Leisure Clusters:

From theory to practice

A report to Midpoint Brabant

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1 Introduction

This is the second report on leisure clusters produced by Tilburg University for the Leisure Boulevard and Midpoint Brabant. In the first phase of this research, an extensive literature study was conducted to analyse the most important features of leisure clusters and to identify different business models that could be relevant for Brabant.

The analysis in the Phase 1 report identified two clear distinctions between traditional industrial clusters and newly emerging models of cultural, creative and leisure clusters. Firstly, because leisure is based on experiences which are produced and consumed simultaneously, leisure clusters by definition contain a mix of production and consumption functions, in contrast to the production focus of industrial clusters. Secondly, leisure clusters tend to be based on cultural-artistic knowledge, compared to the technical-instrumental knowledge that underpins industrial clusters.

The literature study made it clear that the interactive roles of the public sector (local or regional authorities), knowledge organisations and enterprises is one of the key factors affecting the success of a cluster. Many clusters have been stimulated through top down place-based strategies from the public sector, but it is not clear if these policy-led clusters as such can provide the basis for sustainable value creation. On the other hand, bottom up initiatives based on pre-existing agglomerations of enterprises often fail to mature though lack of public sector support or rivalry between the enterprises themselves.

It is also evident that the leisure and cultural clusters that exist have different kinds of focus and use different business models to create value. There are basically two key dimensions of the cluster that are important here. One is the process by which value is generated, and the other is the focus on a specific type of leisure experience or service.

In terms of the organisation of processes, we have identified three basic situations are being important:

- Place-based clusters
- Value chain clusters
- Knowledge spillover clusters

Place-based clusters are often top-down constructions which are designed to increase the visibility or attractiveness of a specific place or region. A typical example of such a strategy is represented in the current study by Zoetermeer, which has attempted to distinguish itself as a ‘City of Leisure’. Value chain clusters are centred on a specific form of value creation, such as media or entertainment clusters. In the current study Media Park in Hilversum represents a cluster build around the media industry and a specific value chain of media

production (although it is now adding elements of leisure consumption as well). Knowledge-spillover clusters are based on the circulation of knowledge and the resulting benefits in terms of innovation. This pattern is fairly common in cultural and creative clusters, but less evident in the case of leisure, where knowledge tends to be related to market behaviour rather than a specific production process.

In terms of the type of leisure experience provided in a cluster, there are a number of elements that are important to underpin successful operation:

- Leisure experiences
- Content/entertainment
- Transport and accommodation

Ideally, all three elements will be present in a cluster, but often there is a focus on one element in particular, which leads to the production of distinct 'business models', as outlined in the Phase 1 report. Leisure experiences are usually anchored in specific places that provide the content for the experience (such as cultural heritage, landscape, etc.). This can be illustrated by the Ruhr area, where the industrial heritage provides the backbone for unique experiences (section 5.4). Content and particularly entertainment, on the other hand is usually more footloose, and requires more specific infrastructure in order to link it to specific locations (such as the construction of musical theatres in various locations). In clusters based on transport and accommodation, the focus is on moving large numbers of people to a specific experience, and/or ensuring that people stay in a specific area (this is the case with Disneyland Paris, for example).

The cases analysed in the current study have been selected to illustrate specific dimensions of leisure clusters as identified in the Phase 1 report. A more detailed description of the case study selection is given in Section 3.

Having undertaken the literature review and identified the most important issues relating to the development of leisure clusters, the current study attempts to analyse how these different types of clusters function in practice.

2 Aims of the research

The task of the Leisure Boulevard is to create an optimal climate for the growth of the leisure sector in the Midden Brabant region. In order to achieve this, Midpoint Brabant is keen to stimulate collaboration between the public sector, commercial sector and knowledge institutions to support innovation and growth. The idea behind the Leisure Boulevard is that the clustering of leisure organisations in the region will provide the basis for knowledge exchange, mutual development of services and marketing, eventually achieving the same advantages as in 'industrial' clusters. Because there is a lack of existing models to follow, it is important to identify the key success factors and potential business models that can underpin the leisure cluster concept. The current study builds on the Phase 1 report by moving from a theoretical analysis of leisure cluster models to a practical study of existing leisure and tourism clusters.

The aim of the study is to identify how different types of leisure clusters function, and what are the key factors in their success (or failure). In analysing this, four basic research questions are paramount:

- How do leisure clusters arise?

- What is the composition of the leisure cluster
    - What type of activities characterise the different types of cluster?
    - What is the role of the different stakeholders (public sector, enterprises, knowledge organisations)

- What determines the existence of the cluster?
    - Why do the cluster participants locate in the cluster?
    - To what extent do they actively collaborate?
    - What are the relationships between the participants?

- To what extent is the cluster centrally organised and managed?
    - Is there a central management?
    - Who makes the decisions concerning the development of the cluster?

3 Framework of the study

3.1. Analytical framework

The theoretical insights on clusters gained in the phase 1 report and a broader range of cluster literature were used to create a framework for this empirical study. This is based on a classification of agglomeration types and on the key dimensions of leisure clusters. These different elements will be briefly outlined in the following paragraphs.

3.1.1. Classification of agglomerations

In order to offer a systematic approach to agglomerations and economic clusters some classification is necessary. The major types of economic concentrations are roughly outlined here, along with relevant dimensions such as the activities or thematic profile of the agglomeration, , the advantages of agglomeration for the participants, the nature of interrelatedness and the type of planning and management in the agglomeration and the driving forces behind the emergence and sustainability of the agglomeration.

1. *Activities or thematic profile of economic concentrations:*

- Diversified **urbanisation agglomerations** with a huge variety of economic activities and large volumes (cities or urban regions)

- **Specialized** (often technology-related) or thematized concentrations (clusters)

2. *Co-location advantages and how these are gained by the stakeholders:*

- **Traditional efficiency advantages** due to agglomeration effects. These are **static benefits** provided by economic efficiency, advantages of scale and scope, costs savings, flexibility (of production and supply), a specialized and skilled labour pool, the use of a common physical or various kinds of infrastructure, interactions between local suppliers and consumers etc. as a result of geographic proximity.
- In the literature these aspects are also described as passive benefits, since active cooperation of economic actors is not a prerequisite for cluster maintenance. The advantages of being in a certain location can be gained

without common actions or conscious coordination (as in industrial districts or urban areas).

- **Dynamic advantages** refer to benefits gained by interactions of diverse stakeholders. Innovation and the creation and sharing of knowledge are herein central dimensions.
  Above the traditional (static) agglomeration benefits, these concentrations can be characterized by:

    - an active social network of complementary organisations/companies within a certain industry or sector;
    - the presence of unique regional/local factors (attractive living and working environment; favourable investment climate; institutional structures; social-cultural characteristics);
    - the presence of catalysts of innovations (universities, venture capitalists, R&D etc.).

In **urban agglomerations** or regions with their huge variety of (unrelated) economic activities and expertise, accidental interactions and encounters among different actors may lead to creative insights, products/services and business models.

Clusters, however, refer to complementary and related activities of a specific sector/industry or a theme. They function as geographic knowledge- and innovation concentrations as a result of an (intentional) cooperation and more planned organizational structure.

3. *The nature and intensity of relationships among the participants within a cluster:*

As pointed out in the study in phase 1 the interrelatedness of and within groups of industries and private businesses/organisations is an elementary part of clusters. They are maintained by the horizontal and vertical linkages and relationships through common technologies, clients, distribution channels, value chains, a shared labour market, social networks etc.

The existence of a cluster is preserved by the linkages among various organisations and companies which can be identified by (one of) the following dimensions:

- They operate on a specific domain or have a special theme and profile;

- Technological proximity;
- They are included in a value chain ;
- They utilize identical sorts of location-specific inputs (resources, infrastructure, specialized labour supply etc.) ;
- They have specialized servicing and supporting sectors;
- They feature geographically bounded co-location although the level of proximity and the scope of the spatial concentration may strongly differ per cluster, ‘*’ranging from a state, region or even a single city to span nearby or neighbouring countries*’’ (Porter, 2000).

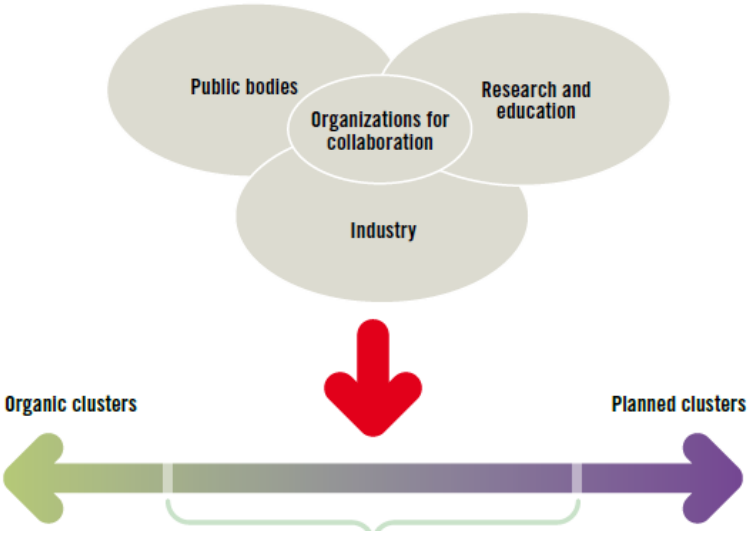
4. The driving forces of emergence and sustainability

This dimension involves the **level of planning and policy involvement** in cluster emergence and its management. Many leading clusters in the world were not “planned” while in other cases there has been more of a deliberate “game-plan” constructed by national or regional governments. Figure 1 illustrates the territory between organic/spontaneous or perfectly planned clusters. Between these two extremes are cluster initiatives driven by the strategic involvement of different kinds of stakeholders.

Many cluster initiatives derive top-down from national or regional governments, such as the Vinnväxt programme in Sweden and the “pôles de compétitivité” in France. The Swedish programme invited competitive bids from the local level (private-public academic partnerships), while the French program, which also invited competition, was based more upon political choice by the government (Sölvell,2008).

The bottom-up cases refer to cluster initiatives where private firms, academic institutions and public actors at the local scale bring common actions without direct governmental support. These stakeholders come together to enhance the attractiveness of the region or to improve their own competitiveness through commercial collaboration.
The cluster literature demonstrates that surviving cluster initiatives over time tend to move from a project status to highly organized ventures, including several areas of activity.

Figure 1: Cluster initiatives - between spontaneous and strictly planned cluster development



Bron: Dagevos & Tomor, 2011, p. 76.

3.1.2. Definition of leisure clusters

As previously indicated in the prospective study in phase 1, there are differences between ''classical'' or modern industrial and leisure clusters in terms of their operation.

For the purposes of the current study leisure clusters have been defined as follows:

A leisure cluster is a geographical concentration of diverse actors collaborating in the production of leisure experiences. These actors refer to entrepreneurs, governments and education/knowledge institutions (the triple helix). In addition, the consumer takes an active role within the cluster as he/she actively participates in the production process. Leisure experience production and consumption take place at the same time through which co-creation is stimulated and market-knowledge generated (Boom & Richards, 2011).

One important implication of this definition is that a leisure cluster is more than a simple passive agglomeration of leisure production. The creation of an identifiable leisure cluster requires active intervention in order to stimulate the dynamic advantages of collaboration within the cluster.

Within a dynamic cluster, there is an interactive distribution of knowledge among the relevant actors that leads to the progression of cluster into an arena of production as well as of knowledge circulation. This interactive way of cooperation and sharing of information, knowledge and know-how create the added value of the cluster that can rather be considered as a "value-network". The traditional value-chain becomes thus replaced by the value-cycle as the creation of value (products, services) is a permanent process between all

production phases. Therefore it is especially the manner of cooperation among all necessary actors within the cluster that determines the successful functioning of a leisure/experience cluster.

However as explained above, clusters may exist without a deliberate cooperation and planned coordination among the different organisations and businesses which gain from the static (passive) benefits. At the same time a cooperative and conscious organization does not necessarily assume the presence of a cluster. In case of leisure concentrations it is the synergy and interrelatedness of activities and facilities which determine the attractiveness of a leisure hotspot as well as cooperation between different partners.

3.1.3. Analytical framework

Based on the academic literature on related types of (cultural, leisure, creative) clusters a list of conditions/factors has been distilled that are fundamental for the functioning of leisure clusters.

In the current cluster evaluation these insights form the fundament for the analysis of the selected clusters in order to schematize the lessons learned touching on their working and provisional outcomes. Although the selected cases (see section 3.2. below) show a rather huge variation in view of numerous aspects (activity, geographical scale, emergence, development phase, planning etc.) these points of interest may help to make as far as possible a comparison among the cases.

- **The creation of new business models and new specialisms**
    - Projects based on economic activities
    - A good mixture of production and consumption activities
    - Synergy: providing integrated and multidisciplinary leisure experiences (through different organisations, sectors, branches etc.). A varied and unique supply for the end-users; complementary services and products making the experience of consumers complete.

- **Rivalry and networking**

    - **A robust interaction/ cooperation/networks among all actors** (government, private businesses, knowledge institutions, sectors) within and outside the cluster in order to increase the diversification and attractiveness of a leisure hotspot.
    - Rivalry among private businesses is a fundamental element, even a precondition of successful and innovative clusters.
      It is therefore the finding of the required balance and healthy relationship between competition and cooperation that needs attention.

- A strong **knowledge infrastructure**

- **Transparency** and visibility of the cluster

- **Local business environment**
  Place and buzz; local knowledge and expertise; anchorage function of dominant players/attractions; physical infrastructure

- **Cluster managment and organisation**
  Shared ambitions, awareness of mutual interests; consciousness and distribution of the roles of each stakeholder; reference frameworks and monitoring; place marketing, including storytelling and theming of the place

- **Government involvement and policy** measures

- **Self-identification** of actors with the (story and theme of) of the destination

Besides these major prerequisites for the functioning and good performance of leisure clusters the following basic elements will be explored in the analytical part. These are elementary attributes for the presentation and good understanding of the cases:

- The profile and activity of each cluster including the composition of major stakeholders
- The spatial scale
- The emergence and the actual development phase
- The provisional outcomes (including challenges and opportunities)
- Critical factors

3.2. Selection of cases

The present research on the practical experiences of leisure clusters concentrates on the following four cases:

- The Ruhr area,Germany
- Media Park & cluster in Hilversum, the Netherlands
- Zoetermeer, ‘’the City of Leisure’’, the Netherlands
- Paris Disneyland and the tourism cluster in Marne-la-Vallée, France

The selection was founded upon the different theoretical clarification of clusters and upon the aforementioned classification of agglomeration types. A crucial consideration during the selection phase was the endeavour to analyse the processes from a broad range of perspectives. The very varied characteristics

of the chosen cases and their complexity offer more learning opportunity regarding their development dynamics and achievements.

The cases are very diverse in terms of their historical development, activity profile, organisational arrangement and business models and thus provides a more complex overview on conceivable diverse development paths and critical operational factors. The designation of two leisure clusters outside the Netherlands adds an interesting facet to the research as more evidences can be engendered on the practices in various institutional and socio-economic contexts.

4 Research methods

In order to answer the main research questions (Chapter 1) the following working methods have been applied. The analysis chiefly has a descriptive and to a certain degree an evaluative character regarding the thematic and activity profile of the selected cases, their development path, the current status and the level of organisation of clustering.

The research has been conducted on the ground of a combination of methods which – in view of the rather limited time schedule - could provide a substantial fundament for the analysis, the conclusions and recommendations.

Desk research

In order to gain a thorough knowledge of each case a significant amount of quantitative and qualitative background information has been gathered from policy documents, official reports on progression, literature on empirical studies, informative folders and brochures, internet sites, media communications and additional audiovisual sources. The details collected through desk research were also indispensable for the consecutive phase, the preparations for the interviews.

Interviews

Owing to the nature and objectives of the present research (the provision of a descriptive and explorative overview of the cases, the practices and the learning experiences) a qualitative research method and a sociological proposition seemed an evident choice.

The analysis draws from the perceptions and observations of participating stakeholders. Actors (organisations) choose their economic and cooperation strategies on the ground of their own interests, values and motives and of their perception of a certain situation related to these aspects. Personal viewpoints are important as they significantly define aspirations and objectives of projects and initiatives as well as the available resources. Serious variations in the perceptions of the stakeholders can have a restrictive impact on processes and on project cooperation.

On the basis of the preceding data gained through the desk research 2-3 interviews per case have been carried out. The number of interviews was deliberately restricted due to the limited availability of time for the research. This inhibition also coerced the careful selection of persons to interview. For this reason the search especially focused on actors who – owing to their position and responsibilities - have a broad overview on the progression of activities and posses relevant expertise and competency. Among the interviewed individuals

were local and regional policy makers, spatial development planners, researchers and professors from universities, entrepreneurs and representatives from private companies, intermediaries from different activity fields (a list of the interviewed persons can be found in Appendix 1. This variegated composition of interview partners had the benefit to study the cases and generate knowledge from alternative perspectives. In order to organize the research activities in an efficient manner due to the short deadline the talks were arranged through telephone calls and lasted between 30-60 minutes per interview.

