-by-step approach to work with media industry statistics and data (chapter 6). This is then used to give first insights about Brussels’ media industry, which will be used for further analysis. Key data about Brussels’ media organizations, media workforce (chapter 7) and online and offline communities (chapter 8) are presented. The information is complemented with an analysis of the plans of the Government of the Brussels Capital Region to create a media cluster in the city (chapter 9). Finally, this dissertation develops and tests a new model that explains why media activities agglomerate (chapter 10) answering the overall research question and using the previously developed frameworks and insights. The model consists of four economic drivers: urbanization economies (driving conditions that can only be found in larger cities that enable the creation of necessary infrastructures and creative processes), localization economies (the availability of infrastructures and institutions that are not dependent on cities), agglomeration economies (conditions that emerge from media businesses being located in proximity to each other supporting collaboration), and perception economies (the positive feedback loop that gives value to media activities by being associated to a certain location). The findings of the dissertation specifically highlight the concept of perception economies. The analysis shows that media businesses need good reputation and have to be associated with a certain lifestyle and ‘coolness factor’. Due to media content being an experience good, the branding of a media business becomes even more important than in many other industries. The results of the dissertation show that certain drivers and consequent conditions are less or more important for media clusters and that different media cluster types are reliant on different drivers and conditions. This means that a one-size-fits-all policy regarding cluster development is best avoided, due to the high levels of heterogeneity in the conditions for media cluster success.

Keywords: media cluster, agglomeration economies, urbanization economies, creative industries, media industry, city development, economic geography, Brussels, perception economies, urban planning