

Strategies for creative industries: an international review

Jo Foord *Cities Institute, London Metropolitan University*

Abstract

The paper presents the findings from an international survey of public policies and strategic plans to promote and support the development of the creative industries at city-regional level. The rationales and mechanisms employed, the shifting definitions of the cultural and creative economy and sectors adopted, are discussed in the context of the grand narrative of the 'creative city'. Case studies of Barcelona, Berlin and London are presented, confirming spatial concentration across the creative industries, but also the continuing dependency on public intervention in what is projected as a growing economic sector worldwide. Policy emulation, but also confusion over classification and social objectives, is evident. At the same time, creative industry employment growth has begun to falter in key creative cities leading to the suggestion that the creative industries are now subsumed into a more substantial and wider knowledge economy.

Keywords

creative industries
creative cities
creative spaces
strategies
policy interventions

Introduction

The notion that creativity is a limitless resource is central to the current popularity of creativity-led economic development and enterprise strategies. The proliferation of designated creative places in recent years is testimony to policy practitioners' (and politicians') belief that almost regardless of local conditions they too can mobilize creativity to transform their economies and communities (cf: current creative city strategies include *Creative Baltimore*, *Creative Toronto*, *Creative Sheffield*, *Creative New York* and *Create Berlin*). Many cite *Creative London*, a London Development Agency-led initiative, as an influential model (LDA 2003).

This paper presents findings from an international comparative study of policies aimed at developing creative enterprise and spaces.¹ It draws on a survey of creative strategies to critically assess policy rationales and anticipated outcomes. In so doing the paper identifies the heightened international focus on the creative economy as a growth sector, examines the highly politicized shifting definitions between cultural and creative industries and the tendency to unthinkingly associate cultural and creative enterprise within a generic new knowledge economy. It also notes an increased preoccupation with the Intellectual Property (IP) of content-based production and services. Using city case studies the paper also traces the increasing popularity of place-based creative cluster policies. These seek to make 'creative spaces' – areas within the city that are attractive to and help retain creative enterprise. Finally it concludes with a brief assessment of the future role of creative strategies in local economic development.

1. This research was commissioned by the London Development Agency (LDA), the city of Toronto and the Province of Ontario Governments (Ministries of Economic Development and Culture). The project was undertaken jointly by Cities Institute, London Metropolitan University led by Graeme Evans and Meric Gertler, and University of Toronto between 2004 and 2006. Reports arising are available at www.creativelondon.org and www.citiesinstitute.org/creativespaces. 'Evidence' was taken to mean substantial and substantiated policy/strategy documents, research

reviews of practice and evaluation documentation. An extensive policy analysis and literature review led to the development of a web-based searchable database (approximately 300 separate entries), which also serves as a research and policy resource. This was supplemented by interviews and communication with practitioners, policy-makers (cultural/creative, economic development, city promotion), field visits to UK and other European cities, and finally in-depth case studies of six cities in Europe and North America, three of which are drawn on in this paper (Barcelona, Berlin and London).

Policy rationales

The survey of creative strategies produced a searchable database of individual creative initiatives and included any cited research and evaluation studies. One of the key selection criteria for inclusion in the database was a focus on developing creative enterprise. Yet further analysis of the main policy rationales showed that alongside economic development there were several other policy rationales (Figure 1). Many of these had different and arguably contradictory strategic goals: social inclusion; development of social capital; community cultural programming; creation of tourist venues and visitor economies. Some strategies were specifically directed at enabling application for specific funding opportunities (in Europe, the European Regional Development Fund [ERDF] for infrastructure investment; the European Social Fund [ESF] for training and social support; in developing areas, the World Bank for strategic investment). Here the prioritization of creative industries was often little more than flagging a high profile economic sector to facilitate the bidding process. This form of instrumentalism raises questions about the types of infrastructure and programmes funded and their relevance to the creative industries.

Underlying the cited policy rationales were two dominant assumptions about the creative sector, both of which continue to drive the adoption of creative enterprise strategies around the world: growth and innovation.

The first assumption was expressed through claims that creative firms and employment are growing faster than those in any other sector. Measured in terms of employment change and gross domestic product (GDP)/gross value added (GVA) growth rates, creative industries were presented as important both in absolute terms and as a rising proportion of national and regional economies. Creative employment was identified as most significant at city level, indicating not only the high concentration of creative enterprise in cities but also the competitive importance of particular creative cities (cities with higher than national levels of creative employment). For example, the stated level of creative industry employment in Austria was 4 per cent but 14 per cent in Vienna; 3 per cent in Germany but

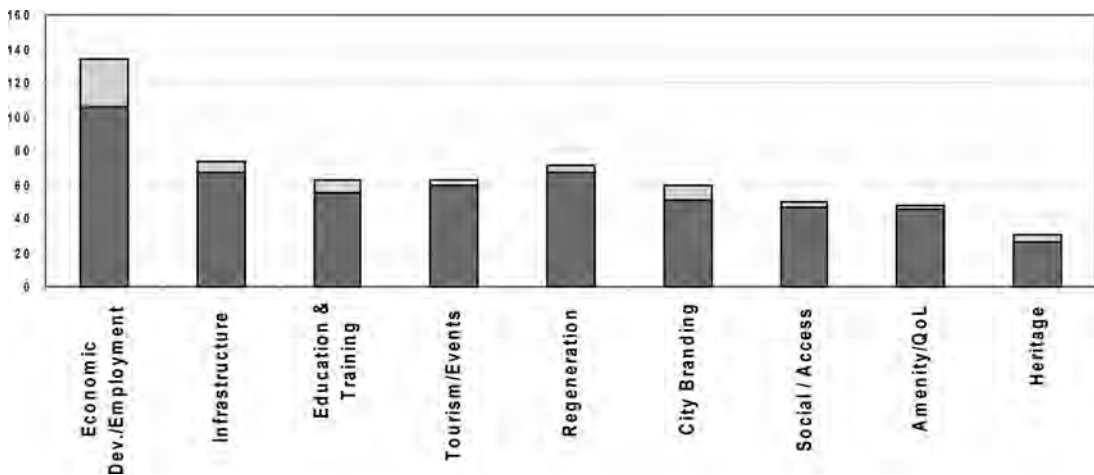


Figure 1: Primary policy rationale for creative industry policy (n = 300).

8 per cent in Berlin; 4 per cent in Finland but 8.5 per cent in Helsinki; 3.9 per cent in the Netherlands but 6.9 per cent in Amsterdam; 5 per cent in the United Kingdom but 8 per cent in London; 2.2 per cent in the United States of America but 8.1 per cent in New York and so on. Creative employment growth rates, cited over individually selected time periods, also varied widely: 5.7 per cent (1996–2003) for Amsterdam; 6 per cent (1999–2003) for Vienna; 7 per cent (1998–2002) for Berlin; 13 per cent (1998–2002) for New York; 5 per cent p.a. (1995–2000) for London; 13.4 per cent (1986–2000) for Singapore; 17 per cent (1999–2003) for Shanghai; and 22 per cent (1999–2001) for Glasgow. Although comparison of national and city data is limited by the different time scales, this was unacknowledged in advocacy documents where relative rates were highlighted to make the case for strategic intervention.

This lack of transparency was exacerbated by the inclusion of different activities within the creative industries. For example, Glasgow's cited high growth rate had much to do with the inclusion of a wide range of information and communication technologies (ICT)-related activities. Similarly, in some strategies, growth rates were quoted without any accompanying data, thus obscuring the relatively low levels of creative employment or GVA. Nevertheless, growth rates cited from previously published strategies were frequently repeated in support of new initiatives.