The major goal of the interviews was to find additional information for the primary results of the desk research. Drawing upon the analytical framework outlined above (section 2.1.3.) a document with orientating questions was set up before starting the interviews (see Appendix 2). Where necessary, the interview items were adjusted during the interviews so that they were in compliance with the specific characteristics of each case and with the function and role of the interviewed actor/organisation. Insights gained from previous interviews were also used to increase the value of information.

5 Leisure cluster case summaries

This section presents an analysis of the four leisure cluster case studies. These are first presented separately, and then overall conclusions are drawn based on the analysis of key factors.

5.1. Zoetermeer: 'The City of Leisure'

5.1.1. Profile

Zoetermeer, a commuter city close to The Hague, houses a number of large-scale **outdoor, sport and adventure facilities** (figure 2). The presence of the 'Big 5' leisure attractions has provided the foundation for the concept 'Zoetermeer: City of Leisure'.

The leisure profile of these main actors and attractions includes the following activities:

- SnowWorld: indoor ski facilities
- BurgGolf Zoetermeer: golf
- AyersRock: event centre of diverse outdoor activities, climbing hall etc.
- Dutch Water Dreams: wild water sport complex (on the level of Olympic games)
- PWA Silverdome: ice sport and a multifunctional entertainment centre

Zoetermeer is situated within the Dutch landscape 'the Green Hart' (a green zone between the cities in the middle of the Randstad agglomeration). This geographical position provides plenty of alternative outdoor and nature-related activities (biking, hiking, swimming, excursions, walking etc.) which can act as an additional leisure supply.

Besides the supply of the major facilities of the ''Big 5'' numerous events and festivals are organized in Zoetermeer throughout the year.

Figure 2: Zoetermeer and its main leisure attractions

5.1.2. The emergence of the cluster

In 2000 Zoetermeer was the first municipality in the Netherlands to explicitly present itself as a ''City of Leisure''. At the time when the role of the ICT sector in Zoetermeer weakened to some extent, stakeholders from the political, economic and cultural circles considered ''leisure'' as an interesting and economically promising theme. Despite significant intervention by the municipality, the image of a strictly planned, top-down-driven leisure cluster is contested by several of the actors involved.

By the time the City of Leisure project was launched some large scale leisure attractions were already operating in Zoetermeer. The seed of the cluster (concept) derives from the establishment of Snow World in Zoetermeer some 15 years ago. After a long selection process for the optimal location and place of activity Snow World opted for Zoetermeer. Subsequently the other major players of the Big 5 chose Zoetermeer as a start-up location – especially the arrival of Dutch Water Dreams has accelerated the leisure process. Accordingly, the city of Zoetermeer took a decision as some of the interviews explain:

‘’ *It is not a cluster created from scratch in a top-down way: we had those local leisure enterprises and facilities which provided the inducement for policy making”*.

‘*’At a certain stage we had so much leisure within our municipal borders that we had to come to the conclusion that, together with the knowledge economy, this has become our strongest side. For this reason it was evident to further develop it”* (B. Emmens, Alderman Economy and Urban planning, municipality Zoetermeer in: Neprom, 14/2009).

5.1.3.The driving forces

The interviews reveal that the major driving forces behind the of large companies with leisure attractions is the advantageous geographical location of Zoetermeer in the Randstad agglomeration with its huge consumer market. Through the well-developed infrastructure, Zoetermeer and of the the designated leisure attractions are easily accessible. In addition, Zoetermeer has sufficient space available for the development of leisure zones. In 1992 The Floriade (a regularly organized international exhibition of flowers and gardening) in Zoetermeer attracted a huge number of visitors due to these geographical advantages.

In addition, the supportive attitude of the municipality seemed to play a significant role in the location choice of the five major leisure enterprises. The progressive mentality, the market friendly approach and the willingness of policy makers to apply flexible development plans and regulations were essential to attract these facilities to Zoetermeer.

5.1.4. Policy making: ambitions and objectives

Major motives

The leisure sector has been designated as an economic spearhead in Zoetermeer. In the strategic vision for leisure (Ecorys-Kolpron 2002) the following motives for the development of a leisure cluster are presented:

- Leisure offers chances to strengthen the position of Zoetermeer within the urban network
- Leisure contributes to the regional and national image-building of Zoetermeer related to leisure
- Leisure contributes to the image of Zoetermeer as the active, green lung of the Delta metropole
- Leisure makes it possible to maintain the broad supply of basic (public) services and provides the opportunity to develop a few unique leading attractions
- Leisure is an important economic sector with a significant growth potential
- Leisure contributes to the creation and maintenance of attractive housing areas and strengthens social cohesion

The growing leisure market in Zoetermeer is a main driving force behind the cluster development by policymakers, whose question is: *'' How can we make the cake bigger?''*

The economic effects envisaged by the municipality would bring an additional 1.8 – 2.4 million visitors on an annual basis with some €24-34 million of direct and roughly €8-11 million indirect guest spending. In addition, the accomplishment of the leisure programme would create 620-870 direct jobs while indirect job creation is estimated at about 350-490 jobs.

The intensification of the cooperation among various leisure stakeholders is also intended to achieve more efficiency with common strategies among private enterprises aimed at reducing costs (infrastructure, purchases, marketing) and the effective organization of certain services (market- and sector focused education).

Clustering

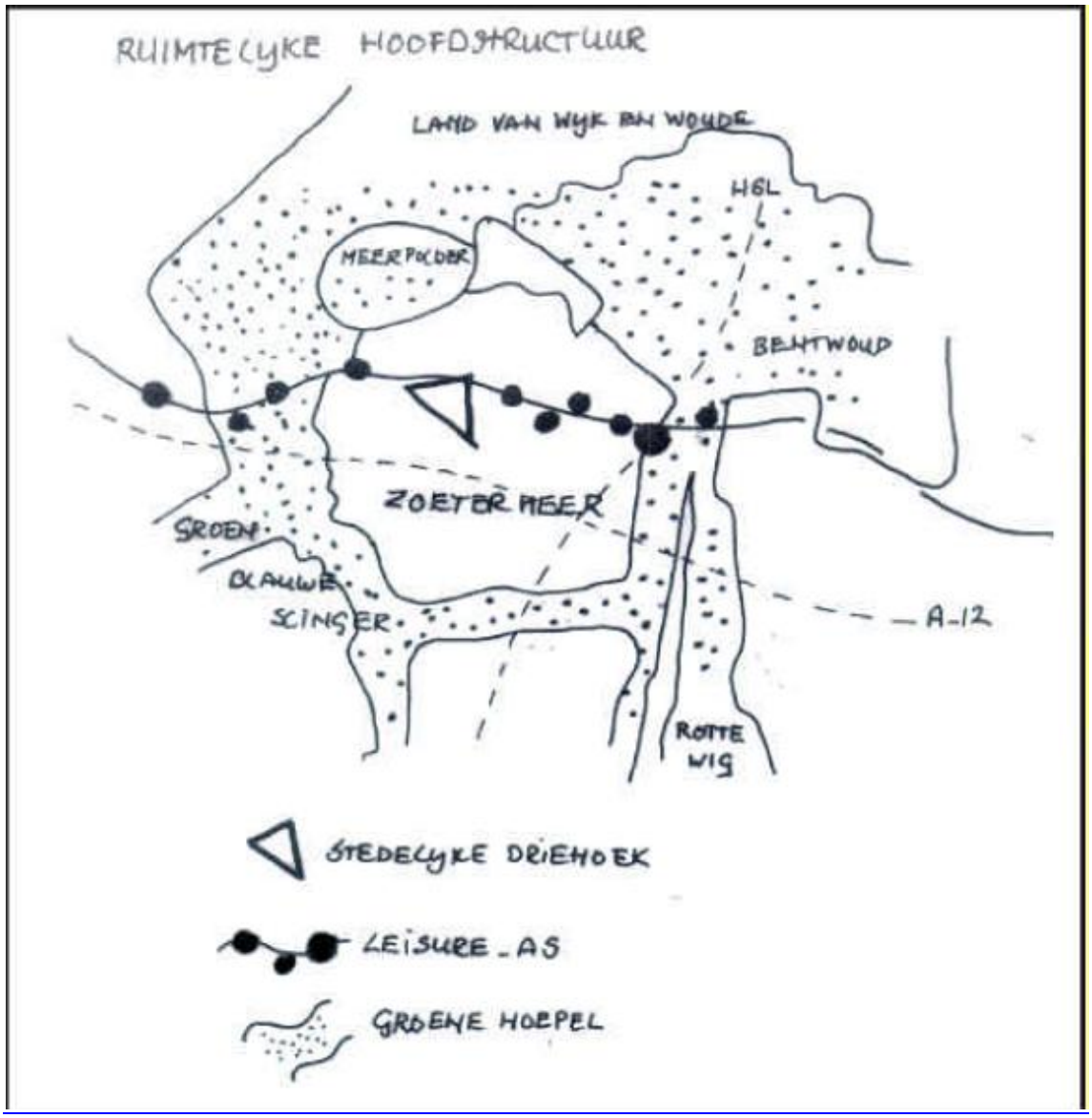
The municipality intends to anticipate the development trends in leisure supply, such as like scaling up, multifunctional uses and the blurring of branch (sectoral) specialties. The idea of clustering and the blend of functions are supported by a more efficient spatial planning providing a varied range of attractive areas. Clustering can thus contribute to the accommodation of a multifaceted and unique spectrum of activities and services. This will also require a good, harmonious mixture of leisure and retail facilities.

Spatial development

The high ambition level for further development of the leisure sector is embedded in a spatial and programmatic policy framework. The leisure programme foresees a balanced intensification between ‘’red’’ (urban) and ‘’green’’ (nature).

The municipality wants to develop diverse types of leisure facilities and let them co-exist next to each other as a complex and integrated leisure area. In the policy document various spatial units have been formulated which are interlinked with each other: an urban strip with (trans)regional services in the sectors of leisure, tourism and entertainment; an urban triangle; housing districts and a green zone (figure 3). According to these elements in the Masterplan 2025 five different project areas were assigned which could function as a patchwork of regional distinctive leisure zones. In this leisure network, specific leisure profiles would be given to the different areas. The interconnection between them would be delivered by special leisure itineraries enriched by new combinations of partial branches like culture and nature and other place- and route-related leisure services.

Figure 3: The distinct leisure zones in Zoetermeer



Source:Gemeente Zoetermeer, Dronkert, 2002

New actors, new facilities and new forms of cooperation

Although the Big 5 forms a crucial part of the leisure supply, Zoetermeer also wants to develop small-scale (open air or indoor) services and activities as well as leisure and entertainment linked to accommodation.

The expectation was that the early involvement of the large leisure enterprises would act as a magnet to lure other ambitious and young entrepreneurs and companies: ‘’*The more such enterprises, attracting a large public, there are in Zoetermeer, the more attractive it will become to choose this city to start a new leisure facility*’’ (Alderman Emmens*).* The intention is to expand the leisure-cluster with catering operations, additional leisure (like discothèques) and cultural (theaters and cinema’s etc.) enterprises and the sport sector.

An important objective of the municipality is to expand the existing day-based touristic and leisure profile by a visitor-scope of staying several days in and around Zoetermeer. This requires connecting local companies and organizations so that they not only form a passive spatial agglomeration, but that also have dynamic, functional proximity. A better exploitation of other sorts of existing leisure activities (other than the Big 5) like the beach or museums is also a serious consideration in the action plan.

The municipality underlines the importance and need for novel ways of cooperation and new alliances between various kinds of stakeholders in order to develop nature, landscape, culture and urban services into surprising and innovative leisure combinations.

Specific criteria and conditions were determined for the negotiation rounds with companies or other actors. The municipality utilizes the principle to require co-financing and investment from new parties (that has a limiting effect on the number of candidates).

Transregional aspirations

The aim is to develop a multipolar leisure cluster which operates beyond the regional scale. Certain leisure areas within Zoetermeer could attract public on a national scale (like the outdoor attractions of the Big 5) while other facilities would serve a regional market (like the urban leisure possibilities and the integrated ‘’red’’ and green’’ zones).

At the same time aspirations were formulated to facilitate transregional leisure activities by way of cooperation with other municipalities. The concept of a Zoetermeer-Scheveningen leisure axis for instance illustrates such an endeavor.

5.1.5. Organizing the cluster

Various functions and organizations have been assigned to evolve the leisure cluster and its related facilities further and to shape the leisure scene of Zoetermeer into a more attractive and coherent sector.

The municipality

The municipality acts as the central coordinator for the leisure development. The major objective is to bring organizations in the leisure business together so that synergies are created. Within the municipality a post was created with a full-time project leader tasked with invigorating cooperation among diverse partners in Zoetermeer. A permanent leisure desk was also established at the

municipality. The Fund for Leisure Development receives an annual budget to invest in public spaces, infrastructure, services and spectacular events. Profitable projects should provide financial support for commercially non-viable services (such as the development of recreation areas). Another purpose of the fund was to get commercial parties more actively involved in the leisure luster.

KIZ (Foundation Knowledge economy and Innovation Zoetermeer)

KIZ aims to stimulate cooperation, innovation and the circulation of knowledge within the strongest economic sectors including the leisure industry. Strengthening the linkages between local government and the business community is an important goal. The overall aim is to develop innovative joint actions so that stakeholders from the different sectors can work together on the basis of mutual interest.

The core of the KIZ's approach is that actions and developments are demand-driven: companies should define themselves where they see market opportunities to initiate cooperative ties. KIZ has regularly organized network meetings which have led to various interesting business ideas. The expectation was that these ideas will soon be developed. Several collective initiatives were thus put on the agenda.

Education formed a crucial part of the KIZ programme for which a project group ''network alliance'' was proposed. The cluster policy aims to strengthen vocational training. Through linking private businesses and institutions in a certain sector their labour market needs can be bundled. New training opportunities can therefore be created.

Foundation Floravontuur Promotie

The foundation plays an important role as a coordinating association for place marketing, touristic advertisement and organizing events. The proactive leisure policy of the municipality is linked with intensive city marketing for attracting more local and non-local attention and thus visitors. Moreover , events and festivals serve to intensify the identity of Zoetermeer as a leisure destination, that of the various spatial segments and to accelerate the progression of these new leisure zones.

5.1.6. Current status

Standstill

Since begin of January 2011 the developments around the leisure cluster have slowed down, nearing a standstill. Although the causes of stagnation has not been meticulously analyzed, among the reasons mentioned are the current

economic crisis (for instance Dutch Water Dreams has recently been saved from bankruptcy by a take-over); budget cuts at the municipality (as a result of which the leisure post was cut) and the failure of efforts to create mutual understanding and cooperation among the large leisure companies.

The absence of knowledge institutions and the limited participation of education partners in the cluster development indicate the failure of collective strategy building. It is also not clear whether new leisure entrepreneurs and suppliers have settled in Zoetermeer as a result of the cluster.

Cooperation : mission impossible?

On the initiative of Floravontuur the five major commercial players of Zoetermeer agreed to collaborate and position themselves in a broader spatial context as a leisure core. The assumption was that this would associate their names and the accumulated knowledge to this specific leisure area.

However, this cooperation has not been realized in practice. There is no real integration among the Big 5 organizations, they remain stand-alone attractions focusing on their own corporate strategies and thus operating on ''separate islands''. One exception is the collaboration between Ayers Rock and Snow World, whose close physical proximity enables them to combine their products for corporate customers by creating a larger and more diverse activity portfolio. This includes the presentation of each other's activities on their websites, brochures and special offers. Companies can thus buy a combined package for their employees to undertake leisure activities on both sites on the same day. However, collaboration remains though limited, and it does not include combined purchases of materials, products or services.

The lack of a meaningful cooperation indicates a missing sense of urgency from the stakeholders. The large commercial leisure companies can be considered as each other's rivals on similar consumer markets, with the main target groups originating particularly from the region (the provinces South-Holland, North-Holland and Utrecht). These enterprises therefore do not have strong motives for deepening cooperative linkages with each other.

The interviews underline the preference for starting collaborative projects with the involvement of important local players. One example was the possibility for setting up hotel arrangements that accommodate longer stays. Nevertheless, such aspirations remain challenging as different companies are caught up in their own planning methods and organizing system, which are incompatible with those of other organizations. Enterprises tend to stick to their own familiar patterns of operation.

Our respondents indicated that the municipality should invest more itself instead of expecting everything to be done by commercial partners. The failure of a

number of leisure initiatives from private investors may demonstrate the validity of this argument. The lack of trust and the harsh financial conditions obstructed entrepreneurs and banks to find finances for setting up affiliates of existing attractions from other places.

Lack of identity?

Doubts have been expressed on the assumed connection of leisure to Zoetermeer. As a new city, Zoetermeer lacks the leisure facilities present in many other neighbouring cities. Interviewees pointed out that Zoetermeer is seen as a suburb of The Hague, '' *a place without a soul''*. There is still a dominant image in the Netherlands of Zoetermeer as a boring location, a commuter village where nothing happens.

Due to the limited local supply of hospitality and leisure sites (cafe's, restaurants, disco) in the city centre many residents of Zoetermeer travel to neighbouring cities such as The Hague (15 minutes drive) and Rotterdam (20 minutes drive) to fulfill their leisure needs.

Interviewees see local policy makers as being too focused on the City of Leisure image rather than seeing the real position of Zoetermeer (*''a small, insignificant place in this region located among important large cities with a strong reputation''*) which would allow better strategies to be elaborated. The concept of the Big 5 seems to some as a pure communication tactic rather than a genuine development strategy.

