Spatial Clustering and Culture Barriers; An exploration in the geography of audiovisual firms[1]

Abstract
The literature on cultural industries and especially the audiovisual industry suggests in the first place that networks are replacing hierarchical and vertically integrated production systems. Secondly, it is argued that this organisational transition coincided with the economic restructuring of the western city centres. Among some other sectors, it is emphasised that cultural industries are close-knit clustered in the core areas of metropolitan regions. However, using qualitative and quantitative research methods, I argue that in the Dutch audiovisual industry both organisational forms not only coexist but also at the same time, are functionally interrelated but spatially distinct. Large hierarchical organized conglomerates in the town of Hilversum are able to realize economies of scale, necessary for the realization of television programs, a cost-cutting business. The industry in Amsterdam, on the other hand, forms an integral part of the project environment of the Amsterdam advertisement industry. Latent relations are long term and have their roots in shared historical trajectories and become manifest in times of temporary collaboration. The Amsterdam network is clustered in the city centre and the co-operating members use artisan and specialized production methods to meet the high-quality standards of the production of commercials.

Keywords
Clustering behaviour, Amsterdam, Hilversum, cultural industries, audiovisual industry, embeddedness

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Introduction

After a phase of marked de-industrialisation from the 1970s until the mid eighties, many western urban economies picked up again in the late eighties and in the early nineties. Even in agglomerations without a noteworthy industrial past, similar shifts were experienced. In cities like Amsterdam, large publishers, financial institutions and hospitals moved from the congested inner cities toward locations near highways where space was relatively abundant (Terhorst et al. 2004, p. 78-81). However, in both industrial and service oriented cities, the return at overall growth of employment was mainly concentrated in the service sector. The new industries are among others, ICT-companies, a diverse set of cultural industries, research and development departments and finance related activities. (Lash & Urry 1994, Sassen 2001, Scott 2000). Lash and Urry argue for example that the old economic core existed of fordistic industries with around it service and finance related activities. Modern capitalism, in contrast, is characterized by an inversion of the old core and is typified by a cluster of financial institutions, information distributors, communication businesses and the advanced producer services that are spatially concentrated in global cities (Lash & Urry 1994, p. 17). The remark by Sassen that global cities have become the production sites of our time can be added to this. She mentions that on the large scale, core firms have outsourced their bureaucratic supporting activities in the sphere of finance and law. On their turn, she argues that especially these service functions are subject to agglomeration (2001, p. 127). Besides advanced service related activities, some cities and city centres in particular have become pivotal for the development of a cultural economy. For example, Scott examined at great length to what extent cultural industries interact with urban creative milieus (Scott 2000).

Likewise, it is continuously emphasised in the literature that this process of economic transition is a pathway toward organisational restructuring as well. Contemporary urban firms operate in so-called networks and not as their fordistic predecessors in hierarchical settings. In contrast with firms in market settings, firms in networks maintain long-term relationships and they collaborate in short-term projects (DeFillipi & Arthur 1998; Starkey et al, 2002; Grabher 2002a, 2002b). Authors as Granovetter, Grabher, and Uzzi argue that self-interest and short-term profit maximization do not explain the logic of these relationships. Instead, social factors as trust building, fine-grained information transfer and joint-problem solving are the key motives to establish embedded relations (Granovetter 1985, p. 485, Uzzi 1996, 1997), which generate 'economies of time' and other externalities like learning effects (Storper 1998). Although a social network might occur without a spatial context, it is argued by economic geographers and spatial economists that proximity foster these socially embedded relations. However, it is claimed that proximity is not enough to join particular social networks (McCann & Sheppard 2003, p. 658). To get access, arrivals need to be acquainted with a specific 'habitus' in order to be accepted as a member (Grabher 2002a). In addition, it is even argued by Bathelt et al. (2004) that entrepreneurs in successful social networks maintain local relations to get access to local bits of news - labelled as buzz by Storper & Venables (2000) - and maintain some strong sought-out 'outside' relations to receive important and often critical knowledge (Bathelt et al.2004, p. 46).

This all fits in perfectly with the widespread view on the rise of post-fordism. As I will explain in more detail later, the idea is that large conglomerates structured in powerful hierarchies and 'cordon-filières' tend to cut down their innovative and creative activities while small firms clustered in socially embedded urban networks lean towards the creation of state-of-the art products or services (Piore & Sabel 1984). Eventually, an economic structure emerges in which the core firm is responsible for financing and the (global) distribution of products, while small firms are responsible for the delivery of semi-manufactured goods or services (Amin & Thrift 1992).

In this article, however, I argue that this commonly accepted view contrasts with the empirical findings of my research on the audiovisual industry in the Netherlands. In line with the literature, the audiovisual industry is, although its variety, a 'role model' cultural industry with a strong tendency towards outsourcing of the creative and productive force. (Barnatt and Starkey 1994; Bassett, Griffiths, & Smith 2002; Baumann 2002; Blair 2001; Brown, O'Connor, and Cohen 2000; Christopherson & Storper 1986; Crewe 1996; DeFillippi & Arthur 1998; Dex et al. 2000; Lampel et al. 2000; Starkey et al. 2000). In addition, it is argued that these outsourced activities are densely knit in urbanised areas (Christopherson & Storper 1986; Brown et al. 2000).

However, I presume that the size and organisational mode depend on the type of product, consumer market and regulative institutions and not as is suggested in the literature on the amount of creativity involved. With qualitative and quantitative data, it becomes possible to argue that large firms might form an integral part of the *creative productive* force as well. It appears that the Dutch audiovisual industry is organized following a spatial division of labour. In here, large conglomerates in Hilversum are focused on the production of television programs, while small firms in Amsterdam are embedded in the advertisement industry. Firms in both clusters have covered different historical trajectories resulting in particular culture barriers and habits that prevent firms from both clusters to interact on a large scale.