The second assumption was a perceived potential for high levels of innovation in the creative industries (more accurately the creation of new Intellectual Property – IP). Reference to the knowledge economy was included in most creative strategies with acknowledgement of the increasing role of intangibles (ideas, tacit knowledge, networks – all difficult-to-define entities with few or no material qualities) and short-term project-based/high risk-orientated working. The creative industries were then assumed to offer a limitless supply of new ideas for potential products – feeding into and from increasingly diverse material cultures and media.

In the majority of cases, justification for claiming high rates of innovation in the creative sector was based neither on quantitative measures nor case study evidence. More commonly, policy and strategy documents profiled individual examples of enterprise or product success (often associated with computer games or design) and examples of locations that had high profiles in cutting-edge industries (mostly Silicon Valley or its clones).

The politics (and economics) of definitions

One of the major problems in identifying and evaluating (as well as developing and implementing) creative enterprise strategies in cities, is the fluid nature of the terms 'cultural industries' and 'creative industries'. In the surveyed strategies these were often used either together as 'cultural and creative industries' or interchangeably. This overlap was most notable in city or regional initiatives where the term *creative* industries was used to identify the sector focus of an initiative but the data and case studies were drawn from the *cultural* industries (usually dominated by the arts and grant-aided/not-for-profit organizations).

This confusion was magnified where there were shifting policy and governance regimes – often imposed from national, rather than city or

2. DCMS (1998, 2001, 2004) creative industries classification: advertising, architecture, art and antiques, crafts, design, designer fashion, film and video, interactive leisure software, television and radio, performing arts, music and software and related computer services. www.culture.gov.uk/global/research/detail/glossary_abbreviations.htm
3. Examples are South East Cultural Consortium/SEEDA Creative and Cultural Industries: An Economic Impact Study for SE England (2002); GEMACA 11, INTERREG IIC Programme (2001/2).
4. In Australia, Queensland has defined creative industries as six interrelated sets of industries: music composition and production; film, television and entertainment software (including animation and computer games); performing arts; writing, publishing and print media; advertising, graphic design and marketing; architecture, visual arts and design – www.premiers.qld.gov.au.
5. The NZ Institute of Economic Research's *Creative Industries in New Zealand – Economic Contribution. Report to Industry New Zealand* (2002) lists advertising, software and computer services (including leisure software), publishing, television and radio, architecture, design, designer fashion, music and performing

regional, guidance. These shifts usually required local cultural practitioners to work within a creative enterprise agenda. Many creative strategies illustrated the struggle cultural practitioners had in putting their concerns within this framework. Likewise, few of those working in the commercial creative industries – publishing, architecture, advertising, film/TV etc – identified with a collective creative industries sector, preferring instead to remain associated with their own professional and industry fields (and markets).

The label 'creative industries' was first used in Australia to signpost the significant interface between commercial cultural activity and the emerging new media driven by technological change. This label brought to the forefront the enterprise dynamics of these activities (risk-taking, self-starting, ideas-driven, lifestyle-based) and their resonance with the new knowledge economy (Cunningham 2002). In the United Kingdom, the term creative industries was extended in the 1990s to highlight the economic contribution of commercial cultural production, leisure activities and entertainment as well as the economic potential of many subsidized cultural activities (GLC 1985; DCMS 1998). The most referenced UK Department for Culture, Media and Sport (DCMS) definition included a wide range of activities combining originality and IP with profitability (DCMS 1998, 2001, 2004).² The list of thirteen activities emphasized the *breadth* of the creative industries and has become a benchmark for identifying creative industries internationally as well as at regional, sub-regional and city levels within the United Kingdom, Europe and Asia.³

Similar advocacy strategies for identifying the scope of the creative industries have been adopted in Australia and New Zealand using approaches derived from the UK DCMS.⁴ However, there is a debate, particularly in Australia, over the transferability of this approach (Stevenson 2004; Gibson and Klocker 2004). An alternative model has been developed in an attempt to capture locally significant IP through patents and trademarks (industrial or commercial production) and copyrights and design-rights (cultural activity). This focus on different forms of IP has been accelerated by the growing importance of digital technology and the fusion of creative content with new delivery platforms. In New Zealand, criticism of the UK DCMS methodology has emphasized the absence of robust statistics. This has led to a more cautious approach and a simplified mapping using ten instead of thirteen creative industry descriptors.⁵

Both Hong Kong and Singapore have adapted the DCMS definitions, tailoring these to capture the local importance of IT and digital media (Hong Kong) and arts and culture with design and media (Singapore). China more generally, and Beijing in particular, has adopted the Australian definition of creative industries with six industrial groupings forming the basis of their mapping exercises. Core elements of the creative industries – entertainment software, film and television, music publishing, book publishing, audio-visual and multimedia – have been grouped together as the 'copyright industries' in the United States of America (Siwek 2004). However, *Americans for the Arts* promotes analysis of creative industries as 'arts centric businesses', defining creative industries as 'both for-profit and non-profit businesses involved in the creation or distribution of the arts' (2005:1).⁶ This definition purposely blurs the distinction between commercial

enterprises and non-commercial arts and cultural activities – although the privatized fundraising regimes of not-for-profit art and culture makes them closer to the enterprise economy than European state-funded cultural institutions (Caves 2000). Consequently, the ranking of creative cities in North America incorporated employment, enterprise, innovation, technology and growth from copyright and so-called arts-centric businesses (Florida 2002).

The creative strategies survey also found that mechanisms for legal registration of IP were increasingly important. The World Bank's approach was to identify products and outputs that were 'protectable under some form of intellectual property law' (Weiping 2005). The most significant creative industries for the World Bank were therefore: software, multimedia, video games, industrial design, fashion, publishing, and research and development (R&D) – all defined by the legal processes of owning creative content. Concern with defining and controlling IP was particularly evident in strategies emerging from the United States, Australia and Singapore, and increasingly China. Here, state-regulated legal and institutional frameworks were identified as necessary to creative industries' development. For cities, regions or countries with less well organized institutional and legal structures this has been noted as a growing barrier to market entry (Healy 2002).

Cultural or creative industries?

In contrast, the UN international trade and development agency, the United Nations Conference on Trade and Development (UNCTAD), made a distinction between the creative industries that derived value from copyrighting and distributing creative content, and the *cultural* industries that generated creative content in a local context through literary, visual and performing arts (UNCTAD 2004). This distinction was critical for those devising creative strategies in developing areas where the creative resource was identified as located in local (indigenous) culture, rather than in the production processes of global creative industries.

There was a similar rejection of a copyright-based definition of creative industries and advocacy of cultural industries by some policy practitioners in the Asian Pacific region (UNESCO 2004). Cultural industries were seen to '...use creativity, cultural knowledge and intellectual property to produce products and services with social and cultural meaning' (UNESCO 2004). This definition emerged in response to fears of exploitation of local cultures (through Intellectual Property Rights (IPR) mechanisms) by global creative industries based in advanced economies. This concern was not limited to emerging economies. In strategies emerging from Canada, at federal and provincial level, creative enterprises also remained within the scope of the cultural industries.⁷

Use of the term 'cultural' rather than 'creative' industries was therefore a key discriminator for those wishing to prioritize the *social* meaning of cultural production, distribution and participation, including ideas of collective ownership of culture and the significance of not-for-profit production. This concern has been reflected in the academic debate with forceful argument being put forward for the use of the term 'cultural industries'. Andy Pratt (2004) argues that the value of this perspective is that it seeks to present cultural outputs as the result of collective innovation by a number of participants

arts, visual arts (arts, crafts and antiques).