More focused communication

Although place marketing and tourist promotion is more professional, it still lacks a central story line. Zoetermeer can offer a huge diversity of experiences, but there is an inadequate focus on ''*telling people what exactly they really can do through creatively combining facilities. A story to be presented to the visitors, something to tell is really what we need*''.

A broad-scaled smart regional alliance

Some are convinced that a different strategy is needed (''*Zoetermeer as a City of Leisure will never succeed''*). There should be more consideration of the possibilities offered by the entire region rather than a narrow focus on the Local Authority boundaries. However, the intense competition among cities and regions for attracting visitors and investment tends to hinder collaboration.

The role of government

The private sector, including the Big 5, recognize the role and efforts of the municipality as a catalyst for making local actors more aware of and enthusiastic about the possibilities of collaboration. All actors benefit from the image construction and marketing of Zoetermeer by the local authority as having a unique leisure position within the Netherlands. The commercial actors complain that the municipality is not sufficiently active or did not sufficiently inform other actors about their development plans. They would expect a more robust contribution from the municipality to attracting more visitors to Zoetermeer. Another criticism relates to the rigid application of planning procedures for expanding existing business activities (e.g. the blocking of a fourth ski run in Snow World due to environmental protests): this makes some participants wonder about the seriousness of the municipality concerning scaling up the leisure sector.

Results

In spite of the current standstill in the cluster development, the actors involved see certain successes. The collaborative representation of Zoetermeer at the annual Holiday exhibition by the Big 5 is an accomplishment. Also, the launching of the Big Youth Experience is a positive outcome. This involves an organized full day for students from secondary schools. They visit all the five leisure attractions on the same day with a guided tour.

In general the efforts of the local government have functioned as an eye-opener. Local actors have become more aware of the concept of leisure and of the cooperation possibilities that exist.

A new elan

After the recent standstill in cluster development, local policy makers and experts are determined to break through the present stalemate. Negotiations with the commercial parties have already begun and the outcomes are promising. There is an optimistic attitude for a new start although interviewees realistically admit that if ‘*’private businesses still do not feel the need to participate and work together it is better to put an end to it*’’.

Despite remaining questions about whether the municipality should take the coordination role in the cluster, local government leadership is still a preference. But once the cluster is given a new kick-start, further progression can be left to the self-organization of the commercial partners.

5.1.7. Critical factors

- Neither a vision, a spatial and programmatic cluster policy nor a vigorous image and identity construction are satisfactory without an objective probability evaluation of the broader economic, social and historical context. A *comprehensive cluster research prior to formulating a cluster policy is* therefore necessary. Such an exploring study identifies the nature and intensity of inter-relatedness among the existent leisure organizations, the possibilities for joint interest and actions, the hiatus, and thus the feasibility of cluster development.

- The *sheer presence of large attractions within a certain geographical unit is in itself insufficien*t as a basis for cluster formation. This is all the more valid if enterprises are rivals, operating in the same consumer market at the same spatial scale.
- If *actors do not have motives for collaboration* in order to tap into interesting combined and novel business concepts *no sense of urgency* emerges for mutual development. The absence of perceived drivers can be caused by accustomed working methods and deeply rooted functioning patterns; by prioritizing the own corporate strategies; by rivalry targeting the same consumers.
- An *impartial coordinating and organizing body* is needed as a catalyst to generate enthusiasm and to build bridges among the possible partners for inventive product development. Such an intermediary actor provides an overview of the existing situation and the chances for value creation, for a more competitive sector and thus economic growth in case of novel alliances. A brokering partner, being expert in the leisure business, highlights the importance of a coherent and diversified leisure package serving the interests of the collectivity as well as of individual participants.
- The local government should maintain a flexible and business-friendly attitude regarding regulations, also after having acquired new investors.
- A more intensive *focus on stakeholders beyond the huge attractions*: on the presence of smaller leisure-oriented enterprises and supporting services, how they fit into the local leisure story and where deficiencies can be signaled.
- The reconsideration of the *entry criteria for commercial actors* for accessing the local leisure scenery.
- Recognizing the *geographical ambition gap* of the municipality (pure local within the administrational boundaries) and of the commercial stakeholders (translocal, regional, national).
- The repositioning of Zoetermeer into a *broader geographical context* (of the neighbouring urban agglomeration) would lead to smart strategies and cooperation in the spirit of diversity and complementarity. ‘’Disadvantages’’ of a locality can be turned into advantages: being small and insignificant means more flexibility and more switching capability to rearrange resources and to adjust to new demands.

- Developing a *robust story line* of experiences for external communication
- Exploring the benefits of involving *research institutes and universities* in the development of the leisure landscape.
- *The assessment of the development trajectory* so far, including successes and failures before re-launching activities.

5.2 Disneyland Paris and the Val d'Europe Tourism Cluster

5.2.1. Profile

The Disneyland/ Marne la Vallée Tourism Cluster is of international significance. It generates an estimated 6% of all tourism earnings in France, providing jobs directly or indirectly for 56,000 people.

Marne la Vallée originated as one of nine new cities planned in France in the 1960s. In 1987 Disney signed a contract to develop Disneyland Paris, which eventually opened in 1992. The theme park suffered teething problems, and plans for expansion of the park were severely delayed. A second park was eventually opened in 2000, and the third phase of development is currently being planned, with further development of attractions and accommodation.

The Disneyland Paris theme park now welcomes over 15 million visitors each year and employs 12,000 people on site. Since opening the park has contributed to approximately 60% of all new economic activity created in the region.

5.2.2 The emergence of the cluster

The emergence of a leisure cluster close to Paris has its origins in central government spatial planning policies. In the 1960s a series of new cities were planned around Paris, designed to create jobs and raise the quality of life. The current 'Greater Paris' development project continues these aspirations, aiming to create between 800,000 and one million jobs over the next fifteen years, through a model centred on innovation and demographic growth, particularly in the working population.

Major infrastructure project shave formed an important part of the overall strategy, with huge central government investments in roads and public transport, including the TGV which now stops at Disneyland. Various improvements are currently under discussion, and alongside the 'Greater Paris' development, around €35 billion of investment will be pumped into a major transport plan over the next decade.

Many of the companies that have located in the region are attracted by its accessibility and the large consumer market it offers. Disney acts as a major magnet for leisure consumers and this provides spin offs for other tourism and leisure providers. In this sense the Disneyland situation can be seen as a leisure cluster that has a strong emphasis on transport and accommodation in order to cater for the flow of visitors.

However the accessibility of the region is a double edged-sword, because people can arrive quickly, but they can also leave quickly. Many visitors to the park therefore stay in Paris and only visit for the day. This limits the benefits to the Marne la Vallée area itself.

Development Phases (Nathalie FABRY & Sylvain ZEGHNI, 2011)

> **Step 1:** creation of the tourism destination (Agreement signature: 9/02/1989) – 616ha : Park Disneyland – Disney Village – Hotels (5165 rooms) – Davy Crockett Ranch (595 bungalows) – Golf (27 holes) – accommodation for employees (700) – visitor accommodation (1577 units) – RER railway station.
>
> **Step 2a:** Creation of the Val d'Europe shopping centre (Agreement signature: 9/12/1997) – 200ha: Val d'Europe urban centre: shopping centre, accommodations, RER station, offices.
>
> **Step 2b:** Creation of the second Park (Agreement signature: 20/01/2000) – 52ha : Walt Disney Studio Park – Val de France Hotels (Vienna International: Dream Castle & Magic Circus Hotel ; Thomas Cook's Explorer Hotel, Kyriad Hotel – 1483 Rooms), Elysée Hotel Val d'Europe (152 rooms), Adagio City Aparthotel (291 rooms) – Marriot's Village (202 rooms).
>
> **Step 3a :** Urban development (Agreement Signature: 15/09/2003) – 291ha: Residences (1875) – Office Buildings (120 100m2) – Business Village (147ha) – Growth of the Shopping Mall.
>
> **Step 3b:** Tourism Destination Development (Agreement signature on September 15, 2003): 8 new attractions – Growth of the Disney Village – MICE development – Hotel Development (Radisson SAS Hotel 250 rooms).

The results of the Marne la Vallée development have so far been impressive. Visits to Disneyland have increased from 8.4 million in 1993 to 15.4 million in 2011. In total over 250 million visits have been made over the past 20 years. Total turnover for Disneyland is now €1.3 billion euro a year.

Daniel Canepa, prefect of the Ile-de-France region said in 2010:

> Regarding investments, the €650 million in public investment have led to €7 billion in private investment, thereby showing considerable leverage (1 to 10). With that, 14,000 jobs were created, there are now close to 30,000 people living in Val d'Europe, and 12,000 housing units were built. So we

have exceptional growth. I remind you that Disney and the Val d'Europe complex represent about 6.5% of France's entire tourism revenue. One can conclude from all this that this public investment has generated a return beyond our wildest expectations.

5.2.3. The driving forces

There are two major driving forces that have been important in the formation of a leisure cluster in the region. The first is French government policy, which has stimulated infrastructure development and also created a specific cluster policy (see section 4). The second is Disney, which plays a major role in determining the direction of development, attracts a large number of consumers, and therefore also a large number of other companies. Disney has also deliberately stimulated the clustering of businesses, for example through the creation of a business park. Interestingly, however, very few of the companies locating in the Disney business park have any connection with leisure or tourism.

In addition to the role of the public sector and enterprises, knowledge institutions have also been important. There are two universities in the region with a total of almost 12,000 students and 12 Grandes Écoles with almost 7,000 students. The Paris-Est Marne-la-Vallée University has strong links with local companies and the highest proportion of *stagaires* in France.

5.2.4. Policy making: ambitions and objectives

The overall aim of the regional authorities and Disney is to consolidate the position of Marne la Vallée as Europe's leading tourism destination.

However, there is also evidence that the aims of the different partners in the region are not always the same. A clear illustration of this is the way in which Disney has used the agreement signed with the French Government to control the companies that operate in the area. One of Disney's main preoccupations was to prevent other accommodation providers from locating close to the Disney theme park and providing competition for its own hotels. This strategy has meant that the only accommodation close to the park is either owned by Disney, or else operated under partnership agreements with Disney. This is clear from the plan to open the Villages Nature holiday park, operated by Center Parcs. This development has been planned in close cooperation with Disney, to the point where it will not be possible to book short stays at the park, in sharp contrast to other Center Parcs.

The result of the lack of competition has been beneficial for Disney, which is able to maintain a high price at its own properties. This strategy may be less beneficial to the region as a whole, however, since it probably forces many people to stay in Paris rather than the surrounding area.

5.2.5. Organizing the cluster

Partners in the Marne-la-Vallée development are:

Government

• SAN Val d'Europe

A regional collaboration between local authorities in the Marne-la-Vallée area (local planning, including spatial planning, transport).

• EPAMARNE development company

Etablissement Public d'Amenagement – central to the regional development process – A group of 21 local authorities in an area of 12.000ha.

The development of Marne-la-Vallée is run by two Établissements Publics d'Amenagement: EPAMARNE (founded in 1972) and EPAFRANCE (1987). EPAMARNE is the operational organisation, and also works for EPAFRANCE, which is a purely financial construction created to facilitate the development of Disneyland Paris. EPAMARNE/EPAFRANCE has 128 staff responsible for the development of the new city and the collaboration with Disney.

• Île-de-France region (link with Greater Paris plan, etc.)

Enterprises

There are over 2500 tourism and HORECA companies located in the Seine-et-Marne department, which account for 11% of total employment.

Education and research

Seine-et-Marne has a student population of 25,500 in universities and graduate schools. Tere are a number of knowledge centres, including the laboratory "Ville, Mobilité, Transports" (LVMT, or "City, Mobility, Transport"), which is the product of a partnership between an engineering school - ENPC- Ecole des Ponts, a research institute -IFSTTAR - Institute on Technology, Transport and development, and a university - UPEMLV- the Université Paris-Est Marne-la-Vallée.

5.2.6. Current status

A further major expansion of tourism development in the region started in 2010 with the extension of the Disney park and the development of Nature Villages by Center Parcs. This development is underpinned by a new agreement between Disney and Central and regional government. This covers the following activities:

- The doubling of the capacity of the two theme parks, with new attractions and the possible development of a third park (decision expected in 2020).
- further urban development of Val d'Europe, with new housing to cope with a population growth from the current 28,000 residents to 60,000 in 2030.
- A tripling of accommodation capacity with the provision of an extra 14,700 rooms. This includes the Villages Nature, project a collaboration between Disney and Pierre & Vacances, current owner of Center Parcs.

Although the growth of the general leisure cluster is proceeding largely thanks to the impulse provided by Disney, there is growing dissatisfaction about the level of collaboration between leisure actors in general. As a result of the lack of collaboration an initiative has been taken to develop a 'tourism cluster' in the region. The original idea came from Prof. Natalie Fabry of Université Paris-Est Marne-la-Vallée. She was interested in exploring the added value that could be gained from clustering, and in particular ''what else can be done outside of Disney in our area?''.

A further inspiration came from the identification of several clusters to be created as part of the Greater Paris Plan; it then seemed that a tourism cluster would be appropriate in Val d'Europe and Marne-la-Vallée, in relation with Paris. The idea of the cluster is to work closely with locally-established industrialists, meaning in this instance EuroDisney and Pierre et Vacances, then to anchor the whole to a university (Marne-la-Vallée), thus creating the right conditions for research, learning and jobs. The cluster will therefore bring together government, enterprises and knowledge institutions in a way that has not happened previously in the region.

According to Fabry and Zeghni (2011):

> A tourism cluster is an institutional arrangement that makes a destination visible (from a demand point of view) and understandable (from an insider point of view). A tourist destination is a place that gathered various actors depending directly or not on tourism. It is the basement of a coherent value–added chain. It transforms functional proximity into strategic proximity and reduces leakages effects.

This concept of clusters is somewhat different from the leisure cluster model developed in the current study. In particular it is primarily production focussed, and therefore has more in common with classic industrial clusters than the production-consumption mix envisaged in Midden Brabant.

The Association that directs the cluster is made up of local elected officials from the Val d'Europe SAN (New Town Association), and representatives from the

Government (EPA and the Regional Prefect), the Paris-Est Marne-la-Vallée University and the EuroDisney Company.

The Cluster will help boost and extend all possible synergies, within a spirit of common success and of shared knowledge and k now - how.

Its objectives are:

- Favouring the economic and tourist development of the Ile-de-France region
- Initiating connections between businesses, research facilities and learning centres
- Facilitating the inception of partnerships between reputed universities and international schools and the world of business
- Becoming a cornerstone of the intellectual influence and reputation of Marne-la-Vallée and Val d'Europe by providing a new scientific and cultural thrust
- The emergence of this upcoming cluster of excellence should serve as an international lever for economic growth and a powerful hub of cultural influence for the Ile-de-France region.

The basic idea of the cluster is to generate synergy around tourism and thereby make Val d'Europe the reference for developing, studying, and experiencing tourism in Europe. The first concrete steps taken through the cluster involved hosting a series of tourism-related conferences in Val d'Europe to study the subject from a variety of perspectives.

Bertrand Ousset, Deputy Managing Director of the Strategic Division of EPAMARNE indicated that: "there can be no cluster without further education and research, intensively interacting with private business and public agencies. The idea is also to solve a paradox. France is one of the top worldwide tourist destinations, especially Île-de-France, yet there are no masters-level curricula".

In the early phases of the development of the tourism cluster, however, it has provided hard to convince local SMEs that the cluster will mean much to them. Smaller producers in the region have tended to let government and/or Disney take a lead role and not take initiatives themselves. However, even Disney is now beginning to realise that they can benefit from a stronger network of providers in the region, and they are encouraging the development t of the cluster, even though Prof. Fabry emphasises that 'this is not a Disney cluster'.

A major challenge for the cluster lies in organisation. There is currently no central organisation and it is not clear who can take this role on.

5.2.7. Critical factors

The critical success (and failure) factors for the Disneyland Paris cluster are:

Government intervention and collaboration

Central, regional and local government have all played an important role in the development of the Marne-la-Vallée region. Government has been crucial in developing the infrastructure necessary to feed visitors into the region and therefore attract new businesses and residents to the area.

Synergies between Disney and the region

The Paris region was attractive for Disney because of the existing consumer market, but the location of Disney in the region has increased attractiveness still further.

Big engine, light steering model of governance

Government has invested heavily in infrastructure, housing and economic stimulus packages, but has also been flexible in terms of policy and planning regulations. This mix was particularly attractive for Disney.

Knowledge exchange between enterprises and knowledge institutions

There have been significant developments in knowledge exchange in the region as a whole, although this has worked less well in the leisure and tourism sector. It is hoped that the tourism cluster imitative will be able to change this in future.

5.3 Hilversum: The Media and Entertainment Cluster

5.3.1. Profile

Hilversum is the media city of the Netherlands, housing organizations with content-related multimedia and entertainment production and distribution activities. The media sector in Hilversum is a typical synergy-creating cluster economy. However, Hilversum is also referred to as a traditional old industrial city that almost completely depends on one economic sector: television and radio broadcasting. This is underlined by the economic importance of the media sector for Hilversum. With about 13,000 workplaces the sector accounts for more than one-quarter of the total jobs in the municipality.

