

# CULTURAL INDUSTRY AS A RESULT OF NEW CITY TERTIARIZATION

## KULTURNA INDUSTRIJA KOT ODRAZ NOVE TERCIARIZACIJE MEST

David Bole



The scheme of the proposed Novi Kolizej in Ljubljana is characteristic for cultural industry, as it combines commercial and artistic function. Zasnova predlaganega Novega Kolizeja v Ljubljani je značilna za kulturno industrijo, saj združuje poslovno in umetniško funkcijo.

## **Cultural industry as a result of new city tertiarization**

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**ABSTRACT:** The article introduces a new form of economic activities, which has attracted much attention during the past years. This new form is cultural industry, a term which defines a certain part of tertiary activities, the importance of which is rapidly gaining in importance within cities. The term cultural industry includes all highly specialized services, which provide products and services, that have a higher symbolic than material value and trade with intellectual property rights. The article provides precise definitions of cultural industry and an empirical presentation in the case of Ljubljana. Furthermore the article also implies possible consequences of cultural industry on the economic and spatial development of cities.

**KEY WORDS:** geography, economic geography, cultural industry, tertiarization, tertiary activities, urban geography, creativity, Ljubljana.

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# 1 Introduction

For decades has Slovenia been facing the imposing process of economy transformation from the so called material activities into non-material. Part of the latter are those activities which result in products with only a symbolic value. Due to the circumstances of economic globalization the industrial production is migrating to areas, where costs of production are minimal, and along with other conditions of globalization, such as liberalization of world trade, deregulation of financial sources and the development of information and communications technologies, cause a substantial shift in the economic structure of developed countries (Ravbar, Bole 2007, 14).

This shift refers to the changed structure of the industrial sector of the economy, which has to transform. This transformation includes deindustrialization, a process, which has been set into motion in the developed countries as early as in the seventies of the 20<sup>th</sup> Century and in the post-socialistic countries from the fall of the socialistic regime (Lorber 1999, 160). Deindustrialization is a transformation of the industrial sector of the economy, which has, in the modern conditions of globalization, technologic advances and internationalization of trade, been forced to change. It is also the main process, which marks the transformation into a post-industrial society. Deindustrialization marks the reduction of the number of employed people in the manufacturing sector of the economy, yet it doesn't reduce the importance of this sector. The process of deindustrialization is an internal reorganization of industry, marked by strengthening of its productivity, parallel to the reduction of workforce costs (Rowthorn, Ramaswamy 1999, 22). A successfully transformed industry will employ less people, but will at the same time, maintain or even raise its production. A characteristic of the economy in developed countries is a reduced rate of low-qualified workforce, which represents the biggest group, and on the other hand the increase in employment of highly educated workforce, which forms the smallest group. The same can be seen in the case of Slovenia, where even with a greater deindustrialization and unemployment of industrial workers in the 1990-ies, in most cases, the indexes of production show growth, especially in the chemical, pharmaceutical, electrical and car industry (Bole 2008, 136).

Tertiarization is not, as is most of the time a rather simplified explanation, the only logical consequence of reducing workplaces in the industry. Tertiarization is predominantly a result of broader socio-economic changes. Highly specialized and technologically developed economy needs a broad spectre of services, from science and research to specialized financial, trading, accounting and other services. Sassen (1995) mentions three types of services, which are a reflection of economic globalization and are rapidly spreading. The first are producer services, which are intended for companies, oriented towards the global market. Among those there are some financial and other service institutions, which hold their relation towards their consumers for the most important. The second type are control functions and represent public administration and all institutions of exercising control and power. The third type are market oriented services, which differ from the first type of companies in not servicing other companies, but producing products themselves and forming added value. These are companies, which mostly produce non-material products in the form of highly specialized services, which are known for its high input of human capital combined with the use of advanced technologies. For these and other specialized services a remarkable growth in the last decade is characteristic, relating to the number of employees as well as to the economic potential – we deal with the so called new tertiarization (Ravbar, Bole, Nared 2005, 25).

This article will mainly focus on the characteristics of the third type of services, due to the fact that these are a brand new form of services, which are characteristic for the post-industrial era. Cultural industry is the most widely used expression, which marks the rise of specialized services in the city. Tertiarization includes other economic activities, for example public services, nevertheless is cultural industry the most common term of the »new economy«, which is characterized by diversity and a creative process of formation of services and products (Montgomery 2007).

## 2 Definition of cultural industry

Montgomery (2007) defined cultural industry as the main feature of modern urban economy. Montgomery stand resembles that of Hall (1998), who bases it on the premise of each type of economic progress developing its specific forms of industry. In certain historic eras the city was marked by iron and steel industry,

later on massive-production industry (for example car industry), and today by industry, named by Montgomery as the industry of the 5<sup>th</sup> wave (2007). This term relates to the 5<sup>th</sup> Kondratieff wave (cycle), which is marked by the post-Fordistic mode of accumulating capital and change of production and consumption from a mass into a more flexible form. This type of industry doesn't necessarily address to physical production, but also to the formation and production of ideas, notably for those economic activities, which are bound with new forms of artistic creation and entertainment, mainly in the areas of computer industry, digital media and internet (Montgomery 2007). When Montgomery describes the new wealth of cities in a new, and on knowledge based economy, he talks about creative or cultural industry as that economic activity, which made the biggest leap forward and formed the new geography of production within cities (2007).

Cultural industry could be seen as a somewhat awkward term, which found its place only in the last decade within the economic and cultural geography (Gibson, Kong 2005). Some authors (Drake 2003; Hall 2000) rather use the term creative industry. In some cases the word industry is replaced by the word production. Many derivatives were formed, but the expressions like creative or cultural production/industry/economy refer to the same, key part of tertiarization and post-Fordistic mode of production.

Along with the rise of consumerism and related activities (mainly trading and personal services) modern economy is also characterized with the industrialization of the service sector, or better said the rise of specialized services (Esser, Hirsch 1994). The term cultural industry implies two basic characteristics: it assures products and services, which often have a non-material character or are a product of human innovativeness and creativity (culture); products and services are formed in an industrial manner, mainly with the help of modern information-telecommunication technologies.

The formation and the meaning of cultural industry were described by Scott (1997, 323): »... *Capitalism moves into a phase, where physical forms and their meanings are becoming more important and even dominant* ...«. With other words – the ever growing proportion of economic activities deals with the creation of services, where the aesthetic and semiotic attributes are the most important. Products and services of cultural industry are extremely diverse, relating to the outlook, content and sector. Their function is primarily aesthetic, social, entertaining, informational and does not necessarily have a specific function of use.

The first authors who used the term cultural industry were Horkheimer and Adorno in 1944, but at that time this term related to the film, music and media industry, which flourished in the USA at that time. The term gained in its use in later decades in Anglo-Saxon countries, when the local and regional authorities tried to raise the employment rates, assure the economic growth and the revival of older industrial regions. The creative industry was defined as »... *all activities, which derive from individual creativity, abilities and talents and have a potential to make profit and more workplaces with the creation and usage of intellectual property* ...«. Among these activities the most common are marketing, architecture, art, design, fashion, film industry, software development, music, theatre, publishing, TV and radio (Drake 2003, 512). This definition was according to many authors unsuitable, because it didn't capture the whole complexity of the concept. UNESCO defines cultural industry as all those cultural activities, which combine creativity, production and distribution of services and products and are usually protected as an intellectual property right (internet 1). Montgomery (2007) most accordingly described cultural production as an activity, which necessarily needs hardware (equipment, technology, studios) as well as software (creative people, ideas, artists). In 1995 this type of economic activity was acknowledged by the EU, which published a white book 'Workplaces and competitiveness' in which cultural industry is mentioned as one of three economic activities with the biggest potential of workplace growth in Europe.

The growth in importance of cultural industry can be explained with a general process of internationalisation of the economy or globalization. Due to cheap production, a material product from less developed countries is less important, whereas the added value of this product is gaining in its importance, usually in a form of advertising, marketing, design. The most apparent result of advanced capitalism and the meaning of cultural industry is the fact, that large international companies practically don't produce material products, but only contribute to their selling, designing and marketing. Forming of this added (or symbolic) value is often related to big inputs of intellectual workforce and modern technologies (Scott 2001).

The main reason for the formation of these specialized services is in the post-Fordistic mode of production or accumulating capital. The characteristic of cultural industry is the formation of products and

services with a symbolic value, or better said this value is higher than their material value (Scott 2004). Cultural industry is therefore often described with those activities, which form:

- products, with a high symbolic value for the consumers (fashion, jewellery, etc);
- services related to entertainment, education and information (media, music, museums, etc).

Cultural industry is a term describing a group of economic activities, which are based on the formation of highly specialized services, and in which products are formed in a known creative productive process and therefore have a high symbolic value. The definition, as well as the empirical presentation, are rather complex. Many authors tried, with the help of individual examples, to show the meaning and the role of cultural industry. They based their findings on various definitions of cultural industry. In general, we can distinct between general and more specific definitions.

