THE CULTURAL ECONOMY OF CITIES

A COMPARATIVE STUDY OF THE AUDIOVISUAL SECTOR IN HAMBURG AND LISBON

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Abstract

This article examines the role that big cities play in an ongoing change towards a 'global cultural economy'. Starting from Allen Scott's argument that a handful of urban flagships may benefit from this shift, it looks for an alternative approach to the territorial dimension of the 'culture–economy nexus' based on a more complex understanding of urban culture. A broad theoretical discussion of Scott's ideas, as well as on the key concepts of culture, economy and the city, is placed alongside two case studies of the development of the audiovisual (AV) media sector in two European metropolitan regions, Hamburg and Lisbon. The article concludes that the territorial dimension of the 'culture–economy nexus' is more than the mere concentration of culturally informed economic activity in a few urban 'master hubs'. Rather, it can be characterized as a non-linear refracted shift, to a large extent moving along historically and culturally determined trajectories of cities and regions.

Introduction: culture, economy and the city

The increasing importance of culture as a major economic force in contemporary society is a fashionable issue in nearly all of the social sciences. However, this increasing interest in the 'culture–economy nexus' is accompanied by an ever-greater confusion about what really characterizes this convergence between the spheres of cultural and economic development, and about how and where a 'culture–economy nexus' can be identified. In a recent paper Allen Scott took forward this discussion, emphasizing the role that big cities will play in future as central hubs of a global cultural economy (Scott, 1997). We begin by examining this argument.

The special role that Scott attributes to big cities as 'master hubs' of a new global cultural economy is a product of two main features, both contributing to the 'reassertion of place as a privileged locus of culture' (p. 324). On the one hand he points to the contradictory role of globalization; on the other, the importance of 'massive urban communities'. Globalization is dealt with as a multifaceted concept. Thus, Scott first puts emphasis on the seeming paradox between cultural production occurring predominantly in localized clusters, while final outputs are channelled into ever more extended networks of consumption. 'Certain key cities' (p. 325) represent a symbiosis of place, culture and economy, thereby functioning as the bulwarks of a new cultural economy of capitalism. Secondly, however, globalization is supposed to imply an ever deeper spatial division of labour, since market enlargement encourages a more pronounced vertical disintegration and therefore spatial specialization.

The concept of 'massive urban communities' is put forward in order to explain how the symbiosis of place, culture and economy works. Massive urban communities are characterized by many different specialized social functions, thereby substantially

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stimulating cultural experimentation and renewal. Furthermore, these communities are also typically the sites of leading-edge economic activity, so that many complex interactions between the cultural and the economic are set in motion. Local cultures help to shape the nature of intra-urban economic activity; concomitantly, economic activity becomes a dynamic element of the culture-generating and innovative capacities of given places. In other words, massive urban communities are constituted both by certain specificities of urban culture and by the economic importance of a given place within the global economic order.

Two criticisms can be raised initially. First, such a view appears highly reductionist since cities other than the handful of 'master hubs' are simply neglected. The case studies of Paris and Los Angeles, which empirically inform Scott's argument, confirm this impression. Second, his own emphasis on the specializing effects of globalization appears to be at least partly contradictory to the notion of a hierarchical division of labour in which a few places dominate others. In addition to these observations, however, an in-depth discussion of Scott's key concepts is necessary in order to provide a broader theoretical framework and a constructive contribution to the debate.

In very general terms, two approaches to a concept of culture, which could constitute starting points for further discussion, can be distinguished. On the one hand, culture is understood as a set of cultural practices. In this sense, culture is considered as something done by people. On the other hand, it can be seen as a 'superorganic system that existed above and beyond the wills and desires of (its) individual members' (Mitchell, 1995: 105). In this sense, culture is considered as something that implicitly influences and reproduces people's actions.

Without reopening a fruitless debate as to what could be *the* appropriate conceptualization, we shall take up these basic strands of discussion in order to improve understanding of an ongoing societal shift towards what we call a 'culture–economy nexus'. This shift can be conceptualized as a change in both what people produce and how this production is influenced. These two directions of discussion have been labelled as 'culture as a commodity' and 'culture as the bed of economy' approaches (Brito Henriques and Thiel, 1997).

The first mainly draws on Horkheimer's and Adorno's sceptical vision of a global culture industry manipulating an anonymous mass of consumers without any chance of making their own decisions (Adorno, 1991; Jackson and Taylor, 1996). In the course of a critical assessment of postmodernity, this structuralist argument was taken up chiefly by Harvey (1989) and Jameson (1984) and transferred from the sphere of consumption to cultural production. Both argued that changes in the logic of capitalism had led to a successive integration of culture into market logics. Or, as Harvey put it: 'precisely because capitalism is expansionary and imperialistic, cultural life in more and more areas gets brought within the grasp of the cash nexus and the logic of capital circulation' (1989: 344). With this focus both scholars remain sceptical, seeing 'postmodernism as a negative cultural development with its fragmentation and replacement of ethics by aesthetics, leading to a loss of the critical edge and political involvement' (Featherstone, 1995: 79). Recently, however, more pragmatist views prevail in academic discussions. The once-threatening culture industries are regarded as a new growth sector, able to solve many of the current problems of de-industrialization and unemployment (Scott, 1996; Hudson, 1995; Kunzmann, 1995; AG Kulturwirtschaft, 1995). As regards the city these views can be summarized as follows: 'With the disappearance of local manufacturing industries and periodic crises in government and finance, culture is more and more the business of cities – the basis of their tourist attractions and their unique, competitive edge' (Zukin, 1995: 2).