5.3.2. The emergence of the cluster

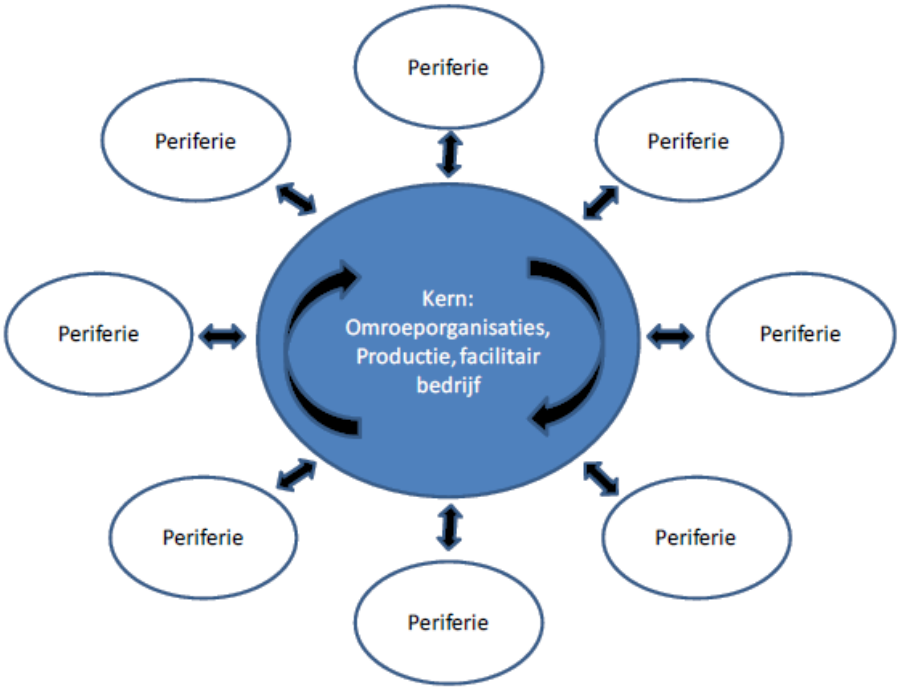
The development of media-related activities in Hilversum shows a path-dependent trajectory leading to a full-blown economic, industrial cluster. The growth of the sector originates from the establishment of public broadcasting organizations in Hilversum. As a result of the decision of a private enterprise (the Dutch Signal Apparatus Factory, NSF) to locate in Hilversum in 1918, the clustering progressed through the radio age and later in the television era, continuing in the current internet economy. Encouraged by the new media law in 1988, commercial parties started to enter the media scene. The result of media privatization was the expansion of the economic activities in the sector and a significant increase of the Dutch market by independent producers with regard to programming as well as facilitating activities. Newcomers in the television world included RTL 4, Net 5, SBS 6, Yorin and V8 and later BNN.

5.3.3. The structure and driving forces of the cluster

Figure 4 illustrates the specific structure underlying the media economy. It encompasses a core and a periphery of activities. The interactions among the various companies demonstrate two particular levels: inside the core on the one hand and between the core and the periphery on the other.

The Hilversum cluster is a concentration with a strong core of a few large corporations, including older public and commercial audiovisual and broadcast companies, production and supporting enterprises. These organizations account for about 60 % (5400) of all jobs in the municipality of Hilversum. Their business concept comprises the creation of reaching consumers (programme development and supply for the spectators). These dominant large companies work together with minor, specialized enterprises.

Figure 4: The characteristic core and periphery structure of the media cluster



Source: TwoMinds, 2010

Around the audiovisual core of the cluster there is a periphery consisting of 300 – 800 small and medium enterprises (SME's) varying in size from 1-20 people. The majority of these enterprises serve larger companies in the media core as subcontractors and as project-oriented producers. The core and peripheral activities strengthen each other: while the nucleus of larger companies places high demands on the peripheral actors for specialization, expertise and flexibility and specific labour skills, the smaller enterprises outside the core and with their entrepreneurial spirit play a catalysing role in innovation. The presence of SME's is therefore vital in terms of innovation: the core companies have their own strategy and rely on global industry innovations while shorter term innovations rely on the interface with the SME's.

5.3.4. The Media Park

Centre of the media universe

The Media Park houses around 180 companies with roughly 6,000 employees and acts as the focal point of the Hilversum media cluster. In this thematic business park a unique synergy appears through the interwoven economic activities among media companies. The origins of the Media Park date back to

1961, in the Omroepkwartier that housed public sector broadcasting. In 1988 the new media law brought about a restructuring of the broadcasting industry. TCN acquired ownership of the Media Park in 2003, which led to the emergence of an independent real estate company focused on the Media Park. TCN is responsible for the development and management of the real estate in Media Park and functions as a manager, facilitator and project developer for the whole terrain, combined with the role of commercial exploitation of and investment in the Media Park.

Developing a dual character: business and experiences

A Masterplan 2020 for the Media Park has been launched to expand and to further develop the territory. The plans have a functional separation: while the (more closed) business park in the north of the territory provides the business services related to the media industry, the southern part is being evolved as a leisure centre, open to the public and attracting visitors.

In the business park more spaces for accommodating new companies and a business support centre will be added. Moreover, new supporting facilities, like a fitness and health centre and a kindergarten, will offer more comfort for the employees.

The consumer function of the Media Park focuses on media experiences with a rich museum collection and an interactive presentation on the advancement of TV and radio broadcasting. Possible new functions include new leisure supply including small shops, cafes, restaurants, cinema and hotels. Accommodation could cater for participants' and their family members in case of longer recording sessions or that of tourists and visitors. However, these additional facilities are primarily oriented towards the employees in the Media Park. Visitors and tourists form only a secondary target group.

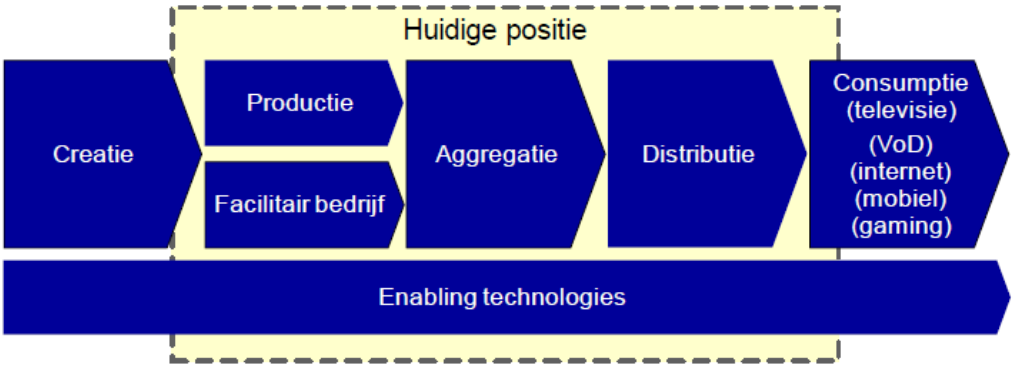
In the future the consumer will play an important role. New consumption trends form the basis of new business models such as the purchase of tickets for tv shows in the Media Park. Because the media cluster will in the future increasingly concentrate on consumption, an attractive environment is needed to support the visitors' experiences. The image of a media workplace should thus be transformed through the presence of a broad range of consumption-related activities and facilities.

5.3.5. Production processes in the media sector

The value chain

The media cluster focuses on the production and distribution of diverse forms of content (newspapers, magazines, films, voice recording and television programs etc.) As illustrated below, the tasks in the production process are carried out by broadcasting organizations, production and facilitating companies. These characterize a chiefly vertical type of relation patterns: different organizations work together as all pieces of the chain are ought to be carried out by specialists.

Figure 5: The media value chain



Source: Two Minds, 2010

The most essential elements of value creation consist of production, facilitating services, aggregation and distribution. The majority (80%) of the employees in the media cluster is involved in these stages. As stated earlier the work is chiefly performed in a project based configuration whereas companies make use of the same production facilities. This working process makes the existence of personal networks important.

Rivalry

At the same time there is much rivalry among the media enterprises in the cluster. This is caused by the competition sensitive market. Niche marketing is a frequently applied strategy in the media sector. In the audiovisual sector for instance, cooperation among competitors is rare and if it takes place it is primarily driven by cost reduction. High awareness of the possible leakage of valuable knowledge reduces the chances for mutual learning processes.

Knowledge networks

In Hilversum the network organization IMMovator aims to stimulate and coordinate knowledge creation, exchange and innovation. IMMovator covers the whole cross media industry in the Netherlands. The participating members involve the triple helix of private enterprises, governments and knowledge institutes.

IMMovator has initiated numerous cross-over projects among diverse types of actors. These collaborations have resulted in a number of new services and innovative products:

Dutch Media Hub – www.dutchmediahub.com (the positioning of the Netherlands as the als Digital Gateway to Europe)

BreedNet – www.breednet.nl (affordable optical fibre network for SMBE's)

Almere DataCapital – www.almeredatacapital.nl (an ecosystem of Enterprises around big data)

Project 10-10-10 - http://www.IMMovator.nl/101010 (standardization of file transfer in the television chain)

Branche Innovatie Contract - http://www.IMMovator.nl/branche-innovatiecontract-ftth and http://www.IMMovator.nl/branche-innovatiecontract-connected-tv (inventory of chances for SME's regarding connected tv)

Chain consultation Digital TV - http://www.IMMovator.nl/ketenoverleg-digitale-tv (agreements for the adoption of the acceleration of digital tv)

At regional level a newly established network organization iTRovator is also working to develop knowledge links in the leisure field. The emphasis of the organization lies in the stimulation of innovation and economic growth. iTRovator is financed from the programme 'Innovative Links' ('Innovatieve Verbindingen'), established by nine local authorities in the region together with the Chamber of Commerce and the Province of North Holland. iTRovator also receives support from IMMovator in the area of innovation and business development. One of the specific activities developed by iTRovator is the 'Cross Leisure Café', a creative meeting opportunity for representatives of the public sector, enterprises and knowledge institutions around d the general theme of leisure.

De netwerktools van iTRovator

Om ondernemers, kenniscentra en overheden bij elkaar te brengen organiseert iTRovator netwerkbijeenkomsten, de Cross Leisure Café's, die meerdere keren per jaar worden georganiseerd en die ondertussen door honderden toeristische ondernemers zijn bezocht. Tijdens deze bijeenkomsten wordt kennis (uit)gedeeld, worden gezamenlijke producten ontwikkeld en zijn talrijke nieuwe onderlinge contacten gelegd, waarvan de vruchten nu en in de toekomst geplukt worden. In 2011 is een gezamenlijk Cross Leisure Care Café georganiseerd in samenwerking met iZovator, het innovatieplatform voor de zorgeconomie. De opkomst ongeveer 85 personen. Het najaars Cross Leisure Café is verzet naar januari 2012 met een opkomst van ongeveer 75 personen.

Source: iTRovator, Drs. Marieke Hendriks

5.3.6. Location factors

The interactive mode of operation highlights the advantages of the unique location of the Media Park. Spatial and social proximity is crucial since content and programme creation have a relatively short production cycle and they demand face-to-face contacts, trust-based relationships and flexibility. In addition the advanced infrastructure system is a fundamental location factor for media organizations. There are 32 studios equipped with all technical facilities, rooms and editorial offices.

As well as being physically close to major broadcasters, many entrepreneurs in Hilversum feel that the Media Park has a unique and inspiring atmosphere. This 'media feeling', fed by the presence of media actors and informal networks stimulates knowledge exchange and the development of new business concepts.

5.3.7. Hilversum under pressure

Technical, social and industrial trends

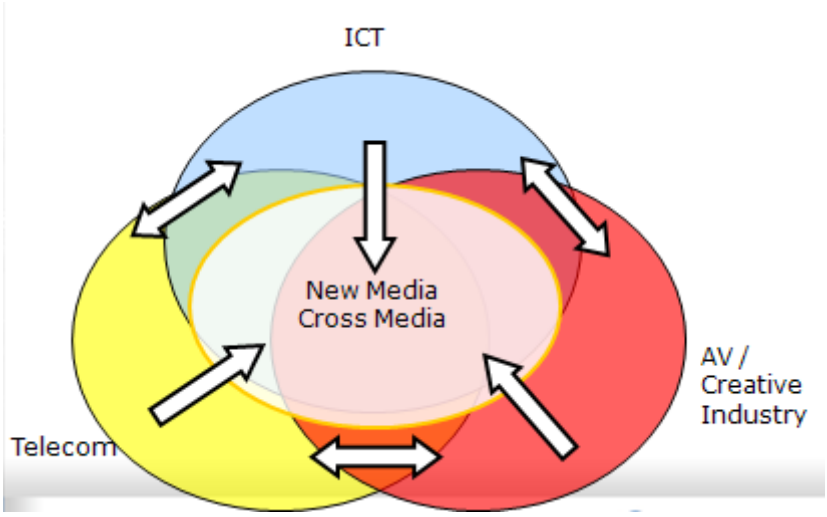
Recent technological developments such as digitalization and the use of internet and the rapidly transforming consumer trends have a huge impact on the operation and role of media companies. Enterprises active in the production, facilitating and aggregation phases, are particularly challenged. Through the rise of new technology the combination of production and distribution in one

location is no longer an advantage: the relevance of place is diminishing. The industry is gradually becoming footloose, and spatial concentration (in Hilversum) becomes less relevant. At the same time competition for audiences is growing, so costs have to be reduced.

In searching for an answer for these challenges new business concepts have arisen, particularly related to the business to business market and multichannel platforms, for example by delivering webcast services, video-oriented, web-based services and very early forms of IP TV. The extensive automation of the production processes linked with fully digitized and networked services and multichanneling have made Hilversum a unique place.

In the meantime new cross media activities have evolved as a reflection of the rapidly transforming trends (see Figure 6). This is about the convergence of various sectors wherein everyone wants to participate in the business of the other. Cross media has in the meantime become the new religion replacing the ''old fashioned'' multichannel approach.

Figure 6: Development of new cross media activities (IMMovator)



Rivalry with other places

Partly due to revolution in the media sector competition with other places at regional, national and international scale intensifies. One can observe the appearance of more and more places furnished with studios and with even more improved technologies and infrastructure. Recent reports demonstrate (Atzema et al., 2011; IMMovator, 2011) the diminishing importance and dominance of Hilversum in the media and entertainment sector. The number of (new) firms and jobs is declining.

The media cluster has a bipolar centrality within the larger Amsterdam metropolitan region. Both Hilversum and Amsterdam are media centres although with different ‘’local buzzes’’ and roles. In terms of complementarily Hilversum is considered as the traditional media agglomeration of broadcasting whilst Amsterdam functions as the creative urban midpoint where various media sectors (film, advertisement, entertainment, art and culture) are situated.

The diverse supply of services, goods, potential partners and the range of different sectors make Amsterdam a more obvious location for the new cross media world. The Cross Media Monitor (2011) reveals the steady growth of the sector in Amsterdam and its stagnation and decline in Hilversum. The advantage of Amsterdam relates to the huge pool of (creative) talent and enterprises, better accessibility, a vibrant atmosphere, the critical urban mass in Amsterdam contradicting the dull image of Hilversum: ‘’ *Amsterdam has the dynamics of Times Square, Hilversum that of an industrial area. Amsterdam is alive and kicking and is creative*.’’

The economic weight of the media sector lies in Amsterdam. It is tempting to characterize Amsterdam as the ‘’thinker city’’ and Hilversum as ‘’the maker city’’, but now Amsterdam is taking over the production role. According to one interviewee the ‘’pulling power’’ of Amsterdam is too great for Hilversum and in 50 years, except some broadcasters, not too much may remain of the media cluster. The local government of Hilversum, in cooperation with other stakeholders, is trying to find ways of strengthening their position in the media industry. The next section therefore considers the role of policy making.

5.3.8. Government ambitions and policy

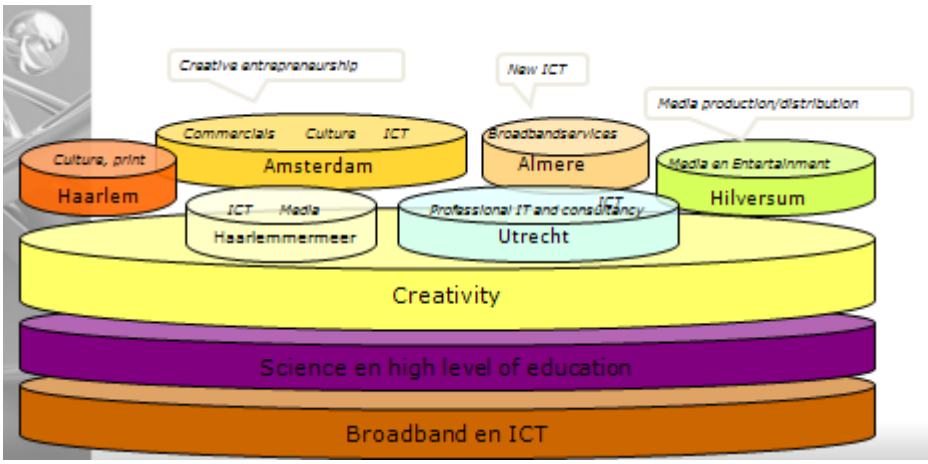
In its *Economic Vision 2007-2020*, the municipality of Hilversum defines three priorities: media, tourism and healthcare. By integrating and linking these themes and sectors synergetic effects may emerge that encourage innovation. Local policymakers, allied with TCN, aim to strengthen the media sector in Hilversum by developing knowledge intensive industries, so that ‘’Media city Hilversum’’ will evolve into an international multimedia brainport.