To reconstruct the Dutch audiovisual industry, this paper is divided into four paragraphs. First, I will explain what cultural industries are and how they are (spatially) organised according to the international literature. I will argue that case studies on the cultural industries and the audiovisual industry are too narrowly focused on small firms in highly specialised (audiovisual) branches. Secondly, I will concentrate on the audiovisual industry in the Netherlands using a quantitative approach. In the third section, I will argue – based on qualitative research- that the historical development of Hilversum as a television cluster and of Amsterdam as an advertisement cluster has resulted into two extremely different clusters in type of organisational structure and inter-firm culture. In the fourth paragraph, an explanation is revealed and suggestions are presented for further research.

Cultural industries

Case studies on cultural industries focus on a variety of economic activities that are hard to compare at first sight. However, industries as designing, apparel production, television and music, share at least two characteristics. First, it is argued by Scott that cultural industries produce goods and services, '*whose symbolic value is at least as important as its functional value*' (Scott 2000, p.2). In other words, not only entertainment or low art, but also products that are 'value added' with an aesthetic or semiotic dimension, like design toasters or garments with imprinted brand names, might be considered as cultural products to some extent. Secondly, the commercial motivation of production in cultural industries is frequently stressed (Hirsch 1972, p. 642). This divides the cultural products from high art by the fact that cultural industries are not *producer-driven*, but at least partly *consumer-driven*. With these two qualities - commercial production and aesthetic value -, cultural products are distinguished from art at the one extreme, which are products with only expressive or pure aesthetic functions. At the other extreme, it is suggested that cultural products are limited by products (or services) with a pure utilitarian function. The typology in figure 1 demonstrates to what extent cultural products may overlap with other products.

Figure 1: typology of cultural products

	Products with a utilitarian function	**Products with an expressive or aesthetic function**
Consumer-driven products	1. Consumer goods like toothbrushes and bread	2. Entertainment
Producer-driven products	3.	4. Art

Cultural industries

The range of cultural products has widened in the last three decades (Scott 2000, p. 2, Lash and Urry 1994). It could even be suggested that the circle in figure 1, which represents the cultural industries, has enlarged over time and that the number of products in cell 1 has diminished with a recognizable displacement from material toward symbolic consumption. This shift is partly a result of an ever-increasing lifestyle fragmentation as mentioned by Zukin (1998). She argues, following Bourdieu, that lifestyle fragmentation eventuates in a volatile consumer demand, which has led to the shortening of lifecycles of products. This effect, on its turn, gave rise to particular modes of risk-management by producers (Banks et al. 2000, based on Ulrich Beck's 'Risk Society') to overcome this increased uncertainty. This risk-management is associated with an increasing autonomy of actors and by that an emerging focus on individual problem solving and the sole deliberation of actions and steps that are to be taken without the normative framework of groups and societies. This is labelled by Giddens and Beck as reflexivity and according to lash and Urry for example, this characteristic of post-modern societies explains the ever-increasing dominance of high-tech firms or other knowledge intensive activities.

However, it might be argued that another dimension of this reflexivity, namely the aesthetic-expressive part (Lash & Urry 1994, p. 54), has led to the extending aesthetic or symbolic share of products in order to attract and attend the consumer. Lash and Urry argue in their second chapter in Signs and Spaces (1994) that the traditional labour process is becoming less important in its contribution than the design process in the production process. The emergence of R&D-activities in the 'value-adding process' contributes to their idea. Furthermore, products are increasingly branded, i.e. the attachment of signs and symbols by marketers and advertisers (1994, p. 15). Mutual reciprocity between consumers - who act as agent and aesthetic gatekeepers – and the symbolic value-adding service sectors reinforce this tendency that eventually might explain the expansion of cultural products and the amalgamation of the boundaries between culture and the economy.

The macro processes that are described above had major impact on the micro level of the workplace. With that I mean that the emergence of a cultural economy resulted in particular modes of production and organisation. Because a cultural economy is strongly dependent on recurring innovations, firms need to combine artisan and specialised production techniques, while collaborating with other firms in mainly localised networks (Piore & Sabel 1984). Especially small firms are suited for this job. Concentrations of high-tech firms in Sillicon Valley or in Bavaria demonstrate the importance of network structures that generate technological creativity. Nevertheless, the successes of *cultural* industries can be explained with network models as well (Scott 1995, Storper 1995), although they do not combine creativity with technological innovation, but with '*conceptual innovation'* (Kloosterman 2004). Conceptual innovation can be understood as the invention of creative ideas for symbolic purposes.

The similarity between high-tech clusters and cultural clusters is illustrated with a discussion of the Hollywood film industry by Christopherson and Storper (1986). They explain to what extent this industry has transformed from a typical tayloristic mass-production system toward a flexible system in which independent producers and interdependent subcontractors deliver their products or services (or both) to the studios. According to them, the role of the studio has changed from executive producer toward a facilitator of shooting space and an organiser of labour and capital. Two contingent events are responsible for this shift according to Christopherson and Storper. In the first place, the US Supreme Court forced the majors with the '*Paramount Antitrust Decision'* of 1948 to divest themselves from their theatre and cinema chains (see as well Storper 1997). Secondly, the introduction of television in the fifties resulted in heavy competition for audience between the old medium and the new medium. Accordingly, both critical developments resulted in a period of competitiveness, uncertainty and instability that eventually led to the breakdown of the hierarchic studio system based on mass production. From the sixties onward the majors separated themselves increasingly from the production outlets, which resulted in the upturn of independent producers and with them the high-tech suppliers.