The second ('bed of economy') approach reflects major criticisms of the neo-classical 'atomistic' view of economic actors and attempts to contrast it with a concept of 'embeddedness' (Granovetter, 1985), thus focusing on the general environment of firms which is thought to influence their decision-making. The cultural dimension of this environment has been added in the context of the different debates that have dominated regional studies since the first seminal works on Italian industrial districts. The growth of certain regions led to the assumption 'that there is something intangible, in the air, which permits innovativeness to proceed in some places and not in others' (Storper, 1995: 203). Concepts such as 'innovative milieu', 'institutional thickness' or 'untraded interdependencies' as routes to competitiveness are to a great extent based upon 'soft (cultural) factors', such as 'shared rules, conventions or knowledge' or 'various forms of socio-cultural identification' (Amin and Thrift, 1994: 14). In other words, a certain regional cultural coherence is supposed to be a crucial precondition for regional innovation. This coherence can however play an ambiguous role, since it is likely to hinder a region's ability to change. Many old industrial regions display examples of 'sclerotic milieus' (Läpple, 1994), leaving them unable to change their development trajectories.

The integration of the city into these theoretical paradigms of debate on the culture–economy nexus involves a series of problems, although big cities are generally considered to play a crucial role in terms of the increasing economic importance of culture. On the one hand, the 'culture as commodity' approach mentions the city as an important factor, but remains either limited to the commodification of its morphology and to the city as a site of consumption (Clarke, 1997) or takes the pragmatic position that culture is a promising growth sector. Thereby it neither emphasizes city-specificity nor provides any real theoretical point of departure. On the other hand, the claim for coherence of the 'bed of economy' approach does not wholly correspond with what is normally supposed to characterize urban culture. As Robins (1995: 47) argues, the 'capacity of the city as a container' is merely one of its three cultural constituents. More important, the city gives the challenge of 'outside' experience to those who live at home, a reality that implies the fundamental ambivalence of urban experience. The personalities of the 'stranger', which are normally invoked to highlight this outside experience inside the city, represent both the positive (and innovative) challenge and the negative experience of fear or loneliness, a negative side of urban difference which is Robins's third constituent of urban culture.

Given this heterogeneity, how could a fruitful theoretical framework for an enquiry into the 'cultural economy of cities' be built which goes beyond the dialectics of 'local production master hubs' and 'global distribution networks'? Given a focus on the culture–economy nexus, three main topics can be identified. First, the 'capacity of cities as a container' relates to the way in which cities or metropolitan regions follow their own internally determined trajectories, creating identities which provide them with a certain degree of internal coherence. Second, this coherence thesis has to be confronted with the role of diversity and difference as key elements of urban culture. How does the interplay between these ambiguous but complementary constituents of urban life influence both the cultural production of cities and their perception from the outside? And third, this interplay has to be articulated with the general shift towards a global cultural economy, thereby adding a territorial dimension. How does the tendency towards the commodification of culture determine and change metropolitan development paths, and vice-versa? Scott's paper offers answers to all these questions, but only partially due to its limited focus on a handful of cities. As Knox (1996: 117) puts it:

> . . . we need detailed biographies of cities that set local change in a global context. We need to examine the significance of particular cities as sites for the construction of new cultural identities and political discourses, and for new processes of political and cultural transformation.

A contribution to this challenge can be found in the remainder of this article, where the evolution of audiovisual (AV) media industries in two European metropolitan regions, Hamburg and Lisbon, are compared.

The audiovisual sector as a case study

Audiovisual media as a paradigm of the 'culture–economy nexus'

A review of the literature concerning the position of culture in contemporary capitalism reveals a predilection for focusing upon AV media. The perfecting of manipulation and reproduction techniques for sounds and images on a large scale is, from several points of view, one of the 20th century's most powerful legacies. It is one of the main technological innovations and one of its most specific forms of artistic expression. It was the development of the mechanical means of reproduction of culture and information that led to the first critical reflections on the ever-increasing 'promiscuity' between culture and the economy, among the celebrated authors of the Frankfurt School. AV media play a major role in the current process of economic restructuring. Many who emphasize the advantages or virtues of cultural product industries in economic growth and regional development to a large extent equate AV media with culture industries (Lim, 1993; Scott, 1996, 1997). Additionally, and independently from its role in regional development, the very fact of AV media being an economic growth sector suggests it is a useful exemplar of the culture–economy nexus. A recent study, for instance, promoted by the European Commission, estimated that in Germany, Denmark, Spain, France, Italy, Ireland and the United Kingdom AV revenues would rise by 70 percent between 1995 and 2005, reaching around ECU 53.9bn (at 1995 prices) by the latter date (Murphy et al., 1997).

Restructuring trends in the audiovisual sector

The AV sector has been undergoing profound structural changes in the last few years, encompassing not only the production process itself but also entrepreneurial organization models and the rules of financing. In the field of organization two main arguments have been put forward. On the one hand the Californian school of economic geography (see for instance Christopherson and Storper, 1986; Storper and Christopherson, 1987) mainly focused on a trend towards decentralization. Analysing the changes that have taken place in the US motion picture industry since the 1950s, they pointed out that 'product differentiation became a key strategy to draw people back to the theatres', based on technical innovations used 'to distinguish motion pictures from television' (Christopherson and Storper, 1986: 309). Besides this focus on quality, strategies aimed at an intensification of internationalization, 'both to use foreign markets to compensate for increasing uncertainty in the domestic market, and to exploit the cost advantages of foreign locations' (p. 310). These authors placed their main emphasis, however, on organizational changes in the film industry itself, presenting its restructuring process as an example of flexible specialization (Piore and Sabel, 1984), thereby stressing vertical disintegration as the dominant trend.

Storper and Christopherson (1987) examined this thesis more deeply, paying more attention to the territorial dimension of the changes. In this respect, they emphasized the trend of territorial reconcentration of both labour and establishments, although noting that filming itself had started to show a more diffuse territorial pattern. This reconcentration may be explained on the basis of the paradigm of flexible specialization, since 'vertical disintegration presupposes the creation of industrial complexes, organised around elaborate inter-firm or inter-plant transactional relationships', which 'include face-to-face contacts and detailed exchanges of information, long- and short-term subcontracting and input–output flows' (p. 108).

