

Audiovisual clusters and public local television: the end of the mirage

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Article received on 07/06/11 and accepted on 13/12/11

Abstract

In the last years, local television has been seen as an emerging industry linked to projects of audiovisual clustering. Through interviews with some of the actors implied in these processes, this article takes to pieces the discourse generated around the capacity of local television to act as a driver of the audiovisual industry; it cannot contribute to develop local audiovisual clusters, which have grown without control because of the lack of a national cluster policy for the audiovisual sector. The inactivity of the regional government has generated problems such as an excessive competence or a lack of coordination.

Keywords

Cluster, local television, public service broadcasting, audiovisual industry, communication policies.

Resum

La televisió local s'ha vist en els darrers anys com una indústria emergent vinculada a projectes de clústers audiovisuals. A través d'entrevistes amb els actors implicats, aquest article desmunta el discurs optimista generat entorn de la capacitat de la televisió local per actuar com a tractor de la indústria audiovisual, i estableix que no contribueix a desenvolupar uns clústers audiovisuals locals, que s'han multiplicat sense control per la falta d'una política nacional de clústers per l'audiovisual. La inacció de l'Administració autonòmica ha provocat problemes com l'excés de competència o la falta de coordinació.

Paraules clau

Clúster, televisió local, servei públic de radiodifusió, indústria audiovisual, polítiques de comunicació.

1. Objectives and research questions

Over the last few years, different industrial projects have been developed in the Catalan audiovisual sector that take advantage of the economies of agglomeration to exploit the geographical proximity of sector companies and develop synergies, increasing the scale of production, optimising distribution and marketing and improving relations with suppliers and clients within a well defined geographical area. These companies help to create poles of specialised skills focusing on audiovisuals, giving shape to genuine industrial districts beyond organic development per se. This allows them to cooperate with other firms and, at the same time, improve the overall performance of all of them as such improvements feed back into the structure. In short, they combine competition with cooperation under a formula generically called a cluster.

This formula has become very popular and has started to be applied in political circles related to the media and new technologies. Catalan research into these areas, however, has not been very interested in clusters as an object of study to date, something which is surprising given the status they have achieved within the industry. This gap in academic literature is what this article hopes to fill, focusing on current projects or those being

developed in Catalonia that relate these clusters with the new local public channels of digital terrestrial television (DTT).

The aims of this research can therefore be summarised into four:

- a. Detect and identify the main cluster projects existing in Catalonia related to the local audiovisual sector.
- b. Characterise these projects and establish the different types in existence, as well as the different actors and economic sectors involved.
- c. Delimit the functions carried out by clusters based on the cases analysed.
- d. Establish the strategies designed to interrelate these projects rooted in the region with local television.

Through these objectives, a whole series of research questions were established that this study hoped to answer:

1. Which cluster projects exist in Catalonia in the local sphere?
2. Why do clusters appear?
3. What are the main characteristics of these initiatives?
4. Which actors are involved in these projects?
5. What are the objectives of clusters?
6. How do they act and what tools do they use to achieve these objectives?

7. How do the actors involved in clusters relate with local television and with the region's audiovisual industry?

2. Research method

The proposed research investigates the object of study by using the case study as its instrument of analysis, the most appropriate method when three circumstances coincide (Yin 2009): questions are raised as to how or why, the researcher has little control over the object of study, and the research is looking at a contemporary phenomenon in a real life context. These three circumstances occur in the case of local audiovisual clusters.

This article first describes and then explores the cases analysed (the *what* and the *how*), subsequently being able to explain the phenomena detected based on the sources of evidence presented (the *why*). It is therefore an eminently qualitative approach.

In order to answer the research questions posed, a method was designed with five phases, combining primary and secondary sources:

- A bibliographical and documentary review of available studies on the subject at a European level, especially from the academic sphere.
- Production of an analytic dataset.
- Monitoring the different local DTT projects and their possible *clusterisation*.
- In-depth interviews with those in charge of the different projects identified.
- Analysis of the clusters, establishing a comparative framework based on the analytic dataset.

Six cluster projects were identified: Barcelona with 22@; Terrassa with the Parc Audiovisual de Catalunya (PAC); Vilanova i la Geltrú with Neàpolis; Granollers with the Centre Audiovisual de Roca Umbert Fàbrica de les Arts; Mataró with the TecnoCampus, and Lleida with Magical Media. With the exception of the TecnoCampus Mataró, all the rest of those in charge of the cluster projects identified accepted our request for an interview, initially formulated by email and held, in some cases, by telephone (table 1). Access to respondents was quite a lot more difficult in the case of local television stations: Barcelona Televisió, Vallès Oriental Televisió, Canal Terrassa Vallès and M1TV de Mataró did not accept our request. The local public television station for Lleida is not broadcasting at the moment, so it was not included in our list of possible interviewees.