Within the creative cluster of independent producers and suppliers, firms are likely to become *inter*dependent from each other. They are mainly organised in networks, as an intermediate mode of governance between markets and hierarchies (Williamson 1994). Within these networks, firms maintain long-term relationships that become manifest in temporary collaboration projects. This is why some speak of latency (Grabher 2001, p.1329) or latent networks (Starkey et al.2000) to emphasise the short-term contacts and long-term relations. However, interdependencies do not solely occur through recurring transactions of economic activities - which are in the eye of economic geographers enforced by proximity from a transaction cost perspective using a (Alfred) Weberian approach. Neither do firms in clusters exclusively profit in a Marshallian way from 'external economies of scale' as a common labour market, infrastructure or educational facilities. In contrast, it is argued by Storper for example that there are some unique characteristics in creative clusters. He claims that innovative firms in clusters – like innovations themselves – evolve along particular path-dependent trajectories (1997, p.19) as underlined by evolutionary economists. It is for that reason that producers depend on innovations and learning processes from other producers in order to develop new technologies (or to innovate new concepts). In addition, *untraded interdependencies* like knowledge spillovers, force entrepreneurs to follow particular pathways in time. Hence, it are these untraded interdependencies which give regions or cities *the* assets of our time.

Over time, interaction and untraded interdependencies lead to a particular knowledge base between the specific entrepeneurs that can be gathered in periods of temporary functional unemployment (i.e. periods of slack or redundancy, Grabher 2001, p.1330). Trust, conventions, vocabulary and norms strengthen interpersonal relations and hence the network organization in general, which are the building blocks of Granovetter's idea of embeddedness (Granovetter 1985, p. 488). If trust is established between entrepreneurs, transactions might turn out to be more efficient.

As a result, information will be received earlier and may be more reliable. Furthermore, members are easier motivated to solve problems together or to develop new creative ideas (Uzzi 1997, p. 678). Based on that logic, it can be concluded that clusters that are socially embedded have the best changes to become innovative.

Refinements on this theoretical framework do exist and focus on primarily three issues. In the first place, it is argued that not the interaction between cluster members results in *the* major learning effects, but the ties that firms maintain with firms from outside the cluster (Scott 1998, Bathelt et al.2004, Nachum & Keeble 2003). While the members inside the clusters profit from '*noise'* (Grabher 2001) or from the ongoing '*buzz'* (Storper & Venables 2002) and filter out relevant information, cluster member keep up to date with the dynamics in the global economy thanks to *key-links* outside the regions border. Secondly and following by that, Scott (1995) and Uzzi (1997) for example argue that social embeddedness has it limits. Social ties can become 'too social' (Portes & Sensenbrenner 1993, p. 1323), which will lead to 'lock-in effects'. Lock-in reflects the idea that it becomes difficult for firms to adapt to certain kinds of external shocks, like the development and sometimes-necessary implementation of new technologies (Scott 1995, p. 57) or organisation methods. Eventually, the most competitive clusters are indeed '*nexuses of untraded interdependencies'* (Storper 1997), however with the capability to absorb outside dynamics and with a delicate balance between social and arm-length interaction with other cluster members.

Within the literature however, a third debate goes on. In here, not the type of relationships within the cluster stands central, however the relation with the core-firm. Related within this debate is the overestimated importance of small firms. It is argued for instance that large conglomerates still dominate the cultural industries in terms of employment and in turnover. This holds for the television industry but for other media related branches, like publishing and cinema as well (Hendriks 1998 p. 166). Aksoy and Robins note in their critique of the analysis of the American cinema by Christopherson and Storper (1986) that both ignored the fact that economies of scale can be realised at finance and marketing departments as well as in the worldwide distribution and reproduction of cultural goods (Aksoy & Robins 1992, p. 15). In an attempt to combine the critique with his own findings, Scott described the film industry as an organisation structure in which '*system houses'* are on top and functions as the hubs of wider production networks (2002, 2004, p. 467). These system houses, that are found in the publishing industry and television industry as well, outsource several activities from which some are highly independent. However, Amin and Thrift for example, argue that this strategy has reduced the sunk costs of large companies, but not their power over these so-called 'independent' suppliers (1992). Nevertheless, Scott objects this fact that in terms of innovative, creative and specialized production, conglomerates become more dependent on small suppliers that are clustered in complex milieus (Scott 2000). In that sense, he argues that hierarchies are not replaced by networks or market structures in media or cultural industries, but subsist alongside. The remark from Lash and Urry that '…working alone or in a small firm which is indirectly dominated by a parent firm is vastly different than working for the parent firm itself…' (1994, p. 23), can be added to this. Based on that, Grabher argues that large conglomerates have outsourced two different types of tasks. In the first place, standardized and routine tasks are performed by highly dependent firms and their input is '*orchestrated'* by the outsourcing conglomerate (Grabher 2002, p. 252). Secondly, creative and innovative tasks are developed in projects of interdependent network members. These members are geographically clustered in particular milieus and they maintain socially embedded relationships. Comparable typologies are made by Ruigrok and van Tulder who distinguish four types of bargaining between the core-firm and its supplier. These are, *obedience*, *coalition*, *direct control* and *structural control*. To them, the negotiating position depends on product type and with that they argue that firms that produce replaceable or substitutable goods are strongly dependent on the core firm, while key-suppliers producing specialised or high-tech equipment might even operate independent from the core firm (Ruigrok & van Tulder 1995, p. 71).