On the basis of a SWOT analysis the following objectives were established:

- The transformation and expansion of the Media Park in order to accommodate the establishment of (inter)national multimedia companies.
- A clear positioning of the ‘’product’’ Hilversum in The Hague and Brussels.
- Encouraging small scale creative activities in the city. This goal involves the establishment of a creative quarter, a ‘’breeding ground’’ with affordable spaces for start-up and small enterprises.

- Together with IMMovator the stimulation of innovation and more intensive cooperation in the sector including joint efforts between research and education institutes and private businesses. Multimedia should act as a catalyst for novel business concepts with other economic and social sectors like tourism/leisure and healthcare.
- Improving the identity and image of Hilversum in order to counteract the association of an old, boring traditional audiovisual and non-innovative site. The revitalization of the city and especially the Media Park with a leisure function serve this marketing agenda.
- In a public-private partnership with the municipality TCN actively participates in the design and execution of the Integral Accessibility of Hilversum. The improvement of the transport infrastructure for a better access to the city employs a sustainable approach in order to protect the surrounding nature and environment.
- The Media Valley: a strategic, regional media cluster. In the first half of 2012 Hilversum outwardly communicates this concept. Media Valley is the total collection of media focused activities and projects moderated by a governmental regional alliance in the ''the North wing'' including different cities and their specialized expertise (Figure 7). This coalition targets smart specialization through cooperation between governments, private enterprises and research bodies. They strive to connect sectors, knowledge, capital and networks to for the economic intensification of the wide-ranging media sector.

Figure 7: the spatial and proficiency elements in the North Wing media landscape



Source: IMMovator, 2010.

3.2.9. Development of the leisure element

Media-tourism

The development of leisure within the Media Park as well as in the broader Hilversum context is still at an early stage. Enhanced leisure and entertainment provision should support the growth of media-related (day)tourism.

Strengthening the relationship between the Media Park and the city of Hilversum is an integral part of the planning scheme. By reducing the physical and mental distance between the city and the cluster the Media Park should become more open and an integral part of Hilversum.

Media Park experiences

The Media Park has a relatively stable flow of visitors for studio recordings, events and other public activities. On a yearly basis the Media Park receives some 500,000 visitors. Over the last 5 years the ''Picture and Sound Institute'', presenting the historical development of the media, has attracted around 1 million people.

Media enterprises in the Media Park develop new concepts and business models for enlarging the interaction between the content creators and its consumers. Events and festivals are also regularly organized for the public (Hillywood Tour; Hilversum Media Festival etc.).

The leisure and consumption related developments in the Media Park were initially seen as threatening by enterprises in the city centre. They were concerned about losing customers to the Media Park. However, they now understand that attracting more ''media visitors'' would also be beneficial for their own businesses.

Regional bundling of forces: Gooi & Vecht

The nine participating municipalities in the region Gooi & Vecht (figure 8) have the ambition to mutually generate new impulses for the touristic and leisure sector. They have established an innovation platform for business tourism and leisure as well as the Regional Tourist Board focusing on the own region. iTrovator, the central coordinator and platform of the regional cooperation, aims to professionalize the sector underlining innovation and economic profitability. The network organisation stimulates cooperation of partners from different sectors and activity fields.

The main objectives include:

- Advancing one-day tourism as well as short overnight visits from the surrounding region (within 25km) through diversification, information provision and promotion of the leisure supply

- Search for new potential markets especially in the health and lifestyle sector

- Search for new possibilities in nearby markets in Germany and Belgium through active project cooperation with other public organizations and tourist boards in the domain of marketing & advertisement, knowledge & advice and product development

- Purchase of newly developed products and services to other touristic destinations (such as layar application for watersport; GPS game, etc.). Functioning as backoffice for '2.0 systems/products' (for instance layar, QR codes)including touristic and leisure entrepreneurs.

The development plans aspire to primarily stimulate quality and lifestyle tourism, consisting of more sophisticated and prosperous visitors. The area of Gooi & Vecht by its social-economical (wealthy municipalities) and geographical features (green and natural environment) support these targets. However, Hilversum is considered a bit ''stranger'' in the group of the surrounding rich villages like Naarden or Blaricum. It is the mediacity and has a very different history and development path than the rest of the region.

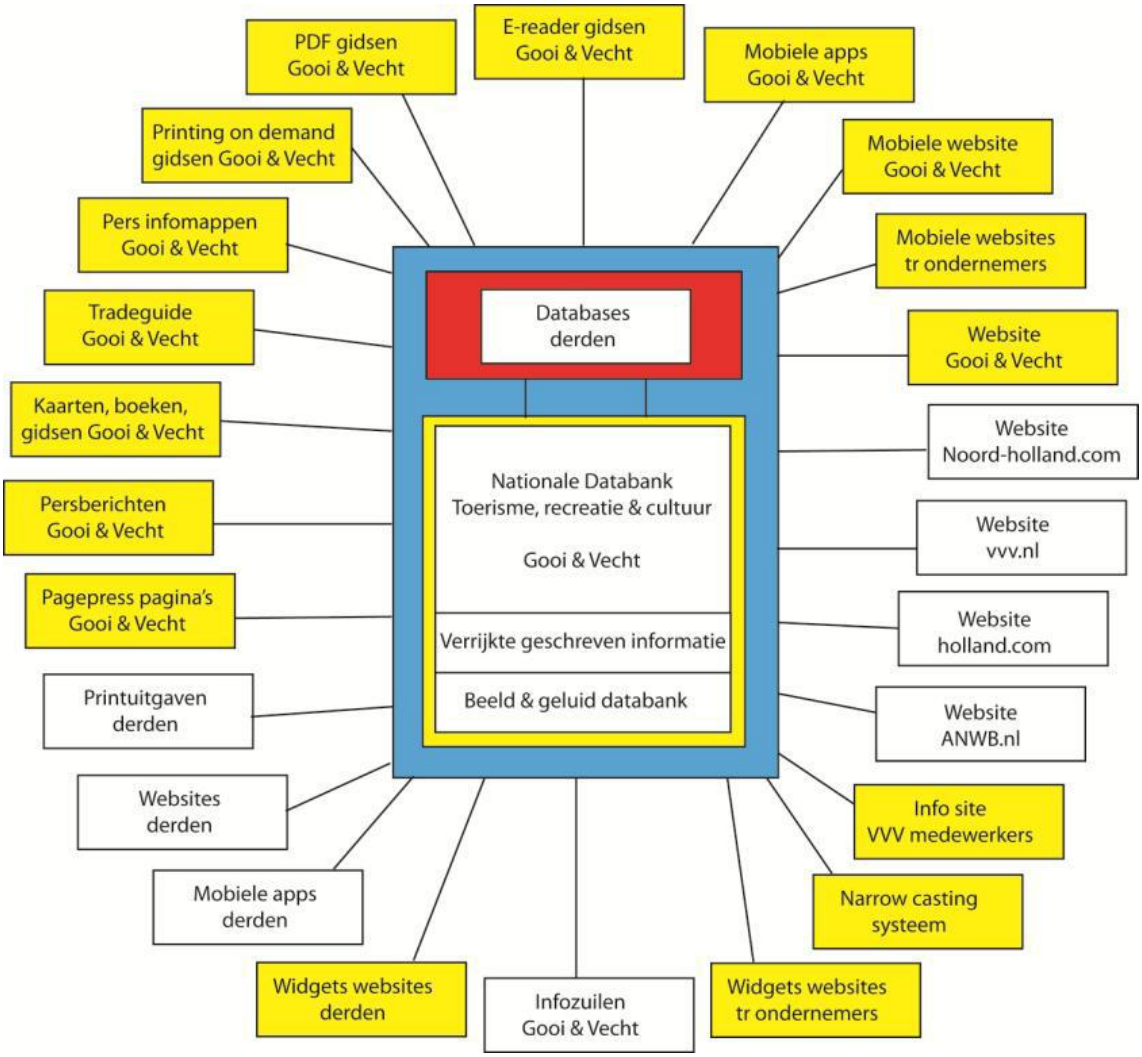
Media innovation through cross-sectoral alliance

There are already signs that the media innovation function of the Hilversum cluster is beginning to have some effect on the development of leisure experiences. For example, iTRovator is now beginning to develop cross-media leisure applications to support the work of the new Regional Tourist Board (Figure 8). This is supported by the strategic involvement of the earlier mentioned iMMovator, the international innovation platform for multimedia. They deliver specific knowledge and expertise for leisure projects that lead to new and unique services.

The initial successes of new projects are promising that can even further the existing enthusiasm of entrepreneurs. At the same time, the collaboration between (smaller) touristic private businesses needs further stimulation. The rather minimal level of commercial and strategic interlinkages is characteristic for leisure and touristic enterprises which, primarily, prioritize their own (short-term) activities.

Figure 8: The touristic region Gooi & Vecht with the participating municipalities

Figure 9: The proposed cross media information system for the region (source: iTRovator, Drs. Marieke Hendriks).



3.2.10. Critical factors

- The clustering of media-related organizations supports top quality technological infrastructure. This would have not succeeded without close cooperation.

- The combination of a private real estate developer (TCN for the infrastructure and economic efficiency/ profitability for the whole area) and a knowledge network (IMMovator). The development of physical and infrastructural attributes complemented by content-related innovative cooperation lead to the emergence of a professional cluster.

- The dependence on one specific (traditional) economic sector and the dominance of a very few large enterprises increase the vulnerability of the local social-economic structure and the chance for a lock-in situation.

- The value-chain approach of production and all activities (which is unavoidable in the media sector) forces competitors to collaborate.

- Local government has recognized the need for economic repositioning. Efforts are being made to develop new services/products and markets. These efforts are gradually giving Hilversum new impulses and making it more open.

- The Media Park (and cluster) is chiefly financed by private enterprises and investments.

- Finding new financing resources for catalyst activities such as those of IMMovator. The adverse economic situation makes it more and more difficult to invest in new projects and developments.

- There is a tension between increasing the accessibility of Media Park and its protection against possible attacks. The national government has designated the Media Park (just like Schiphol) as an area of high risk.

- The stimulating role of the municipality is mostly recognized and appreciated by other partners. Local policy makers are actively involved in the development of the media cluster. The cooperation links with other stakeholders (TCN, IMMovator etc.) are defined as close and positive.

- The presence of professional and ambitious organizations with entrepreneurial spirit such as iTRovator and iMMovator. Their activities and their more intense cooperation needs to be enhanced by the municipality.

- The establishment of a local education institute, having a specialized media curriculum, would be relevant and beneficial for the development of the cluster.

- There is some skepticism regarding the founding of the Media Valley. Some consider it as a ‘’paper tiger’’ - ambitions that would hardly realize due to the strong rivalry among places and governmental bodies.

- Notwithstanding the search for alliances on a larger spatial scale and placing the specialized capacities of Hilversum in a broader (inter)national and regional media context for creating content and novel combinations.

- The high level of rivalry between commercial enterprises on the local scale but also among media clusters on the global scale compel innovative solutions that frequently demand a cooperative attitude from the market parties.

- Although the development for the leisure side of the media cluster is still in an initial phase there is still no clear structure. This may be caused by the strong primary function of the cluster as a business park and/or by the unclear deliberation on the manner of setting up the leisure component (actors, products, activities, places and scale etc.).

- The possibilities to fit Hilversum – having a deviating character compared to the surrounding villages - into the broader regional leisure and touristic supply. This could especially be grounded on its specific strong attributes: technical infrastructure and innovative concepts in the media business.

- The specific requirements for spatial and functional self-positioning, depending on the type of cluster: for media activities the relatedness to Amsterdam and to the Media Valley while on the leisure and touristic field linkages to the region of Gooi & Vecht.

5.4 The Ruhr Area

5.4.1 General facts & figures

The Ruhr area is a predominantly urban region in the federal state of North Rhine-Westphalia. With its 4435 square kilometers and 5.3 million inhabitants, it is considered the largest German agglomeration. Its four administrative regions have 11 bigger cities and 42 smaller municipalities (Figure 9). The largest cities are Dortmund, Essen, Duisburg, Bochum with between 380,000 and 585,000 inhabitants.

Figure 9: Administrative borders and (main) cities in the Ruhr

Source: ERIH,2012.

5.4.2. The transformation

The region has in the last few decades gone through a spectacular transformation that was in particular encouraged and coordinated by regional and local government. It has repositioned itself from a grey area of declining heavy industry with severe social-economic challenges into a service and culture oriented region. Local stakeholders are using the global rise of the ‘’fun

society'' by creating a combination of leisure amenities and creative cultural and experience economies.

The main stages of regional evolution:

• **Since the 1960s**: Numerous **strategies have been formulated to restructure** the region based on mainstream innovation areas.

•**1989-1999** : the **IBA Emscher Park strategy** to re-image the region and to preserve industrial heritage through numerous creative culture-related projects. This large-scale programme was a milestone in the spatial and economic reorganization of the region. There were three main goals: the restructuring of industry; the renewal of nature and the development of creative locations for economic development. A new interpretation, a new narrative was needed for the re-use of the sites of old mines and the steel industry.

Image and identity construction of the Ruhr area forms an essential part in the transformation of the economic structure and of the urban landscape. The local potential has been exploited through place marketing and the robust positioning of the area as a destination for urban and cultural tourism. The new brand name ''Ruhr Metropole'' aims to radiate a scientific, technological, cultural and hip atmosphere wherein the inhabitants have a high life standard.

•**Since 1991**: **5 governmental Reports on Cultural Industries in North Rhine- Westphalia**. A long-term strategy was developed in order to turn the Ruhr area into a postmodern region of services and technologies. Investments were made in the consumption and leisure cultural sectors so that the Ruhr could adjust to the patterns of new lifestyles and consumer behaviour. The startegic components in the Masterplan are defined as:

- Industrial culture and nature
- Entertainment
- Culture and cultural events
- Expo's, congresses and conferences

The subject of the leisure cluster/sector in the Ruhr area is embedded in the overarching **discourse and concept ''culture and creative industries''**. The state North Rhine- Westphalia identifies the clustering of the cultural and creative sector among the most important economic spearheads, with explicit objectives for cluster management. However it is surprising that leisure, tourism and entertainment (or the integration of these aspects) is not mentioned at all among the major domains of the creative cluster.

• **Creative islands with cultural and leisure activities evolve** all over the region on derelict coal and steel precincts.

•**The Ruhr 2010: Cultural Capital of Europe** with the motto"Change through culture – culture through change. More than 10 million people visited the

cultural and leisure facilities of the Ruhr and the specific activities organized during the event.

- **Financing the transformation**

For the realisation of projects and for the general economic restructuring the German state and governments on different administrative levels (though especially the local ones) provided significant financial means. Due to lack of external investment though, most initiatives were dependent on the mobilisation of internal (regional and local) funding, and by EU, national and private capital flows.

5.4.3. Central actors

Ruhr Tourismus GmbH

Since 1998 efforts have been made to combine forces for Ruhr-wide activities to promote tourism in a coherent manner. This umbrella organisation fulfills the main regional coordinating role to develop a diversified leisure landscape in the whoe Ruhr area. Ruhr Tourismus is working with 53 cities and towns on product development, marketing and promotions.

They recently developed a consultative council that includes all public tourist boards and other special facility providers (museum, theaters etc.) in the Ruhr. The 25 individuals represent public bodies (15 permanent members) and the private sector (10, changing annually). However it is striking that RAG Montan Immobilien, a large real estate developer and the owner of all derelict industrial areas (30,000 hectares) in the Ruhr is not (yet) involved in the collaboration or in any strategic partner alliance.

Regionalverband Ruhr (RVR, Ruhr Regional Association)

This central organisation is the regional hub of 11 independent urban municipalities and of the four administrative regions in the Ruhr Metropole. The association, which has already existed for 80 years, aims '*to improve the life quality of the Ruhr inhabitants*''.

The RVR is responsible for regional spatial planning and is a significant investor in infrastructural projects (like the Industrial heritage route or the Emscher Landscape Park). Their tasks include the improvement of the regional business climate and the tourism and leisure sector as well as PR and marketing activities.

Kultuur Ruhr GmbH

The fundamental objective of this organization is the intensification of collaboration between cultural institutes and the support of specific projects with a reputation beyond the regional borders.

University Alliance Ruhr Metropool

Established in 2007 with the aim to generate a unique diversity of disciplines, the alliance consists of a network of 89,000 students and 1250 professors from the universities Bochum, Dortmund, and Duisburg-Essen. Their major objective is to promote the strength of the universities and to establish mutual research programs. This initiative should conduce to the ambitions of presenting the Ruhr area as a qualitative knowledge environment and ‚educational excellence‘.