On the other hand, Aksoy and Robins (1992) were critical of this argument, considering that 'the restructuring of Hollywood is being shaped and driven by forces that are not adequately recognised or emphasised in the "flexible specialisation" thesis' (p. 6). Arguing that the ability to extend the market is more important than a reduction in production costs, they emphasized changes that had taken place in the distribution and control of the business relative to those made in the production process itself. What therefore stood out in their work was the idea that 'the emerging industrial structure is made up of a very small number of very large companies which dominate the market through their position as gatekeepers to the distribution of filmed entertainment on a global scale' (p. 11).

This argument has been corroborated by other studies (Álvarez Monzoncillo and Iwens, 1992). The acquisition of Columbia Pictures by Sony, and the merger of Time and Warner, reinforce a view that the key words in the restructuring of the AV industry are the transnationalization of investments and the formation of large multimedia conglomerates, which tend to take an almost oligopolistic control of the global market. More recent accounts however argue that both organizational globalization on the distribution side and fragmentation on the production side of the AV value chain are by no means mutually incompatible (Scott, 1997; Lash, 1998). They should even be understood as two inherent and constitutive parts of the restructuring processes of the whole AV media sector that take place simultaneously and are mutually dependent, being associated with the requirements of the globalization process.

In addition to these overall trends, the television

(TV) segment, a field with an ever-increasing economic importance in the AV world, has been influenced by a series of changes in the wider institutional environment of AV media. The chief factor of change here has been the move towards deregulation and the ending of monopolies, especially in European countries, giving rise to a privatization of TV transmission rights and the proliferation of private channels in many countries. This was brought about as a result of strong criticisms of the legitimacy of the state TV monopoly, on the one hand, coupled with the interests of powerful economic groups, on the other hand, which considered this sector a highly attractive investment area, mainly due to the revenue from advertising.[1] The opening of the television sector to private investment had diverse effects, above all in the entrepreneurial structure itself, again displaying the seeming paradox of the overall structure of the AV sector. Thus, heavy operating costs of a TV network strengthened the position of the more powerful economic groups, thereby favouring processes of horizontal integration and the formation of multimedia conglomerates that were frequently transnational (see Álvarez Monzoncillo and Iwens, 1992; Coste-Cerdan and Schmutz, 1994; Decker, 1994).

Moreover, the proliferation of new networks, increasing the number of viewing hours per day, caused a sudden rise in the demand for programmes. Due to the lack of productive capacity on the part of domestic suppliers, this led to a considerable rise in the international flow of AV products, mainly to the benefit of American suppliers. As Rebelo (1995: 69) observed: 'to fill in most of the transmission time with piles of films, telefilms, series, and sitcoms, selected with just one criterion: low cost' became the common strategy of a majority of TV networks in most of Europe. This is why, in turn, many North American motion picture producers have discovered a new specialized area in made-for-television films (as they have in video[2]) and a way to expand their markets.

Yet in other fields of programming the deregulation of TV had more stimulating effects on AV production in European countries. The contractual needs of private TV networks caused a notable increase, chiefly in the area of documentaries, but also in fiction. National production also considerably expanded in information-rich and studio programmes, made for the population as a whole and obeying the simple criterion of capturing audiences.[3] Therefore deregulation and the multiplication of TV channels has also favoured the formation of independent producers of TV programmes (Álvarez Monzoncillo and Iwens, 1992: 166).

The audiovisual panorama in Germany and Portugal

Notwithstanding the tendencies outlined above, of European integration and institutional concentration on the one hand and of local agglomeration on the other, differences on the national level continue to impinge decisively on the development of AV media. This is mainly due to both economic and cultural factors, the latter being particularly evident in different languages, whereas the former reflect both 'hard' economic differences and 'soft' factors such as the institutional and regulative framework surrounding the media sector. The distinct structure of AV media production in the two case countries is outlined below in order to establish a link between the general tendencies and the regional cases.

Germany is the biggest and economically strongest of all EU countries, even if its success is at the moment being seriously questioned by high rates of unemployment and a high level of public indebtedness. This leading role and the corresponding purchasing power of a huge internal market also has its expression in a highly developed infrastructure supporting the use of AV media. A relatively dense distribution of cinemas can be taken as one indicator, although reunification has notably reduced the national average. Thus, the inhabitants/screen ratio increased from 19,200 in 1990 to 21,900 in 1992, before slightly decreasing (to 21,500 in 1995).[4] The admission frequency per inhabitant amounted to 1.5 per year in 1995, displaying stability despite substantially rising average ticket prices (from ECU 4.1 in 1989 to ECU 5.0 in 1995). Thus German cinemas could augment their revenues in the early 1990s by more than 20 percent.

Diametrically contrary to this relatively successful evolution of cinemas is the role that national movies played in German cinema. The dominance of US films is notable, and it continues to grow (Table 1). This weak market penetration by German films had decisive effects on the structure of national film production. The high risk of being economically unsuccessful with domestic production led to the necessity for public intervention in this sector. Thus, movie production has turned out to be an economic activity highly dependent on state funding.

The main specificities of AV media in Germany lie in the federal structure of the public broadcasting service. Eight regional corporations are responsible both for the supply of the national ARD channel and for eight regional channels which have the potential of national reception due to cable or satellite connections. Along with this federal system a second nationwide public channel constituted the backbone of German public TV until the middle of the 1980s. Then, two major changes caused a substantial restructuring process: the introduction of new transmission technologies (cable and satellite), and the opening of the TV market to private agents. The so-called dual system emerged with initially two additional channels (SAT1 and RTL), leading to a whole body of private and public, general and specialized programmes,[5] slightly differing from one state to another since the allocation of transmission licences is in the hands of newly established regional authorities.

This considerable extension of channels could – in terms of financing – be compensated by a similar extension of the advertising market. In the first years after the beginning of the dual system even the public services increased their turnover in advertising. From the 1990s onwards however, they lost a huge part of both audience shares and advertising revenues.[6] In terms of pay-TV as an additional method of programme funding, at present one channel (Premiere) is transmitting nationwide from Hamburg. However, along with the future introduction of digital TV, there are plans for a digital pay-TV channel, supplied by cooperation between the two German private media majors, Bertelsmann and Kirch. So far this cooperation has been rejected by the European Commission, thereby increasing the likelihood of a more transparent structure of future TV supply, also involving public services.