This dichotomy between innovative firms and those that produce routine tasks has spatial implications as well. Creative firms for instance that deliver creative ‘key-services’ are clustered in the city centres, while supportive firms that carry out routine tasks are located in peripheral areas (Scott 2000, p. 99; Leyshon 2001, p. 64). In most cases, the latter type of firms thrives on mass-production methods in an attempt to realise economies of scale. For example, Scott focused on the French cinema and found out that although the bulk of the creative personnel had their offices in the eight *arrondisement* of Paris, the shooting studios were located outside the municipality’s border (2000, p. 101). Leyshon on the other hand, distinguishes in the music industry, networks of creativity, of reproduction, of distribution and of consumption. Networks of creativity are defined as centres of creative and technical musical knowledge (2001, p. 62), which are found in the heart of the urban areas. These networks exist of technicians, lawyers, creative people and the record companies. By that, the record companies are partly situated in the city centres to be as close as possible to cultural developments but ‘also to expedite the transaction-intensive process of contractual dealing with artists, managers and lawyers…’ (Leyshon 2001, p. 63). On the other hand, these record companies dominate the networks of production, which are more stable and based on mass-production. Consequently, these production networks are able to realise economies of scale and are situated in the margins of the urban areas. Another spatial dichotomy is formulated by Coe who researched the film industry in Vancouver (Coe 2001). He described this audiovisual cluster as a satellite-platform for executive tasks organised by creative firms in Hollywood. He concludes that the Hollywood majors have sourced-out their shooting activities in an attempt the save (employment) costs (2001, p. 1761). In the end, he notices that Vancouver district slightly evolves into a ‘Marshallian’ district where firms are no longer dependent from American multinationals but create, produce and distribute their own films and television programs (Coe 2001, p. 1770).

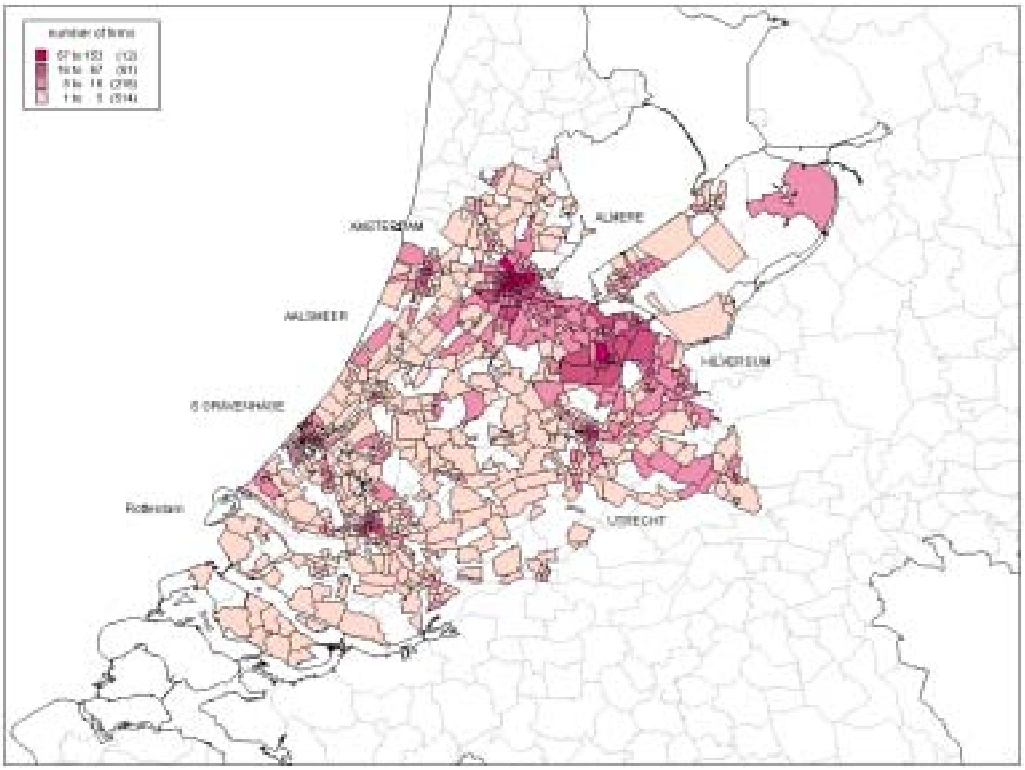
The Dutch audiovisual industry

The question is if this concept of the spatial organisation of cultural industries can be revealed in the Netherlands. This concept or model of cultural industries can be summarized as follow. In the first place, cultural industries concentrate in metropolitan areas. Secondly, some parts of the production process, as shooting activities, are relocated toward low cost areas while some other parts of the value chain, as distributional activities, are located outside the metropolitan core. Third, the most creative and innovative entrepreneurs cluster in socially embedded networks and creative parts operate independently from large oligopolistic financers and distributors.

As shown by Kloosterman (2004), the spatial distribution of cultural industries in the Netherlands does correspond with the first statement. He argues that concentrations of publishers, advertisers, the audiovisual industries and the performing arts, are found in the northern wing of the

Randstad Region[2] with Amsterdam as it core (Kloosterman 2004 p. 251). However, it is necessary to focus on small cities to demonstrate the exact positions of the core areas. If we look at the spatial distribution of the audiovisual industry, some major differences within this Northern wing are uncovered.

Figure 2 Distribution of television related firms in the Randstad region in 2003.