6. Americans for the Arts' (2004, 2005) *Congressional Report on the Creative Industries* has taken a conservative approach to defining the creative industries by including only those businesses involved with the production or distribution of the arts. They include museums and collections, performing arts, visual arts and photography, film, radio and TV, design and publishing, and arts schools and services.
7. Canadian Framework for Cultural Statistics (2004) includes written media, the film industry, broadcasting, sound recording and music publishing, performing arts, visual arts, crafts, architecture, photography, design, advertising, museums, art galleries, archives, libraries and cultural education.

8. Standard Industrial Classification (SIC 2003); International Standard Industrial Classification of All Economic Activities (ISIC 2002); Classification of Economic Activities in the European Community (NACE 2002); North American Industrial Classification System (NAICS); Australia and New Zealand Standard Industrial Classification.
9. See for example the North American Product Classification (NAPC).

whose participation is various, but linked together by the organization of production. The European Parliament has retained this emphasis on the cultural industries. Until recently, culture was at the heart of the European project with funding through structural funds (ERDF) often going to support major cultural projects and industries. These were frequently linked to culture-led regeneration or city (re)branding in the Mediterranean and northern post-industrial cities and associated with the development of visitor economies. In 2005, the European Commission proposed that the 'creative industries' should be viewed as a sub-set of the 'cultural industries', retaining the cultural agenda for Europe (European Commission 2005).

Within Europe, individual regions and cities have selectively identified specific cultural or creative industries for promotion and development (for example, art and design in Barcelona; media in Munich; film in Paris; advertising in Lisbon; fashion and design in Milan; music technology in Stockholm) or devised their own definitions linked to locally significant industrial sectors such as ICT (Oslo and Stockholm) or arts production (Helsinki). Some quota systems operate at national (France) and regional levels (Catalonia), particularly to protect indigenous language production in broadcast media and film. The United Kingdom is the only European member state to define and prioritize the creative industries in national policy.

Classification matters

Identifying the scope of the creative or cultural industries to be included in a creative strategy was hindered further by the inadequacy of national and international industrial classification systems.⁸ Categories of industrial economic activity are based on the output of an industry or industrial group (its product or service) and its process of production (manufacture or service). Classification systems have been built up over time and are subject to national and international agreement. They reflect a detailed understanding of the subdivisions in manufacturing activity but a less robust knowledge of the fast-moving service-related industries (though this is less so in North America).⁹ Employment in each industry includes all those working in that sector, regardless of their job or role. Most creative strategies took a pragmatic approach and selectively identified creative industries, often cutting across existing industrial groupings. However, the inclusion of a large number of non-creative employees was unavoidable. This did lead to an exaggeration of the creative nature of some 'creative' industries, for example through the inclusion of tasks relating to the routine aspects of digital media and audio-visual production as well as many distribution-related activities.

National administrative data on employment and enterprises tends to undercount small and medium size enterprises as well as micro businesses and sole traders. Yet the surveyed creative strategies and initiatives almost universally recognized that these groups were the mainstay of the creative sector and central to its growth and innovation potential. In order to capture sole traders and micro business in their evidence base, many creative initiatives at city or local level commissioned local snap-shot surveys to supplement or even replace national data. These local surveys were variable in quality and tended to adopt their own categorization of creative industries. Some were supplemented by trade association data, thus potentially double counting enterprises and exaggerating the size of the sector.

A significant number of strategies also drew on research documents and academic publications that have suggested an alternative occupational approach to defining creative activity. This work focuses on the perceived importance of creative occupations in a knowledge-driven economy and has identified specific jobs and tasks that are central to the creation of new ideas, new technologies and new content. It has been noted that many of these creative occupations require high educational achievement and subsequently attract high wages (DTI 2004; Florida 2002; Markusen and Schrock 2001). The scope of creative occupations is also seen as wider than that of the creative industries. Workers in these occupations can be employed outside narrowly defined creative industries just as many employees in the creative industries are not required to produce creative content or work creatively. This occupational approach was fuelled by Richard Florida's identification of talent as a key component of his creativity index. His work measured the proportion of the creative class (sic) in the labour force (for city, region or nation).¹⁰ It has also had a major impact on creative enterprise policy. Strategies aimed at attracting and/or retaining particular (talented and creative) people were more prevalent. These ranged from industry-related training and education initiatives (for example, Helsinki Arts and Design College, Arabianranta; University Pobra Fabra, Barcelona; 'Retaining Creative Talent', Scotland) to proposals and plans for wholesale neighbourhood change led by cultural projects (such as the transformations of La Raval and Poblenou in Barcelona and the development of the cultural/consumption-led urban quarters of the Museumquarter in Vienna).

Where strategies identified creative workers and creative occupations as a target for intervention, problems similar to those identified for industrial classifications and employment arose (see above). Occupational classifications do not reflect current jobs especially within the rapidly evolving creative sector.¹¹ Identification of creative occupations and measurement of creative talent relies on manipulating existing occupational and labour market categories and therefore is limited. Nevertheless, Florida's 'talent index' was applied to city ranking across North America and Europe (Florida and Tingali 2004), and was a popular reference for policy practitioners, particularly in places where the creative industries agenda had already been taken up (for example Australia, New Zealand, Singapore and China).¹²

Attempts to find analytical coherence for the scope of the creative industries and creative occupations is a messy, often retrospective task. Those policy practitioners who worked across existing classificatory boundaries assembled data from a wide variety of sources. Creative strategies and policies have tended to refer to this evidence as if it was well founded and verified. This was not always the case.

Types of intervention

Further analysis of the survey results indicated that practical interventions cited within the creative strategies could be grouped by one of six broad categories:

- i. Property and Premises Strategies
- ii. Business Development, Advice and Network Building
- iii. Direct Grants and Loans Schemes to Creative Business/Entrepreneurs

10. www.creativeclass.org
11. The DCMS (www.culture.gov.uk/global/research/det/soc) and Canadian Statistics (Cultural Framework 2004 Appendix C) have listed their selections of creative occupations using the Standard Occupational Classification.
12. www.creativeclass.org

13. Cluster policies and strategies are widespread across developed economies and have developed from the work of Porter on competitive advantage (1990, 1995, 1996). Porter has developed the concept of the cluster 'diamond', which identifies the interdependent conditions in which cluster development can lead to increased productivity. This includes the local context, inputs, demand and related and support industries. The DTI (UK) have a cluster strategy – *Business Clusters in the UK* (2001) www.dti.gov.uk/clusters; IKED (2004) *The Cluster Policies White Book* provides an international review of cluster policies and strategies and offers a toolkit for measurement and evaluation; The Institute for Strategy and Competitiveness at Harvard Business School runs an international cluster project www.isc.hbs.edu.

- iv. Fiscal Initiatives
- v. Physical and IT Infrastructure
- vi. Soft Infrastructure

These categories are not exclusive, but they provide a profile of the main types of intervention and therefore the mechanisms used to promote and support creative enterprise in particular localities. Many of the interventions are familiar types of economic development support common to generic business support initiatives – providing workspace and training, advice, networking and loans, business management skills and creative education, access to trade events and new technology. Some were specific to the creative sector – including fiscal incentives such as tourist taxes and percent for art used to raise finance for public investment in arts infrastructure or direct tax credits for creative artists.

As with generic support services, many of the business support initiatives for the creative sector were directed at start-up businesses, micro or small and medium-sized enterprises and were managed by intermediary public or voluntary sector agencies. Where the particular needs of the creative industries were highlighted, these tended to emphasize the peculiarities of the creative process and the lack of business awareness amongst practitioners. Interventions were framed within the language of enterprise development, but in some cases appeared to be a response to growing market failure, particularly in traditional craft-based industries lagging behind in process and product innovation.