Portugal's AV sector has likewise undergone a series of quite rapid and deep changes in the last few years that in a way have followed the trends seen in other European countries. The situation of the AV sector in Portugal, however, has specific problems that are the result of both the size of its internal market and the legal and institutional framework in which AV production is embedded. The resident population of Portugal is a little under 10m people and per capita income continues to be among the lowest in the EU, despite rapid economic growth since the mid-1980s. These two facts explain why the motion picture cinema network is quite small, with one of the highest inhabitant/screen ratios in Europe in 1995: 35,200 inhabitants per screen. Moreover, despite a notable shift towards multiscreen and multiplex cinemas since the end of the 1980s, especially in the two main urban regions – Lisbon and Oporto – Portugal's cinema structure is still poorly adjusted to the growing trends of market segmentation and product differentiation. Mono-screen cinemas provided 62 percent of the total in 1995.

As far as demand is concerned the annual per capita average of visits to cinemas is also one of the lowest in the EU, and, contrary to the general European trend, substantially decreased in the first half of the 1990s. While in 1989 12 million tickets were sold, in 1994 the number had decreased to

Table 1 Distribution of films in Germany according to origin (% of total), 1989–95

	1989	1990	1991	1992	1993	1994	1995
German	16.7	9.7	13.6	9.5	7.2	10.1	6.3
US	65.7	83.8	80.2	82.8	87.8	81.6	87.1
European	16.3	5.6	4.0	6.2	3.4	6.5	5.1
Other	1.3	0.9	2.2	1.5	1.6	1.8	1.5

Source: *European Cinema Yearbook*

little more than seven million. Thus, a growth in box-office receipts in the same period was the result of a progressive rise in the average price of tickets, which made it even more difficult to reverse the decline in audiences.

Distribution is, as in other countries, concentrated in the hands of a small number of agents which frequently control the screening sector as well. Only one distributor in Portugal – Filmes Lusomundo, originally a distributor and today a part of a vast multimedia group whose business also includes cinemas (some in Spain), TV, press and radio – controls about 60 percent of Portuguese cinemas (Cádima, 1996). It is no surprise, therefore – because Lusomundo is the exclusive representative of North American majors, working in a joint venture with Warner on the opening of multiplex cinemas in Portugal – that more than 60 percent of motion picture screenings in Portugal are of American production. Unlike in Germany, however, movies from European countries play a more important role in the Portuguese market (Table 2). The limitations of the market clearly explain the crisis that Portuguese motion picture production is passing through. An inability to rely on the home market, plus the lack of channels that allow distribution abroad – outside the restricted circle of film festivals – results in Portuguese motion picture production being rather small, modest in investments and heavily subsidized.

Unlike the cinema, TV in Portugal has been experiencing a period of euphoria, which began with the formation of private TV channels in the beginning of the 1990s. Although rather late in comparison to other European countries, 1992 and 1993 saw the launching of regular transmissions by two private channels – SIC and TVI – obliged by contract to transmit to all of mainland Portugal. From then on, Portuguese television wavelengths were shared by these two channels and two public channels, RTP1 and TV2,[7] thereby implying a duplication of the number of daily viewing hours. As in the rest of Europe, this not only led to an increase in the importation of fiction[8] and entertainment programmes,[9] but also stimulated domestic production.

Besides this, TV became the chief beneficiary of advertising revenues and caused a sudden and very rapid rise in advertising investments. Portugal has even become the European country with the highest advertising spending rate as a percentage of GDP: 1.1 percent in 1996, TV accounting for 58 percent of the total, or ECU 510m. Not all the channels, however, benefited from this growing advertising revenue to the same extent. SIC and RTP1 finished up by capturing around 90 percent of prime time audiences and the corresponding share of advertising revenue, whereas TVI suffered a serious financial crisis, being obliged to reorganize several times.

Cable TV appeared shortly after the opening of the private channels. The number of people acquiring a cable TV link has risen rapidly, but it is far from reaching saturation point. Cable TV therefore seems to be a sector that will enjoy appreciable growth in the next few years. A recent law finally ended the monopoly of generic TV channels and opened the way for the appearance of private thematic channels (national, regional or local) to be transmitted through cable TV.[10]

Audiovisual media in Hamburg: looking for competitive advantage in a decentralized urban system

It is impossible to understand the role of AV media in the urban economy of Hamburg without taking

Table 2 Distribution of films in Portugal according to origin (% of total), 1989–95

	1989	1990	1991	1992	1993	1994	1995
Portuguese	1.2	1.7	3.5	4.3	5.5	6.0	5.6
European	26.1	27.2	28.5	19.7	11.9	27.0	35.1
USA	72.1	70.3	66.9	67.7	72.6	62.2	48.9
Other	0.6	0.8	1.1	8.3	10.0	4.8	10.4

Source: *European Cinema Yearbook*

into account both the role of the city in the national urban and regional system, and the regionalized structure of a huge part of German AV media supply. Hamburg, besides Berlin, Munich and Cologne, has always played a major role within this system. Social changes in Germany, stimulated by political, technological or institutional shifts, always constituted 'windows of opportunity' for the AV sector in Hamburg, thereby requiring processes of adaptation which sometimes affected even the wider environment of the media productive system. Hamburg is, after Berlin, the second biggest city in Germany, with 1.7 million inhabitants, and a further 1.3 million in the surrounding districts. One of Hamburg's specificities is its status as a 'city-state', that is, it is on the administrative level of the German Länder, thereby functioning as local and regional authority at the same time.