Source: Chamber of Commerce 2004, own calculations

Figure 2 gives an overview of the spatial distribution of companies in each 4-digit postal code based on data from the Dutch Chambers of Commerce[3]. Like many other cultural industries, the audiovisual industry is clustered in the centres of the largest cities. However, two cities give evidence of enormous concentrations. In Amsterdam, there are 1680 firms concentrated and in Hilversum are 359 firms concentrated. Rotterdam, Utrecht and The Hague are lagging behind with 262, 225 and 157 firms respectively. However, *large* firms are relatively over-represented in Hilversum as is demonstrated in figure 3. In addition, if the total number of firms is compared with

[2] The Randstad Region is the western part of the Netherlands and the densest part as well. In the Randstad region the four largest cities are situated. These are Amsterdam and Utrecht in the North and East and Rotterdam and The Hague in the South and West.

[3] The Dutch Chamber of Commerce was asked to give a list of all television and film related companies in the four provinces, Noord-Holland, Zuid-Holland, Utrecht and Flevoland to cover the Randstad region. Firms in production and supplying activities of radio and television (bik95-code 92202, 92203) were selected.

the total number of employees, we might conclude that Hilversum is the largest cluster (figure 3).

Figure 3: Number of firms, full time employment, average employment in selected municipalities in 2003

Municipality	Average employment	Number of firms	Total employment
Hilversum	22,8	359	8194
Amsterdam	2,4	1680	4087
Rotterdam	2,3	262	602
Utrecht	2,3	225	514
Den Haag	3,1	157	486
Aalsmeer	44,0	10	440
Haarlem	2,0	113	231
Diemen	10,2	22	225
Almere	2,5	85	209
Amstelveen	4,2	48	201
Lelystad	5,7	28	160
Wijdemere	2,2	59	130
Amersfoort	1,9	65	125
Delft	3,7	34	125
Bussum	1,9	62	115

Source: Chambers of Commerce 2004, own calculations

Although absolute numbers give a clear indication of concentrations, location quotients reveal the contribution of specific economic sectors to a city. After these are calculated, it will become clear which cities ‘thrive’ on the audiovisual industry. Specifically, location quotients are used to express the relationship between an area’s share of a particular industry and the national share of a particular industry[4] (Mayhew 1997, p. 260, Kloosterman 2004, p. 247). Location quotients higher than 1,0 imply a surplus of economic activities in the selected industry in a particular area, while quotients lower than 1,0 suggest that the selected branch is underrepresented.

[4] Thus the location quotient equals: relative employment in a field of a given region / relative national employment in that field.

Figure 4: location quotients of selected municipalities in audiovisual sectors in 2002.

Municipality	Distribution of (video) films	Supporting activities for the production of (video) films	Supporting activities for radio and television	Production of (video) films	Production of television and radio
Almere	0	0.6	0.3	1.3	9.8
Amstelveen	0	3.2	0	1.8	1.5
Amsterdam	10.3	4.0	1.4	4.0	4.9
Bussum	0	11.6	0.5	6.7	4.6
Diemen	0	2.6	0	2.0	39.3
The Hague	0.8	0.3	0.7	0.2	0
Hilversum	2.4	26.8	19.8	27.5	7.7
Lelystad	0	0.6	0	0.4	0.5
Rotterdam	0.2	0.6	1.1	0.4	1.0
Utrecht	0	0.7	0.2	1.0	1.8

Source: LISA, 2002

Again, the dominance of Hilversum and Amsterdam is demonstrated in figure 4. Rotterdam, The Hague and Utrecht are outdistanced by small towns as Bussum (neighbouring to Hilversum) and Amstelveen and Diemen (adjacent to Amsterdam). Two concluding remarks can be made for now. In the first place, Amsterdam and Hilversum are the core areas of the Dutch audiovisual industry with some surrounding municipalities. Secondly, the average number of staff in Hilversum is significantly higher than in Amsterdam. With these two remarks, it might be tempting to argue that a spatial division of labour has occurred in the Netherlands comparable to the observations of Coe or Leyshon in Vancouver and England.

However, as I will demonstrate, it appears that this division is not derived from an economic geographic logic that explains how reproduction and redistribution activities in music for instance is ‘forced’ to locate at peripheral areas of agglomerations or to low-cost areas elsewhere. Neither Hilversum nor Amsterdam is a production satellite as firms in Vancouver are for Hollywood majors. Qualitative findings of both clusters reveal that the Hilversum cluster and the Amsterdam cluster do not have much in common in terms of their final products and consumer markets. This turned out to be the case after is focused on the interaction activities between firms from Hilversum with their colleagues and competitors in Amsterdam. As I will demonstrate below, the two clusters are rather autonomous, they operate on different markets and they do not share the same historical trajectory. While firms in Amsterdam are embedded in the advertisement industry, firms in Hilversum are rooted in a television production network coordinated by broadcasters and large suppliers.

The television industry in Hilversum

Why the production of television programs is dominated by large firms is explained using two arguments. In the first place, it is argued that the mode of production is fashioned by the particular type of market. In other words, television needs big firms (Economist 2002, Hendriks, 1998). In the second place, I would like to argue that Dutch policy has reinforced a tendency toward consolidation over the years. However, before I continue with the complex issue of firm size in Hilversum, I will explicate first why television is located in Hilversum and not in Amsterdam.

As in other countries, Dutch television has its roots in radio. Dutch radio, on its turn, has its roots in wireless communication purposes for overseas trade and defence aims. Radio, in that sense, was one of the first ‘IC-technologies’ on board of many ships. A broadcasting company and a manufacturing company for the production of receivers was founded in 1918. It was decided that both would be located in Amsterdam near the (at that time) national harbour. However, high rents and lack of space, forced both new institutions to look for cheaper locations. Especially the factory required a huge amount of space. Although Alkmaar (30 kilometres north of Amsterdam) and Tilburg (in the south of the Netherlands) were considered as alternatives, Hilversum was selected for its low rents. Besides, construction costs were much lower than in Amsterdam and Alkmaar because Hilversum is located on sandy grounds, while Amsterdam has its base on muddy peat. Therefore, it was not necessary to drive piles into the ground, a required construction procedure in Amsterdam (Abrahamse & Cabout 1995, p. 15).