3. Theoretical framework

In the economic literature, the term *cluster* appears very much related to that of *industrial district* and, in fact, this terminological difference has also given rise to two different conceptions of how groups of companies function. The idea of *cluster*, in its spatial sense, has been made popular since the 1990s principally through the work of the North American economist Michael E. Porter (1990). The notion of *industrial district*, on the other hand, is based on the work by the Italian Giacomo Becattini (1979), who reclaims and updates the postulates of British academic Alfred Marshall (1963, originally from 1890). In the specific case of Catalonia, both terms arrived quickly and were incorporated and applied by different economists and researchers.

Table 1. List of interviews carried out

| Project | City | Representative | Position | Date |
|---------------------------------|----------------------|-------------------|---|----------|
| Clusters | | | | |
| 22@ | Barcelona | Marc Sanmartí | Director of Territoris Estratègics de 22@, SL | 18/03/11 |
| 22@ | Barcelona | Marta Ysern | Business Development Director for the Barcelona Mèdia Foundation | 31/03/11 |
| Roca Umbert Fàbrica de les Arts | Granollers | Lau Delgado | Coordinator of the Audiovisual Research and Distribution Centre of Granollers | 25/03/11 |
| Magical Media | Lleida | Santiago Planas | Science Director at the Food Science and Technology Park of Lleida | 04/04/11 |
| Magical Media | Lleida | Pep Oriol | Project Consultant | 04/04/11 |
| Neàpolis | Vilanova i la Geltrú | Joan Carles Lluch | Managing Director | 06/04/11 |
| Parc Audiovisual de Catalunya | Terrassa | Quim Berenguer | Service Designer | 08/04/11 |
| Local televisions | | | | |
| Canal Blau Televisió | Vilanova i la Geltrú | Jordi Carrillo | Managing Director | 13/05/11 |

Note: Added to these interviews is the one held with Antoni Esteve as an expert on the theme, Chairman of the TV production company Lavinia and very much involved in the local sphere (Barcelona, 2 May 2011).

Source: Author.

In the industrial world, a *cluster* is defined as a concentration of companies related to each other, in a relatively defined geographical zone, so that they make up, by themselves, a specialised production pole with competitive advantages. This is what can be inferred from the classic definition of Michael E. Porter (1998), which establishes that they are geographic concentrations of interconnected companies, specialized suppliers, service providers, companies in related industries and associated institutions (for example, universities, standards-setting agencies and trade associations) in particular fields, which both compete and collaborate. Porter's central argument is that both institutional relations and relations between companies encourage innovation, international competitiveness and the capacity to grow. Many of the industrial policies on regional and local development for developed countries over the last few decades have been based on this idea, including Catalonia (Hernández Gascón, Pezzi, Soy and Casals 2010).

Public policies for clusters were created to support the strategic groups of companies in a specific territory. In other words, based on the detection of a group of strong industries in a certain area, the aim of public policy was to stimulate this and encourage it via different measures, such as consultancy, R&D and assistance for internationalisation. These initial policies for natural clusters were followed by a policy of what Pacheco-Vega (2007) calls *induced clusters*; i.e. industries that, given their size, cannot be considered as a cluster but where the potential has been identified for them to become a cluster in the future. And that is why they are aided.

In the case of the audiovisual industry, British clusters are surely the best documented in the European context. Chapain and Comunian (2008) compare the cases of Birmingham and Newcastle-Gateshead and find that their potential comes from the characteristics of the city per se, while the main problems are shared, such as limited markets, a negative image and competition with the capital, London. They also highlight the need to analyse these areas' connections with other production centres to understand the phenomenon in all its complexity. For their part, Cook and Pandit (2007) chose London, Bristol and Glasgow for their comparison. Among their conclusions, they question the regional scale in the process of clustering, as well as little evidence that an active public policy can boost this. The Bristol study by Bassett, Griffiths and Smith (2002) highlights the fact that smaller cities can play a leading role in the sphere of cultural production if they have the capacity to retain some autonomy with respect to the large centres, such as London. This capacity depends on some specifically local circumstances that cannot always be repeated. In the case of Bristol, public-private collaboration has been crucial to attracting investment and infrastructure. On the other hand, there are factors that go beyond the local sphere and therefore escape the action of local public policies, such as international distribution networks, market volatility or technological change. These specialised clusters, therefore, can only survive by continuous adaptation, innovation and creativity, bringing new areas of activity into the cluster.

A few other authors claim that policies aimed at promoting specific industries so that they develop into clusters are not always effective because the regions where they are applied suffer from a lack of suitable resources or the necessary institutional structures. The study by Turok (2003) on the cluster policies of the audiovisual sector in Scotland point out that cluster policies "à la Porter", focusing on developing local supply chains and local collaborative networks, are not enough to create and develop clusters that promote regional objectives. They are often even unnecessary policies. Another habitual criticism of Porter's model has been its *ahistoric* nature; i.e. that it defines a series of parameters that may ignore, for example, the reasons for the historical location of a firm in a particular place. Similarly, it has also been criticised for placing too much emphasis on local relations while the importance of national and international connections has been ignored or undervalued for these groups of firms.

In short, clusters are built up on the strengths of the region itself in the form of clients and suppliers, infrastructures and natural resources, human resources available, reduced transaction costs due to limited distances, research and training centres and universities. For a balanced analysis, however, we must also evaluate the possible negative effects of proximity, such as predatory behaviour in the search for clients and highly specialised labour.