## 2.1 General definitions of cultural industry

It includes all services, which create content, intended for massive consumption and generate added value in a creative work process. But the term doesn't include only those workers who are directly part of the working process, but also those, who are only indirectly connected with the production of creative products (Pratt 2004a, 8). In practice that means, that workers in cultural production are not only players or directors in the theatre (people who make the content), but also those, who provide technical and other services for normal functioning of the theatre (for example an accountant in the theatre, ticket salesman, etc.). This definition is rather general and doesn't include only a traditional tertiary sector, but also the secondary sector of the economy. Two main supporters of this definition are Scott (1997; 2001a; 2001b; 2004)

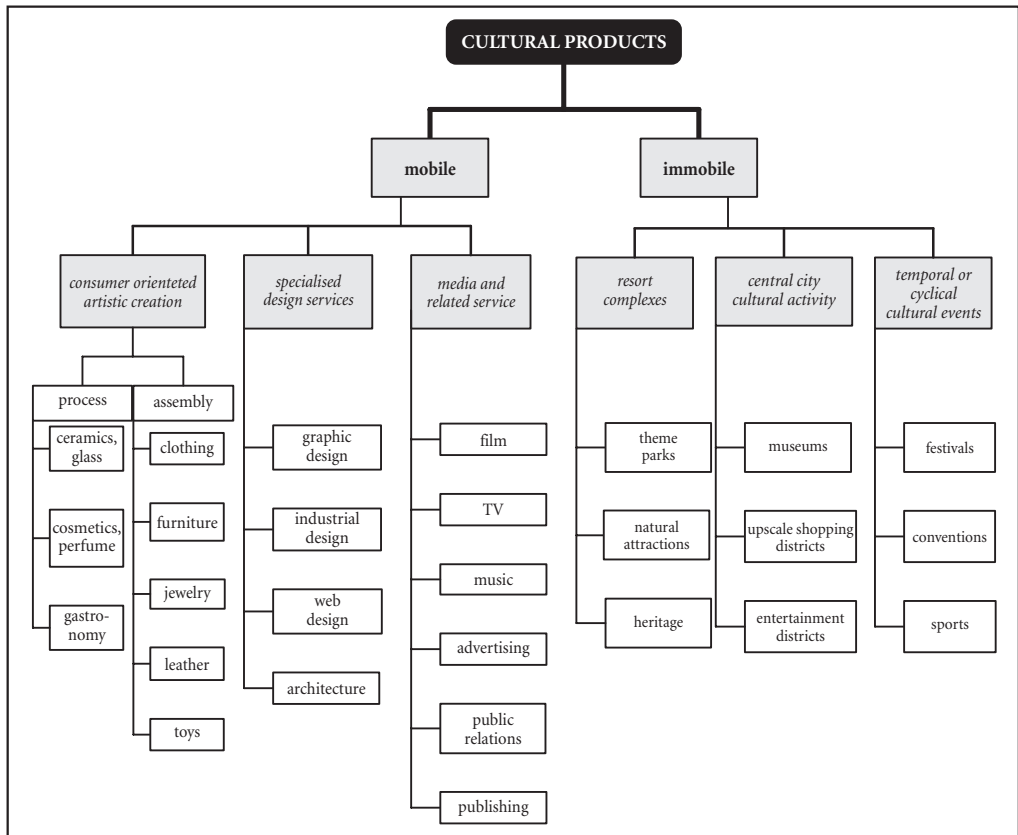


Figure 1: Products of cultural industry by a general definition (source: Scott 1997).

and Pratt (1999; 2000a; 2000b; 2004a; 2004b). Picture 1 shows Scott's general definition of cultural industry by individual economic activities.

This definition has many deficiencies. It includes almost an entire sector of catering and tourism, whereas the definition of natural heritage as a product is also questionable. We can also be critical towards some other elements of this definition for example sports, entertainment and other 'pseudo-art' activities – for example production of clothes, furniture, toys, etc. This definition of cultural production has, regardless of criticism for being too wide and for containing activities, which are only marginally related to creative production, become most vastly used method of defining cultural production in cities and regions.

## 2.2 Specific definitions of cultural industry

General definitions are in the opinion of some authors too broad and not precise enough (Gibson, Kong 2005). Cultural industry is in their opinion defined by the work process, work organization and the use of modern technologies, basically the human input and not merely the end product.

Cultural production is embodied by those companies, which are organized as smaller business subjects, which base their production on contract work and in which the mobility of workers between companies is high. The most important feature is the combination of cultural content and modern technologies. Inter-linking of software makers, telecommunication and information companies caused a real revolution in the economy. New ways of propagating information and of selling products (cable TV, mobile phones and internet) emerged. But modern technology isn't only useful as means of propagating cultural contents, but also as means of production and consumption.

Pratt (2000a) mentions as the most eloquent example of convergence, connection of cultural production and technology within the formation of the so called multimedia contents. This term is used often, but it actually means a way of combining human input (cultural, media contents) with advanced technologies. According to Pratt it is based on combining text, sound and picture in one unified format, controlled by the computer (Pratt 1999). The specific definition of cultural industry derives from the aforementioned convergence and it includes all the companies, which are able to combine the human creative input, intended for entertainment, informing or communicating, and modern technologies, and with that form a new product, which becomes an intellectual property. Part of this can be various activities of web-designing or software development, mostly those, which are connected to the selling of pictures, sounds and texts (various web browsers, multimedia players, etc.).

Gibson and Kong (2005) define selling and trading with intellectual property as characteristics of cultural production. Beside companies of the information sector (publishing, telecommunications, music, film) these rights are an object of trading also by companies, focusing on design, media research, advertising, etc. Some studies therefore also include, besides the classical information sector, some additional activities for empirical classification of cultural production (Pattinson Consulting 2003).

Table 1: Economic activities within the specific definition of cultural production.

Code	Description
22.110	Publishing of books
22.120	Publishing of newspapers
22.130	Publishing of journals and periodicals
22.140	Publishing of sound recordings
22.150	Other publishing
72.210	Development and supply of software
74.400	Marketing
74.871	Exhibitions, fairs, congress activities
74.872	Design
92.110	Film and video production
92.200	Radio and television
92.310	Artistic creation
74.130	Market and media research
72,400	Internet data services

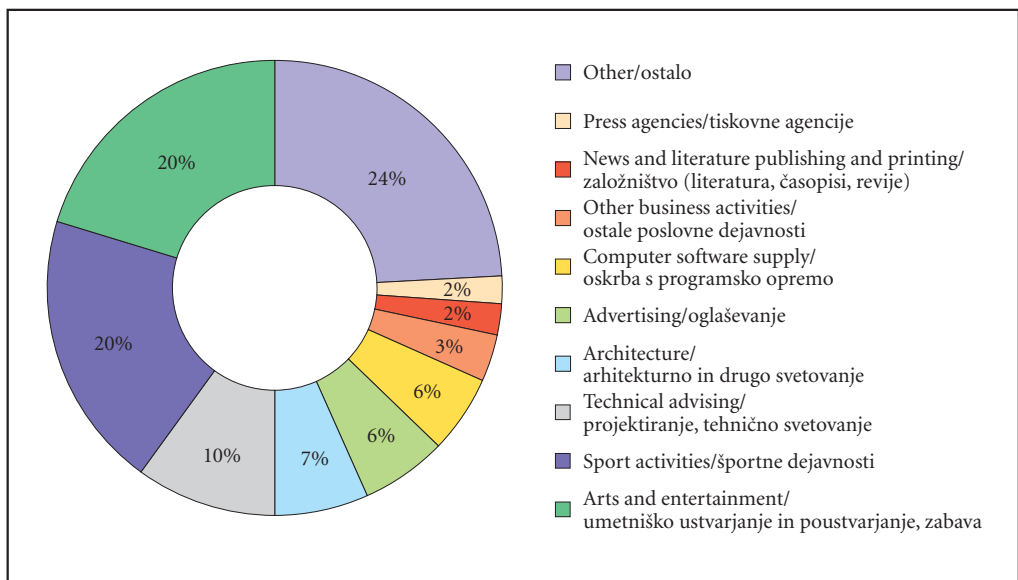
Due to their non-material form, another feature of products of cultural industry is their protection as part of the intellectual property rights. The specific definition therefore includes fewer activities than the general one, due to the fact that it only includes those economic activities which produce non-material products and mainly or entirely trade with intellectual property rights (Table 1). The biggest difference between the general and the specific definition of cultural production is in the fact, that the specific one doesn't include manufacturing and is focused only on those activities, which are able to produce and trade with intellectual property. The general definition includes also manufacturing activities, for example – production of furniture, textile, toys, etc.

### 3 Cultural industry in Ljubljana

The meaning of cultural industry could also be shown empirically, with the number of companies or workspaces in a specific area. The empirical display of the meaning of cultural industry in Ljubljana is also interesting from the point of view of Ravbar's research (2007). Ravbar came to a conclusion that the city region of Ljubljana has a distinctive concentration of creative occupations, part of which are typically occupations from the cultural industry. In this part of the article we focus mainly on the importance of services in the area of Ljubljana, which are shown by the number of workspaces. We examined the structure of the companies (the size and the ownership) and if there are any specific characteristics of agglomeration of companies in individual city communities.

The data was taken from the Business Register of Slovenia (PRS), which is led by Agency of the Republic of Slovenia for Public Legal Records and Related Services (AJPES) and with which it is possible to exclude all the companies according to their main activity (and some other characteristics). The link with the register of spatial units enables a spatial display of agglomeration within the city area. We will show the dispersion of cultural industry in the case of Ljubljana, according to the general and to the specific definition.

According to the general definition there was approximately 21.400 people employed in the specialized activities of cultural industry in the year 2005. That presented 12.65% of total workplaces in the city municipality of Ljubljana. The number of employed is rather large and can be compared with the number of employed in public administration (less than 24.000) or in manufacturing (more than 21.000). But



Picture 2: The percentage of companies in cultural industry in Ljubljana by the standard classification of activities.

these comparisons are not really adequate, due to the fact that there are some activities of the cultural industry, which are under the classification, part of public administration (for example archives) or part of manufacturing (for example jewellery making).