Due to competition with international radio companies (like the British Marconi company and the German Telefunken company), the Dutch transmitting company moved away from the early ‘ICT’-market market toward (amateur) radio broadcasting. Consequently, broadcasting organisations that had their headquarters mainly in Amsterdam (near the variety theatres), established their studios in Hilversum near the transmitting aerials. Until the thirties, Amsterdam was considered the artistic and organisational centre for the *invention* of radio formats, while Hilversum was merely a production outlet. However, the increasing importance of the sound studios led the broadcast organisations decide one by one to relocate their Amsterdam based head offices near their studios in Hilversum from the forties onwards (Abrahamse & Cabout1995, p. 27, p. 38).
After the Second World War, these broadcasting agencies introduced television and from that time, the name Hilversum became synonymous with Dutch television. Although there are many broadcast organisation, a reflection of the Dutch pillarised society, all were and are, subsidised with national government funding. Besides, all programs were made by one facility supplier, the NOS, a state monopoly, who owned the transmitting aerials in Hilversum as well.

Although an explanation for the concentration of television-related firms in Hilversum is given, it is not revealed yet why so many large firms in Hilversum does exist. As said, on the one hand it is inherent to the industry. A tendency toward consolidation (Student Research Group 1997) is forced by the urgency to realise economies of scale (Hendriks 1998). This is because television is saturated. Although the number of channels since the introduction of commercial television in 1987 has quadrupled, the amount of advertisements did not increase proportionately. A reason for that is the stagnating number of viewers, which is inherently associated with the national population. Consequently, at one point in time, the amount of revenues of advertisements falters. As a result, the television-industry has a cost-cutting strategy, which means that more programs has to be made with less money. Today, we can add two further remarks. In the first place, global recession did even lower the amount of advertisement revenues for broadcasters for some years (McKinsey & Company 2003). Secondly, other media, especially the Internet, caused for severe competition (Van Mil 2004). Meanwhile, the large number of channels is coordinated by three clusters of broadcasting agencies (from which one is the consortium of public broadcasters). This oligopoly forces the independent producers to lower their prices. Small facility suppliers are driven out of the market, while efficient and large all-purpose suppliers are the ones that survive. In addition, facility suppliers rent out complete sets ranging from light installations, sound recording equipment and cameras. Even staff and assistants necessary for the registration are included in the ‘package deals’. The advantage of this system is that the producer does not need to ensure that all different companies are present at the same place on the right time. The production costs are lower, because the staff members are employees. Moreover, it saves administrative costs.

A second reason to explain the consolidation tendency is that the *executive production* of television programmes was carried out by the state-owned NOS until 1989 (Het Financiële Dagblad 1998). Nevertheless, the introduction of commercial television only gradually changed this mode of production. While the state facility supplier became semi-privatised, it lost its monopoly position it received in the early days of radio broadcasting. In the nineties, the newly semi-privatised facility supplier renamed NOB, received governmental funding in order to widen its tasks from registration assistance towards pre-production and postproduction facilities. Other facility suppliers followed and consequently, all present themselves nowadays as all-purpose facility supplier. In addition, Hilversum and NOB invested in a new television production site at the border of the municipality to accommodate all broadcast companies in the immediate surrounding of the NOB studios and transmitting aerials. Second, the local government of Hilversum stimulates the cooperation between the broadcast agencies in order to realise new multimedia techniques especially those that integrate television and Internet in order to create interactive television, so that consumers can choose their own moment to watch shows. Consolidation is reinforced by the national neo-liberal government as well (McKinsey & Company 2003). From 2004 onward, the public broadcasters are coerced into a cost-cutting strategy and have to save 70 million euros until 2007 (McKinsey & Company 2003).

However we cannot argue that Hilversum predominantly exists of large oligopolistic firms that produce and broadcast everything in house. In figure 5, it becomes clear that even the 50 percent of the firms has less than two employees. Comparable with the archetypical Toyota-like organisation structures (Dicken 1998, p. 168-172) and the old fifties Hollywood cinema (Scott 2002, p. 960), the large subcontractors and broadcasters are surrounded by small firms as editors, scriptwriters, voice-over freelancers, sound operators and multimedia firms. Although these professions are found within the core-firms themselves, the periphery of small firms function as a buffer in time of high conjuncture while others fill up particular niches. It is argued by Van Mil (2002) that new innovations are invented and tested within this network of young ambitious entrepreneurs, amateurs and hobbyists, while the broadcasters keep a close watch on them. This turned out to be the case at the end of nineties when the multimedia industry evolved alongside the broadcasters. When the broadcasters finally understood their relevance, they were consolidated in order to organise television shows accompanied by Internet sites.