The end of the Second World War and the subsequent separation and reorganization of German territory have probably been the most important events in the history of Hamburg's media economy. The old port city benefited from this situation for two main reasons. First, to a certain extent it inherited a part of Berlin's former capital functions, namely national primacy in the news sector. This was partly due to geographical proximity and to the attractiveness of its waterfront, but also because of the 'provinciality' of the new German capital, Bonn. As one of the main agents in this context the most important German news agency, 'dpa', established itself here. Second, the fact that Hamburg belonged to the British zone of occupation had a double effect on the development of AV media in the city: a liberal British policy was favourable both to the growth of an endogenous infrastructure for film production, and to the establishment of the NWDR (Northwest-German Broadcasting Corporation) as a pioneer among the regional public broadcasting corporations in Germany. Even when the West German Broadcasting Corporation (WDR) was separated from it in 1956, the NDR was able to maintain an important position (Steinkopp, 1987). Furthermore, the occupation authorities sought to import as much of their own culture as possible, thereby encouraging the emergence of studios dealing with movie dubbing in order to guarantee a high level of penetration (Steinkopp, 1987: 27). In this context the existence of good theatres helped ensure a supply of movie actors and dubbing speakers.

Thus, events at the beginning of German postwar history created two basic pillars for media production in Hamburg: its role as 'news centre', manifested mainly in the growth of Germany's largest print media cluster,[11] and the emergence of a technical infrastructure for film/TV production, with the NDR as the crucial hub. The main difference between these two pillars has always been that print media were in general market oriented, whereas the AV sector depended to a very high degree on public regulation and/or subsidies.[12]

The NDR as the pivotal institution within film/TV production gained even more significance with the acquisition of Studio Hamburg. This originally emerged as a private initiative, but has been owned as an 80 percent subsidiary of the broadcasting corporation since 1959 and 100 percent since 1971. This advance into the private sector on the part of the public institution turned out to be the decisive step for the city when TV transmission was opened to private activity in the 1980s. The concentration of production facilities in Studio Hamburg was the principal point of departure for an independent production structure.

Two further sectors were able to develop in Hamburg, again more or less independently from the two principal pillars, namely music production and advertising. Whereas the first was mainly determined by the fact that the four major music companies in the world[13] merged with formerly local sound-carrier producers (Kirsch and Schröder, 1994: 136), the growth of the latter was due to specific needs on the part of the local food and tobacco industry.

Film and TV as core sectors of AV media production were able to maintain a certain level of activity in Hamburg during the 1960s and 1970s, although the city lost much of its significance in the movie sector. Due to a need for public support in film-making, the heavily subsidized economy of Berlin attracted the majority of both German film production and dubbing of foreign movies. Thus, Hamburg's role for a long time remained mainly oriented to the public TV market, determined by the activities of the NDR. The disappearance of cinema film production from the city and the subsequent outflow of good actors in the early 1980s resulted in a sceptical view as to the future of AV in the face of deregulation and privatization of the sector. The anticipated battle for advertising as an important source of programme funding made officials paint a dark future for Hamburg.[14]

However, several factors contributed to the fact that those negative forecasts were not fulfilled. First, the print media began to diversify and to direct their attention towards television, either acquiring shares of whole channels or organizing single programmes,[15] in order to minimize the risk associated with reorganization in the advertising sector. Thereby they were able to apply their experience both in production and in a privately organized market. Second, advertising itself was greatly stimulated by the introduction of private TV channels. In this context Hamburg benefited from the simultaneous existence of advertisers and TV production infrastructure, the latter mainly provided by Studio Hamburg. Third, the infrastructural complex of Studio Hamburg helped persuade the new TV channels to establish their headquarters or at least parts of their productive complexes in the city. In addition, along with the tendency to outsource parts of the programme, it encouraged the emergence of a whole body of small film production companies and studios which were able to exploit the agglomeration economies provided by dense cooperation networks between different parts of AV production. Fourth, in a general environment of an AV boom, even the film industry of Hamburg experienced a revival, to a great extent stimulated by strong political commitment and the establishment of public funding on the part of the city-state authority. As had happened in the 1950s, the urban landscape of a port city made Hamburg attractive as a location even for international productions. Thus, the establishment of the dual broadcasting system in Germany constituted a window of opportunity for AV media production in Hamburg, which could be to a very large extent exploited by the vast majority of this sector.

Examination of regional employment data shows that this success was only evident in terms of jobs after 1992. Except for 'advertising', which was the most dynamic of all media sectors in the 1980s (Kirsch and Schröder, 1994: 92), the subsectors of AV media – as compared to the national average – displayed a 'latecomer' performance, only increasing their national employment shares in the 1990s (Table 3). Using the 12 most important metropolitan regions instead of the national territory as the geographical base, Hamburg's figures reveal the same, slightly more dynamic tendency, with 15.3, 16.2 and 16.8 percent of the total in 1987, 1992 and 1997, respectively, and a continuously positive evolution in 'Radio/TV stations'.

The size distribution of enterprises reveals a heterogeneous pattern (Table 4). While the actual transmission of radio/TV programmes requires large units, activities more related to content production seem to be spread over a complex firm mix. Notwithstanding the fact that employment statistics exclude freelance and self-employment activities, this pattern lends support to other evidence of enterprise strategies visible in Hamburg. On the one hand, there is a strong tendency towards concentration, globalization and diversification into other media sectors. On the other hand, this increasingly concentrated structure is 'fed' by an increasingly dense network of small enterprises and structures of self-employment. Taking Studio

Table 3 Relative importance of AV employment: Hamburg in the national context, 1987–97

	1987		1992		1997	
	Hamburg	% all Germany	Hamburg	% all Germany	Hamburg	% all Germany
Film prod/distrib	2,290	13.2	2,970	12.5	3,565	13.3
Radio/TV stations	3,180	9.5	3,760	9.4	4,480	10.3
Advertising	5,045	10.7	7,910	11.2	8,990	11.4
AV total	10,510	10.7	14,640	10.9	17,030	11.4
Total employment	718,680	3.4	791,350	3.4	732,320	3.3

Source: employment statistics, own calculations.