The soft interventions of advice, skills and enterprise training for start-ups and entry level employment dominated. Higher level interventions in technology infrastructure, international marketing and IP legal frameworks were rare. Strategies were mostly directed towards the aspirations of creative economies based on small firms in arts and crafts or new media, and within the goals of local area-based regeneration policy. They did not address the needs of large, private-sector creative firms trading in the commercial creative sectors (such as advertising, film, mainstream fashion) and through global networks, even though this is where the lion's share of market, employment and innovation activity is found. There was evidence also of a sustained public subsidy of intermediary agencies engaged in delivering these interventions. Many in the European Assistance Areas were supported by ERDF funding, suggesting entrenched public sector dependency.

Several creative strategies included statements outlining how the success of such initiatives should be assessed. These included generalized statements on how sustained the initiative proved to be, how far it integrated with other economic initiatives, whether or not it elicited city growth, how far it involved and benefited the creative sector and how responsive it was to economic and political change. However, standard evaluation methodologies and tools can rarely fully assess such desired outcomes.

The promotion of creative strategies and the proliferation of supportive interventions (sometimes with not insubstantial funds attached) coincided with the ascendancy of business cluster strategies¹³ linked to local growth agendas. Drawing on the influential ideas of Michael Porter, support for 'creative clusters' was included in strategies where policy support for the creative industries had been established.

Integrated strategies: creative clusters?

From the strategies reviewed, a 'creative cluster' was largely taken to mean a linked grouping of creative industries, firms and/or cultural activities that had a spatial concentration. Geographical proximity was identified as particularly important, especially in clusters dominated by creative small and medium enterprises (SMEs) and micro businesses. These were based on specialized craft or new digital practices, or where work was predominantly organized around short-term projects or labour flexibility and where labour market information was deemed critically important. These assumptions about how a creative cluster worked were replicated time and again with little confirmatory evidence.

Current research and policy toolkits on creative industry clusters focus on the creative production chain (United Kingdom) and cultural chain (Canada) (Pratt 2004; DCMS 2004; Statistics Canada 2004). However, these tend to miss the wider interdependencies of a 'creative cluster' with cultural institutions and educational programmes – especially higher education in the creative arts.

National and trans-national cluster policy research has identified general creative industries clusters centred on major conurbations throughout Europe (GEMACA II 2002) and in the United Kingdom centred on London (DTI 2003). Some regional spatial and economic strategies have identified localized creative sectors, for example games software and digital media in central Scotland. At city level, creative cluster strategies were associated with particular industries (film/TV in Los Angeles; jewellery in London; fashion in Paris) or with assembling cultural premises (cultural industry quarters in Sheffield, Amsterdam, Helsinki, Glasgow) or a mixture of the two, for example 'creative hubs' in London – although the United Kingdom as a whole has now been named a global 'creative hub' (DCMS 2006). Some cluster-led creative strategies have sought to address the measurement of cluster scope and geographical reach, although this has proved problematic at the sub-regional level.¹⁴

The stage in the development cycle is one way of evaluating the strength of a cluster. In conventional cluster analysis, the stages of cluster development have been identified as *Embryonic*, *Established*, *Mature*, *Declining*, based on levels of employment and output, depth of inter-firm linkages and the significance and reach of business and consumer markets.¹⁵ The creative industries clusters identified in the surveyed strategies were found to be *Embryonic* when judged against conventional business cluster evaluation. However, it was evident that creative clusters are not conventional business clusters and additional factors were critical to their development and form (especially the role of publicly funded arts and cultural institutions). The strategic aims of creative clusters and therefore the anticipated outcomes were different from conventional business clusters. Creative clusters had social as well as enterprise objectives – goals of inclusion, cultural development, as well as enterprise growth.

Four types of development for creative clusters emerged from the survey of creative strategies: *Dependent*, *Aspirational*, *Emergent* and *Mature*. These are summarized in Table 1 below, illustrating the roles of the public sector, nature of markets and firm size as key differential factors.

14. For example the City Fringe Partnership – City Growth Strategy (DTI Small Business Service); Department of Communications, Information Technology and the Arts/National Office for the Information Economy, Australia *Creative Industries Cluster Study*.
15. This is used by the UK DTI (now BERR), however, others use *Agglomerating*, *Emerging*, *Developing*, *Mature* and *Transforming* to note the life cycle of cluster development – IKED (2004) *The Cluster Policies White Book*. See also www.isc.hbs.edu.

Stage	Definitions
1. Dependent	<p>Creative enterprises developed as a direct result of public sector intervention through business support, infrastructure development for cultural consumption and finance to SME/micro creative enterprises.</p> <p>Public subsidy required to sustain the cluster.</p> <p>Limited and underdeveloped local markets.</p>
2. Aspirational	<p>Some independent creative enterprises and/or privatized former public sector cultural enterprises in place but limited in scale and scope.</p> <p>Underdeveloped local markets and limited consumption infrastructure.</p> <p>High levels of public and institutional 'boosterist' promotional activity.</p>
3. Emergent	<p>Initiated by growing number and scale of creative enterprises with infrastructural investment from the public sector.</p> <p>Developing local and regional markets with visible cultural consumption.</p> <p>Some internationalization of market reach.</p>
4. Mature	<p>Led by established large-scale creative enterprises in specific industries with established sub-contracting linkages and highly developed national and international markets.</p> <p>Business-to-business consumption.</p> <p>Arms-length public intervention.</p>

Table 1: Creative cluster development.

The majority of the creative cluster initiatives in the surveyed creative strategies were *Dependent* (for example, Sheffield Creative Industries Quarter; St Petersburg Creative Industries Development Centre; Seoul Digital Media City; Taipei Creative Industries Cluster) or *Aspirational* (Brisbane Creative Precinct; The Digital Hub and MediaLab, Dublin; Leipzig Media Cluster; West Kowloon Cultural Centre, Hong Kong; Creative Gateway, King's Cross London). Many were essentially *cultural* quarters made up of assorted cultural consumption venues and not-for-profit arts activities with limited SME creative enterprise activity (for example, Westergasfabriek, Amsterdam; The Veemarktkwartier, Tilburg). Some were *Emergent*, especially where astute commercialization of innovations had taken place with infrastructural support (for example the film/TV sector in Glasgow). Few were *Mature* and where these did exist there was a notable absence of active policy intervention (for example, film/TV production in Los Angeles; fashion and furniture in Milan; fashion in New York).

Often the adoption of a cluster approach drew little from Porter other than the label. His emphasis on capitalizing local advantages for enterprise development was replaced in practice by attempts to facilitate interaction between existing and potential enterprises, possible cultural consumption and the aspirations of the local policy regime. From the evidence reviewed it was the strength of the relationships between these three elements that characterized and sustained an effective creative cluster initiative especially where it was expected to deliver social as well as economic objectives.

In the absence of one or more of these three elements, creative clusters were unlikely to establish or grow in a sustained way. If one or more element dominated, the creative cluster became unbalanced, and wider strategic (policy or industry) objectives were neither achieved nor sustained. The interdependence between public and private sectors was particularly acute where creativity was embedded both in the processes and products of the cluster. This was also a factor in cluster growth where public subsidy and procurement underpinned both markets and cultural activity.

For example, higher education emerged strongly in both *Mature* and *Emergent* creative clusters. University, vocational and technical training hubs, encompassing education and training facilities, R&D, incubation/start-up companies, consumer education in taste and trends all had key roles to play. Here, innovation was closely related to R&D-higher education-industry hubs and partnerships, in both creative and 'non-creative' production. Similarly, public-private cooperation was critical to *Emergent* creative clusters (instigated by either sector). Notable examples included MedienCampus Bayern centred on Munich, the 'Internet city in Germany', founded by thirteen leading media firms, education and industry associations in 1988; and 22@Media, Barcelona's new media city in the former manufacturing district of Poblenou, a joint venture between a private-sector company, MediaPro, an art and design university, University Pobra Fabra, and the city of Barcelona.