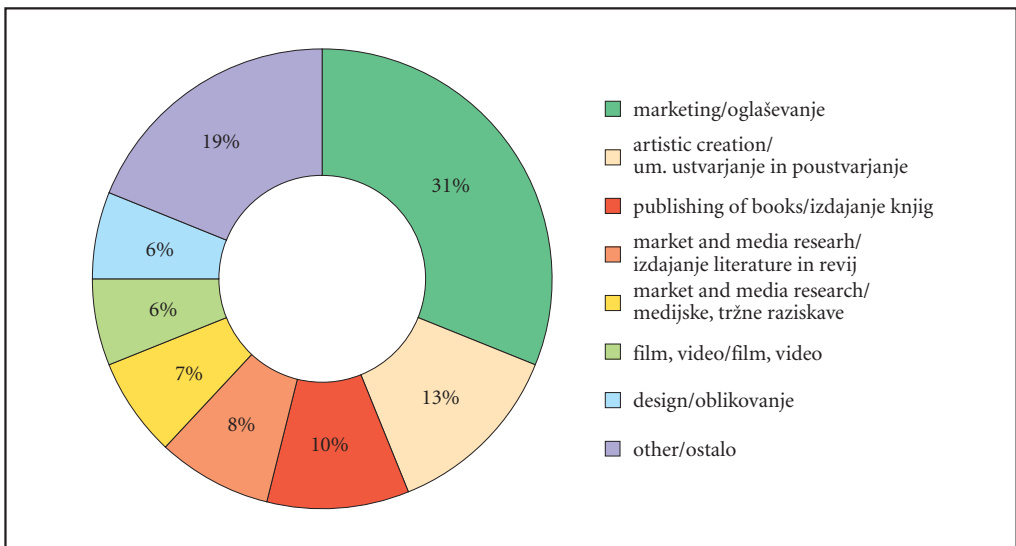
In comparison to other cities is the percentage of employed within cultural production in Ljubljana relatively high. In Wien the percentage of cultural production is just slightly higher than in Ljubljana (14%), in spite of higher numbers of inhabitants and higher centrality of the city in a European context (Kultur-dokumentation 2004). With the majority of other cities and regions the percentage of employed people in cultural industry is around 10%, which puts Ljubljana relatively high on the European scale. In Dutch cities this percentage is between 5 and 8% (Kooijman, Romain 2007), but comparisons are due to non-unified databases and different statistical merits difficult.

Within the cultural production in Ljubljana the most business subjects are from the field of arts and entertainment (20%) and sport activities (20%). Companies are characteristic for a more flexible way of production: on average they are even smaller than other companies, seeing that more than 95% of all companies have less than 9 employees. There is quite a large number of private entrepreneurs, who have only 1 person employed (30%). There is also an above-average home ownership with more than 96% of all business subjects.

The specific definition seems more reasonable, because it includes only actual specialized services, which recorded great growth within the last years and are characteristic for modern economy, in which creativity and culture are offered as market goods or services (Scott 2001). Characteristic for companies, which are part of the 'new tertiarization', is their relying on human input, combined with the use of advanced technologies. This merging is the basic characteristic of the economy from the 1990-ies onwards. It influences various processes within cities. The specific definition of cultural production usually includes all those activities:

- which create ideas, goods, services that are protected as intellectual property;
- where the production process is diverse, dynamic and needs a large amount of human innovativeness, but along with it, also a vast spectre of modern information and communications technologies;
- where workers, companies, individuals and consumers are tightly connected, which is also seen through their spatial concentration.

Empirically this means, that we should exclude all those activities which suffice all the aforementioned conditions, which is a harsh task, due to very general merits. Table 1 offers the definition of those activities which suffice the merits set. This includes all media (published, TV, radio and digital – web) and activities



Picture 3: The share of companies in Ljubljana based on a specific definition of cultural industry.



in the area of advertising and promotions (classical advertising and putting together expositions, fairs, etc). Among those already mentioned, we can also include activities of artistic creation. Such activities are frequently described as the information sector of economy. A similar process was used in other countries, where they even formally combined all these activities into one unified standardized classification of activities, known as the information or multimedia sector (Pattinson Consulting 2003). In 2004 the UN published the classification of the information sector of economy, which includes all activities that are part of the specific definition of cultural production.

This definition of specialized services in the case of Ljubljana gives us the figures, which shows that 649 business subjects have 6.924 employees, which is over 4% of all workplaces. 31% of all companies specialize in advertising, artistic creativity (13%), publishing of books, literature and magazines (18%) (Picture 3).

Companies are a bit bigger comparing to a general definition of cultural production and have on average 13 employees per company. Foreign and mixed capital is present on a larger scale, due to the fact that the percentage of business subjects, formed solely with local capital, is 88% (in general definition even over 95%).

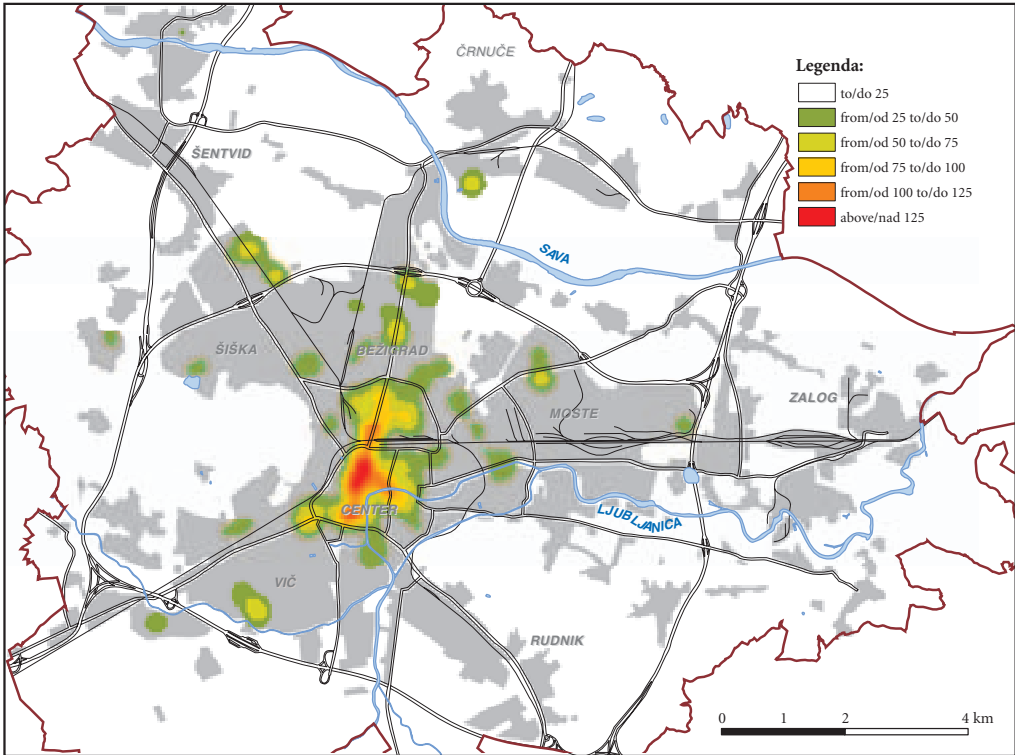
Numbers partially confirm the hypothesis of cultural industry being an important factor also in Ljubljana – it has 13% of employees, based on the general definition, and 4% based on the specific definition.

## 4 Spatial influences

In the opinion of Florida (2002; 2004) the creative sector of the economy is the key aspect of city economy. A high percentage of workplaces in cultural industry is a feature of a successful transformation of the economy in the city and its competitiveness on a global scale: »... *creativity brings new ideas, new forms of work and new products. Cultural industry has a big potential in creating new forms of work within urban economy...*« (Montgomery 2007, 44). The importance of cultural production in the city is multilayered. The economic importance can be most easily defined – Montgomery (2007) says, that the industry mentioned, contributed 8.2% of all the GDP in Great Britain in 2001. A characteristic is a rapid growth of this sector, due to the fact that the added value rises by 8% annually, which is almost 4 times faster than the average growth of the economy. Although cultural industry includes non-material products, Montgomery mentions, that it contributed almost 4,2% of the whole domestic export in 2001, with the annual growth of export at 15%. The economic importance of cultural production is also in employment. In the year 2001 1.1 million workers in Great Britain were part of this activity, with 3% annual growth in the economy. An especially high growth percentage was contributed by the activities of software development (software making), design and fashion, film, video and photography. Similar data, which show growth in profits and in employment, can be seen in other countries as well, for example in Austria (Schiffbaenker, Reidl 2007). The economic importance of cultural industry is also represented in workplaces for creative population, which is the main factor of technical and social innovations in city agglomerations (Ravbar 2007).

The economic influence, seen in higher profits and employment, is not the only effect of cultural industry in cities. Especially important is the influence on the revitalization of degraded city areas and city centres and as a contrary fact to the ever growing economic deconcentration in city areas.