In the Spanish case, the creation of audiovisual clusters occurs within the context of the attraction generated over the last few years by audiovisuals as a strategic sector and with a great potential for growth. To exploit the advantages of companies clustering together, public policies and some private initiatives have attempted to develop industrial parks focusing on audiovisuals as a way of concentrating the industry's resources and thereby increasing exchanges and productivity within it.

These models based on the clustering of companies must be distinguished from other initiatives also called clusters that ignore the geographical element, key to the classic definition of cluster. These tend to be political initiatives that, with similar objectives, aim to boost cooperation between agents in the audiovisual sphere by means of different programmes. This has been a clear tendency in Spain's autonomous community policies over the last decade, with the creation of cluster entities such as the Cluster Audiovisual Galego, the Eiken-Cluster Audiovisual de Euskadi, the Cluster Audiovisual Valenciano, the Cluster Audiovisual de les Illes Balears, the Cluster Audiovisual de Extremadura or the Cluster Audiovisual de Madrid. In this case, these are more like professional associations, many of which, under the officially recognised formula of innovative business groups (AEI in Spanish and Catalan), pursue a certain cooperation between their participants based on postulates of the Marshall-type industrial district. The AEI formula is defined as "the combination into one geographic space of specific industrial companies, training centres and public or private research units involved in processes of collaborative exchange and aimed at securing advantages and/or benefits resulting from carrying

out joint projects of an innovative nature".¹ This formula originates in the Business Development Plan approved by the Spanish government in January 2006, inaugurating a new industrial policy based on two pillars (Trullén 2006): strengthening the advantages resulting from scale and strengthening the advantages resulting from the environment in the form of growing returns associated with the spatial concentration of innovative SMEs. These clustering policies have received some attention from academic research, although to date very little attention has been paid to the audiovisual sphere.²

4. Cluster projects and local television in Catalonia

A documentary analysis of the cluster projects and opinions of the sources of information led to a large and varied range of information. This analysis has been carried out from a comparative perspective of all the projects, characterised in table 2, so that the shared elements can be seen and therefore the trends offered by the different experiences. Beyond design, the differences can be explained in some cases by the differences in key aspects such as the resources invested or the number and size of the agents involved. That's why the analysis focuses on eight aspects that have emerged as central: the defining label for the projects, the spheres and lines of work, the role of training, the role of research, business relations, relations with local television, the scope of the project and its elements of coordination.

Labels

The importance of being labelled a cluster does not seem to have been taken on board by all the people interviewed in this research. One initial position is that of indifference, with statements such as "we'd already been in operation for some time, doing cluster activities, with or without a label; I think that's secondary". A second position is taken by those who don't exactly see themselves as a cluster. One respondent comments "I wouldn't define myself as a cluster, rather a hub", a notion that refers to a more centrifugal than centripetal role, and notes that "the city works as a cluster space". Finally, others do recognise themselves as clusters and have assumed a discourse along these lines.

Beyond labels, a predominant perception emerges that the urban development and real estate project to which the cluster is linked has often been more important than the production project itself or support for the industry, as if the audiovisual cluster were merely an excuse for a different urban development plan: "normally these centres are set up because a mayor is desperate because they have to renovate an area and because someone sees that audiovisuals are "mass", because it's the latest buzzword and the guys say: [let's set up] an audiovisual centre", or simply "the concept of cluster is too large... too real estate".

Spheres

The spheres worked on by the different projects are varied, although a phrase such as "create a new sector of economic ac-

tivity related to issues of new technologies, providing their city with capacity and detecting the talent in the city" could surely be applied to almost all the cases analysed.

Content creation plays a key role in all the projects, although there are nuances. Some cases such as Terrassa and Lleida are very clear, as infrastructures predominate in the project, although this is not the only task. Others such as Barcelona focus on attracting companies by offering other incentives or promoting incubators, such as those of Granollers, Mataró and Terrassa. Along the same lines is *co-working*,³ a very important line of work in Vilanova i la Geltrú and, more modestly, in Terrassa. The case of Mataró needs to be treated separately, as the shift in positioning for the audiovisual project revealed when we communicated with them seems to indicate that some of the elements contained in the original plan have failed. As it was impossible to gain access to someone from the Parc TecnoCampus to provide us with more information, we have not been able to investigate this specific aspect further.

One aspect that is common to various respondents is the need to push the boundaries of audiovisuals, which are by their very nature wide-ranging. The possibility to transfer experience and know-how in this field to other areas where it might be useful is a particularly interesting option in the current period of economic crisis and the crisis in the media. The relatively common sensation of an overly large Catalan audiovisual sector would encourage some of these clusters to work towards new areas, ranging from e-commerce to public services such as education, health or care for dependents. One specific example of this idea is *living lab*⁴ which is taking over as a formula in various clusters.