Wirtschaftsförderung Metropoleruhr GmbH (Agency for economic development)

The agency was founded in 2007 as a company belonging to RVR. The organisation is deep-rooted in the region and it actively participates in regional economic processes and fulfils the classical tasks characteristic for a development agency: through its broad range of relationships bringing different actors closer together; expanding networks and clusters; advising investors on business locations, providing financial support and initiating projects.

ECCE (European Centre for Creative Economy)

Established to stimulate the creative economy, the ECCE cooperates closely with the development agency.

Initiatevkreis Ruhr and Pro Ruhrgebiet

An example of the involvement of businesses is the establishment of Initiatevkreis Ruhr and Pro Ruhrgebiet some 30 years ago. The major targets of the 60 leading founding private enterprises in the Initiatevkreis Ruhr are to intensify the economic development of the Ruhr and to reshape its poor image with unique selling points. The member companies invest huge amounts in project initiatives. Education is also an explicit aim, in order to create a pool of good skilled labour force. In addition, the enterprises cooperate to enhance cultural highlights in the Ruhr area.

Pro Ruhrgebiet has some 350 members, including companies and well-known public figures. Their main aspiration is to accelerate the dialogue between business organisations and science.

Professional associations

There is a wide range of branch organisatons and formal cooperative associations in the Ruhr area. They represent the interests of the private business sector and take part in the optimalization of innovation and sustainable development. Networking, knowledge and information exchange, the organisation of meetings, the commercial exploitation of innovative concepts are a few examples for their activities.

5.4.4 Current status

- **Stubborn difficulties**

Despite of all efforts to convert the social-economic decline into a renaissance and into newly generated economic activities, the Ruhr area still suffers from a mixed reality and image. There is a huge number of abandoned industrial sites throughout the Ruhr area forming a huge concern for the cities as they are poor locations: they function as scars in the urban landscape, often badly contaminated and exposed to vandalism.

A continuing deterioration can be seen in the social-economic domain as well. Unemployment rates remain very high in this so-called 'shrinking region', and a large number of young people and companies keep leaving the region. After having initially located in the Ruhr region, companies tend to move other regions/continents because of lower labour and production costs. These negative trends create a very challenging context for all actors operating in the Ruhr.

There is an overcapacity of spaces and development areas in the Ruhr region that makes matters even more difficult. There is great competition for the scarce number of investors – the demand for sites in the leisure industry is still very low. The presence of so many degraded sites as well as the enduring poor image of the Ruhr makes progress difficult.

- **Tourism**

In comparison with the number of overnight stays in the rest of the federal state , the Ruhr area with its 4 million visitors can be called as a ''less developed country'' in the domain of tourism (Krajewski, 2008; Stein, 2004). Other German regions such as Berlin, Hamburg, Köln have four times more overnight guests when compared to the number of inhabitants. The major part (80%) of overnights in the Ruhr are spent in relation to MICE-tourism (Meetings, Incentives, Conventions and Exhibitions) while leisure still represents a meager fragment (20%).

- **Culture and creative industries in the Ruhr**

Three quarters of all businesses in the culture and creative industries in North Rhine-Westphalia are based in the Rhine-Ruhr Metropolitan Region. Businesses associated with "content" (artists etc.) are clustered in the areas around Cologne/Düsseldorf. Production companies and end-userrelated providers are concentrated at the Ruhr.

In 2007 this sector in the Ruhr area had a turnover of €8.2 billion (2,4 %) with around 13,200 taxpaying businesses and independent contractors (9.5 %) , 51,000 employees (3.3 %), and a 74,000 strong labour force. In the Ruhr the share of culture and creative industries of the overall economy is slighter than

its share in North Rhine-Westphalia (turnover, businesses and employees). Also the economic dynamic of this sector is behind the level of the “Bundesland” (the software sector is far more developed in the Ruhr than in other parts of North Rhine-Westphalia).

‘’The Ruhr is a “late comer” in the development of culture and creative industries, because of :

- skilled working class labour had neither money nor time to enjoy fine arts and performing arts
- leisure time was used for sports
- until the sixties there was no university in the region and
- still there is no public broadcasting company (as an anchor point for developing the culture and creative industries)

Nevertheless the Ruhr was the birthplace of the debate on culture and creative industries in Germany. In all cities and districts of the Ruhr the culture and creative industries are an important, but an often neglected sector. The big cities are the “power houses” (with around half of the businesses and two thirds of the turnover in the culture and creative industries).Medium-sized cities like Hagen can be described as “basic and developing centres” (with one quarter of the businesses at the Ruhr)’’ (Ebert & Kunzmann, 2010).

- **The emergence of a non-traditional economy**

The development of leisure clusters in the Ruhr region is still in an initial phase. The reason can partly be found in the so-called resistance coalitions that tried to work against restructuring and change. Also, communities which lost their economic basis hoped to rebuild new industrial sites in place of the shut-down mines.

Stakeholders recognize that the leisure industry is a new sort of business and approach, strongly differing from other economic sectors. The leisure concept applied by local actors refers to a very broad sense of the terminology including many types of activities: heritage, sports (especially football and related tourism), culture, hospitality, entertainment, health and recreation. Most organisations need to gain knowledge and experience in this new field. For instance, for the real estate developer RAG Immobilien – owning all abandoned sites in the Ruhr – it means expanding the range of their traditional activity like housing, industrial areas or parks. Unconventional, new perspectives are being gradually developed to find business opportunities in the wide plethora of leisure themes.

- **Coordinating and uniting**

As mentioned in the previous section the Ruhr Tourismus fulfils a catalyst role in organizing and coordinating leisure activities in the Ruhr region. They have a central position in defining a mutual strategy for the advancement of tourism and leisure in the Ruhr area.

Their main objectives for reaching an enriched leisure cluster are:

- Advantageous economic effects for the region
- Improving the quality of life for the inhabitants. This is badly needed after the decline of the regional economic fundament and as a result of it the diminishing services and facilities.
- New leisure amenities and additional cultural and entertainment activities are also apply as instruments to improve the internal and external image of the Ruhr.

The long-term objective of the Ruhr Tourismus is to significantly develop the leisure and tourism sector in the coming 20 years. The more specific aim is to increase leisure tourism into the Ruhr area by an ambitious 5 % each year.

Two or three years before the Cultural Capital Ruhr 2010 took place they started a large-scale operation in order to bundle all activities, branches, actors and exiting marketing powers into a new operational leisure structure. The main aim of the (marketing) measures developed was to stimulate all stakeholders to follow the same strategic direction.

As a second step a strategic *Marketing Plan for 2012-2016* has been developed. The elementary facets in the plan are based on two large surveys held among consumers: one refers to a panel of 1200 inhabitants presented in a national research databank while the other was an one-time survey focusing on 2000 hotel guests. In the marketing plan three main issues are formulated by defining the:

- most relevant scenes with viable business opportunities. The theme ‘Industrial heritage‘ forms the backbone, in combination with shopping, events, culture, gastronomy and cycling.
- target groups
- source markets: despite the stubborn difficulties most stakeholders are optimistic and believe in the huge potential of leisure in the Ruhr. The region provides good market perspectives due to the large number of inhabitants and the need for new products and services. Primary source markets are NorthRhein-Westphalen; Baden-Württember; the rest of Germany; the Netherlands and Belgium while the secondary markets refer to Great-Britain and Poland.

The major task consists of building up new networks including all actors in the leisure, hospitality and tourism sector. This would raise awareness and make local actors and enterprises think of the Ruhr as one area instead of focusing only on their own location. In this context every year four meetings *for marketing*

cooperation among 40 participating organizations are held. The members unite their separate marketing budgets for combined marketing objectives.

- **Leisure landscapes**

As a result of the investments in and the organization of the leisure sector on different scales some large multifunctional leisure facilities have been developed that can be divided in diverse categories (Table 1). These facilities function on the cross roads of various leisure amenities. The touristic representation categorises the experiences in ‚industry and monuments‘, ‘art and culture‘, ‘events and entertainment‘, ‘adventure and action‘ and ‘cycling and touring trips‘.

Table 1: Large-scale leisure facilities in Northrhein-Westfalen and in the Ruhr

Facility	NRW	Ruhr Valley
UEC (Urban Entertainment Center)	1	1
Arenas	7	3
Multiplex Cinemas	43	11
Musical Theatres	5	3
Leisure Fun Waterworld	63	27
Indoor-Ski Facility	2	1
Leisure Theme Parks	5	1
Zoos and Animal Parks	13	6
Sum	**139**	**53**

Source: Krajewski, 2008

The large urban agglomerations within the Ruhr area were given their own leisure and experience theme. Accordingly, the Ruhr metropole is divided into five themed areas. This partnership presents the various cities with different characteristics: Bochum as the city of theater and festivals, Dortmund the creative city, the harbour city Duisburg as ‘’cultural harbour’’, artistic Essen and Oberhausen as pure entertainment and spectacle (Ruhr Tourismus, 2011; Seppenwold, 2010).

The project ‘industrial heritage‘ is a guiding element in the Ruhr leisure landscape. It is a 400km-long route leading around the Ruhr area alongside various industrial heritage sites like factories, buildings designed by famous

architects, museums and panoramas. This specific itinerary with 25 anchor points and diverse theme's provides a historical view of the region.

The past gives the opportunity for alternative, unconventional leisure activities and amenities like diving in gas chambers filled with water, climbing on the walls of blast furnaces, swimming and skating in the shadow of coke ovens. Different heritage places have been transformed into theatres for dance and music performances, cabaret and presentations. The exploitation of the industrial past contributes to the forming of the current and future identity of the Ruhr region.

- **Value creation**

The gradual transformation from a dirty industrial area into a culturally-vibrant region and a developing postmodern leisure scene underlines the value added in the process. The future oriented efforts of various stakeholders in the region are gradually breaking through the regional lock-in. The focus on the improvement of the local social and enviroenmental conditions also emphasizes the sustainable aspect of the development.

Innovative renewal strategies are applied through the integration of past and present, of new global trends (experience economy) and local traditions (heavy industry). Maintaining the industrial heritage leads to new, market-driven products and services. This global-local interaction produces new creative combinations in 'industrial culture'.

These measures are framed by the creation of new symbolic centres and a new story of the place that also comprise a strong internal message for the mental reorientation of the inhabitants.

- **Expanding the education and cultural infrastructure**

In order to meet the new demands of the labour market and to create spin-offs in the service and leisure economy, new universities and schools have been established. For the improvement of the regional cultural infrastructure numerous actions have been initiated like the establishment of museums, concert halls, gardens, and green and blue areas. The investments in design, films and shopping malls demonstrate the newly arisen interest in culture and ''lifestyle''.

- **Cultural Capital Ruhr2010**

This flagship event gave an enormous boost for the touristic, cultural and leisure organization in the area. Its decisive importance is underlined by the repeated reference to the state of the region 'before'' and 'after' the event. According to the evaluation of the Cultural Capital 2010, it has 'paid off extremely well'' and is considered as a success. 10.5 million people attended it. This was a boost for

the polycentric metropole within which each municipality could strengthen its own identity.

The event has provided a framework to experiment in the field of leisure and culture. New types of projects, new concepts and initiatives were launched. New networks and alliances were forged. Local actors gained momentum due to the label and organization of Ruhr2010 by recognizing the importance and possible impact of leisure on the social fabric as well as on economic development.

At the same time, some question the impact of the Cultural Capital. It has created a slightly better image for the Ruhr area and for its cultural opportunities, but mainly among those interested in high culture. One of the more frequently observed criticisms is the elite character of the artistic venues. This contradicts the officially-constructed image of improved social cohesion as a result of this year-long event.

- **Relationships**

Collaboration

Because of the industrial monoculture in the past, earlier relations could be characterized by chiefly hierarchical (vertical) and strictly centralized patterns. This meant business connections between huge conglomerates and smaller, dependent enterprises. There has been a gradual switch from these rather rigid relational forms into more open, horizontal and transverse linkages.

Innovating market- and product combinations were realized through sub-national, bottom-up policy measures. This needed the participation and cooperation of relevant regional stakeholders from various domains (private businesses, inhabitants, associations and branch organisations, universities and public institutes).

An example is the region-wide collaboration for the project ‚Industrial heritage‘‘. The RVR worked together with many various actors like companies and institutes from the tourism and leisure sector, governments, the 12 tourism regions and other public institutes. This illustrates their ambition for bundling product and market development in order to generate an own regional tourism profile for the Ruhr (Ruhr Tourismus, 2010).

Rivalry

The region has no metropolitan government and there is a significant competition among urban centres for attracting new activities and investments while their financial situation remains critical. The dominating political attitude of ‘first thinking of the own kreutz‘ combined with the large number of municipalities (53) within the Ruhr area fortifies rivalry. This and the polycentric structure of the region makes mutual development plans very complicated.

Some measures and development plans often invoke the (feeling of) competition. Some new activities have been questioned on their effects. The building of new shopping centres is often considered as a creation of large rivals for conventional shops in the traditional districts of city centres.

At the same time, however, one sees a slowly evolving change in the behaviour of the communities: on a growing number of topics (urban planning, tourism) they start working together.

- **Flexibility in a polycentric structure**

The local and regional government institutes have become more flexible aiming to have competent employees with expertise. They cherish a new type of working method and governance and active in making coalitions among various stakeholders from all fields of life for a mutual vision and projects.

Although the integration of different actors is a crucial factor, the polycentric spatial and administrative structure oft he Ruhr area makes it rather complicated to expand networks.

The multifaceted character of alliances may also create problems in defining roles and coordinating information and knowledge flows. A recent inventory-type of research for the leisure sector, carried out by the regional development agency Wirschaftsförderung Ruhrmetropole is a point in case. The collected data were not registered in a systematic way that made impossible to sort out the different types of interested investors, their economic and activity profiles, the leisure branches and types of sites they were looking for.

- **High risks, failed projects**

Huge investments were in the past done in the diversification of leisure and culture supply although that did not prevent certain projects from economically failing. This is partly due to the short-term character of postmodern leisure services. Investments are confronted with very short life cycles: at the moment the unique feature of an aspired product/service weakens, the facility loses its attractiveness for the consumer, leading to a financial fiasco.

- **Limited scope of activity**

The Ruhr region is an industrial location. This profile, despite the sufficient supply of space, limits to a certain extent flexibility regarding new facilities. In the functional sense there are insufficient possibilities for activities, other than already being carried out in existing buildings.

- **Long procedures of preparing old sites**

The short-term character of the sector is even more enhanced by the long procedures needed to prepare old industrial sites for their reuse. Owing to the heavy contamination of the soil, the cleaning process, combined with the German-type of consensus building in spatial development take usually many years. One can imagine the effect when asking investors to wait some 10 years for site development. These issues significantly increase the amortization rate of the whole portfolio of abandoned industrial locations.

- **A creative hotspot**

In the Ruhr area Dinslaken's Zeche Lohberg – a mine closed some 5 years ago - is being developed into a centre for the creative economy.As per the hopes of the developers small enterprises in the creative sector and renewable energies industries shall establish themselves here – enabling iving and working in a green area. From a city-planning perspective, the Dinslaken project is the biggest intra-urban development area in Germany and is even exemplary in Europe. The city, the site-owner RAG Montan Immobilien and citizen's initiatives are currently joining a round table to discuss on the development of the area. Funding from the state and the EU has already been granted (Labkultur, 2012).

- **Financial difficulties**

A huge source of difficulty derives from lack of financial means for enlarging leisure activities and erecting new cultural sites. Although all partners are positive and enthusiastic on the intentions and progress, the difficult economic situation and lack of funding puts pressure on the cooperation initiatives as well.

For the moment financing oft he Ruhr is more or less solved from the supporting scheme of the federal state North Rhein-Westphalen. These sources originate from the EU budget for cultural programmes, including European Cultural Capitals and reserving €400 million for the period of 2007-2013.

5.4.5 Critical factors

- A mutual sense of urgency due to the economic necessity for change and the resulting need to forge new coalitions

- Mental and attitude transformation to break through cycles of decline and lock-in

- Creating a new storyline for the region, a new place identity and image and its robust internal and external promotion is a crucial

aspect and a long-term process (the bad image of the region prevails). Transparency and visibility of leisure clusters are fundamental in their maintenance and development.

- The question of scale, size and administrative complexity of the region is a considerable factor

- Providing an explicit and precise position/agenda for leisure within the overarching regional economic structure and vision as well as relating it to the culture and creative industries

- Large flagship events and attractions boosting developments, leading to new concepts and insights and attracting visitors to the area (IBA, ECOC, Centro)

- Regional and local mobilisation for finding new financial resources and creative solutions for funding

- The self-organizing power of the regions, who have launched many bottom-up initiatives and got other actors involved. At the same time a strong catalyst is necessary to prevent fragmentation and inefficient duplication of activities. This requires uniting information and knowledge in the leisure field

- Involve knowledge workers: universities are strongly present in the region although their knowledge is not exploited in the development of a leisure cluster

- Value creation based on existing strengths using the innovative integration of new global market demand and local traditions

- Guarding against a one-dimensional, predominantly marketing-based strategy: content development and the creation of (new) products and services should remain a central focus

5.5 Summary of the cases: comparing theory and practice

The four cases presented illustrate differing aspects of cluster development and distinct challenges and strategies of the actors involved. It is clear that none of the cases analysed represents a fully operational leisure cluster. The ‘gap’ between theory and practice varies for each case, but it seems that many of the problems revolve around the shift from a ‘passive’ agglomeration of leisure enterprises into a ‘dynamic’ leisure cluster. In most of the cases there is a lack of linkage between the strategic vision (or lack of vision) of the public sector and the ambitions and capabilities of the enterprises and/or knowledge institutions.