For European and Slovenian city regions it is characteristic that the ever growing deconcentration of economic activities is moving from compact city areas into suburban areas, where there are more transport possibilities, lower land prices and a better flexibility of locations (Ravbar 2002). The formation of shopping centres, business and industrial zones in the suburbs also brings with it impoverishment of city centres with economic functions. For companies in cultural industry it is characteristic that they are vertically and horizontally linked and need an aesthetic and culturally attractive surrounding, which lead to their involvement in the politics of revitalization of old city quarters and centres. Hutton (2004a; 2004b) mentions the formation of cultural quarters (districts), where smaller companies are concentrating one next to another and where some accompanying activities (leisure, commercial, entertainment and recreational activities) can also be found. These activities provide a more vibrant social life and give many new opportunities to socialize, form social networks and encourage creativity. Hutton (2004a) also concluded

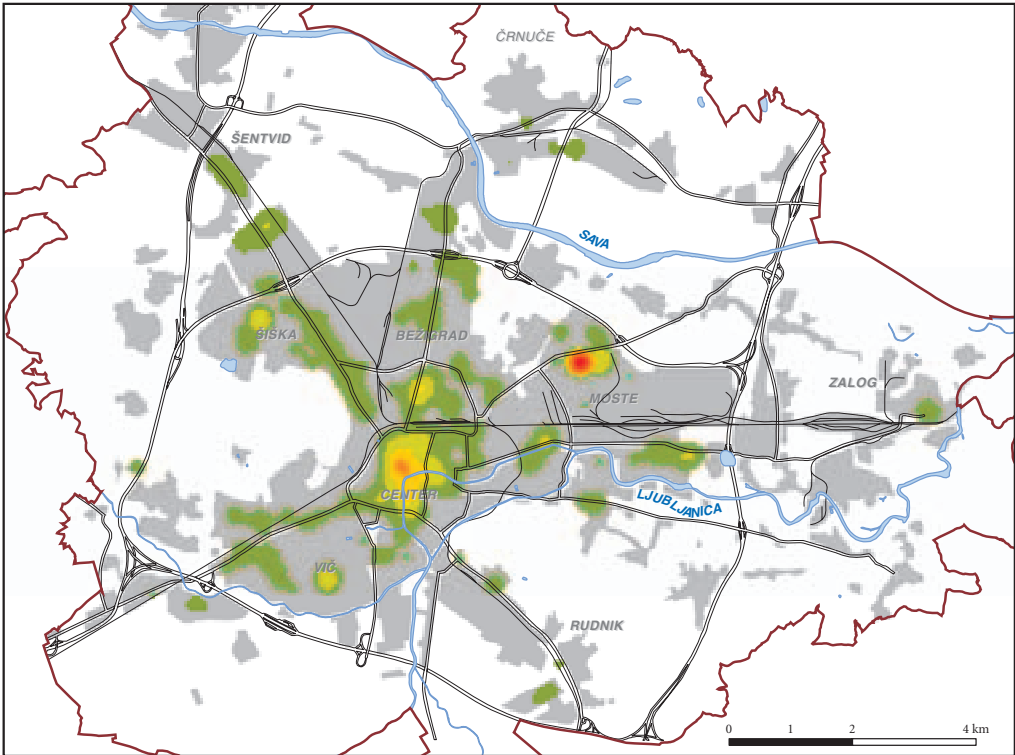


Picture 4: The density of business subjects of cultural industry in the Ljubljana area (businesses per km<sup>2</sup>).

that specialized services ('the new economy of city centres') are usually located in old abandoned industrial zones in city centres or their vicinity. The second appealing location are individual districts in city centres or even in central business centres of the city, which are formed spontaneously or planned with the help of local authorities.

The central location within an agglomerated city is a result of these services needing a critical amount of human interaction, which cannot be given by anonymous locations in the city outskirts. A certain amount of physical (aesthetic) and cultural attractiveness is essential for such services. The so called soft location factors decisively influence the macro location (city) and the micro location (a specific city district). The most eloquent examples are Dublin's Temple Bar, London's Soho and Paris' Le Marais. Other interesting examples are also given: the formation of such a district in Helsinki, in an abandoned cable factory, which employs more than 100 workers in cultural industry. Such a district was formed in Amsterdam in the area of an abandoned gas factory (Westergasfabriek) and today represents one of the most fashionable and prestigious part of the city (Montgomery 2007).

There is a distinctive concentration of cultural industry companies in Ljubljana (Picture 4). Companies are almost without exception located within the city centre, along the street Slovenska cesta, between the streets Dunajska cesta and Aškerčeva cesta. The biggest concentration of companies is along the following streets: Slovenska cesta, Dunajska cesta, Trubarjeva ulica and Čopova ulica. High concentration of companies is also seen in the new part of Bežigrad district, along Dunajska cesta and in some individual attractive locations near the city centre. The density of business subjects is high and, with 147 business subjects per km<sup>2</sup>, surpasses some services, which have a characteristic high density (for example the financial services, with which the highest density reaches around about 120 business subjects per km<sup>2</sup>). Modern business and shopping areas, where there are greater commerce and office activities (for example 'BTC' or the industrial-business district in Stegne) and which offer lots of space and good transport accessibility, lack social activities and are less attractive. The BTC area in the district of Moste, which is one of the



Picture 5: The density of business subjects of retail trade in the Ljubljana area.

biggest shopping centres in Ljubljana, has only a few companies, which are part of this sector. Pictures 4 and 5 show obvious differences between the agglomeration of companies of cultural industry (city centre) on the one hand and companies basing on wholesale and retail trade on the other, which are located mostly in the outskirts of the city.

Cultural industry is important from the perspective of maintaining the urban image, mainly with general deconcentration of other economic activities in the city centre. A good example of the influence of cultural industry on an urban building is the planned construction of the cultural centre called 'Novi Kolizej'. This project, with its slogan 'Novi Kolizej, the cultural heart of Ljubljana', embodies everything characteristic for cultural production in a city. Along with its location right in the city centre it will also have a symbolic modern architecture with its mixture of various traditional, cultural and commercial functions (theatres, museums, offices, business quarters intended for specific services). The publication intended to promote this project among the citizens and the local authorities uses such 'tricks' to attract sympathisers of this project: »... *The last decade has seen a decay of the city centre due to new shopping centres, which are located on the outskirts of the city and provide the public with everything needed, including a well organized transport regime. Only new generators of development will provide the city centre with new growth and revival, according to the needs of the 21<sup>st</sup> Century. These are attractive public places, intended for social events, qualitative spending of free time, meeting people and satisfying of cultural and commercial needs, in hand with an adequate transport regime...*« (Kolizej, novo kulturno srce Ljubljane 2004).

The accumulation of specialized services is, along with other processes in the city centre (the reduction of commerce function, growth of tourism input), only a part of the new approach of defining spatial relations and re-territorialisation as a symbol of post-industrial society. On the level of individual districts this process can also be seen in Ljubljana. Are specialized services to succeed in filling in empty shopping areas is a question to which we yet haven't got an answer to.

## 5 Conclusion

Cultural industry is a relatively new term that coincides with the ever growing tertiarization of economy, which doesn't depend so much on the massive formation of physical products, but mainly highly specialized services, which are indispensable in post-Fordistic mode of production. Its characteristics are: flexibility of production, meeting the individual taste of a consumer, rapid changeability and high input of human creativity, which advertises, trades and sells the product. All these leads to a growing importance of companies that utilize human creativity and modern technologies in forming services and products with a high symbolic value.

In many cities as well as some European documents it is quite 'fashionable' to encourage cultural industry, which attracts new forms of work and is quite often bound with the formation of the so called 'creative class' (Raybar 2007). Is encouraging cultural industry from a long-term perspective really the right way of reviving city economies and individual city districts, is a question, to which we haven't got an answer yet. Some authors say that it is (Florida 2002; Florida 2004; Montgomery 2007; Hall 2000; Scott 2007), others are more sceptical about it (Kooijman and Romein 2007). Kooijman and Romein warn that places, which Florida described as creative, could also be seen as socially most polarized, due to social and income differences among cities inhabitants (Kooijman, Romein 2007).

But undoubtedly, cultural industry is a part of the creative sector of economy and it brings significant spatial and economic consequences for future development of cities and city regions.

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## **Kulturna industrija kot odraz nove terciarizacije mest**

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**IZVLEČEK:** V prispevku je predstavljena novejša oblika gospodarskih dejavnosti, ki je v zadnjem času deležna velike pozornosti. Gre za kulturno industrijo, s katero opisujemo določen del storitvenih dejavnosti, katerih pomen v mestih močno narašča. Pojem kulturna industrija vključuje vse visoko specializirane storitve, ki ustvarjajo proizvode/storitve, ki imajo simbolno vrednost večje od materialne in trgujejo z intelektualnimi pravicami. V prispevku predstavljamo natančnejše opredelitve kulturne industrije in empirično predstavitev na primeru Ljubljane. V prispevku skušamo tudi nakazati posledice kulturne industrije na gospodarski in prostorski razvoj mest.

**KLJUČNE BESEDE:** geography, ekonomska geografija, kulturna industrija, terciarizacija, storitvene dejavnosti, urbana geografija, ustvarjalnost, Ljubljana.

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## 1 Uvod

Že nekaj desetletij je v Sloveniji poglobljen proces preobrazbe gospodarstva iz tako imenovanih materialnih dejavnosti v nematerialne. Med slednje se uvrščajo zlasti tiste dejavnosti, katerih proizvod ima zgolj simbolno vrednost. Industrijska proizvodnja se namreč v pogojih ekonomske globalizacije seli tja, kjer so stroški proizvodnje minimalni in skupaj z ostalimi pogoji globalizacije – to je liberalizacijo svetovne trgovine, deregulacijo finančnih virov in razvojem informacijsko-komunikacijskih tehnologij, povzročajo temeljni premik v gospodarski zgradbi razvitih držav (Ravbar, Bole 2007, 14).