Training

One characteristic of the six projects analysed is their link with training activities. The first level is university, with the presence of the Universitat de Barcelona (Barcelona and Terrassa), Universitat Pompeu Fabra (Barcelona and Mataró), Universitat Politècnica de Catalunya (Terrassa, Vilanova i la Geltrú and Mataró), Universitat Oberta de Catalunya (Barcelona and the support centres located in various clusters) and the Universitat de Lleida (Lleida). In some cases the aim is to take part in the atmosphere of an environment of economies of agglomeration (clearly the case of 22@), while in others the link is stronger, either via the university being directly involved in the cluster (Lleida) or because it constitutes an essential element of the project (Mataró). The second level is professional training, important in Lleida, Terrassa and Vilanova i la Geltrú. These are the auxiliary tasks required to carry out audiovisual projects in which each of these towns has a particular strength. The third level is continued learning, an emerging area.

Research

The situation regarding research is similar to that of university training. The following phrase is quite significant in terms of the orientation pursued by all clusters: "we want to create a symbiosis between the public and academic sector".

Table 2. Characterisation of the clusters analysed

| Clusters | 22@ | Parc Audiovisual de Catalunya | Neàpolis | Roca Umbert Fàbrica de les Arts | TecnoCampus Mataró | Magical Media |
|-----------------|---|---|--|---|--|---|
| Objectives | <p>Urban renovation of the industrial zone of Poble Nou.</p> <p>Transform the zone into a science, technology and culture platform centred on innovation.</p> <p>Influence the role of new technologies in improving professional activity and quality of life.</p> | <p>Create audiovisual infrastructures to produce and attract companies and projects.</p> <p>Strengthen the audiovisual training offered in Terrassa and its relations with the business sector.</p> <p>Generate activities around the audiovisual sector.</p> | <p>Support the implementation of access networks.</p> <p>Strengthen university studies located in the city and propose new ones.</p> <p>Generate new research and development groups.</p> <p>Promote economic activities and innovative technological proposals.</p> <p>Become a benchmark in the creation of audiovisual, interactive content in Catalan.</p> | <p>Share resources.</p> <p>Bring together productions resulting from artistic collaborations.</p> <p>Become an example of an arts district integrated within the rest of the city.</p> <p>Bring culture and arts alive by involving citizens.</p> | <p>Improve the ties between academia and society.</p> <p>Take over ownership of the Polytechnic University School of Mataró and the University School of the Maresme.</p> <p>Carry out the tasks benefiting a Science and Innovation Park in the area of technology-based business investment.</p> <p>Attract technology-based business investment and promote activities in Mataró and its area of influence.</p> <p>Offer audiovisual training to obtain better qualified professionals.</p> | <p>Encourage local audiovisual production, offering equipment and support for different initiatives.</p> <p>Form an area of R&D and innovation and transfer working on medium-term profitable projects that can be attractive both for researchers and for future sellers, based mostly on franchises that generate revenue to achieve new lines.</p> <p>Offer audiovisual training to obtain better qualified professionals.</p> |
| Infrastructures | Urbanització 22@, including spaces such as Parc Barcelona Media and the MediaTIC building | 2 active studios + auxiliary areas, 2 studios under construction, business incubator, co-working area and archive for the Filmoteca de Catalunya | 2 studios, auditorium and co-working area | Studio + auxiliary areas, postproduction room, Digital Audiovisual Archive of Granollers, research areas and main offices for the local TV station | 4 buildings + those of the TecnoCampus Network (TCM V. 1.0, Nau Minguell and Hotel & Catering University School of Sant Pol) | 5 studios + auxiliary areas, postproduction rooms and auxiliary areas |
| Training | UPF, UOC, UB-IL3, UPC and Bau - Higher Design School | Specific projects and academic courses in Terrassa (ESCAC, UPC, Drama Institute and training cycles) | UPC, UOC, University Campus of the Mediterranean, Municipal School of Art & Design and own ICT programmes | Learning networks in cultural management and Technological & University Centre of Granollers | UPC and UPF | UdL |

| Clusters Elements | 22@ | Parc Audiovisual de Catalunya | Neàpolis | Roca Umbert Fàbrica de les Arts | TecnoCampus Mataró | Magical Media |
|-------------------|--|--|---|--|---|---|
| Research | Barcelona Media Innovation Centre, Barcelona Digital Technological Centre, Yahoo Labs, Orange and others | Audiovisual Livinglab Terrassa | Vilanolab (living lab) and projects with the UPC and other partners | Audiovisual Distribution and Research Centre of Granollers (CIDAG) | With the UPC, TCM-Net-lab, TCM Living Labs, TIC/Media, TCM Audiovisual and CETEMMSA research centre | Digital content for education, stereoscopy, precise geographic positioning, digital content conservation, participative projects in 4D, automatic animation, games, virtual exhibitions, alternative digital advertising and multimedia / multi-screen content. |
| Business | 1,502 companies (2009 census) | Around twenty companies in the incubator and the Tòrax Club, a network of associated companies | Canal Blau-Maricel TV, Teledigital Consortium of the Garraf | Vallès Oriental TV and content company incubator | Around fifty companies and a dozen more in the incubator | Incubator of the Technology Park |

Source: Author.