Table 4 Employment (%) in the AV sector in Hamburg by size of firm, 1997

	Employment (%) in firms with					
	1 worker	2–9 workers	10–49 workers	50–99 workers	100–499 workers	>500 workers
Film prod/distrib	3.2	18.2	28.7	25.9	24.0	–
Radio/TV stations	0.1	0.1	4.1	6.5	3.0	86.2
Advertising	4.9	22.9	33.6	12.2	26.3	–

Source: employment statistics, own calculations.

Hamburg as an example, this hub of Hamburg's AV economy has transformed itself into a holding company, reorganizing individual business units as profit centres, and at the same time extending its overall activity towards Cologne and Berlin in order to guarantee its presence in the AV media business in Germany overall.

The process of 'softening' of the barriers between single media subsectors is being carried to an extreme as the city moves into the information society. In particular, the publishing groups that had already broadened their activity with the emergence of private TV channels now constitute one of the main vehicles in the construction of a multimedia cluster. Again this activity of big economic groups is complemented by dynamic evolution of small 'multimedia' agencies being set up as spin-offs from advertisers or other media firms. In this sense Hamburg may substantially benefit from the coexistence of a great variety of media enterprises able to accomplish both content and technological production tasks. On the other hand, there are also critical voices arguing that the print media's diversification hinders rather than helps innovation since their main interests consist in the maintenance of their shares in the advertising market. Thereby the city could run the risk of relying merely on the content-elements of multimedia, neglecting the significance of technological know-how (DIW, 1998: 192).

What will happen cannot yet be assessed. The political commitment on the part of those responsible for economic development policy is remarkably strong. A new funding programme for start-ups in the multimedia sector and a centre of multimedia production have been established (see Wirtschaftsbehörde Hamburg, 1998). The next few years will show whether Hamburg is able to deal with this new window of opportunity, thereby compensating for losses in the news sector due to the German government's move to Berlin.

Audiovisual media in Lisbon: restructuring in a context of peripheral urban primacy

Unlike Hamburg, which is a metropolis integrated in a developed and balanced urban system, occupying a central position in relation to the main international flows, Lisbon is a peripheral capital, marginal in the context of the European economic zone, but enjoying a position of primacy in the national context. This is why it has also been one of the chief beneficiaries of the modernization of Portuguese economy and society in recent years (Gaspar et al., 1998). Lisbon and its metropolitan area today corresponds to a vast urban agglomeration that encompasses 18 municipalities, housing 2.5 million inhabitants. Although it is not small even by European standards, in the Portuguese context Lisbon is a major influence since it contains about a quarter of the country's population.

This primacy, however, is not limited to demographic aspects. The prominent position of the Lisbon metropolitan area in the country, which is marked by a poorly developed urban network showing a manifest historical lack of strong regional capitals, also has a functional and qualitative significance. Lisbon has always been a privileged area on the Portuguese economic map, being the centre of decision-making (from ministries to company head offices) and the locus of the most innovative and important activities (universities, laboratories, capital-intensive industries, and information-intensive services).

The particular conditions for development that Lisbon enjoys within the Portuguese framework – which is reflected in the Lisbon and Tagus Valley region's per capita GDP, significantly higher than the rest of the country and near the European average – give rise to a cultural consumption that has no quantitative or qualitative parallel in any other Portuguese urban agglomeration. Lisbon thus affirms its position of capital in the cultural field, polarizing the country's scarce 'creative energies', institutions and agents responsible for the commodification of culture. As in no other area of Portugal, Lisbon has acquired some of the advantages of the urban agglomeration in the development of cultural industries. These include a market of more abundant and diversified, experienced and/or skilled labour compared to the rest of the country, and therefore better adjusted to the flexible labour relations that are characteristic of the cultural industries; the formation of external economies, which in the case of cultural industries transcend the question of cost reductions, as even 'cultural creativity is not just an effect of the lonely ruminations of the individual, but is more an outgrowth of multiple stimuli situated at the point of interaction between many different agents' (Scott, 1997: 333); and the development of a series of 'institutional infrastructures', whether formal or informal (as in the networks of interpersonal acquaintances and joint work practices).

It is not surprising, therefore, that in the particular case of the AV sector, more than 75 percent of national employment is concentrated in the Lisbon area (Table 5). This concentration tends to be more pronounced as the degree of ubiquity of the activity decreases, or the technical and skills demands increase. So in the area of motion picture exhibition (Film/video projection) Lisbon accounted for 'only' 62 percent of existing labour in Portugal in 1997, rising to over 75 percent in the case of film production. This concentration reached its highest level in the field of Post-production activities (editing, dubbing and subtitles, sound, graphic animation), in which a high level of technical skill is required.

A slight deconcentration can be observed in the production activities. Motion picture exhibition reveals the opposite tendency however, the region's share increasing by 7 percent from 1995 to 1997. This seems to show that the gap between Lisbon and the national territory is being extended on the demand rather than on the supply side.

The situation is similar regarding the number of firms. Only Radio and Television Activities,

Table 5 Relative importance of AV employment: Lisbon in the national context, 1990–97

	1990		1995		1997	
Designation[a]	Lisbon	% all Portugal	Lisbon	% all Portugal	Lisbon	% all Portugal
Advertising	3,315	79.3	4,540	78.8	7,800	78.6
Film/video prod	130	92.2	320	85.8	455	85.9
Post-prod activities	325	94.2	225	96.1	215	92.2
Film/video distrib	300	93.7	220	76.1	190	64.6
Film/video project	700	50.8	500	55.4	680	62.2
Radio/TV activities[b]	n.a.	n.a.	3,490	77.4	3,460	74.0
News agencies	n.a.	n.a.	295	89.4	315	85.1
AV total	4,765	75.0	9,590	77.3	13,110	76.6
Total employment	717,810	32.1	713,650	32.0	1,012,020[c]	43.1

Notes:
[a] The designation followed is used in the Portuguese Economic Activities Classification (EAC).
[b] Both TV and radio programme production activities and activities concerning storage, distribution and transmission are included in this category (EAC 92200).
[c] The enormous leap in total employment between 1995 and 1997 mirrors a series of privatizations of national enterprises.
Source: Ministério do Trabalho e da Solidariedade. The information used here comes from data supplied by firms to the Ministry of Labour. Thus the real extent of such activities may be under-assessed, since the self-employed and public enterprises are not included. The latter may have particular consequences in the field of Radio/TVactivities.

combined in the same class for statistical purposes (EAC 92200), show a somewhat anomalous situation. While firms are scattered all over the country (only 28.3 percent were located in Lisbon in 1995), there is a strong concentration of labour in Lisbon (77.4 percent in the same year). This apparent paradox, however, can be explained through the differences in how firms work, their model of organization and the geographic pattern of radio and TV. In fact, while there has been a certain proliferation of local radio stations that are not very demanding in terms of programming, big national radio stations, and above all TV networks, which are more demanding from the technical and work skills point of view and have large labour forces, have all been established in Lisbon.