Ta temeljni premik se nanaša na spremenjeno strukturo industrijskega sektorja gospodarstva, ki se je prisiljen preobraziti. Ta vključuje deindustrializacijo, proces, ki poteka v razvitih državah že vse od 70. let 20. stoletja naprej, v postsocialističnih državah pa od padca socialističnega družbenega reda (Lorber 1999). Deindustrializacija je preobrazba industrijskega sektorja gospodarstva, ki se je v sodobnih pogojih globalizacije, tehnološkega napredka in internacionalizacije trgovine prisiljen spremeniti ter je poglobljen proces, ki označuje prehod v postindustrijsko družbo. Deindustrializacija pomeni zmanjševanje števila zaposlenih v proizvodnem sektorju gospodarstva, kar pa še ne pomeni, da se zmanjšuje tudi vloga proizvodnega sektorja. Deindustrializacija namreč pomeni notranjo reorganizacijo industrije, višanje njene produktivnosti ob hkratnem nižanju stroškov delovne sile (Rowthorn, Ramaswamy 1999). Uspešno preobrazena industrija bo tako imela manjše število zaposlenih, a bo sočasno ohranjala ali celo povečala obseg proizvodnje. Značilnost industrije v razvitih državah je torej zmanjšana zaposlenost manj kvalificirane delovne sile, ki je bolj množična, in na drugi strani povečano zaposlovanje visoko izobražene delovne sile, ki je manj množična. Temu lahko pritrdimo tudi na primeru Slovenije, saj kljub obsežni deindustrializaciji in odpušcanju delavcev v industrijskih panogah v začetku 90-ih let 20. stoletja, indeksi obsega proizvodnje v večini izkazujejo rast, zlasti v kemični, farmacevtski, električni in avtomobilski industriji (Bole 2008).

Vendar pa terciarizacija ni zgolj logična posledica upadanja števila delovnih mest v industriji, kot je pogosta poenostavljena razlaga. Terciariacija je tudi, ali predvsem, izraz širših družbenoekonomskih sprememb. Visoko specializirano in tehnološko razvito gospodarstvo namreč potrebuje širok spekter storitev, vse od znanosti in raziskovanja, do specializiranih finančnih, tržnih, računovodskih ter ostalih storitev. Sassnova (1995) govori o treh tipih storitev, ki so v močnem porastu in so hkrati odraz ekonomske globalizacije. Prve so tako imenovane podjetniško orientirane storitve (*producer services*), ki so namenjene oskrbi na globalno tržišče orientiranim podjetjem. Sem spadajo nekatere finančne in druge storitvene ustanove, katerim je najpomembnejša bližina do potrošnikov – podjetij. Drugi tip so storitve, ki se često imenujejo tudi 'kontrolne' funkcije in predstavljajo javno upravo in vse institucije izvajanja kontrole in moči. Tretji tip so tržno orientirane storitve, ki se od prvega tipa podjetij razlikujejo po tem, da ne 'servisirajo' drugih podjetij, temveč sama ustvarjajo proizvode in ustvarjajo dodano vrednost. Gre za podjetja, ki ustvarjajo povečini nematerialne proizvode v obliki visoko specializiranih storitev, za katere je značilen visok vložek človeškega kapitala, ki se združuje z uporabo naprednih tehnologij. Za te in tudi druge specializirane storitve je značilna izjemna rast v zadnjem desetletju, tako po številu zaposlenih kot ekonomskemu potencialu – gre za tako imenovano novo terciarizacijo (Ravbar, Bole in Nared 2005).

Ta prispevek se bo osredotočil zlasti na značilnosti tretjega tipa storitev, saj gre za povsem novo pojavno obliko storitev, ki so še posebej značilna za postindustrijsko obdobje. Kulturna industrija je najpogosteje uporabljen izraz, s katerim se označuje vzpon specializiranih storitev v mestu. Seveda terciarizacija vključuje tudi druge gospodarske aktivnosti, na primer javne storitve, vendar je kulturna industrija najbolj značilen izraz 'nove ekonomije', za katero sta značilna raznovrstnost in ustvarjalen proces nastajanja storitev/proizvodov (Montgomery 2007).

## 2 Opredelitev kulturne industrije

Montgomery (2007) je kulturno industrijo označil kot glavno značilnost sodobne urbane ekonomije. Montgomery ima podobno stališče kot Hall (1998), ki meni, da vsak tip ekonomskega razvoja razvije tudi lastne in značilne oblike 'industrije'. Tako je v določenih zgodovinskih obdobjih mesto zaznamovala železarska industrija, pozneje masovno-proizvodna industrija (na primer avtomobilska), danes pa tista industrija, ki jo Montgomery poimenuje 'industrija petega vala' (2007, 19). Pri tem misli na 5. kondratijevski val (cikel), ki ga označuje postfordističen način akumulacije kapitala in sprememba proizvodnje ter potrošnje

iz uniformne v bolj fleksibilno obliko. Ta industrija ne pomeni nujno fizične proizvodnje, temveč tudi proizvajanje in poustvarjanje idej. Predvsem to velja za tiste gospodarske dejavnosti, ki so povezane z novimi oblikami umetniškega ustvarjanja in zabave, zlasti na področju računalniške industrije, digitalnih medijev in interneta (Montgomery 2007). Ko Montgomery zato opisuje 'novo bogastvo mest' v novi in na znanju temelječi ekonomiji, govori o ustvarjalni ali kulturni industriji kot o tisti ekonomski dejavnosti, ki je naredila največji preskok in v mestu ustvarila 'novo geografijo proizvodnje' (Montgomery 2007, 42).

Kulturna industrija je sicer nekoliko neroden izraz, ki se je uveljavil v zadnjem desetletju v ekonomski in kulturni geografiji (Gibson, Kong 2005). Nekateri avtorji (Drake 2003; Hall 2000) raje uporabljajo izraz ustvarjalna (kreativna) industrija, prav tako se ponekod beseda 'industrija' zamenjuje z izrazom 'proizvodnja'. Nastale so številne izpeljanke, vendar pojmi ustvarjalna ali kulturna proizvodnja/industrija/ekonomija opisujejo isti, ključni del terciarizacije in postfordističnega načina gospodarjenja. Poleg vzpona potrošništva in z njim povezanih dejavnosti (predvsem trgovine in osebnih storitev) sodobno ekonomijo namreč zaznamuje tudi 'industrializacija storitvenega sektorja' oziroma vzpon specializiranih storitev (Esser, Hirsch 1994). Izraz kulturna industrija torej nakazuje dve temeljni značilnosti: da ustvarja proizvode in storitve, ki imajo pogosto nematerialen značaj oziroma so produkt človeške inovativnosti in ustvarjalnosti (kulture); proizvodi in storitve se ustvarjajo na 'industrijski' način, predvsem s pomočjo sodobnih informacijsko-telekomunikacijskih tehnologij.

Nastanek in pomen kulturne industrije je opisal Scott (1997, 323): »... kapitalizem se pomika v fazo, kjer kulturne oblike in njeni pomeni postajajo pomembnejši oziroma celo dominantni ... Z drugačnimi besedami: vse večji delež ekonomskih aktivnosti se ukvarja z nastajanjem in trženjem storitev, kjer so najpomembnejši estetski in semiotski atributi ...«. Proizvodi in storitve kulturne industrije so izjemno raznovrstni, tako po videzu, vsebini in sektorju. Njihova funkcija je primarno estetska, družbena, zabavna, informacijska in nima nujno specifične uporabne funkcije.

Prva avtorja, ki sta uporabila izraz kulturna industrija, sta bila že Horkheimer in Adorno daljnega leta 1944, vendar se je sprva nanašal le na filmsko, glasbeno in medijsko industrijo, ki je bila v tistem obdobju v ZDA v velikem razcvetu. Izraz se je začel pogosteje uporabljati pred desetletji v anglosaksonskih državah, ko so lokalne in regionalne oblasti skušale spodbujati zaposlenost, ekonomsko rast in oživiljanje starejših industrijskih regij. Ustvarjalno industrijo so definirali kot: »... vse aktivnosti, ki imajo svoj izvor v individualni ustvarjalnosti, sposobnostih in talentih in imajo potencial za nastajanje dobička ter delovnih mest preko ustvarjanja in koriščenja intelektualne lastnine ...«. Med te aktivnosti se najpogostejše uvršča dejavnosti oglaševanja, arhitekture, umetnosti, oblikovanja, mode, filma, razvijanja računalniške opreme, glasbe, gledališča, založništva, televizije in radia (Drake 2003). Ta zgodnja opredelitev pa po mnenju številnih avtorjev ni bila primerna, saj ni zaobjela celotne kompleksnosti pojava. UNESCO opredeljuje kulturno industrijo kot vse tiste kulturne dejavnosti, ki kombinirajo ustvarjanje, proizvodnjo, distribucijo storitev in blaga ter so ponavadi zaščitene kot intelektualna lastnina (internet 1). Montgomery (2007, 44) je še najenostavneje opisal kulturno proizvodnjo kot dejavnost, »... ki neobhodno potrebuje tako *hardware* (opremo, tehnologijo, studie) kot *software* (ustvarjalne ljudi, ideje, umetnike) ...«. Leta 1995 je to vrsto ekonomske dejavnosti priznala tudi Evropska unija, ki je izdala belo knjigo 'Delovna mesta in tekmovalnost', kjer je kulturno industrijo omenjala kot eno izmed treh ekonomskih dejavnosti z največjim potencialom rasti delovnih mest v Evropi.

Rast pomena kulturne industrije lahko pojasnimo s splošnim procesom internacionalizacije gospodarstva, oziroma globalizacije. Materialni proizvod je po zaslugi poceni proizvodnje iz manj razvitega sveta manj pomemben, pomembnejša pa postaja dodana vrednost temu proizvodu, ponavadi v obliki oglaševanja, trženja, oblikovanja. Najbolj očiten izraz naprednega kapitalizma in pomena kulturne industrije je ta, da velika globalna podjetja praktično ne ustvarjajo več proizvodov, temveč skrbijo le še za njihovo prodajo, oblikovanje in oglaševanje tržnih znamk. Ustvarjanje te dodane (ali simbolne) vrednosti pa je pogosto povezano z velikimi vložki intelektualne delovne sile in sodobne tehnologije (Scott 2001).