In fact, the transfer of know-how to industry is an evident, shared interest, something which has resulted in the creation of specific transfer offices in some cases. Others encourage the involvement of firms in research projects. Sometimes this direction in research encourages companies to set up internal R&D departments. This is the situation of the larger clusters (which are also more research intensive) while, in the smaller clusters, the work can end up becoming one of replacement: "I sometimes end up becoming the R&D of what should be companies of a certain size in the sector". Clearly one of the most evident incentives behind this dominance of research has been the lines of finance available for research programmes at a Catalan, Spanish and European level. The Plan Avanza, a source of funding in Barcelona, Terrassa, Granollers and Lleida, has appeared at various times in this research as a kind of Holy Grail to start up projects or develop specific lines of work. At another level, AElS have played a similar role, more focused on the area of production. In any case, there are still doubts as to whether clusters will be self-sustainable once the manna of funds for the large projects ends.

With regard to research subjects, the different clusters have attempted to specialise, paying attention to different problems; for example, focusing on distribution (Granollers), on citizen applications (Vilanova i la Geltrú), on creating formats (Lleida), on advertising (Lleida), etc. Other areas are more shared between them, such as stereoscopy or product testing in living labs.

Business

There is a common desire for collaboration between the clusters as public agents and the private sector, although the ways in which this comes about are different in each case. Also varied is the type of firm present in the clusters. One respondent states that "our fundamental job is to be the industrial infrastructure", so that the goal is to attract companies to use the infrastructures and services available. In other cases there are nuances: "we are a public company in both senses: we are a company and we are public. In some way, we have to recover revenue, we have to justify billings and, on the other hand, there is a public desire to support the creation of companies, to support youth and innovation projects, which we have to carry out from the perspective of a public and not strictly private company".

Beyond the model of renting infrastructures, which is core in cases such as Terrassa and Lleida, and complementary in Vilanova i la Geltrú, Granollers and Mataró, the relationship with business has also been developed via other means. One of the emerging methods is to create incubators via which clusters assist and advise new innovative firms, also offering preferential access to technical equipment: "the function a cluster must have is to help generate what we have in new, emerging or strategically interesting sectors that would not be generated naturally".

A third, looser model is that of association. An evident example would be the Tòrax Club of the Terrassa PAC, which manages to maintain a certain link with the private sector beyond the classic

model of commercial or contractual ties. The aim in Lleida is to develop a similar model that involves firms in research.

Relations with local television

Public local television stations are included among the companies related to clusters. Or at least it would seem that this should be the case, at first glance. In fact, of the cases analysed only Barcelona Televisió, Canal Blau-Maricel TV and Vallès Oriental Televisió are located within the clusters of Barcelona, Vilanova i la Geltrú and Granollers, respectively. For the present, no public operator is on air in Lleida, while in Terrassa and Mataró the public television stations are still at their offices in the city centre.⁵ In these last two cases there is no relation between clusters and local television.

Even when local television is within a cluster, interaction and collaboration are limited. In most cases these limitations are due to local television being a financially weak sector, as explained to us by Canal Blau-Maricel TV: "we have a commitment with a consortium, we have the money we have to do things, we have the staff we have and things are tight. When we do something extra, for us it's a terrible headache". In any case, it's not a question of lack of desire but lack of resources: "there is a public consortium with six councils that provide public money for a TV station. You have to use this money to make television; you can't use it to do something else... or they have to authorise you". The need is therefore proposed for a guide and a political undertaking on the part of higher bodies, as the reality is that clusters and television stations are still very separate areas.

The clusters hold slightly different views. First of all, it's quite clear that local television stations have limited power: "the level of investment isn't enough to work for local industry; here there is broad ambition" or "when we ask ourselves who will create assignments for that, for us the answer is never TV stations alone, let alone local television, because it has very little money at the moment, although if the mindset changes a bit, we might end up achieving it". This other quote is along the same lines: "it's a problem of a lot of local TV stations, an age-old problem: television stations are only interested in the day-to-day stuff and don't look beyond their channel for economic returns. At the moment they're not investing in any other projects that aren't television, pure and simple, and they don't envisage television that goes even a little beyond that".

This respondent believes that this situation is difficult to change, in spite of the advantages that a local television station might offer thanks to "the agility a local TV station can have, which a large station doesn't". This person believes that, within the current context of intense competition with DTT, it doesn't make sense to reproduce the models of large TV stations but rather to explore other paths, such as audiovisual-based public services, a possible alternative via convergence with ICTs and one that fits in with the lines of work of living labs, for example.

In some cases it is felt that the location of local television stations within the clusters' facilities is a political decision that

does not meet the criteria of business or the market. One respondent believes that “very often it’s an excuse. I’ve created an audiovisual space and how do I fill it? I can move local television there and fill it”. In others, however, it is fully justified that public investment should influence a publicly-owned and public-oriented service. “From the moment it’s a town council initiative [...], the council realises that it must encourage local industry wherever possible and, consequently, spaces and services are preserved so that the DDT sphere can use them”.