Radio/TV and Advertising activities (although the latter is not limited to AV media) are the most important areas in terms of permanent employment, employing about 3,500 and 7,800 workers, respectively, in 1997. These figures, however, underestimate the real extent of jobs generated, as these activities use a high level of casual labour that can include both unskilled workers and qualified professionals (from extras to translators and actors).

The launching of private channels forced the restructuring of the TV sector and introduced some changes in AV production organization in Lisbon. The lower productivity of the public channels compared to the private channels, and the fall in advertising revenue of the former as a result of new competitive conditions, led to a rationalization of labour and a drop in the number of jobs (down 20 percent between 1992 and 1996). The employment generated in the private sector and the rise in the number of independent producers, associated to a degree with vertical disintegration of production, occurred as the TV channels sought to reduce their fixed costs and obtain a wider range of products, and allowed the sector to compensate for the job losses suffered by the public channels.

At present, as can be seen from Tables 6 and 7, Radio/TV activities seem to be centred around two types of enterprise. First, a fairly restricted group of large units that dominate the production and transmission of programmes and correspond to the nationwide TV and radio networks. Second, a large group of small enterprises, the local radio stations and independent producers of TV programmes that supply the nationwide networks or are subcontracted by the latter to execute specific tasks.

It is evident that some signs of fragmentation of TV production are already visible, with a strengthening of the ties between a group of large units and a nebula of small producers, independent recording studios, enterprises providing subtitles, and scriptwriters, which carry out their activities in orbit around the former. There is still a long way to go, however, before reaching the 'transaction-intensive agglomeration of specialized firms' (Scott, 1996) that functions on the principles of flexible specialization. The weakness of the Portuguese AV market and the relative immaturity of its TV system mean that investment is still high risk and know-how limited, conditions which together inhibit the appearance of new independent enterprises.

Table 6 Employment (%) in the AV sector in Lisbon by size of firm, 1995

	Employment (%) in firms with					
	1–4 workers	5–9 workers	10–49 workers	50–100 workers	100–499 workers	>500 workers
Advertising	14.2	14.7	45.9	11.8	13.4	0.0
Film/video prod	33.8	29.4	36.9	0.0	0.0	0.0
Post-prod activities	7.6	21.4	45.5	25.5	0.0	0.0
Film/video distrib	10.1	17.1	29.0	43.8	0.0	0.0
Film/video project	3.8	17.7	62.0	16.5	0.0	0.0
Radio/TV activities	0.8	2.4	5.8	9.0	54.2	27.8
News agencies	1.7	9.1	10.1	0.0	79.1	0.0

Source: Ministério do Trabalho e da Solidariedade.

Table 7 Firms in the AV sector in Lisbon by size, 1995

	No. of workers per firm						
	1–4	5–9	10–49	50–99	100–499	>500	Average
Advertising	264	101	106	8	4	0	9.4
Film/video prod	47	16	6	0	0	0	4.6
Post-prod activities	6	7	6	1	0	0	11.2
Film/video distrib	8	6	5	1	0	0	10.9
Film/video project	9	13	12	1	0	0	14.3
Radio/TV activities	14	13	9	4	10	1	68.4
News agencies	2	4	1	0	1	0	37.0

Source: Ministério do Trabalho e da Solidariedade.

Conclusion: territorial refractions of the global cultural economy

The search for an appropriate conceptualization of the culture–economy nexus in the city formed the point of departure for this article. In this context three crucial topics have been identified as a general framework for shaping empirical analysis, two of which are concerned with the internal situation of metropolitan areas, indicating 'coherence' and 'diversity' as constituent dimensions of urban culture. The third topic is concerned with the link between this focus on the urban and a general tendency towards a 'culture–economy nexus' in contemporary society.

The conclusions that can be drawn from the empirical evidence we have presented suggest that the hypothesis that a general shift towards a global cultural economy is occurring, with mainly positive repercussions in a handful of 'massive urban communities', misses the point. The territorial dimension of the ongoing shift in capitalist societies occurs in a manifoldly refracted way and can by no means be understood as linear. Thus, despite a series of similarities concerning city size and even the importance of AV media in regional employment, Hamburg and Lisbon move along completely different development trajectories within the global cultural economy.

In theoretical terms, perhaps the most striking argument is based upon the non-linearity of cultural production and consumption, which seriously challenges Scott's idea of a local–global dualism. The more products and services 'are infused . . . with broadly aesthetic or semiotic attributes' (Scott, 1997: 323), the more their consumption requires a process of 'decoding' which generally does not obey the same 'meaning structures' of the 'encoding' process of cultural production (Hall, 1980: 130). Globalization as an increase of transnational interaction inevitably reinforces this asymmetry within the 'communicative exchange'. This implies a fundamental contradiction between the 'global' and the 'cultural' dimensions of the global cultural economy which in turn has strong repercussions for its territorial pattern. Scott's master hubs certainly do play a specific role as important places of cultural production, as can be seen in the importance of Hollywood movies in nearly all European markets. However, they by no means constitute paradigmatic examples for a bipolar territorial logic of local production and global distribution.