Glavni razlog za nastanek teh specializiranih storitev je v postfordističnem načinu gospodarjenja oziroma načinu akumulacije kapitala. Značilnost kulturne industrije je »... da ustvarja proizvode in storitve, ki imajo simbolno vrednost oziroma je le-ta večja od njihove materialne vrednosti ...« (Scott 2004, 462). Kulturna industrija se zato pogosto označuje s tistimi dejavnostmi, ki ustvarjajo:

- proizvode, ki imajo visoko simbolno vrednost za potrošnike (moda, nakit in podobno);
- storitve, ki so povezane z zabavo, izobraževanjem in informiranjem (mediji, glasba, muzeji in podobno).

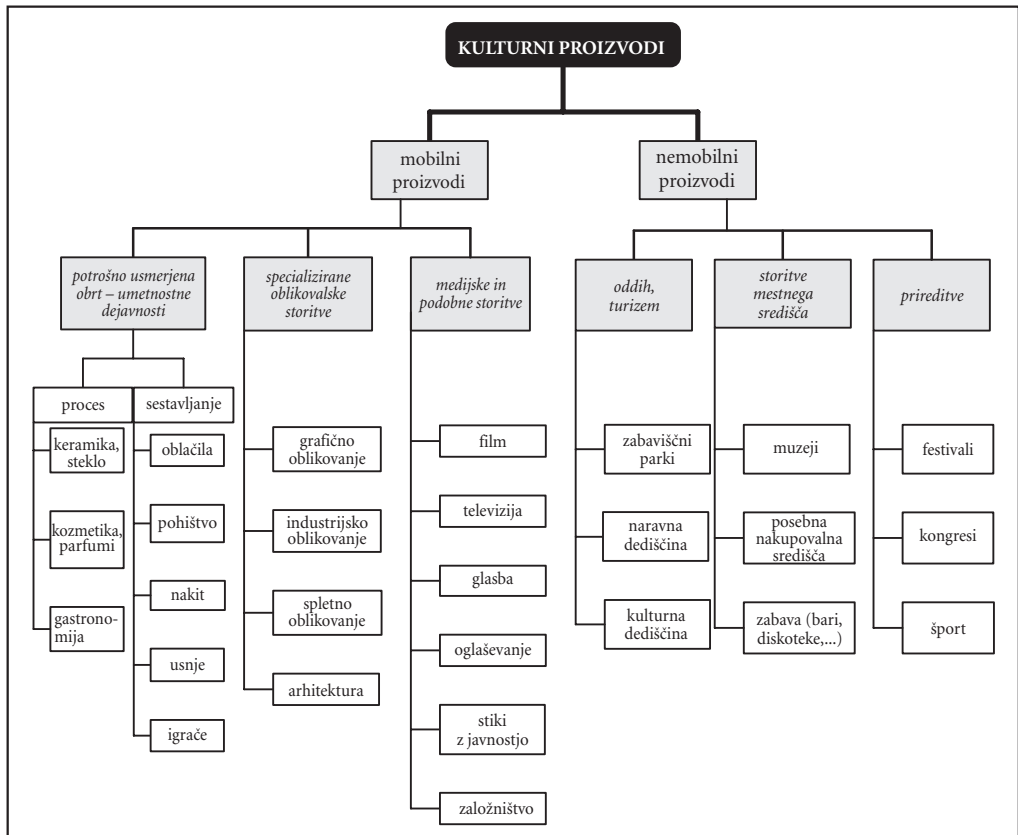


Kulturna industrija je torej pojem, ki opisuje skupino ekonomskih aktivnosti temelječo na nastajanju visoko specializiranih storitev, kjer proizvodi nastajajo v značilnem ustvarjalnem proizvodnem procesu in imajo visoko simbolno vrednost. *Že sama opredelitev je precej zapletena, zato je zelo težavno tudi empirično prikazovanje. Številni avtorji so skušali na posameznih primerih prikazati pomen in vlogo kulturne industrije, pri čemer so se posluževali različnih opredelitev kulturne industrije. V osnovi lahko razlikujemo med širšimi in ožjimi opredelitvami.*

## 2.1 Širše opredelitve kulturne industrije

Ta vključuje vse storitve ki ustvarjajo vsebino, namenjeno množični potrošnji, in ustvarjajo dodano vrednost na ustvarjalen način. Vendar pa ne vključuje le tistih delavcev, ki so neposredno vključeni v ta delovni proces, »... temveč tudi vse tiste, ki so zgolj posredno vključeni v proizvodnjo kreativnih produktov...« (Pratt 2004a, 8). To pomeni, da delavci v kulturni proizvodnji niso na primer le igralci ali režiserji v gledališču (torej tisti, ki ustvarjajo vsebino), temveč tudi vsi tisti, ki nudijo tehnične in ostale storitve za normalno delovanje gledališča (na primer računovodja v gledališču, prodajalec kart in podobno). Ta opredelitev je zato precej široka in ne vključuje le tradicionalnega terciarnega sektorja, temveč tudi sekundarni sektor gospodarstva. Največja zagovornika te opredelitve kulturne industrije sta Scott (1997, 2001a, 2001b, 2004) in Pratt (1999; 2000a; 2000b; 2004a; 2004b). Na sliki 1 je Scottova širša opredelitev kulturne industrije po posameznih ekonomskih dejavnostih.

Ta opredelitev ima sicer mnoge pomanjkljivosti. Vključuje namreč skoraj celoten sektor gostinstva in turizma, vprašljivo je tudi opredeljevanje naravne dediščine kot 'proizvoda', kritični pa smo lahko tudi do drugih elementov te opredelitve (na primer šport, zabava in nekatere umetnostne dejavnosti, ki to niso –



Slika 1: Proizvodi kulturne industrije po širši opredelitvi (Scott 1997).

na primer izdelovanje oblačil, pohištva, igrač in podobno). Ta opredelitev kulturne proizvodnje, je kljub očitkom da je preširoka in zajema tudi dejavnosti, ki so le marginalno povezane s kreativno proizvodnjo, postala najširše uporabljena metoda določanja kulturne proizvodnje v mestih in regijah.

## 2.2 Ožje opredelitve kulturne industrije

Širše opredelitve so po mnenju nekaterih avtorjev presplošne in premalo natančne (Gibson in Kong 2005). Po njihovem mnenju opredeljujejo kulturno industrijo delovni proces, organizacija dela in uporaba sodobnih tehnologij, skratka človeški vložek, in ne zgolj končni proizvod.

Kulturno proizvodnjo tako predstavljajo tista podjetja, ki so značilno organizirana v manjše poslovne subjekte, kjer je delo pogodbeno in kjer je mobilnost delavcev med podjetji visoka. Najpomembnejša lastnost pa je zblíževanje kulturne vsebine s sodobnimi tehnologijami. Zblíževanje izdelovalcev programske opreme za računalnike, telekomunikacijskih in informacijskih podjetij je povzročilo pravo revolucijo na gospodarskem področju. Pojavili so se novi načini razširjanja informacij in s tem tudi prodaje vsebine (kabelska televizija, mobilna telefonija, svetovni splet). Vendar pa sodobna tehnologija ne služi zgolj kot način razširjanja kulturne vsebine, temveč tudi kot način proizvodnje in potrošnje.

Pratt (2000a) tako omenja kot najbolj zgovoren primer zblíževanja kulturne proizvodnje in tehnologije v nastanek t. i. multimedijjskih (večpredstavnostnih) vsebin. Ta izraz se pogosto pojavlja, dejansko pa pomeni združevanje človeškega vložka (kulturne, medijske vsebine) z naprednimi tehnologijami. »... *Gre za združevanje besedila, zvoka in podob v enoten format, ki ga obvladuje računalnik* ...«, piše Pratt (1999, 4). Ožja opredelitev kulturne industrije izhaja iz omenjenega zblíževanja, zato vanjo lahko uvrstimo vsa podjetja, ki so sposobna združiti človeški, ustvarjalni vložek, namenjen zabavi, informiranju ali komuniciranju, s sodobnimi tehnologijami in ustvariti nek nov proizvod, ki postane intelektualna lastnina. Sem lahko spadajo različne dejavnosti spletnega oblikovanja ali razvoja računalniških programov, še posebej tiste, ki so povezane s prodajo podob, zvoka in besedila (razni spletni brskalniki, grafični predvajalniki, večpredstavnostni predvajalniki in podobno).

Gibson in Kong (2005) menita, da je značilnost kulturne proizvodnje prodaja in trgovanje z intelektualno lastnino. Poleg podjetij informacijskega sektorja (založništvo, telekomunikacije, glasba, film) pa s temi pravicami trgujejo podjetja oblikovanja, medijskih raziskav, oglaševanja in podobno. Zato so v nekaterih študijah poleg klasičnega informacijskega sektorja upoštevali še dodatne dejavnosti za empirično ovrednotenje kulturne proizvodnje (Pattinson Consulting 2003).