16. The full case studies are available from www.creativelondon.org.uk.

City case studies – creative clusters everywhere

The survey of creative strategies found that cluster development was increasingly at the forefront of city-level interventions. A cluster approach was often adopted where there was also a 'knowledge city' and/or a 'knowledge economy' strategy driving mainstream economic development and inward investment policy. This section of the paper draws on three (of six) in-depth case studies undertaken for this project.¹⁶ These case studies are of European cities and represent contrasting political, cultural and economic systems as well as scales of creative sector development. However, all the cities sought to reinforce their regional and international status through their advocacy of creative and cultural enterprise.

Barcelona

Barcelona is often used as an exemplar of how to do 'culture-led regeneration' – it has also developed a reputation for design-based creativity, event-led business tourism and cultural consumption. The primary role of historic and modern architecture, city design and public realm in policy have generated a powerful mix driving the physical reconstruction and rebranding of the city supported by a strong city/regional political consensus. The higher education sector is strongly represented in the city with a number of specialist

design and architecture institutions attracting rising numbers of students. The city's cultural plan promotes Barcelona as one cultural project, bringing together civic, creative enterprise and territorial initiatives. This is an outward-looking strategy linking Barcelona into European and global city (political and practitioner) networks (for example, the City Mayors Forum, the Global Cities Network and the UNESCO Creative Cities Network).

The knowledge economy, defined by the city as cultural, communication, professional and design services, has been identified as the driver of considerable employment growth in Barcelona, especially since 2003 and particularly in the wider metropolitan area. Although Catalonia accounts for 28 per cent of the cultural industries employment in Spain, only 2 per cent of national employment is in this sector (third lowest in the core fifteen EU states). They represent just 1 per cent of all firms in Catalonia, generating an estimated 1.2 per cent of GVA. However, a 20 per cent increase in the GVA from cultural industries is claimed for 1998–2001. Dominant sectors are audio-visual and publishing, with the largest growth claimed for film and TV (post-liberalization) and the visual arts (albeit from a very low base). Most growth has been based in the wider Barcelona Metropolitan Area (BMA), indicating less concentration in the city itself. 75 per cent of Catalonia's ICT, professional design and arts and entertainment employment is in the BMA – accounting for 5 per cent of all employment. The creative sector is no bigger than other European cities (though high for Spain). This is perhaps surprising for a city popularly known for its creativity.

A recent study of creative industries in Barcelona has plotted the clustering of creative enterprise within the city (Figure 2) (InterArts 2004). This suggests that particular districts have their own creative specializations and this has been associated with the existing neighbourhood variations in public-private infrastructure. These are largely *Aspirational* creative clusters with low levels of enterprise activity but strong links with distinctive neighbourhood cultures (for example in Gracia and Ciutat Vella).

This tradition of neighbourhood underpins the current strategy to develop a new digital media locality in the former industrial district of Poblenou. This initiative is being led by the city (in a joint public-private initiative, see above) through the development of workspace/incubator facilities and training, as well as in a grant-aid programme and venture capital investment. There is a long-term public investment commitment in the 22@ Media City through support for new higher education and innovation projects. This suggests that this creative cluster will be *Dependent* for some time.

There are weaknesses in Barcelona's creative economy. It is not diversified and is over-concentrated in architecture, art and design, although film/TV and radio and live theatre are re-emerging. High-risk infrastructure investment strategies are being pursued, albeit with private-sector partners, in highly competitive sectors in which the city neither has established strengths nor, as yet, a critical mass.

The strain on the old city is also evident in terms of loss of housing, rising gentrification, endemic street crime, overcrowding and traffic congestion. Economic growth is taking place in the metropolitan region, leaving new migrant areas potentially isolated and ghettoized. The city does not

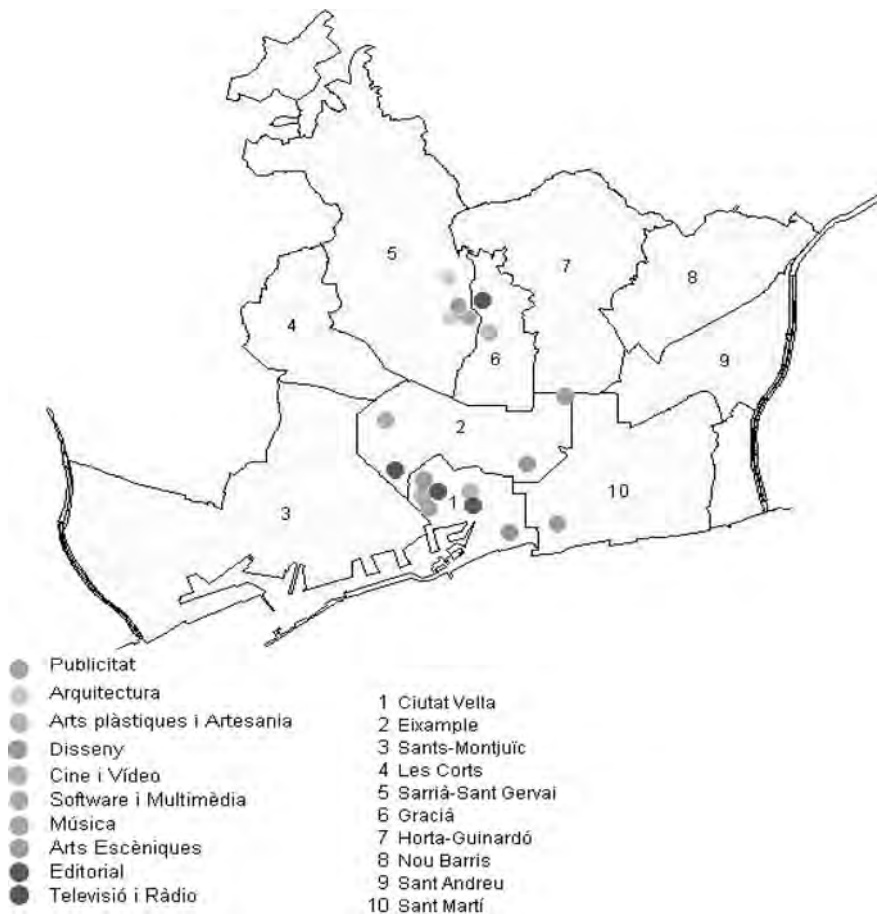


Figure 2: Creative enterprise clusters in Barcelona.

have a multicultural approach or strategy, and the transition from a culturally autonomous to a cosmopolitan city is a political challenge. Major urban projects (including the UNESCO Culture Forum and Poblenou developments) have not received universal support and there has been resistance from incumbent communities. There are also few professional creative intermediaries with networks to support creative enterprise. The city takes a municipal rather than an enabling role, although recent initiatives have recognized the need for arms-length intervention and greater industry-led activity in cluster development.

Despite an impressive long-term strategic plan, policy evaluation, statistical data collection and measurement methodologies are neither integrated nor established across the tiers of government, nor identified with a measurable creative production chain. However, the publication of general cultural indicators in the annual report of the Cultural Institute and the Barcelona Statistical Yearbook is beginning to provide the basis for longitudinal analysis. The development of cultural indicators as part of the adoption of the Agenda 21 for Culture (ICB 2004) may also enable a more robust review of the Strategic Plan objectives and progress.