Table 2 attempts to summarise the main features of each case in relation to the different dimensions of cluster operation as outlined in section 3.1.3.

Table 2: Aspects of cluster operation: a comparison of the cases

Aspects of operation	Zoetermeer City of Leisure	Disneyland Paris – Tourism Cluster	Hilversum Media Park	Ruhr
The creation of new business models and new specialisms	Strong leisure experience focus with Big 5 leisure attractions in sport and outdoor activities. But: Low synergy between the attractions	Poor: There has been little synergy between Disney and other companies (except in partnerships selected by Disney). New initiatives to: * complete the Disney feeling with the historical and cultural features of the broader region *expand the focal point of Disney into the large concept of Tourism Cluster including education and research activities	Limited: the cluster is still largely based on traditional media value chains. New initiatives tend to integrate different sectors for economic repositioning (media, ICT, tourism, health) There is some development of consumer activities, but not yet a major value creator	The innovative mixture of ''global trends/demands and local traditions'': The region has developed a strong position in industrial heritage Other leisure facilities and activities (culture, creative businesses, sport, relaxation, shopping, gastronomy and biking) are being combined with the main theme of ''industrial heritage''. Still high fragmentation in the region and lacking striking leisure hotspots and flagship attractions.
Rivalry and networking	Rivalry between Big 5 limits collaboration.	There is a poor balance between competition and collaboration, largely thanks to the dominant role of Disney. It is hoped that the new tourism cluster will redress this balance, but there is a lack of cluster coordination.	High rivalry between media enterprises within the cluster limits collaboration which is a ''normal'' phenomenon in the media business and niche marketing. Cooperation between leisure entrepreneurs in the region is low (limited and short-term focus)	Rivalry between the cities has been turned in many projects into collaboration through strong regional leadership. Mushrooming bottom-up initiatives including from commercial actors. Competition still prevails due to the polycentric, complex administrational structure, the size of the region and limited financial means in a still declining area with heavy social-economic burdens.
A strong knowledge infrastructure	Totally lacking	There is considerable knowledge infrastructure, but this has not been specifically applied in the leisure and tourism fields.	IMMovator has stimulated knowledge exchange and cross-over projects. The involvement of education institutes is still meagre.	Very strong position in knowledge creation based on industrial R&D infrastructure. Challenge now to adapt for experience industries.
Transparency and visibility of the cluster	City of Leisure a top-down concept that has	The Marne la Vallee region as a whole has now achieved	Visibility of the media cluster is high, but the	Visibility increasing thanks to regional

	little meaning for consumers	high visibility thanks to Disney, and is one of the major European tourism destinations.	transparency is low and there is little connection with Hilversum itself. Leisure supplies or even leisure development plans have a very low visibility.	initiatives, European Capital of Culture. Despite enormous efforts still having a ''bad image of an unclean industrial area'' in the outside world.
Local business environment	Accessibility of Randstad a big locational factor, but little advantage from the city of Zoetermeer itself (mainly sufficient space and initial government support)	Disney needs to be more strongly anchored in the region, and this is one of the aims of the tourism cluster. Marne la Vallee still has problems of attractiveness due to the proximity of Paris.	Good environment for media businesses supported by hi-tech infrastructure. Nice living environment. Less optimal for wider leisure development, since production is moving to audiences, creation, production and distribution channels in Amsterdam. Misses the vibrancy, the creative buzz, critical mass of a huge urban agglomeration.	Strong network of large and small firms. Strong regional consumer market. Declining and shrinking region with numerous economic and social problems. Abundance of contaminated old industrial sites (scars in the landscape) Overcapacity of development spaces
Cluster management and organisation	Some attempt to lead the cluster from the municipality, but scrapped during the crisis. This year: rehearsal of coordination by the local government.	This is a major strength of the Marne la Vallee cluster as a whole, because there has been strong coordination by government and collaboration between different levels of government and the private sector. In the specific Disney case, however, the lack of balance between the local players has had a negative effect on cluster development.	A lack of strategy hampers effective development. Central management from TCN, but only as a real estate development – no 'programming'. The knowledge coordinator iMMovator covers the whole Netherlands. Promising signs on the development of leisure and touristic sector in the region by robust guiding and pragmatic execution of projects.	Strong coordination at regional level (Ruhr Tourismus), but the number of local authorities remains problematic in terms of coordination. Also, the involvement of private enterprises remains a challenge. Insufficient information exchange and strategic alliance between regional development bodies on leisure and tourism.
Government involvement and policy measures	City of Leisure strategy came from government, but not coherent and with little thought for long-term sustainability. Its focus on a pure spatial and programmatic aspect of development of leisure facilities without concern for the needs/ambitions of private enterprises unable to reach the ambitions.	A very strong role for all levels of government. Clear policy frameworks and evaluation.	Government not strongly involved in the cluster. Mis-match between local, regional and national agendas. Also, on the leisure component of the cluster it lacks vision, expertise and a specific planning scheme.	Strong government leadership at regional level. Leisure and tourism is not explicitly positioned in the cluster policy of the federal state (for culture and creative industries). The evolution of this new economic sector is still in the initial stage. Local/regional stakeholders are still in a

	No evaluation of achieving objectives.			learning phase.
Self-identification of actors with the (story and theme of) destination place	Poor, mainly recognized for marketing purposes	This is problematic, since there is a lack of local collaboration and identity. Marne la Vallee has developed in a physical sense, but still lacks a 'story' (beyond the role of Disney)	Media cluster has high level of identification, but this does not extend to Hilversum as a destination. Problem of rivalry with Amsterdam as 'media capital'. Leisure & tourism: also difficulties with identification with the surrounding villages in the region Gooi & Vecht : Hilversum has a different history and culture than the rest.	Increasing identification of 'Ruhr metropolis' among residents and enterprises. At the same time ''caring chiefly for the own municipality/place'' remains powerful.

6 Conclusions and recommendations

The concluding section of this report summarizes the most important findings and presents recommendations specific to the situation in Midden Brabant. In doing so, particular attention is paid to the critical success factors (or challenges) for the cluster case studies analysed, the emerging best practices, business models and value chains.

6.1 Critical success factors for leisure clusters

Enabling role of the public sector

In the most successful leisure clusters, the public sector has played a strong enabling role that has given enterprises access to basic production factors and has provided a basis for the knowledge exchange that is vital for innovation.

In the early stages of cluster development it seems that agglomeration is often ad hoc and often lies below the radar of public authorities. It is only when a certain critical mass is already achieved that the nascent leisure cluster is incorporated in the strategic agenda of the location or region. By defining a strategic agenda for the cluster, the public sector can play an important role in steering the direction of development and also increasing visibility and coherence of the cluster.

Once the cluster becomes more concrete, the public sector role also begins to include the physical aspects of cluster maintenance, which most importantly include physical planning and accessibility. Accessibility and accommodation are vital for leisure clusters, because the consumer travels to consume leisure experiences at the point of production. In the case of Disney, for example, transport infrastructure and the right conditions to construct hotels were decisive in the decision to locate to Marne-la-Vallée, which in turn provided an essential basis for the tourism cluster. Infrastructure planning of this kind is a vital function that the public sector must lead.

The public sector is also often the initiative-taker in the development of clusters. However, this is a function that is less suited to public sector leadership, because the development of a top-down cluster in the absence of other important locational factors often leads to failure. This is clear in the case of Zoetermeer, where a top down leisure cluster has been formed, but because the concept was developed as a public sector initiative it has not taken sufficient account of the needs of the other partners. In the cases examined no professional cluster management, having a comprehensive and practical organisational function, has been found.

Enterprising businesses

The essential area of value creation on which a cluster depends lies mainly in the commercial sector leisure functions. The creation of new and innovative leisure experiences lies almost completely within the commercial domain (although supported in many cases with knowledge infrastructure).

Successful leisure clusters are therefore based on enterprising, innovative businesses that can take the lead in the development of leisure concepts. This means that attracting new, dynamic enterprises is important for the overall health of the cluster. This has worked well in the case of Disneyland Paris because they have been able to use their own market power to attract other companies (although not other leisure producers). In Brabant there is a need to create an image of the region as a good base for leisure production and consumption. At the moment much business development effort is concentrated on relatively traditional industry and service sectors. The Leisure Boulevard could play an important role in persuading companies to relocate to Midden Brabant.

Knowledge development and transfer

The circulation of knowledge is important for innovation in the leisure sector. In many cases this happens informally in clusters, as individual cluster members learn from each other by observation and informal networking. However, a more rapid and effective circulation of knowledge can only be achieved if knowledge is made more explicit and is made available to a wider range of players. Very often it takes a specific catalyst to enable knowledge transfer systems to be established effectively, as in the case of the IBA and the European Capital of Culture in the Ruhr region. Both of these events created a focus for knowledge creation, a sense of urgency and a need to share information.

However, the main challenge lies in linking knowledge and commercial application in the leisure sector. Current business models are highly reliant on generic knowledge (usually market based) or highly specific company-based knowledge (as in the case of Disney, for example). The innovation platform Zoetermeer, launched for an integrated and all stakeholders including leisure development illustrates an alternative approach. However, whereas in the more traditional industry sectors the R&D function is often well developed, with strong links between knowledge institutions and enterprises (as in the case of science parks, Brainport, etc.), leisure tends to be viewed by policy-makers primarily as a consumption domain with little knowledge content. This is probably related to the predominant view of leisure as ‘fun’, rather than a more holistic view of the function of leisure, which would include the creative, social and cultural roles of leisure as well. There is a need for a more specialised knowledge development organisation in Midden Brabant, along the lines of iTRrovator and Immovate in the Hilversum case. These have the advantage of operating within defined sectors where their nodal function is easily recognised.

There is therefore a need to share information that goes beyond the traditional ‘market information’ normally related to leisure (visitor profile, length of stay, expenditure, etc.) and incorporates a clearer vision of visitor wants and needs. This is also an area where collaborative knowledge creation can be beneficial,

since the wants and needs of visitors usually relate to the generic types of experiences provided by the cluster, rather than the specific products of individual providers.

Collaboration

A region can contain many successful individual leisure enterprises, but this is not sufficient to ensure success or to harness the benefits of clustering. One of the biggest barriers to collaboration is rivalry, which is evident in many of the clusters examined. Rivalry not only affects organisations at the same level in the value chain, but it extends to leisure organisations who wish to extend their operations over a larger range of the value chain (Disney being a classic example).

Again, the creation of a shared agenda is important to stimulate collaboration. At the moment, many functions are deemed to be the preserve of particular players in the cluster, rather than shared problems. This is often the case with transport infrastructure, for example, which is often considered to be the unique function of the public sector. However, solving transport issues has been shown to be vital for the success of clusters, and the solutions to such problems often lie in a combined approach. Hilversum and the Ruhr region both provide examples of how collaboration between different partners can be focussed around specific issues of common interest to the cluster partners.

Furthermore, the profile of the leisure cluster as well as the regional attributes (additional leisure amenities) frequently contributes to intensification of rivalry of commercial stakeholders. In Zoetermeer, where overnight tourism is poorly developed, the motives for making alliances are even weaker among individual attractions.

Rivalry among places (cities, regions etc.) is another hampering factor in an integrated development (particularly in economically depressed areas like theRuhr. In almost all cases one can observe the competition on the administrative scale for new investments that keeps mutual regional alliances especially a case of rhetoric.

Stimulating innovation

A mix of rivalry and collaboration is important in stimulating innovation in the cluster. Competition both from without and within the cluster stimulates enterprises to develop new leisure experiences, and sharing knowledge allows these innovations to spread and be adopted by other firms in the cluster.

A mix of small and large players in the cluster also seems to be a crucial factor. Larger enterprises can act as anchors, attracting consumers and stimulating other producers to locate in the cluster. Larger and smaller enterprises are unlikely to see each other as direct competitors, whereas a group of larger attractions (as in Zoetermeer) will tend to have a high degree of rivalry and may be less inclined to collaborate, particularly in areas of experience innovation.

As the Hilversum case shows, innovation is no longer simply dependent on technology. Media companies and other content providers have become increasingly footloose, and lifestyle factors have become increasingly important

in the location decisions of knowledge workers. Supporting the general quality of life of a region therefore becomes an indirect means of attracting creative people and stimulating innovation.

Balance of power

One of the important elements underpinning the willingness to cooperate within clusters is the perceived balance of power between the players. If there is a single party that dominates the agenda (such as the public sector, which often controls important planning decisions, or Disney, which controls much of the leisure-based activity around its parks), then others are often less willing to contribute resources, leading to skewed development and lack of commitment. If on the other hand a balance between the needs of the actors can be maintained, then collaboration is more likely to occur and there will be more effective circulation of knowledge and innovation.

A successful cluster will tend to have a mix of bottom up and top down dynamics. Most innovation will tend to occur from the network of enterprises in a bottom up fashion, but at the same time strategic, top down control is needed to make sure that the overall development of the cluster proceeds in an effective way. This is particularly important in the case of factor conditions such as infrastructure provision. The public sector should have a strategic role in increasing the accessibility of the cluster, so that the necessary leisure markets can reach the producers, but the enterprises need to generate an attractive leisure proposition that will create the desire to visit the cluster among consumers.

Ambition level

One of the problems with top down clusters is that the ambition level of the project coincides with the administrative boundaries of the initiative-taking authority. This is a clear mis-match in the case of Zoetermeer, where the ‘Big 5’ leisure players have been attracted to the cluster by a local authority concerned to develop the local economy. The local authority sees this as a project which relates to the municipality itself, whereas the commercial operators are much more concerned about the wider position of the city in the Randstad. They are not particularly concerned with the local leisure market. The reverse is true in the Ruhr, where the broad regional remit of the Regionalverband Ruhr is sometimes at odds with more local interests. This also underlines the point that the physical scale of the region is important. Smaller regions, such as Midden Brabant, perhaps have a better chance of creating consensus than larger, more complex regions.

In the case of Paris, however, there is a much clearer fit between the ambitions of Disneyland to establish itself as a leading European tourism destination, and the mix of public authorities involved in the project. Even though the local authorities clearly have a vested interest in developing their local areas, a balance is maintained by the networks of local, regional and even national authorities that have a view of the strategic role of the tourism cluster at national and European level. The knowledge institutions also tend to raise the ambition level of the cluster, since they are used to thinking about projects on a broader, and often transnational basis.

This shows the importance of developing a strategic agenda for the cluster, which goes beyond the individual interests of the different sectors. The public sector has an important role to play here as a relatively neutral player that can bring other cluster actors together around a coherent agenda. Without this kind of stimulus, the ambitions of the different players in the cluster will remain disparate and therefore synergies are unlikely to emerge.

Long-term thinking

The policy cycle for successful leisure projects is often much longer than anticipated by individual actors. This is because the time required to establish the nascent conditions for cluster formation is often very long. The Disney case indicates that planning horizons need to be raised to around 25 years or so, which is the kind of time span necessary for the benefits of major investments to become evident.

Moving from a passive to a dynamic cluster

The key development moment in a successful leisure cluster lies in the transition from a passive to a dynamic cluster. This is not purely a matter of ad-hoc agglomeration, as a large collection of leisure enterprises will not necessarily produce the active knowledge exchange and collaborative action necessary to generate synergies. Neither is it simply a question of top-down direction, because enterprises can be attracted by incentives (as the Disney and Zoetermeer cases show), but they cannot be forced to work together.

What seems to be most important is achieving the right balance between catalytic enterprises and the supporting facilities and networks within the cluster. The Disney case shows clearly that Disney has functioned as an important catalyst for other processes in the region (such as the growth of transport networks, the business park, etc.). But Disney has a very dominant position in the region vis-a-vis other commercial players, which has acted as a brake on further development. Innovations have occurred, but largely as a consequence of individual agreements between Disney and selected partners, which has slowed processes of knowledge exchange. This is now beginning to change with the formation of the tourism cluster in the region, which has partly been possible because of Disney's realisation of the important of the supporting network of companies. The fact that it has taken 20 years and a severe economic crisis to prompt this change of direction indicates how difficult it is to harmonise the agendas of commercial players with the wider needs of the cluster. This is also evident in Zoetermeer and Hilversum.

The Hilversum case also illustrates the problem of reconciling different sectoral interests. TCN has played an important role in organising and managing the media cluster. However, as a real estate developer, TCN is primarily concerned with generating large-scale returns in a relatively short period. This militates against a more balanced programming approach to cluster development. The contrast with the Westergasfabriek in Amsterdam is important here: the local authority there had a much more strategic role in the development of the cultural-creative cluster, which allowed them to strike a deal with a developer for a more balanced development model. This model combined public control over

cultural programming (effectively ensuring the right mix of tenants and production and consumption functions) with private investment in real estate.

These lessons seem to indicate that timing and form of intervention are important. In terms of timing, there needs to be sufficient leisure content to support a viable leisure cluster, with a healthy mix of large and smaller enterprises. This suggests that a certain amount of ad hoc, grass roots growth of the leisure sector is needed before a coherent strategic intervention can be made. The strategy of moving in large leisure enterprises without a supporting network of other leisure provision (as in Zoetermeer and Disney) is likely to produce an uneven pattern of development. It is also important to have a number of key players in place in order to provide a coherent basis for strategy development. The Zoetermeer case indicates that the retro-fitting of the "City of Leisure" concept has not worked well because it was produced as a top-down label rather than an agreed strategic direction.