Figure 5: Number of firms in same full time employment cohort in Hilversum, 2003

	Number of firms	Relative number of firms	Cumulative percentage
1 employee	194,0	54,0	54,0
2 till 4	83,0	23,1	77,2
5 till 9	29,0	8,1	85,2
10 till 19	14,0	3,9	89,1
20 till 49	17,0	4,7	93,9
50 till 99	9,0	2,5	96,4

100 till 199	1,0	0,3	96,7
200 till 499	10,0	2,8	99,4
750 till 999	1,0	0,3	99,7
1000 and more	1,0	0,3	100,0
	359,0	100,0	

Source: Chambers of Commerce, 2004

Nevertheless, the small percentage of firms at the top end in figure 5 give rise to the extreme discrepancy with Amsterdam and other municipalities in average firm size (as is demonstrated in figure 3 and 4). This proportion, existing of the broadcasters (public and commercial), some large producers and facility suppliers, accommodates the lion share of the labour force. The problem is that a correlation between the amount of flexibility and dependency on the one hand and the fact if a cluster exists of large firms cannot be proved. As a studio space owner mentions *'After RTL decided to establish his own in-house production company, HMH, some previous independent directors were placed on the payroll of HMH, however they still operate independently in temporary projects…'*[RG15]. In contrast, independent producers might film exclusively for one broadcaster to avoid the legislation that 25 percent has to be outsourced. For example, Dohmen argues that if a program is invented within a broadcasting agency, the producing job almost automatically goes to the in-house production company, or to the formally in-house producer [RG4, RG11] (Dohmen 2003).

We might conclude that the Hilversum cluster exist of large-scale mass-like production conglomerates that produce mostly in-house. The executive work is done by technicians, camera staff and others that are on the pay list. This confirms the tendency toward standardization and repetitive functions. A periphery of small firms function as a back up reservoir yet as well as a repository in which small-scale technological innovations can thrive. Television series are made with long-term contracts depending on the number of shows that are estimated. To end, my opinion is that television is a product that is routinely produced. It is extremely efficient in time and money – a potential asset that is frequently stresses by media experts as van Mil to open up the Amsterdam network - and by that not highly flexible and specialized as the Storper's post-fordistic film industry or Allen Scott's aerospace consortia. This, as I will demonstrate in the next section, contrasts with the findings in Amsterdam.

The audiovisual network of Amsterdam

In this section I will focus on the Amsterdam network as a culturally embedded cluster. I will explain how this organisation structure is organised and what the consequences are for the overall image of the audiovisual industry in Amsterdam. Furthermore, I concentrate on two facets of clustering behaviour. One that is related to proximity and another that is related to the overall atmosphere of Amsterdam.

While the Dutch television industry came to mature in Hilversum, in Amsterdam the audiovisual industry developed toward the production of commercials (see figure 6). Among twenty respondents, mainly producers and editors, the existence of a social network was revealed of freelancers that operated on the *advertisement market*. This market is organised around an advertisement agency, '*the creatives*'. They are hired by the marketing departments from large

multinationals as Unilever and Ahold, *'the advertisers'*. The creatives appoint on their turn a director that works exclusively for a particular production company who arranges the production from pre-production, shooting and post-production. The creatives and the directors need to 'win' contracts in the form of so called '*pitches*'. These are puffed-up presentations from the director (with or without an prototype commercial) to demonstrate its creativity and relevance for the advertiser.
Although advertisers careful decide about the frequency a particular commercial is broadcasted (as demonstrated in the Hilversum paragraph), they are extremely demanding with the content of a particular commercial. As a result, advertisement agencies can permit to cooperate with the most creative (i.e. expensive) individuals, which is reinforced by the fact that a particular commercial only takes 30 seconds, By that, directors and editors can focus on every single cell to improve the final results. Consequently, the status of the production of commercials is much higher than the production of television programmes. Within the industry, the production of commercials is compared with the conceptualisation of art and the creators consider themselves as artists. Consequently, an Amsterdam based firm stands for quality, elite, wealth and glamour. A sale spokesman of a postproduction agency mentions the yearly party for all their clients at the commercial festival at Cannes [RG20] and the director of a camera rental agency indicates the dichotomy as follow:

'*When the prime minister suddenly appears outside, a cameraman from Hilversum of the eight o clock-news can zoom in immediately, which is very impressive. However, you cannot compare this to a cameraman in Amsterdam working all day long in a studio (here just around the corner) with a director and a light assistant, creating the right atmosphere with filters and light techniques for a particular commercial'* [RG11].

Figure 6: Number of advertisement firms in the four largest cities and in Amstelveen and Hilversum in 2002

City	Number of firms	Number of staff	Location quotients
Amsterdam	1527	5099	2.4
Rotterdam	395	1594	1.1
Amstelveen	102	988	5.8
Gravenhage, 's-	246	947	1.0
Utrecht	442	882	1.0
Hilversum	169	275	1.3

Source, LISA 2003

The fact that lifestyles are unique in both clusters and that the working budgets differ, did some large Hilversum based facility suppliers as Valkieser (renamed UBF) and 'BV de Jongens' decide to establish subsidiaries in Amsterdam using adapted formats to penetrate the advertisement market [RG5, RG7, RG11]. By attracting managers which are familiar with the Amsterdam milieu to minimize the connection with Hilversum, they have found their way within the advertisement industry.

However, a third characteristic stresses the discrepancy even more. Unlike firms in Hilversum with its repetitive shows, the advertisement industry is short of continuity. As a result of that, firms do not have large numbers of employees. The respondents assumed that in Amsterdam almost all functions are carried out by freelancers, that are hired on a daily base in projects that last for a few weeks. The shooting of a commercial is regularly done in a couple of days with an extension of one day if the weather is bad. It is arranged by law and by collective agreements that a working day is 10 hours, after that the freelancers are paid in overtime hours.