Scope

The different cluster projects have very different ambitions regarding the scope of their activities. 22@Barcelona is the most internationalised project, as Barcelona competes with other large cities in Europe to attract firms and investment. In the case of audiovisuals, this view might be nuanced due to the persistence of eminently national markets in areas such as television. In fact, 22@ stresses the idea that they act as a cluster for the whole metropolitan area, a dimension that should be promoted a lot more, in their opinion: “the idea is not to compete with anyone”.

This view is not shared by the clusters located within this metropolitan area. The shadow of Barcelona and 22@ is very long. One respondent makes this clear on saying that “the only thing we can offer that Barcelona can’t offer is *affection*”. It’s difficult to compete with Barcelona in facilities or equipment: “there’s no point in offering brick or connectivity; you have to offer dynamism, content capacity, the ability to break into markets, diversification, etc.”.

One idea repeated by the various respondents is that “from our perspective, Barcelona is a cluster in itself, it doesn’t need 22@”. In other words, industry was already concentrated in Barcelona before 22@, although perhaps more spread out around the city. Barcelona’s power means that the rest of the projects have to take this into account. One respondent states that “we have an ambition not to be the cluster of [place name]”, while another, which declares that its cluster is Catalonia-wide, makes the specific point that “we interpret Catalonia as not-Barcelona”.

Coordination

From the issue of scope we go on to the idea of a lack of coordination between clusters and the fact that public financing is duplicating work unnecessarily; “there should be someone to direct a strategy, an audiovisual cluster”.

Respondents agree that there isn’t enough critical mass for all the infrastructures being created. They even ask for some containment to be carried out because, today, there are too many studios, according to quite a widespread opinion. And in all the clusters analysed there are studios as infrastructure for industry.

This also highlights the need for some project coordination, an aspect that most respondents agree about: “I don’t see a country-wide strategy, I don’t see that any audit has been carried out of which cities, which values, which assets you have

and how to relate and activate them”. The creation of clusters “is very often not directly related to the country’s strategy of industrial policy”; i.e. work is carried out unmindful of the reality of the whole and focusing on the specific need of a region.

Others, however, think in more competitive terms. “I believe we compete with everyone and we rely on having a good commercial department”, playing the card of low costs offered by the facilities and, in general, the low cost of living outside the Catalan capital. Others are positioned at a different level: “Barcelona is one battle; we have a different one” referring to the fact that they aim their proposals at a different kind of industry.

Various respondents acknowledge that some attempts have been made to coordinate the different clusters and even i2cat⁶, the Catalonia-wide technological cluster. In the case of 22@, there has not been any understanding and we are reminded that “centrality is mental, not only physical”. It hasn’t worked in other cases either: “we have a relationship with each other [...] but there’s no coordination of common projects, of planning joint Avanza or Impacto projects; projects that attract industry”.

5. Conclusions

This research has provided an initial exploration of the projects commonly called clusters that have proliferated over the last few years around the Catalan audiovisual industry. As a limitation to the findings, we should note that the view of local TV operators has not been widely represented, given the impossibility of accessing the vast majority of them, something which is quite significant. Their limited involvement in the cluster phenomenon is evident in the data available and in the view of the clusters, but greater access to these informants would have helped to provide further insight into the reasons behind this position.

The first research question asked about the cluster projects existing in the local environment. From the qualitative work carried out, it can be deduced that the definition of local environment is highly relative. Although the six cases analysed were originally chosen because they have been related, at some time, with public local television, at the time of the analysis three of them (Terrassa, Mataró and Lleida) had no kind of relationship. Vilanova i la Geltrú and Granollers are the ones that have most clearly integrated their respective local television stations. These two are precisely the smallest clusters. The last case, Barcelona Televisió, is also part of a cluster but its presence is not very relevant in such a large cluster with much bigger actors.

The second question focused on the reasons behind clusters being formed. As has already been mentioned, many of the cluster projects are related to urban development and/or real estate projects. In some cases it’s not clear which is the cause and which the effect. As mentioned by some respondents, audiovisuals has been seen as an emerging sector over the last decade; it’s not contaminating, difficult to move elsewhere,

with a technology and innovation component, cultural value and the capacity to generate new jobs requiring a certain level of skill. It is therefore a political commitment of the first order. Some of the studies that laid the foundations to the current clusters already pointed this out and, within the context of the information society political discourse, audiovisuals have become fashionable and an essential actor in modernising local industries throughout the territory. In other cases, however, there is no clear evidence of any solid foundations for the projects.

The next research question aimed to characterise these initiatives. The infrastructural element is very important in all of them. This is logical as it is the most costly element, as well as the most tangible. Moreover, it quickly generates an image of the project. There is also widespread interest in innovation, both to find and/or generate it in order for it to be applied to the production sector. Innovation is strongly related to training and especially to research, which are central elements, especially the latter, in all the projects. In fact, the research has highlighted a growing interest in transferring results to industry.

The fourth question asked about the actors involved in the clusters. These are of different types, although universities stand out, acting as a very important pole for training and research. It is also noticeable that, since universities are involved extensively in different projects, such as the UPC in Terrassa, Mataró and Vilanova i la Geltrú, they don't contribute to coordination between clusters and the research carried out by their own research groups. With regard to companies in the sector, the transfer mechanisms need to be improved and this has been stressed by a large number of the clusters studied.