Ker imajo proizvodi kulturne industrije ponavadi nematerialno obliko, je njihova nadaljnja značilnost, da so zaščiteni kot intelektualna lastnina. Ožja opredelitev tako vključuje manj dejavnosti kot širša, saj vključuje le tiste ekonomske aktivnosti, ki proizvajajo nematerialne proizvode in povečini ali v celoti trgujejo z intelektualno lastnino (glej preglednico 1). Glavna razlika med širšo in ožjo opredelitvijo kulturne proizvodnje je v tem, da ožja ne vključuje proizvodnje in je osredotočena le na tiste dejavnosti, ki so sposobne ustvarjati in trgovati z intelektualno lastnino. Širša opredelitev vključuje tudi dejavnosti proizvodnje, na primer pohištva, tekstila, igrač in podobno.

Preglednica 1: Ekonomske dejavnosti v ožji opredelitvi kulturne proizvodnje.

SKD šifra	naziv dejavnosti
22.110	izdajanje knjig
22.120	izdajanje časopisov
22.130	izdajanje revij in periodike
22.140	izdajanje posnetih nosilcev zvoč. zapisa
22.150	drugo založništvo
72.210	razvoj in založba programskih paketov
74.400	oglaševanje
74.871	prírejanje razstav, sejmov in kongresov
74.872	oblikovanje, aranžerstvo, dekoraterstvo
92.110	snemanje filmov in video filmov
92.200	radijska in televizijska dejavnost
92.310	umetniško ustvarjanje in poustvarjanje
74.130	raziskovanje trga in javnega mnenja
72,400	omrežne podatkovne storitve

### 3 Kulturna industrija v Ljubljani

Pomen kulturne industrije lahko prikažemo tudi empirično, s številom podjetij ali delovnih mest na določenem območju. Empirični prikaz pomena kulturne industrije v Ljubljani je zanimiv tudi z vidika Ravbarjeve raziskave (2007), ki je ugotovil, da je v ljubljanski mestni regiji izrazita koncentracija ustvarjalnih poklicev, kamor se povečini uvrščajo tudi poklici v kulturni industriji. V tem delu prispevka nas zanima, kako pomembne so te storitve v prostoru Ljubljane, izražene s številom delovnih mest. Pregledali smo tudi strukturo podjetij (velikost, lastništvo) in ali obstajajo določene zakonitosti zgoščevanja po posameznih mestnih soseskah.

Podatke smo črpali iz Poslovnega registra Slovenije (PRS), ki ga vodi Agencija RS za javnopravne evidence in storitve (AJPES) in kjer lahko izločimo vsa podjetja glede na poglobitno dejavnost, ki jo opravljajo in glede na ostale značilnosti. Povezava z registrom prostorskih enot pa omogoča tudi prostorski prikaz zgoščevanja podjetij v mestnem prostoru. V nadaljevanju predstavljamo kulturno industrijo v Ljubljani glede na širšo in ožjo opredelitev.

Po širši opredelitvi je bilo leta 2005 v specializiranih storitvah kulturne industrije zaposlenih približno 21.400 ljudi, kar je predstavljalo 12,65 % vseh delovnih mest v naselju Ljubljana. Število zaposlenih je torej znatno in se lahko primerja s številom zaposlenih v javni upravi (slabih 24.000) ali industriji (dobrih 21.000). Vendar primerjave niso najbolj na mestu, ker so v sami opredelitvi kulturne proizvodnje tudi nekatere dejavnosti, ki se po SKD klasifikaciji uvrščajo v javno upravo (na primer arhivi) ali proizvodnjo (na primer izdelava nakita).

V primerjavi z ostalimi mesti je delež zaposlenih v Ljubljani v kulturni proizvodnji dokaj visok. Na Dunaju je tako delež kulturne proizvodnje le malo višji kot v Ljubljani (14 %), navkljub veliko večjemu številu prebivalcev in večji središčnosti mesta v evropskem kontekstu (Kulturdocumentation 2004). V večini ostalih mest in regij se delež zaposlenih v kulturni industriji giblje okoli 10 %, kar uvršča Ljubljano relativno visoko tudi v evropskem merilu. V Nizozemskih mestih se ta delež giblje med 5 in 8 % (Kooijman, Romein 2007), a so primerjave zaradi neenotnih baz podatkov in statističnega zajema težje primerljive.

Znotraj kulturne proizvodnje v Ljubljani so najbolj zastopani poslovni subjekti s področja umetnosti in zabave (20 %) ter športnih dejavnosti (20 %). Podjetja so značilna za bolj fleksibilen način proizvodnje: v povprečju so še manjša kot ostala podjetja, saj ima več kot 95 % vseh podjetij manj kot 9 zaposlenih. Zelo veliko je tudi število samostojnih podjetnikov, ki imajo le eno zaposleno osebo (30 %). Izkazuje se tudi nadpovprečna zastopanost domačega lastništva z več kot 96 % vseh poslovnih subjektov.

Slika 2: Delež podjetij v kulturni industriji v Ljubljani po standardni klasifikaciji dejavnosti.  
Glej angleški del prispevka.

Ožja opredelitev se zdi bolj smiselna, saj vključuje le dejanske specializirane storitve, ki so doživele močan porast v zadnjih letih in so značilne za sodobno ekonomijo, kjer sta »... *ustvarjalnost in kultura ponujena kot tržno blago ali storitev* ...« (Scott 2001, 11). Značilnost podjetij, vključenih v 'novo terciarizacijo' je predvsem njihovo zanašanje na človeški vložek, kombiniran z uporabo naprednih tehnologij. Ravno to združevanje je bistvena značilnost ekonomije od devetdesetih let 20. stoletja naprej in vpliva na številne procese tudi v mestu. Ožja opredelitev kulturne proizvodnje ponavadi vsebuje vse tiste storitve, ki:

- ustvarjajo ideje, dobrine, storitve, ki so zaščitene kot intelektualna lastnina;
- kjer je proizvodni proces raznovrsten, dinamičen in potrebuje veliko mero človeške inovativnosti, a hkrati pogosto tudi ob uporabi sodobnih informacijsko-komunikacijskih tehnologij;
- kjer so delavci, podjetja, posamezniki in potrošniki tesno povezani, kar se izkazuje tudi v njihovi prostorski koncentraciji.

Empirično to pomeni, da je potrebno izločiti vse tiste dejavnosti, ki zadostujejo omenjenim pogojem, kar je težka naloga, saj so merila zelo splošna postavljena. V preglednici 1 so opredeljene tiste dejavnosti, ki jih lahko smatramo kot takšne, ki ustrezajo tem pogojem. Gre za vse medije (tiskane, televizijske in radijske ter digitalne – spletne) in dejavnosti oglaševanja ter promocije (klasično oglaševanje in prirejanje razstav, sejmov in podobno). Sem spadajo tudi dejavnosti umetniškega ustvarjanja. Gre za dejavnosti, ki se pogosto označujejo kot 'informacijski sektor' ekonomije. Podoben postopek so uporabili tudi v drugih državah, kjer so celo formalno združili te dejavnosti v enotno standardizirano klasifikacijo dejavnosti, ki se imenuje informacijski ali medialni sektor (Pattinson Consulting 2003). Organizacija ZN je leta 2004

objavila klasifikacijo informacijskega sektorja ekonomije, ki pravzaprav obsega vse dejavnosti, vključene v ožjo opredelitev kulturne proizvodnje.

Tovrstna opredelitev specializiranih storitev na primeru Ljubljane nam pokaže, da ima 649 poslovnih subjektov 6.924 zaposlenih, kar predstavlja dobre 4 % vseh delovnih mest. Kar 31 % vseh podjetij je v dejavnosti oglaševanja, med številčnejše pa sodijo še dejavnosti umetniškega ustvarjanja in poustvarjanja (13 %), izdajanja knjig, literature ter revij s skupaj 18 % (slika 3).

Podjetja so nekoliko večja kot v širši opredelitvi kulturne proizvodnje in imajo v povprečju 13 zaposlenih na podjetje. Bolj je zastopan tuj in mešani kapital, saj je delež poslovnih subjektov, ustanovljenih z domačim kapitalom, 88 % (v širši opredelitvi preko 95 %). Številke torej deloma potrjujejo tezo, da je kulturna industrija pomemben dejavnik tudi v Ljubljani – ima slabih 13 % zaposlenih po širši in dobre 4 % po ožji opredelitvi.

Slika 3: Delež posameznih podjetij po SKD klasifikaciji v Ljubljani (ožja opredelitev).  
Glej angleški del prispevka.

## 4 Vpliv na prostor

Po mnenju Floride (2002; 2004) je ustvarjalni sektor ekonomije 'vlečni konj' celotne mestne ekonomije. Visok delež delovnih mest v kulturni industriji je lahko pokazatelj uspešne preobrazbe gospodarstva v regiji ali mestu in njegove konkurenčnosti na globalnem tržišču: »... *ustvarjalnost proizvaja nove ideje, nove oblike dela in nove proizvode. Kulturna industrija ima zelo velik potencial pri ustvarjanju novih zalog dela v urbani ekonomiji*...« (Montgomery 2007, 44). Pomen kulturne proizvodnje v mestu je večznačen. Najlažje ovrednotimo ekonomski pomen: Montgomery (2007) navaja, da je omenjena industrija v Veliki Britaniji prispevala v letu 2001 8,2 % celotnega BDP. Značilna je predvsem hitra rast tega sektorja, saj navaja, da dodana vrednost narašča za 8 % letno, kar je skoraj štirikrat hitreje od povprečne rasti gospodarstva. Kljub temu da kulturna industrija vključuje nematerialne proizvode, Montgomery omenja, da je leta 2001 prispevala kar 4,2 % celotnega državnega izvoza, pri čemer je bila letna rast izvoza 15 %. Ekonomski pomen kulturne proizvodnje je tudi v zaposlovanju delovne sile. V Veliki Britaniji je bilo leta 2001 1.1 milijona delavcev v tej dejavnosti, pri čemer je bila letna rast 3 odstotna. Posebej hitro rast so izkazovale dejavnosti razvoja programskih paketov (programiranje), oblikovanja in mode, filma, videa in fotografije. Podobne podatke, ki izkazujejo rast v dobičkih in v zaposlovanju, navajajo tudi v drugih državah, na primer v Avstriji (Schiffbänker, Reidl 2007). Ekonomski pomen kulturne industrije je najbrž tudi v tem, da so to delovna mesta za ustvarjalno populacijo, ki je nosilec tehničnih in družbenih inovacij v mestnih aglomeracijah (Ravbar 2007).