In most circumstances, the art director freelances exclusively for a particular production agency, which he or she in most cases established him or herself. Producers with that particular relationships commission in formal sense the director, however are only mandated by the director to organise all equipment and requisite staff for a particular shooting. Sometimes the producer makes use of the expertise of professional intermediaries or employment agencies that are involved to find the most suited persons, however most are directly contacted by the producer. Producers often claim that they prefer to commission people they know and with who they have worked before with. Because of that, producers build up particular networks within the Amsterdam network resulting in particular 'culture islands' within the overall working culture. The fact that producers prefer to work with freelancers they know is a method to restrict access according to Baumann (2002). Advantage is that the number of transactions will increase between the remaining partners, which improves coordination and decreases uncertainty and opportunism (Baumann 2002, p. 32). in line with Baumann, the second most common form to hire people is via intermediaries. However, this method is only used if the employer is not sure which person to hire and calls upon the network-knowledge of others (2002, p. 33). With my experiences during the shooting of a car commercial, it appeared that only the light technicians and the sound assistant were hired indirectly. The electricians and light technicians came from a specialised agency, that operated quite similar as a regular employment agency, only then on this particular niche market. The sound assistant appeared to be the girlfriend of the sound engineer and both were inseparable.

In the Amsterdam-network, freelancers do not apply for a job as in other branches. Baumann claims that job ads can be used only in those sectors where the job function is well described, which is quite uncommon in the audiovisual industry (Baumann 2002, p. 33). In fact, they apply indirectly during the working hours of a project by demonstrating their usefulness as a light assistant or camera operator. During the shooting of a commercial, the freelancers might reveal that they have spare time in two weeks and they mingle with key persons during the breaks wondering about upcoming projects. To widen the opportunities to get a job in a next project, freelancers diversify their potential tasks within their particular niches. A freelancer might have a name as a producer, however might rent out himself as a location manager or a production assistant in times of low conjuncture. '*If you hire them, they might hire you sometimes…*', seems to be the adage [RG10].

As in Hilversum, the Amsterdam network is densely clustered. This clustering is twofaced. In the first place, entrepreneurs can improve their contacts with other freelancers or core-firms. Secondly they cluster to profit from the surrounding atmosphere that is offered in capital city as Amsterdam. The first issue refers to proximity. However although many have argued that proximity correlates strongly with the idea of knowledge transfer and crucial information transmitting, it appears that especially the low-value bulk of the cultural industries need to cluster. This is argued by Bathelt et al.(2004) as well, and in line with that, the respondents I interviewed mentioned the existence of a large pool of labour as an arguments to stay and work in Amsterdam. With a large cluster, producers can pick from a reservoir if someone falls out, while members in the reservoir can extent their networks. In that sense, concentrations of firms do not necessarily flourish thanks to a

cultural elite, however, they do flourish due to quantity and social embeddedness. By that I mean that effectiveness is not realised as in Hilversum with economies of scale, though it is managed through the fact that members are aware of each reputation based on individual capacities.
In addition, transport cost aspects have motivated freelancers to locate in Amsterdam as well. If one wants to climb up in the order from 'runner' toward producer or from 'extra' toward director of photography, he or she better be sure to live in the immediate surrounding of the most important shooting areas (probably the inner cities with its canals). One sound engineer mentioned [RG5] that he only commissioned freelancers that lived within cycling distance. Or as another producer mentioned:

'*If a shooting takes place in Rotterdam for what kind of reason, I have to pay for all the travelling expenses of my freelancers. However if some particular camera man wants to shoot in Amsterdam, it is his problem that he does not live in Amsterdam. He won't get any refund of his travelling expenses…* '[RG25].

The second argument to cluster in Amsterdam is based on the overall metropolitan atmosphere, the asset of Amsterdam. As the director of the Hilversum based Media Academy mentioned: *'Of course do all the young and trendy creatives live in Amsterdam, as long as they do their television work over here, we do not care…'*[RG26]. However those that work in the advertisement industry gave notice of the fact that the inner city provides visual information about street culture and trends. The city is essential for adding knowledge about what is hot and what is not. Moreover, producers find there future partners in a bar, or when its summer, on a terrace on the Rembrandtplein. Face-to-face contacts in early phases of the production process reveal the character of the other person. Getting to know each other is more than a job interview in a clean prefabricated office building. Although it is a cliché, most respondents eventually mention that the audiovisual industry is a '*peoples business*' with its own particular habits and vocabulary.

Conclusion

Although literature on cultural industries suggests that small firms control the creative production chain in cultural economies, it is explicated here that in the Netherlands two densely clustered concentrations exist of creative firms. The Amsterdam cluster is the largest in number of firms, while in the Hilversum cluster more are employed. The differences between both clusters assume that cluster theories, based on the transition from mass production toward flexible organisation forms, are only partly useful. Furthermore, theories that bear in mind a spatial selection with creative firms in the centre and the outsourcing of reproduction activities toward the peripheral areas do not cover the reality in the Dutch case either. It appears that the historical roots and the market in which both are embedded have resulted in different organisational structures. From that perspective, it turned out that embedded relations between audiovisual firms are essential to survive if the network consists of small firms. However, it is not claimed that all transactions between firms occur on a socially embedded logic. Especially between the two clusters and within the Hilversum cluster, transactions take place on a more rational base. This can be explained by the organisational mode of production in both clusters. However, culture clashes between both clusters might be responsible for this development as well. In Amsterdam, producers and facility suppliers are mainly moulded by the high quality standards of the advertisement industry, while in Hilversum the regime of broadcasters and government forces the facility suppliers and producers to realise economies of scale. Networks of small firms have not replaced the large conglomerates in the audiovisual industry, even in the production phase. It turned out that both modes of production existed and continue to consist even in a phase of economic transition.

Therefore, the idea should be abandoned that a specific mode of production is a fact, a constant, in clustering behaviour, certainly in the cultural industries. After we are convinced, that clustering does not only occur in social embedded networks, however as well in hierarchical settings, we should aim at models with variable modes of productions. Besides, we cannot claim that the mode of production directly influences the mode of the relations between firms. Both are variable and are as well shaped by the type of product, history, proximity and by an institution like a government.

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