The fifth question was about the clusters' objectives. Without doubt, the most common objective is to have a positive effect on the capacity of the audiovisual industry, either in the form of suitable infrastructures and equipment or via training or by transferring the results from research. In most cases activities are also carried out aimed at a broader public, but only in the case of Vilanova i la Geltrú do these have a significant specific weight. Discovering and attracting talent also figure highly on these projects' list of priorities, especially those that are smaller in size.

The sixth question aimed to discover the tools employed to achieve the objectives declared. Here the variety is as wide as the objectives are different. One sphere in which this divergence is reflected is in scope, which ranges from the city in the strictest sense to international ambition. Another sphere is the financial involvement in innovative projects, which only occurs in a few cases.

The last of the questions posed initially aimed to evaluate the role of public local television and the local audiovisual industry within the context of the different clusters. Here the image is quite disturbing. In fact, on analysing the presence and function of public television, a reality appears that is quite far removed from what seemed to be indicated by the report produced by the Catalan Audiovisual Council (2009). After this research, it can be firmly stated that local DTT does not help to develop local audiovisual clusters, as its involvement in these projects

has almost been zero. When it does take part, it is unable to bring in other actors from industry. The growth boosted by the digital switchover, which helped to legalise and professionalise local television, has encouraged a certain collective enthusiasm in the local sphere and an exaggeration of its potential to attract local audiovisual industry. In reality, it scarcely has the capacity to fulfil this role.

On the other hand, local television stations strictly fulfil their television role but do not go any further, as demanded by some clusters that wish to include them actively in their project. Here we should consider whether television stations have enough human and financial resources to take part and, if this is not the case, whether there is the political desire to ensure they take part. This commitment would mean transcending traditional audiovisuals in the search for new areas in which their capacities can be applied, along the lines of what some clusters are already starting to do, for example via living labs.

If we consider what role local television should play in this context, three great strengths or areas of expertise clearly emerge: its knowledge of the audiovisual language and environment, its knowledge and involvement in the local world and its condition as a public service.

Financing should also be added to this equation. In most cases, clusters are financed publicly, just like the television stations, although both may have other private sources, such as corporate services in the former case and advertising in the latter. A change in priorities in the functions of local television or, at least, a rethink of certain activities should come from a higher level. This is a political choice that entails breaking with the traditional conception of public television and seeing it as a public service of the first order that can, and should, collaborate with the rest of the public services financed via the contributions of all citizens. In a context of strong TV competition, moreover, this factor could differentiate local television from purely commercial operators.

Along this political line, another aspect should be noted. To date there has been no national audiovisual cluster policy. In spite of the potential attributed to the sector, the Catalan government's cluster policy has focused on other sectors. This has led to the initiatives to *clusterise* audiovisuals being based on the local environment. Moreover, these have been developed without any control and without evaluating whether the country had the capacity to absorb the whole series of infrastructures that was being created or whether work was being duplicated, be it in training, research or the creation of equipment. Evidently, here a political decision would be required regarding whether the aim is a sector with a certain coordination or whether the desire, consciously or thoughtlessly, is for competition between clusters. The policy consists of managing the *res publica* and, in this case, it has neglected its duties.

The cluster managers themselves mostly agree on the need for a coordination that has not occurred to date. There is no agreement regarding who should take on this role, although the respondents point to bodies such as the government of

the province of Barcelona or the Catalan Audiovisual Council (CAC), neither of which are likely contenders. The former because it lacks legitimacy throughout Catalonia, as its territory is a single province. The latter because this is not included among its legally attributed functions, although it could take part on the side of local television, which does lie within its brief. The other two actors mentioned are the Catalan government and the Catalan Institute of Cultural Industries (ICIC), although this is unmistakably rejected by some actors, basically because it is seen as little more than a distributor of grants, although this is not the only work it does in practice. Indirectly, another institution appears such as XAL, with an important network among the world of local television, although it does not seem that it can fulfil a role of coordination as a cluster.

On the other hand, neither can we ignore the fact that there is a Catalan-wide cluster, *i2cat*, that is highly focused on the technological area. Although it collaborates in some projects with other clusters, it seems necessary to involve it in the coordination of research tasks carried out in other clusters.