Ekonomski vpliv, ki se izkazuje v višjih dobičkih in zaposlovanju, pa ni edini učinek kulturne industrije v mestih. Zlasti je pomemben vpliv na revitalizacijo degradiranih mestnih površin in mestnih središč ter kot protiutež vse večji gospodarski dekoncentraciji v mestnem prostoru. Za evropske in slovenske mestne regije je namreč značilno, da poteka vse večja dekoncentracija ekonomskih aktivnosti in premeščanje podjetij iz strnjenege mesta v suburbanizirana obmestja, kjer so ugodnejša prometna dostopnost, nižje cene zemljišč in večja fleksibilnost lokacij (Ravbar 2002; Drozg 2006). Nastanek nakupovalnih središč, poslovnih in industrijskih con na obrobju namreč hkrati pomeni tudi siromašenje mestnih središč z gospodarskimi funkcijami. Ker je za podjetja kulturne industrije značilno, da so vertikalno in horizontalno zelo povezana in potrebujejo estetsko in kulturno mikavno okolje, so postala v nekaterih mestih del politike revitalizacije starejših mestnih četrti in središč. Hutton (2004a; 2004b) omenja nastanek kulturnih četrti (*cultural quarters* ali *cultural districts*), kjer se zgoščujejo manjša podjetja in spremljajoče dejavnosti, od prostočasnih, trgovskih, zabavišnih do rekreativnih dejavnosti. Te omogočajo živahno družabno življenje in s tem možnost navezovanja neformalnih stikov, oblikovanja socialnih mrež ter s tem spodbujanja procesa ustvarjalnosti. Hutton (2004a) je tudi ugotovil, da se specializirane storitve ('nova ekonomija mestnega središča', kot jo sam poimenuje) locirajo najraje v starejše zapuščene industrijske cone v mestnem središču ali njegovi bližini, druga privlačna lokacija pa so posamezne četrti v mestnem središču oziroma v osrednjem poslovnem središču mesta, ki nastanejo spontano zaradi značilnih lokacijskih dejavnikov, ali načrtovano s pomočjo lokalnih oblasti.

Središčna lokacija znotraj strnjenege mesta je posledica dejstva, da tovrstne storitve potrebujejo kritično maso človeške interakcije, ki ga bolj anonimne lokacije na mestnem obrobju ne nudijo. Prav tako

je pomembna določena fizična (estetska) in kulturna mikavnost, ki je bistvena za delovanje teh storitev. Tako imenovani mehki lokacijski dejavniki so tisti, ki odločujoče vplivajo na makro lokacijo (mesto) in mikro lokacijo (posamezno mestno četrt). Najbolj zgovoren primer je dublinski Temple Bar, londonski SoHo, del pariškega Le Maraisa. Omenja pa se tudi druge zanimive primere: v Helsinkih je takšna četrt nastala v opuščeni tovarni kablov in danes združuje več kot 100 posameznikov, delujočih v kulturni industriji. V Amsterdamu je takšna četrt nastala na območju opuščene plinske tovarne (Westergasfabriek) in je danes eden izmed bolj modnih in prestižnih predelov mesta (Montgomery 2007).

Tudi v Ljubljani je izrazita koncentracija podjetij kulturne industrije (slika 4). Podjetja se skoraj izključno umeščajo znotraj mestnega središča, ob Slovenski cesti med Dunajsko in Aškerčevo. Največja koncentracija podjetij je ob Slovenski, Dunajski cesti in Trubarjevi ter Čopovi ulici. Visoka koncentracija podjetij je še v novejšem delu Bežigrada ob Dunajski cesti in posamičnih 'atraktivnih' lokacijah v bližini mestnega središča. Gastota poslovnih subjektov je visoka in s 147 poslovnimi subjekti na km<sup>2</sup> presega tudi nekatere storitve, ki imajo značilno visoko gostoto (na primer finančne storitve, kjer je največja gostota okoli 120 poslovnih subjektov na kvadratni kilometer). Sodobna poslovna območja, kjer so večje trgovske in pisarniške dejavnosti (na primer BTC ali industrijsko-poslovna cona v Stegnah), ki sicer nudijo veliko prostora in dobro prometno dostopnost, pa so za tovrstne storitve zaradi perifernosti in pomanjkanja družbenega dogajanja manj atraktivne, zato jih tam praviloma ni. Območje BTC v Mostah, ki je eno največjih trgovskih središč v Ljubljani, ima zelo maloštevilna podjetja iz tega sektorja. Na sliki 4 in 5 so vidne očitne razlike med zgoščevanjem podjetij kulturne industrije (mestno središče) na eni strani in podjetij trgovine na drobno ter debelo na drugi strani, ki se zgoščujejo na obrobju mesta.

Slika 4: Gostota poslovnih subjektov kulturne industrije v prostoru Ljubljane (v številu poslovnih subjektov na km<sup>2</sup>). Glej angleški del prispevka.

Slika 5: Gostota poslovnih subjektov trgovine na drobno v prostoru Ljubljane. Glej angleški del prispevka.

Kulturna industrija je torej pomembna iz vidika vzdrževanja urbane podobe, zlasti ob vsesplošni dekoncentraciji ostalih gospodarskih dejavnosti iz mestnega središča. Lep primer vpliva kulturne industrije na urbano zgradbo je načrtovana gradnja kulturnega središča Novi Kolizej. Projekt Novi Kolizej, katerega slogan je: 'Novi Kolizej, kulturno srce Ljubljane', pooseblja vse, kar je značilno za kulturno proizvodnjo v mestu. Poleg lokacije v središču mesta naj bi imel tudi simbolično sodobno arhitekturo z mešanjem različne tradicionalne kulturne in komercialne funkcije (od gledališč in muzejev do pisarniških ter poslovnih prostorov, namenjenih specializiranim storitvam). V publikaciji, namenjeni promociji projekta med meščani in lokalno oblastjo, je med drugimi tudi zapisano (Kolizej, novo kulturno srce Ljubljane 2004): »... V zadnjem desetletju mestno jedro zaradi novonastalih nakupovalnih centrov na obrobju mesta, ki nudijo ustrezno ponudbo in urejen prometni režim, tako rekoč izumira. Samo novi generatorji razvoja bodo omogočili mestnemu jedru novo rast in oživljenje, ustrezno potrebam 21. stoletja. To so atraktivni javni mestni prostori, namenjeni dogodkom, kakovostnemu preživljanju prostega časa, srečevanju ljudi ter zadovoljevanju kulturnih in merkantilnih potreb, seveda ob ustreznih prometnih ureditvi...«.

Kopičenje specializiranih storitev je poleg ostalih procesov v mestnem središču (zmanjševanje trgovske funkcije, povečevanje turistične vloge) le del novega definiranja prostorskih odnosov ali reteritorializacije kot izraza postindustrijske družbe. Na ravni posameznih četrti je ta proces viden tudi v Ljubljani. Ali bodo specializirane storitve uspele zapolniti prazne trgovske prostore pa je vprašanje, na katerega še ni pravega odgovora.

## 5 Sklep

Kulturna industrija je relativno nov pojem, ki sovпада z vse večjo terciarizacijo gospodarstva. Ta ni več toliko odvisno od masovnega nastajanja fizičnih proizvodov, temveč visoko specializiranih storitev, ki so neobhodno potrebne v postfordistično organiziranem načinu gospodarjenja. Značilnosti le tega so v fleksibilnosti proizvodnje, ustrežanju individualnemu okusu potrošnika, hitri spremenljivosti in velikem vložku človeške ustvarjalnosti, ki trži, oglašuje in prodaja proizvod. Iz omenjenega izhaja tudi vse večji pomen

podjetij, ki izkoriščajo človeško ustvarjalnost in sodobne tehnologije pri ustvarjanju storitev ter proizvodov z veliko simbolno vrednostjo.

V številnih mestih in tudi nekaterih evropskih dokumentih je precej modno spodbujanje kulturne industrije, ki privlači nove oblike dela in je često povezana z nastajanjem tako imenovanega 'ustvarjalnega razreda' (Ravbar 2007). Ali je spodbujanje kulturne industrije dolgoročno res pravi način obujanja mestnih gospodarstev in posameznih mestnih četrti pa je vprašanje na katerega še ne poznamo odgovora. Nekateri avtorji so v to prepričani (na primer Florida 2002; Florida 2004; Montgomery 2007; Hall 2000; Scott 2007), drugi pa se bolj skeptični (Kooijman, Romein 2007). Slednja opozarjata, da so tista mesta, ki jih je Florida označil kot ustvarjalna, hkrati tudi najbolj socialno polarizirana, saj so socialne in dohodkovne razlike med prebivalci mest največje.

Nedvomno pa je, da je kulturna industrija del 'ustvarjalnega' sektorja ekonomije in da ima pomembne prostorske in gospodarske posledice na razvoj mest in mestnih regij.

## 6 Literatura

Glej angleški del prispevka.