6.2 Recommendations

Our analysis shows that there is a need to combine several different factors in order to generate a successful leisure cluster. The basic steps required are:

1) Creating the right mix of leisure experiences
2) Moving from a passive to a dynamic leisure environment
3) Broadening the vision
4) Synchronising agendas

Creating the right mix of leisure experiences

Midden Brabant has already gone through an extensive phase of leisure agglomeration, which has so far been a predominantly bottom up, grass roots process. This growth has been stimulated by positive locational factors, such as the availability of land, accessibility and availability of knowledge resources.

In order to strengthen the nascent leisure cluster, there is a need to make the area more attractive to new leisure enterprises who wish to locate in the area (and thereby can strengthen the attractiveness of the area to consumers). This requires action, particularly in increasing the accessibility of the leisure cluster, as this is vital to ensure the market access that is key for successful leisure enterprises. The Zoetermeer and Disney cases clearly show that the major leisure players see location as vital, and for them location close to major markets is the key. Midden Brabant can effectively be moved closer to these markets if accessibility is improved. This implies a key role for the public sector in examining issues of road access and public transport provision.

The planning regime is also an important locational factor. The Netherlands, with its relatively tight spatial planning regime, will find it hard to replicate the

kind of ‘big engine, light steering’ model of development seen in the Paris region. One possible avenue to be explored, however, lies in the region of social innovation. Midden Brabant could position itself as a ‘leisure laboratory’ in which selected development controls are loosened to facilitate location of new leisure enterprises and expansion of existing ones. This is effectively the model that seems to have worked for Disney, since it has a virtual carte blanche in relation to development of the area surround its theme parks. In the case of Midden Brabant, however, such arrangements would need to be created on the basis of mutual agreement, rather than pure market power of the parties involved. This again underlines the important balancing function of the public sector.

Moving from a passive to a dynamic leisure environment

Attracting new leisure enterprises and building the critical mass of leisure experience provision is important. Without the strategy, however, the cluster will not move from being a simple, passive agglomeration of leisure providers into being a dynamic collaborative environment capable of generating synergies and spin-offs for those involved.

There is a need for a clear strategic focus that can bring together the three elements of the triple helix (public sector, enterprises, knowledge institutions) and shape collaboration. The indications are that this needs to be as far as possible a shared agenda that can be embraced by as wide a range of partners as possible. This will mean devising a layered approach to policy and goal setting, which recognises the differing time horizons of public, commercial and knowledge sector partners in terms of the types of returns that can be expected from the formation of a leisure cluster.

Perhaps in the early stages of development there is the need for a broad ‘leisure forum’ that can help bring disparate leisure interests together and help shape a common agenda for the region. This should be convened by the public sector partners, with input from the knowledge institutes and a strong representation from the commercial sector. As well as setting an agenda for leisure development, such a forum could discuss the best vehicles for future development of the leisure agenda (members of existing networks or new organisations/partnerships?).

Broadening the vision

One of the important aspects of leisure clusters that has come to the fore in the current study is the need for long term vision and planning. It is unrealistic to expect that the benefits of clustering will be visible in the short term. There is a need to lengthen the planning horizon over a period of 25 years or so.

Obviously this is a challenge for both public and private partners. Public partners need to show deliverables within the timespan of a mandate and private sector partners need to generate financial returns in the short, medium and long term.

One of the important aspects of this element of cluster development will be working on the positioning of the cluster within national/regional agendas. In a

regional context South East Brabant has a stronger position in technology and industrial innovation, North East Brabant is strong in food and West Brabant in logistics. Midden Brabant has considerable potential in the development of leisure experiences. Perhaps a suitable positioning for the region would lie in the general service sector, with leisure as one core element of this. There are specific areas where experience production can be strengthened, for example in the network of cultural venues (which recent research for Brabant2018 has shown is weakly developed). Accessibility and transport links need to be improved in order to maximise the return from leisure visitors, and particularly the range and quality of accommodation needs to be improved.

The choice of positioning will also affect the discussion about cluster leadership, since a positioning based on generating long leisure-based stays in the region will probably favour a stronger role for tourism actors (although they are probably not well placed to lead leisure innovation at the moment).

Synchronising agendas

One of the means of ensuring that a shared vision is created is the provision of catalysts. The ECOC is a good example of this. By planning for an event over the longer term a space is created that allows different actors to identify their own field of interest as well as shared agendas. The staging of a concrete event (or even the bidding process for an event, which has a deadline as well) can focus the minds of different stakeholders on the need for collaborative action.

Events such as the ECOC increasing act as both catalyst and synchronising mechanism. In order for a region to compete at a large scale (national, European or global) it is important that stakeholders are able to see the big picture and have a sense of urgency about the need to collaborate.

Brabant has tried to instil a sense of urgency by bidding for the European Capital of Culture, although even in times of economic adversity this does not seem to have created sufficient momentum in a relatively prosperous region.

There is a need for an agenda that outlines the potential dangers of the status quo. That pushes the major players into a more proactive stance, and makes the whole region more open to change. This can provide the stimulus needed to generate innovation and collaboration.

Benchmarking could be one means of creating urgency. By finding out where we stand, the strengths and weaknesses of the region become clearer. In areas where there is a disadvantage relative to other regions, the question becomes: how can we catch up? This places renewed emphasis on the knowledge generation capability of the cluster, because this information is not currently available for leisure, only for clusters in general (European Clusters Observatory).

Sharing knowledge

Knowledge of the potential dangers of ‘doing nothing’ is clearly important. But there are a wide range of other issues on which knowledge needs to be generated and shared. These include consumer trends and leisure industry trends. Vrijetijdshuis Brabant currently has a role in collecting and analysing

some of this information, but there is a lack of analytical material which can identify trends and stimulate action. Similarly, Leisure Academy Brabant (LAB) undertakes a wide range research activities, but these are not yet sufficiently focused on the needs of industry. LAB also needs to be more open to a wider range of knowledge institutions, as the main actors are currently limited to Tilburg University and NHTV Breda.

The Academic Workplaces created by LAB provide one potential vehicle for sharing knowledge more effectively with the professional leisure field. The idea of the leisure cluster could also act as a catalyst in itself by bringing different Academic Workplaces together to focus on specific issues of importance to the cluster as a whole, such as different business models in leisure, marketing leisure experiences and content development. At the moment there is no tried and tested model for knowledge development in leisure, and this is one area where Midden Brabant could position itself as an innovative region.

This is also an area of potential international collaboration and leadership. Our contacts with cluster actors indicates that there is a lack of knowledge surrounding leisure and tourism cluster development at present, and people are actively seeking knowledge partnerships in this area.

Structuring collaboration or co-opertition

Without collaboration there is no benefit to clustering for leisure organisations – otherwise they simply share a location. And if the main benefit of the location is easy access to consumer markets, then the leisure enterprises in the region are simply competing for the attention of the same consumers. Collaboration can turn rivalry, which is a zero-sum game, into a more positive approach that can increase the market for all players.

Collaboration on the development of new products, or improved accessibility or image building, can help to increase the total potential market for all concerned. Particularly in the case of leisure experiences, there is a direct incentive to collaborate, because the better the quality and sophistication of the total experience, the more likely the consumer will stay longer and spend more in the region as a whole.

This does not mean, however, that actors in the leisure cluster should only engage in collaborative actions. Increasingly there is a need to strike strategic alliances which combine the core competences of a range of enterprises. However, in rapidly changing markets, the line between collaboration and competition is increasingly vague, and we are moving towards a state of 'co-opertition', in which collaboration and competition can coexist.

There is a role for a coordinating actor in the region whose job it would be to spot opportunities for collective action and to forge new alliances where these are advantageous. The recent meeting of players located along the N261 is an example of how a cluster can create new links which can lead to new opportunities. There is clearly a role here for the Steering Group of the Leisure Boulevard in terms of identifying opportunities and setting strategic agendas which steer the cluster towards these.

Clear, shared objectives

There is a key role for the public sector in setting a strategic direction for the leisure cluster. A strategy needs to be developed in consultation with the leisure industry players and the knowledge institutions, but strategic decisions about the focus of the cluster, models of organisation and management and systems for accountability need to be established in a top down fashion.

The model for developing service-based clusters seen in the Ruhr might be instructive for the leisure cluster in Brabant. They have been able to create a relatively open environment for collaboration by emphasising the importance of broader, regional objectives. It is important to have public sector collaboration in the development of the shared agenda, however, as the objectives identified at regional level have to match the aspirations of local levels of administration as well.

Leisure programming

The concept of programming leisure content and events is increasingly common in large cities, where the public sector often adopts responsibility for managing and/or funding a strategic events programme. Regional programming is less common, but is beginning to be developed in a number of areas in North America and in some projects in Europe (such as the PLURIONET platform linking Luxemburg, Germany and France). Midden Brabant has to opportunity to link together the leisure programming already available in the region, and in particular to coordinate across local authority boundaries and link urban and rural areas. This already happens on an incidental basis (such as during the Incubate Festival), but could be stimulated more strategically to provide a more attractive and comprehensive offer of leisure experiences within and around the cluster.

Although the broad concept of ‘leisure’ might be useful for developing a broad experience programme for the region, some thought should be given to the fit between the leisure label and the needs of consumers. Our case studies indicate that ‘leisure’ in its broadest concept does not always provide a clear enough focus for collaboration. The same may well be true of consumer perceptions of the leisure label, which may need to be broken down into more functional experience realms for marketing and communication purposes. This is the approach adopted in Zoetermeer with the different leisure zones (although with varying success) and in the Ruhr with different cluster concepts.

Evaluating progress

There is a need for an evaluation and monitoring system that can give feedback on the progress of the cluster and its constituent parts.

Monitoring also has the effect of raising awareness. Benchmarking, as noted above, is also a useful tool for agenda setting and ensuring that the different actors are aware of shared challenges.

There is therefore a need to explore the potential for benchmarking and monitoring with regional partners, such as Vrijetijdshuis, het PON and the knowledge institutions.

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Appendix 1 List of interviewees

Mr. Bertrand Ousset, Deputy Managing director in charge of the strategic division of EPAMARNE/EPAFRANCE Marne-la-Vallee / Paris Disneyland-Tourism Cluster

Mrs. Nathalie Fabry, professor and research fellow at the Université Paris-Est Marne-la-Vallée/ Paris Disneyland-Tourism Cluster

Mrs. Marlies Hakvoort, communication manager iMMovator/ Hilversum Media Park

Mr. Rogier van der Groep/ Amsterdam Bureau Research & Statistics Statistiek; PhD research on media in Hilversum & Amsterdam

Mrs. Marieke Hendriks, director iTRovator / Hilversum Media

Mr. Niels Kranenburg, Communicatie en marketing TCN / Media Park Hilversum

Mr. Rien de Vries, director Foundation KIZ (Knowledge economy & Innovation Zoetermeer)

Mr. Dick van Harten , policy advisor Municipality of Zoetermeer

Mr. Roel van Leeuwe, sales & marketing Dutch Water Dreams / Zoetermeer

Mr. Hans Doeve, projectleider OZON, Network organisation for enterpreneurs in Zoetermeer

Mr. Laurens Otterloo, marketing & communication Ayers Rock / Zoetermeer

Mr. Konrad Ruprecht, RAG Montan Immobilien/ Ruhr area

Mr. Axel Biermann, general manager Ruhr Tourismus GmbH

Appendix 2: Interview items

1. De genoemde voorwaarden/factoren voor leisure clusters

1. **Business Development/ producten en diensten**
   Projecten gebaseerd op economische bedrijvigheid en business modellen
   Een goede mix van productie- en consumptieactiviteiten;
   Geïntegreerde en multidisciplinaire inhoud;
   Gevarieerd en onderscheidend aanbod, aanvullende diensten en services die de consumentenexperiences compleet maken

2. Krachtige **samenwerking 3O's** (creëren en pakken van kansen) in plaats van elkaar beconcurreren (?):
   Samenwerking diverse partners in de productie van leisure experiences→ creëren synergie, innovatie en ''social innovation'' (nieuwe zakenmodellen en mechanismen)
   Netwerkvorming (ruimtelijk en digital)
   Sociale netwerken (geografische dichtbijheid/face-to-face is belangrijk)

3. **Kennisinfrastructuur** en kennis als bron: interactieve kennisdeling onder betrokken actoren (3Os) →waardenetwerk en toegevoegde waarde

4. Toegankelijkheid en transparantie/**zichtbaarheid** cluster

5. **Kernfactoren vestigingsplaats** (place & buzz).
   Place: bron van lokale kennis (voor leisureproductie en storytelling), vermaak, vervoer, consumentencontact;
   Een of meerdere (grotere) leisure ondernemingen als ankerrol/magneetfunctie (voor aantrekken consumenten en andere bedrijven)
   Infrastructuur en ruimtelijke bestemming, veiligheid en leefbaarheid.

6. **Cluster Development**
   Raamwerk,doelstellingen, management/organisatie
   Marketing en promotie voor de regio (regionale branding): het creëren van uniciteit op basis van de locatie; effectiviteit storytelling/thematisering bestemmingsplaats (bundelen karakteristieke locatiegebonden verhalen door bedrijven)

7. **Beleidsontwikkeling** (integraal beleid bij diverse overheidslagen)

8. Zich **betrokken** voelen in het cluster & zich identificeren met het ''verhaal van de locatie'' (actoren)

9. De te vervullen **rollen en taken** / stakeholder-type (studie Greg vanaf pagina 21)

10. Door zich aansluitende **potentiële partners**: effectievere marketingstrategieën (vergroting aantrekkingskracht bezoekers en bedrijvigheid)

2.Voorlopige kernvragen

1. ***Wat zit er in het cluster? →Door welke activiteiten, functies en profiel kan het cluster gekarakteriseerd worden (de keten en de sectoren)?***

2. ***Wat maakt het een cluster? →Waarom zitten ondernemingen in elkaars nabijheid en wat hebben ze met elkaar gemeen? (de drijfveren achter clustervorming) In welke aspecten zijn de deelnemers aan elkaar gerelateerd?***

3. ***Clustermanagement →Op welke wijze wordt het cluster georganiseerd en gemanaged? (vorm, door wie, taken, enz.)?***

Conclusie opmaken voor: uitkomsten, succes- en faalfactoren

3.Subvragen/interviewvragen:

Drijvende krachten

1. Welke zijn de meest relevante drijfveren van clustervorming?

2. Om welke redenen zijn ondernemers in het cluster/de regio gevestigd?

Actoren

3. Wie zijn de relevante (soorten) stakeholders in het cluster?

Ambities/doelen

4. Wat zijn de (gedeelde en individuele) verwachtingen, ambities en motieven t.o.v. de clusterontwikkeling en activiteiten?

5. Wat wordt als succes beschouwd en welke elementen zijn daarvoor onmisbaar?

Onderlinge samenwerking/ business development

6. In welke mate, om welke motieven en tussen welke actoren vindt samenwerking plaats in het cluster?

7. In hoeverre wordt er samengewerkt in het cluster/de regio met (nieuwe) partijen vanuit andere sectoren voor het ontwikkelen van nieuwe zakenmodellen/combinaties (aan elkaar aanvullende producten/diensten/activiteiten)?

8. In welke mate, door welke drijffactoren en door welke processen komen (vermarkte) innovatie**s** in het cluster tot stand? (voorbeelden?)

Externe relaties

9. Welke soorten relaties op welke ruimtelijke schaal hebben de organisaties buiten het cluster?

Rivaliteit (intern en extern)

10. In hoeverre bestaat er rivaliteit in het cluster/de regio en wat betekent dit voor de clusterontwikkeling?

11. Wat is de kracht/positie van het cluster ten opzichte van (inter)nationale concurrenten?

Rollen: kennis en overheid

12. Wat is/was de rol van kennisinstellingen en overheden in de clusterontwikkeling?

Clustermanagement

13. In hoeverre bestaat er een proactief clustermanagement en op welke manieren wordt het georganiseerd ten opzichte van uitvoerende actoren, functies en doelstellingen?

Betrokkenheid

14. In welke mate zijn de stakeholders bewust van het bestaan van het cluster en betrokken in de clusterontwikkeling?

Uitkomsten/huidige positie

. 13. Wat zijn de voordelen en de meerwaarde van clusterparticipatie voor zowel de deelnemende ondernemingen als voor het gehele cluster? Welke synergie-effecten treden op?

14. In hoeverre en door welke factoren is het cluster in de huidige fase succesvol? (In hoeverre zijn de doelstellingen bereikt?)

15. Is er een monitoring-systeem in het leven geroepen voor de meting van effecten/resultaten of een onderzoek naar de uitkomsten uitgevoerd? (zo ja, wat waren de resultaten?)

16. Wat waren/zijn de bedreigingen/uitdagingen/negatieve zijeffecten in de clusterontwikkeling of voor de participerende ondernemingen en welke factoren dragen hieraan bij?

17. Welke maatregelen, acties of omstandigheden zouden deze belemmeringen wegnemen?