Berlin

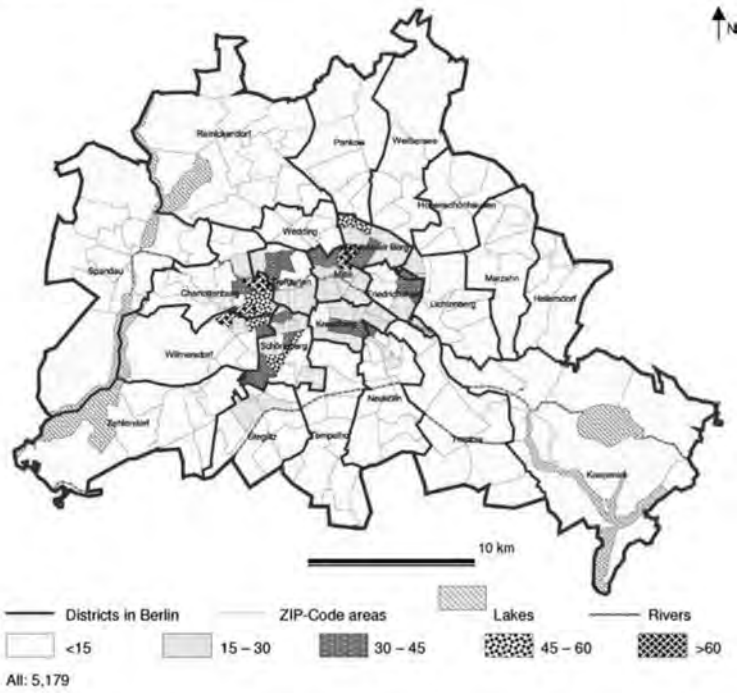
Berlin has experienced more recent change than perhaps any other European city. After reunification, the city regained capital status but financial deficit and political uncertainty has created both an identity and policy-implementation vacuum. Berlin is a city still in flux.

The publication of the city's first *Creative Industries in Berlin Report* (Berlin Senate 2005) sparked a local debate on the role of creativity in the economy. The creative economy is estimated to employ 8 per cent of the workforce (80,000 people excluding 20,000 to 30,000 self-employed artists, designers and sole traders) and to produce 11 per cent of Berlin's GDP compared to 3.6 per cent of German GDP. Creativity has been highlighted as a major production factor.

A new media and related industries cluster has been identified in inner East Berlin, with multimedia firms co-locating at building and street level (for example on Chausee-Strasse – 'Silicon Allee'). This co-location is assumed to generate cross-fertilization within the creative production and value chain, creating what Stefan Kratke coins, a 'space of opportunities' (Kratke 2002). Leading companies in the communication and media sector are relocating alongside privatized public corporations and for many young and creative media experts Berlin is the sought-after location. Recent locational analysis by Marco Mundelius (2006) has identified significant clustering of both software/multimedia and film/video firms in Kreuzberg, Mitte and Prenzlauer Berg – all central border districts that experienced disinvestment prior to unification (Figure 3). Berlin aims to build on this clustering to become Germany's media metropolis through major strategic infrastructural investment in the MEDIACITY, Adlershof in the south-east of the city. This pioneering location is playing an increasingly important role in the development of this production-driven cluster. Using the typology of creative clusters (see above), Berlin's media sector appears to be an *Emergent* creative cluster.

The district of Prenzlauer Berg is part of the borough of Pankow and is said to have replaced Kreuzberg (which has experienced recent decline and social tension) as the up-and-coming residential creative district, in which many artists live/work and galleries and bars co-exist. A multicultural milieu has emerged, as 6.4 per cent of people who live in Pankow have a nationality other than German. Together, Mitte and Prenzlauer Berg are promoted by their local administrations as the creative centre of Berlin, with 13,000 people said to be working in the creative and cultural industries. High public investment in education and the large number of specialist freelance workers located in these areas are seen as strengths, as is a robust public infrastructure. But the lack of marketing expertise has resulted in the under-exploitation of entrepreneurial potential and a very low degree of internationalization of the cluster. Only a small fraction of sales income is said to be achieved in foreign markets. Creative production is inward looking to local (Berlin) markets. Creative enterprises are more likely to struggle with access to funding than those in other sectors and there are management-skills deficits. These are the characteristics of an *Aspirational* creative cluster. Moving from 'creative scene' to creative enterprise is proving a big step. Active strategies to encourage creative clustering and entrepreneurship have been identified as key areas for city-level public intervention.

Density of firms per km²



Film/video
Density of firms per km²

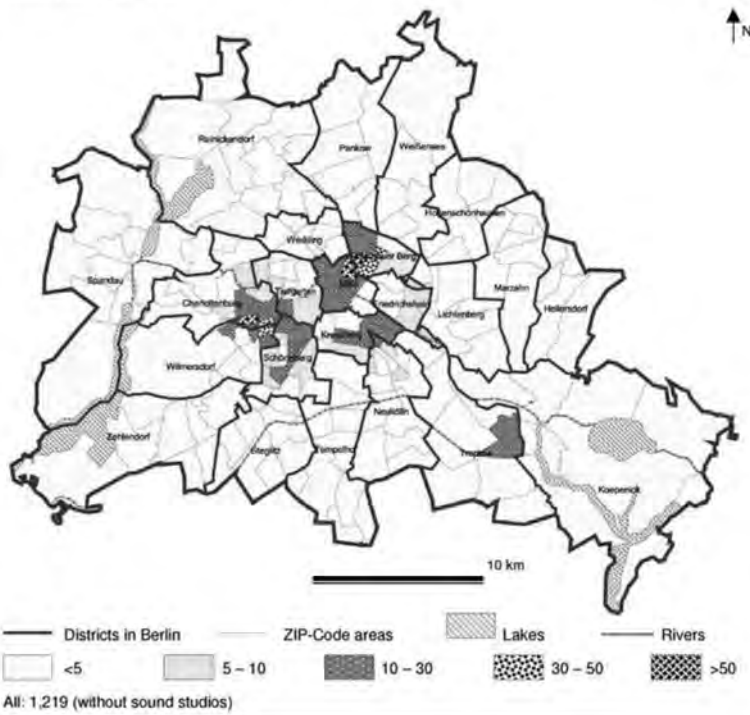


Figure 3: Creative clusters in Berlin.

However, structural weaknesses in the city will hinder this intervention. The city has a large budget deficit and has instituted public expenditure cuts. There is high un/under-employment and significant levels of worklessness despite attracting highly skilled and educated migrants from across Europe and North America. There is a lack of faith and trust in local politicians, born out of both the deficit crisis and accusations of property speculation (and corruption). The city is becoming divided between social and ethnic groups, introducing new issues of social inclusion for the administration. There is no overall strategic policy framework for the city, so the ability of policy-led intervention to influence economic development has been limited in the past. Berlin's creative economy has been organic and anarchic, so evaluation of 'success' and measurement of scale are problematic. Berlin has competitive advantages (location, availability of premises, high educational attainment), however, the current problems suggest that it will be another decade before its creative city role and status embeds and matures.

London

London has championed the creative industries within its economy since the late 1980s. This has increased in intensity since the first DCMS *Creative Industries Mapping Document* was published in 1998. Headline claims used to support the *Creative London Action Plan* (Creative London 2006) suggest that, since the late 1990s, annual increases in employment were 5 per cent, with 8.5 per cent for output and 4 per cent for improved productivity in the creative sector – out-performing all other sectors of the economy. The *Action Plan* cites creative industries as responsible for 15.9 per cent of London's GVA, one in five new jobs in the creative industries and 450,000 'creative' employees (Creative London 2006: 5).

Research undertaken by GLA Economics (GLA 2007) confirms that London and the Rest of the South East (ROSE) region dominate UK employment in the creative industries, with 58 per cent of all creative jobs representing 7.9 per cent of London jobs and 4.2 per cent of all jobs in the ROSE (Table 2).