6. Action proposals

Although the fieldwork's findings for this research highlight that local television has a much diluted role in audiovisual clusters, the idea per se of cluster should not be rejected, although it seems clear that it needs to be reformulated. From such a constructive stance, ten proposals are presented:

- Broader research needs to be carried out that adds quantitative elements on the sector to the initial qualitative work carried out in this study: quantitative elements are necessary to analyse in more detail and detect the most effective elements in each cluster, be it in terms of economic profit or social benefit (population attended, encouraging innovation, contribution to training and research, knowledge transfer, etc.). However, we should also continue to focus on qualitative aspects, asking other actors such as local television stations themselves.
- If audiovisuals are truly a strategic sector, we need to implement a national policy of audiovisual clusters: this policy, which already exists in other sectors, has not been applied as yet to the audiovisual field. If we believe the rhetoric of audiovisuals as a strategic sector for the future, we must act accordingly. Among the possible proposals, that of a national audiovisual cluster could be one of the policy's fundamentals.
- Coordination needs to be established among the clusters involved, defining previously the levels of competition and cooperation required: especially at a time of limited and decreasing budgets, priorities must be established and all resources optimised. An efficient way to get the most out of material, economic and human resources (and especially of people's knowledge) is to share them, prioritising cooperation above competition. This coordination should not be limited to the clusters described here but should be extended to other projects such as *Citilab* in Cornellà, and *Spurna* in Girona.
- We need to establish a coordinator with enough legitimacy among the actors involved: an institutional but not bureaucratized coordinator that is recognised and accepted by the different actors involved and that, at the same time, can also be sensitive to the realities of such different but converging sectors as audiovisuals, ICTs and telecommunications. In our opinion, the Catalan government seems to be the most suitable contender for this function, provided there are no power battles between the different government departments that should be involved, such as Economy and Knowledge, Culture or Business and Employment.
- The core of the industry is in Barcelona but the production base must be extended geographically and culturally: this extension will help to achieve three desirable objectives, such as (a) to reflect Catalan diversity and thereby take advantage of the country's cultural potential, (b) to attract talent from all over the territory, as training centres are all around the territory, and (c) to share investment, public in many cases, generated by the sector, as public revenue comes from taxes on citizens and companies all around the territory.
- Each cluster needs to define its specialisation based on its current strengths, its present and future skills and the sector's needs in the Catalan area: not everyone can have the same skills and it's not even desirable, since specialisation is increasingly necessary in quickly evolving industries such as audiovisuals and ICTs. Moreover, specialisation helps to create niches of expertise that can differentiate this business proposal or cluster from the growing competition in these areas. All this, obviously, taking into account the needs and strategic lines of the sector in Catalonia.
- A map is required of the relevant actors in the industry and in the areas of training and research, defining their strengths and involving them in the work carried out by the clusters: the mere location of these actors cannot determine their inclusion or exclusion in these projects irrespective of the value of their contributions. In practice, this means, for example, that a cluster located in a specific place does not necessarily have to work with the university or research groups of that place if their specialisations don't coincide. The most excellent group in that field needs to be found, even if that means going outside Catalonia or Spain. Talent usually has few boundaries.
- Audiovisuals must be seen in their broadest sense and must play their part in the audiovisual development of society. This is a public service and business opportunity in a strictly audiovisual sector that seems to have hit a ceiling, in addition to helping to legitimise its existence and extend its influence. The current crisis must be used as a lever to take the leap from a strictly TV-based sector, taking advantage of audiovisuals being present throughout society. Areas

such as health, education or social welfare clearly need the know-how and skills of audiovisuals. It is a business opportunity but also the chance to influence culture and contribute to society.

- Local television needs to be more involved in those areas of action that have a local dimension or in those where involvement by this actor can add value. Close links with the territory is a key element to this involvement and to helping to enhance the cohesion of the social fabric, especially in smaller areas. Perhaps this doesn't make so much sense in other spheres, such as research. Local television does not have the resources to establish itself or take part in such spheres beyond a still limited role as a testing ground for certain technologies.
- Local television stations need to redefine their role within the digital context and assume the public service functions related to other spheres beyond audiovisuals; we cannot continue with a model from the analogue era in the digital era. The public service model is still valid, although it is constantly being redefined. However, the more limited size and scope of local television does not exclude it from such a redefinition.

Notes

1. Article 5 of Order ITC/2691/2006, of 2 August, regulating the rules, regime of aid and management of support measures for innovative company groups. *Boletín Oficial del Estado*, no. 199, 21 August 2006. <<http://www.boe.es/boe/dias/2006/08/21/pdfs/A30854-30862.pdf>>.
2. The work by Vallejo Peña (2009) is one of the few exceptions. Regarding more general studies, particularly recommendable are the monographs of 2006 from the journal *Economía Industrial* (<<http://www.a360grados.net/sumario.asp?id=239>>) and of 2003 from *Ekonomiaz* (<http://www1.euskadi.net/ekonomiaz/taula1_c.apl?IDPUBL=48>), focusing on the Basque Country, surely one of the most proactive autonomous communities in Spain in this kind of policy.
3. *Co-working* refers to a style of working in which spaces are shared by different professionals from various firms or institutions, often liberal professionals and/or freelancers. The workspace offers certain infrastructures and the possibility to network with other professionals they share the workspace with, often specialising in related activities, such the media or ICTs.
4. A *living lab* is a research and testing environment for products and services, often related to technology, that reproduces a real environment of use. The key aspect in the living lab idea is the view of users, even with their involvement via co-creation.
5. After this research had ended, Mataró television moved to the TecnoCampus (<<http://diarimaresme.com/2011/m1tv-sinstal%C2%B7la-al-tecnocampus/>>).
6. i2cat is a foundation aimed at developing the internet, in which the public administration, companies and universities take part (<http://www.i2cat.net>).

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