Thus culture actually hinders rather than fosters globalization, thereby shaping the global distribution process from two directions. On the one hand, geographical extension of AV distribution is culturally selective, being channelled via cultural and linguistic criteria, or other historical linkages. The great success of Brazilian soap operas in Portugal may be one example of how globalization follows traditional routes, though in this case inverting the colonial power relationship. On the other hand, if AV distribution goes across cultural borders, it requires strategies of 'embedding' into the receivers' environment. In the simplest form this means the dubbing of movies such as in the case of postwar Germany. But even this simple 'translation' had a series of side-effects, for instance providing Hamburg with a part of the infrastructural preconditions for its present success as a media city.

Another, more recent example from Germany which has not been outlined in the case study above illustrates how the need for 'embedding' can be fostered by the emergence of a domestic competitor. MTV – the world's biggest music channel – initially entered the German market with its original US programme. After the establishment of VIVA, which is transmitting similar content but adapted to the needs of the German audience and presented by German speakers, MTV lost substantial market share, having in the meantime changed its strategy, providing its own German programme from a branch office in Hamburg. Thus, even the extremely globalized and niche-oriented market of pop music is not immune to cultural barriers and prefers national solutions. This preference is one of the main reasons for the persisting importance of the national environment of AV production, upon which the second set of arguments against the linearity of a global cultural economy is based. From the national point of view the differences between our two case studies are clear. National differences also offer helpful insights into the dimensions of urban cultural production, into the logics of 'coherence' and 'diversity' outlined above.

In the case of Germany and Portugal these differences are above all mirrored in their status as parts of the European centre and periphery. This dichotomy manifests itself, for instance, in terms of purchasing power, and also in the role regional producers and distributors have in global filières of the cultural industries. Simultaneously, it has a strong regional dimension since it reflects the different divisions of labour within the national territory. Whereas Lisbon's predominant role as national hub of the AV industry arises out of its character as the predominant urban space in the national territory, Hamburg's position can be understood as a fluid one, constantly being restructured in competition with other metropolitan regions within the national urban system. It is an open question which of Scott's facets of the division of labour will dominate in the end. There are hints as to both a polarizing dynamic and an increasing specialization between the metropolitan regions.

Additionally, even the way in which 'massive urban communities' impinge on the development of the cultural economy is substantially influenced by the national territory. There are some factors which favour agglomeration in itself as a productive space for the cultural economy, such as the existence of a 'redundant' and flexible labour market, which favours economic activity based upon self-employment, short-term contracts and virtual enterprises, as well as the existence of Scott's 'different specialized social functions' that stimulate cultural production. But again, whereas Lisbon, at least in the national context, represents these features automatically, Hamburg's agglomeration economies live in continuous comparison with others, 'massivity' in this sense being no longer the most important factor, but replaced by the peculiarities of the place.

The third and last argument against linearity draws on a conceptualization of AV media as a field of overlapping technological paradigms that compete for the leisure time of consumers. As can be seen from the impacts that the growth of private TV had on Hollywood's movie production, this competition has been one of the main driving forces of regional restructuring processes. Even what is labelled 'multimedia' is not likely to undermine this dynamic, adding a new means of transmission to the previously dominant ones rather than replacing them. However, the 'melting' of different technologies, of technology and content, production and consumption, may change the overall production and distribution processes of AV media, just as TV did with cinema movies. This is to say, multimedia does constitute a new quality of the 'culture–economy nexus', as Lash (1998) argues, thereby having strong impacts on the territorial pattern of the cultural economy; but these impacts will by no means be visible in a linear one-way road to Los Angeles.

Notes

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1 Jhally (1991) characterized the operating logic of commercial TV networks as the sale of audiences to advertisers. Recent innovations in transmission technology, however, have given rise to another type of business based

on the direct sale of programmes (such as subscription networks, pay-per-view, and video-on-demand).

[2] The video is not only a promising market for North American producers. It is estimated, in the case of Europe, that 'the video market [is] generating twice as much revenue as cinema screenings and meeting over half a film's production budget' (Media Programme, 1996: iv).

[3] These are also the programmes that make up the new *télévision compassionnelle* that is emerging and to which Mehl (1996) refers: they include, for example, talk-shows on light, up-to-date themes.

[4] Data taken from *European Cinema Yearbook*, 1996.

[5] The Statistical Yearbook of the European Audiovisual Observatory indicates that in January 1998 there were 14 public and 22 private channels with potential national reception.

[6] Whereas ARD and ZDF still covered 77% of television consumption in 1988, this share fell to 35% in 1993 (Donsbach and Mathes, 1995: 513), partly due to the limitation on advertising in public television (20 minutes per day and not after 8 p.m.) (Schuler-Harms, 1997: 96).

[7] RTP1 is financed by means of an ambiguous scheme simultaneously based on state subventions and advertising revenue. TV2 started working on the same system, later being transformed into a pure public service channel financed exclusively by the state.

[8] In this context Brazilian soap operas (telenovelas) have been playing a particular role, even stimulating national production of similar programmes.

[9] This occurred at least partly to the detriment of other areas of AV consumption: video retail turnover, taking both sales and hiring into account, has dropped by about 25% since private TV channels started operating in Portugal.

[10] A project to create a package of three channels on a pay-TV system by a consortium consisting of Lusomundo, SIC and TVGlobo of Brazil has already been announced.

[11] This importance is mainly due to the fact that three of Germany's largest magazine publishers are based in Hamburg. The nine highest-circulation newspapers of the country are published here and 58% of the turnover in magazine advertising is accounted for by Hamburg's publishers (Kirsch and Schröder, 1994: 66).

[12] Regulation in the case of TV, subsidies in the case of cinema film production, the latter due to the poor market situation for German movies.

[13] Although Sony's activity in Hamburg only encompasses classical music; the German base is in Frankfurt.

[14] See the contributions to a symposium organized by the media research institute of the University of Hamburg in 1984 (Hoffmann-Riem and Ziethen, 1985).

[15] Thus, the biggest German newspaper and magazine publisher, Springer, held 20% of SAT 1 and 24.9% of DSF (German Sports Television) in 1994 (Donsbach and Mathes, 1995: 509).

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