	Workforce jobs (000)	% of workforce that is 'creative'
London	360	7.9
ROSE	293	4.2
Rest of UK	485	2.5
UK	1,138	3.7

Table 2: Workforce and creative jobs, 2005 (DCMS-DET defined industries).

Source: GLA Economics, 2007.

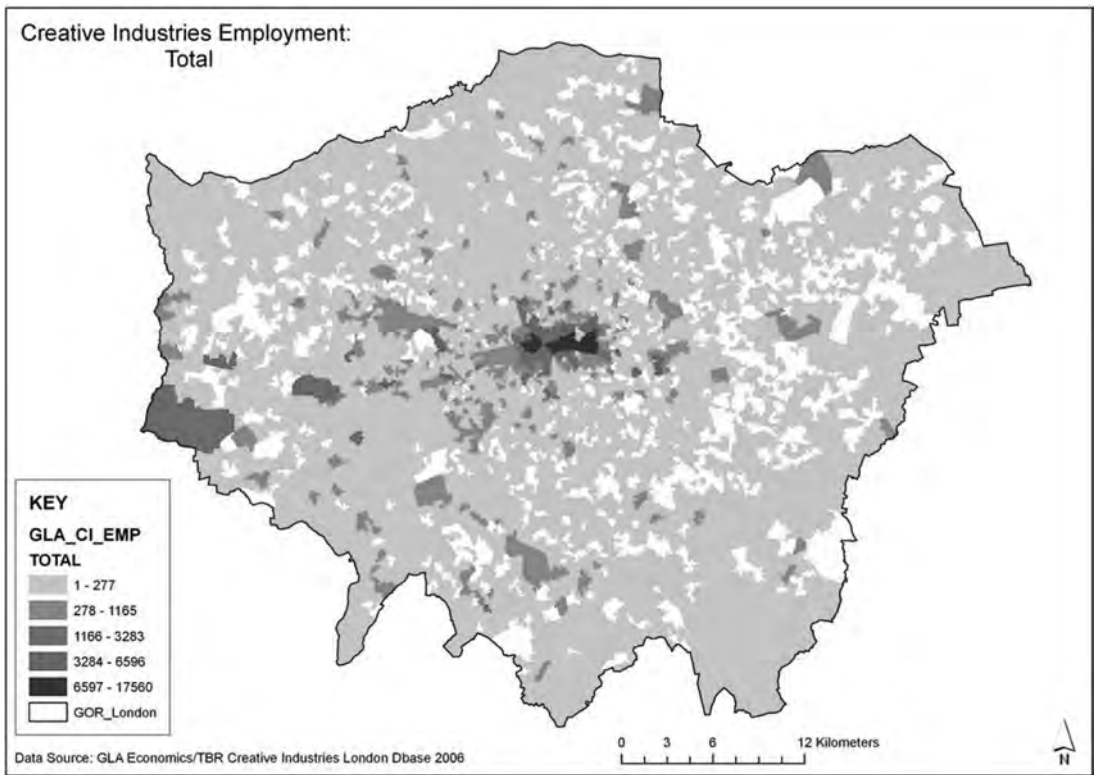


Figure 4: Creative employment in London.

There is further concentration of the creative industries within central London (Figure 4), a pattern reinforced for each of the production chain of the domains advocated by the DCMS in their DCMS Evidence Toolkit (DET). London's *Mature* creative clusters overlap and are highly centralized (Figure 5).

Nevertheless, one of the key programmes under the Creative London Action Plan (2006) – creative hubs – is based on cluster development outside this central London core. This new programme has been developed to use creativity as a catalyst for entrepreneurial development in areas of enterprise deprivation and where there is thought to be some potential for creative activity based on the location of a higher education arts institution, subsidized arts venue or active local community cultural programme. Ten hubs have been designated (Figure 6), all with not-for-profit organizations of varying sizes and with a remit to support the creative industries. In each area, a lead organization has been appointed to communicate with local agencies and develop a long-term plan. Since 2003, £56 million in funding has been approved in hub-based areas, more than 50 per cent of which has been raised from non-creative industry investment programmes, notably from property and regeneration budgets, and sector and skill investment programmes (Creative London 2006). This public sector-led creative cluster strategy is working with mostly *Aspirational* or *Dependent* clusters and indeed some which are pre-*Dependent* (Barking and Dagenham, Outer East London). Here, the hub strategy is to develop the networks and infrastructures that might facilitate creative activity of any kind.

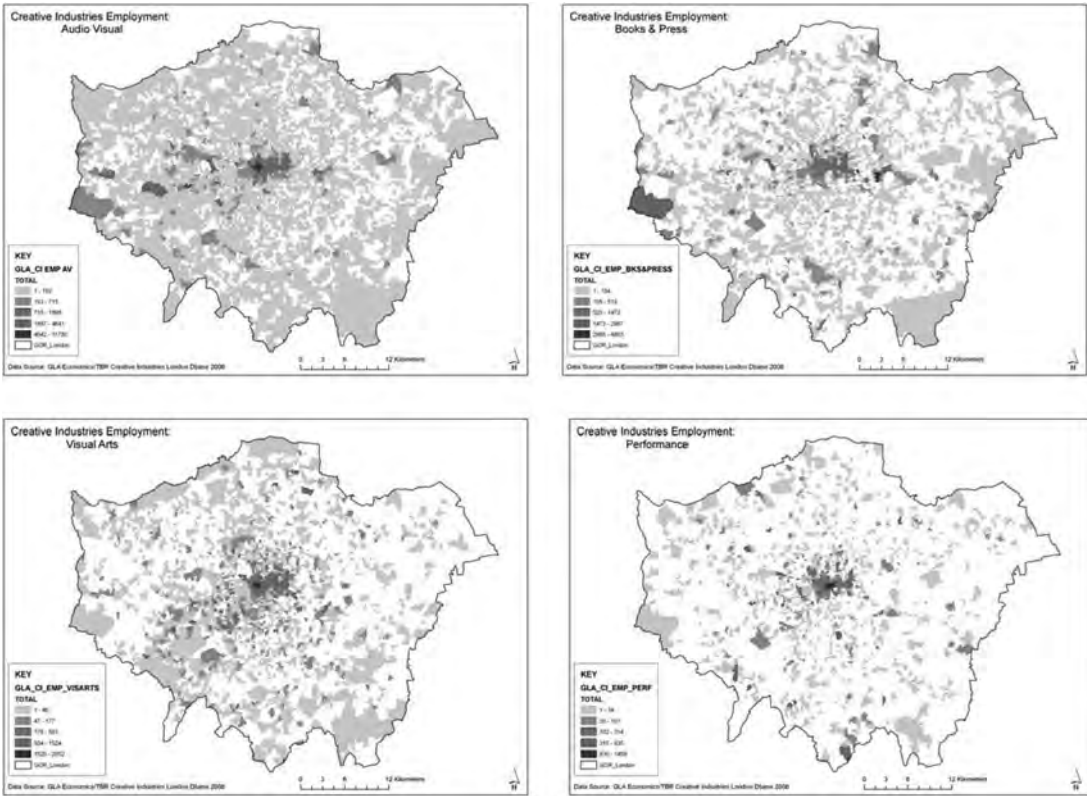


Figure 5: London's creative industry domains.



Figure 6: Creative hubs in London.

This creative hub programme is being implemented as London's creative employment appears to be in flux. By plotting employment trends for London, ROSE and the Rest of the United Kingdom, research by GLA Economics has identified a significant and potentially disconcerting recent downturn for creative employment in London (GLA 2007). For ten years, between 1991 and 2001, creative employment rose steeply for all three geographical areas. This pattern – and what it implied for the strength of this sector – justified the plethora of advocacy documents and strategies found by our survey not only for London but for many other cities and regions across the globe. However, creative employment in London fell sharply after 2001, with the beginnings of a recovery seemingly taking place only in 2005. Furthermore, this downturn was steeper in creative employment than for London's employment as a whole (Figure 7).

London's creative employment downturn goes against the trends for both the United Kingdom and ROSE. Upward growth continued in the Rest of the UK and creative employment in ROSE did not experience the same dramatic slump, as it appeared to recover quickly after a small dip in 2002. Initial explanations for these trends are emerging: the growth outside London may in large part be due to the expansion of those who are 'creatively occupied outside the creative industries' often in the public sector, which, as a whole, has been growing. There may also be a dispersal of the creative industries from London into ROSE. The particular volatility (or vulnerability) of London's creative employment has been linked to recent trends within the private sector. It is estimated that 47 per cent of all creative output is to supply 'intermediate demand from business' (GLA 2007). When there is a squeeze on the private-sector economy, creative industries in London suffer disproportionately, suggesting that many of the services and products offered by the creative industries are additional to

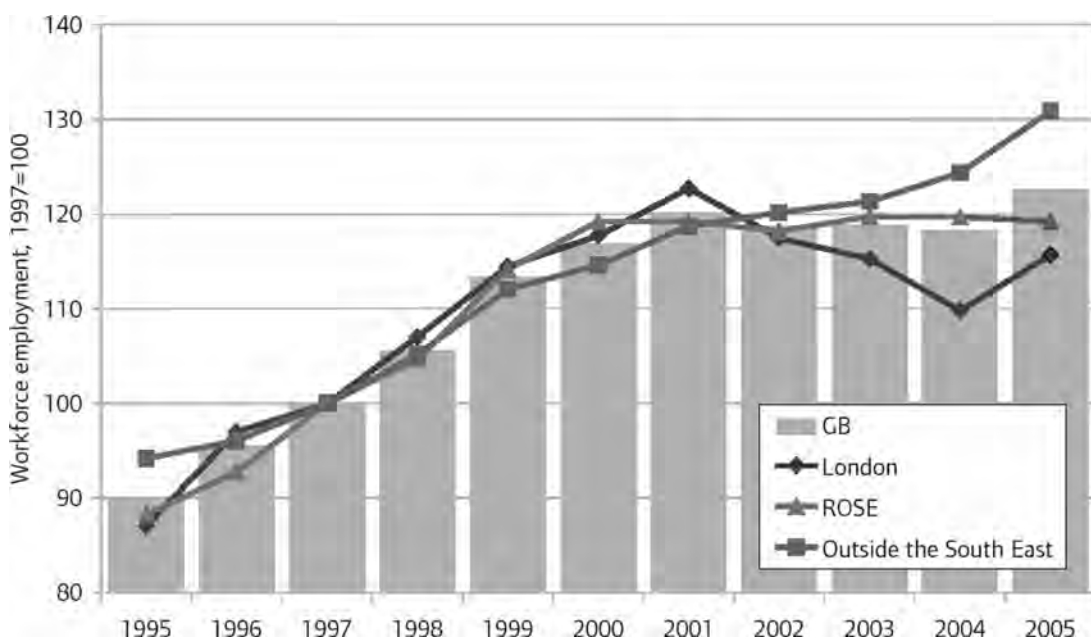


Figure 7: Creative employment trends for London, ROSE, Outside the South East and Great Britain.

core business activities and can be dispensed with when markets are contracting. Data from 2005 indicate a levelling out of London's creative employment decline, with some sectors again growing (those in the audio-visual, and books and press domains), but others not recovering so well (those in the visual arts and performance domains) (GLA 2007).

London's assured status as a creative city is beginning to look somewhat different as market pressures expose the systemic weaknesses within the sector. Similar volatility in creative industries employment is evident in other cities such as Berlin and Amsterdam following the dot.com fall out from 2001. In the United States of America, jobless growth has been identified, where the number of creative firms and productivity have increased but employment has fallen (Americans for the Arts 2005).

Other factors affecting the rate of growth of the creative economy in London are common to many world cities, notably high property and start-up costs. These are exacerbated by the gentrification (regeneration) of a number of London's inner city neighbourhoods, the dominant residential market, declining suitable light industrial and affordable workspace premises, coupled with the failure of live-work quotas. The impact of the Olympics development is too early to assess, although short-term workspace losses are already evident (Evans 2007).

More generally, London's socio-economic, cultural and spatial divide is also widening. London is high on Florida's 'inequality index' (Florida 2005) and creative industries employment does not reflect the city's cultural diversity – only 15 per cent of creative employees are from black and minority ethnic communities (GLA 2007). Indications of creative employment losses suggest dependency on fragile micro enterprises and a movement to outer London and out of London. Policy initiatives and interventions (including incubator and workspace initiatives, creative clusters and hubs, skills training and business support) are too recent for their impacts to be fully assessed.

London's links with international and UK regional city networks are – despite London's 'world city' status – less established than other European and UK regional cities. Steps being taken to internationalize London's creative industries profile and policy networks include international showcasing (for film, music and fashion) and the establishment of London's economic development and inward investment offices and representatives in China.

The strong presence of higher education art and design research and practice in London is also not reflected in measures of innovation and R&D performance. The United Kingdom scores low when compared with the United State of America and other European countries (the United Kingdom is eighth in Europe). Furthermore, productivity gains have not improved in line with the United Kingdom's competitors and there is little correlation between London's creative clusters and increased productivity. Finally, London, in common with Barcelona, is at risk of generating an over-supply of art and design graduates relative to employment opportunities. This, coupled with a general shortage of investment and venture capital for new creative entrepreneurs, makes London a difficult environment for the creative industries.

Conclusion

The survey of creative strategies and the city case studies have exposed many of the contradictions embedded within creativity-led policy discourse.

Creative industries are linked to anticipated growth and innovation and have often been used to lever funds for more general structural or sector-wide investment. In some cases this has deflected attention and investment away from cultural development and arts programmes or dedicated creative industries strategies. The lack of comparability in data analysis used to support creative strategies, their inconsistent definitions and applications of creative industries classifications, makes it difficult to truly assess the relative contribution creative industries make to city, regional and national economies. However, the survey did find a powerful drive towards defining creativity and the creative industries in terms of IP, although there was resistance to this where the social meaning of culture had been specifically valued.

Support for 'creative clusters' that bring together public and private institutions with enterprise growth and social (regeneration and inclusion) goals proved to be increasingly popular at the city level. However, the replication of creative clusters (media cities/digital hubs/creative hubs/fashion quarters/cultural quarters) raises questions about an over-supply of similarly targeted enterprises (within individual cities such as London as well as between cities at the national and international scales) and possibly unrealistic expectations of assuming an ever-expanding creative economy. As London's creative employment dipped in the wake of a private-sector downturn, it may be time to reassess the rush to become a 'creative place'.

It is therefore likely that future creative strategies will require a more sophisticated and realistic consideration of the role of the creative industries within the knowledge economy, including a deeper understanding of the innovation and production linkages between the creative industries and other sectors of the (not-so-new) knowledge economy. They would also benefit from a greater consideration of the different outcomes that can be anticipated from creative enterprise and cultural development programmes. Finally, if the objective is to facilitate creative places, then more attention needs to be paid to the particularities of locality. Creativity may be found everywhere, but perhaps not all localities can become 'creative places' with the competitive advantages that this implies.

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Contributor details

Jo Foord is a Principal Research Fellow at the Cities Institute, London Metropolitan University, where she undertakes research on urban and regeneration issues.

Contact: Cities Institute, London Metropolitan University, Ladbroke House, 62-66 Highbury Grove, London, N5 2AD.

E-mail: j.foord@londonmet.ac.uk