

CREATIVE INDUSTRIES IN SPATIAL PERSPECTIVE IN THE OLD INDUSTRIAL MORAVIAN-SILESIA REGION

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Introduction

According to Scott [72] "cultural products of all sorts constitute a constantly increasing share of the output of modern capitalism, and cultural-products sectors represent some of the most dynamic growth industries in the world at the present time" (p.3). The main reason can be traced in the ever increasing intensity of cultural and economic ties [43]. This convergence is the most distinctively demonstrated by the advertising because it functionally represents both culture and economy [83]. As Lash and Urry [49] argue, the main part of the value added of products is represented by a symbolic and aesthetic value, in other words symbols play a more important role in their production than material objects do and the aesthetic and symbolic dimensions of goods and services are growing in importance. The aesthetic, symbolic and expressive value of creative industry goods is more important than their real value [17]. Other processes strengthening the development of creative industries are among others the change of offer and change of consumer patterns (individualization, social distinction) [34]. The growing importance of creative industries has logically surfaced also in professional interest in the area of local and regional development [58, 62, 41]. Close attention is paid to questions of spatial organization of creative industries as well as possibilities of its stimulation in the interest of strengthening the competitive position of individual areas. In connection with creative industries are most frequently mentioned the world cities [45] in economically powerful regions. Highlighting these "hubs in the space of flows" [10] has its rightful logic, as these hubs offer suitable economic, power-political, and social conditions for creative industries' development [25, 60, 16]. A little less attention is usually paid to the role and spatial organization of the creative industries in diverse geographical conditions,

such as old industrial or rural regions. Although this is a dynamic sector with a high growth potential, its benefits have not been adequately reflected, which is also documented by the fact this sector has not been unambiguously defined until now (2009). The reasons can be seen in a relatively minor importance of creative industries in the Czech economy and particularly in generally weak databases in the services and industrial sectors [30], which limits the empirical research in this field. Among surveys carried out in the Czech Republic, we can mention the inspiring work of the Theatre Institute (2008) [76, 44, 57], as well as the theoretical work of Cikánek [12]. The creative industries under the conditions of the Czech Republic practically imitate the trends from the developed countries; therefore its strongest representation is in Prague, which belongs among the so-called gamma world cities [5]. In other regions and cities of the Czech Republic, the creative industries are represented less significantly. The presented text is necessary to be perceived as an opening of a discussion concerning the issue of creative industries and its spatial organizations principles under conditions of the Czech Republic on an example of the Moravian-Silesian Region, in whose framework we attempted to verify by means of descriptive analysis if (a) creative industries concentration occurs even in conditions of an old industrial region with peripheral location, (b) to what extent is the creation (evolution) of companies dependent on local conditions, and (c) how much impact does the specific character of the region show on the size structure and age of companies.

1. Definition and Specification of Creative Industries

Creative industries (CI) represent a highly heterogeneous complex and its specification or defi-

nition is connected with a number of ambiguities and complications [64, 47]. Wide range of terms for creative industries appears, such as cultural products, creative economy, multimedia, or cultural economy, whereas in this paper we perceive these terms as synonyms. As an outline of definition specification, we can be stemming from the work Gibson and Kong [21], which presents these basic approaches: (a) sectoral approach, (b) labour market and organization of production (c) creative index.

(a) The first approach emphasizes the symbolic dimension of products. As a good example of this approach we can consider the definition of Department for Culture Media and Sport: "activities which have their origin in individual creativity, skill and talent, and which have the potential for wealth and job creation through the generation and exploitation of intellectual property with the key sectors being: advertising, architecture, the art and antiques market, crafts, design, designer fashion, film, interactive leisure software, music, the performing arts, publishing, software and television and radio" [14, 65] defines cultural production as a process of contextually interconnected cultural production chain. This definition includes: (1) Content origination – as generation of new ideas. (2) Exchange – as relationship to the audience or marketplace. (3) Reproduction – as cultural industry production. (4) Manufacturing inputs – which means that ideas must be turned into products and prototypes, through using tools and materials for cultural production. (5) Education and critique as training and the discourse in critical ideas. (6) Archiving - maintaining "memory" of cultural forms. A big problem concerning the sectoral approach is its ignoring of a number of sectors whose competitiveness is based on the exploitation of intellectual property and creativity [15]. Another disputable aspect is the very question of distinguishing between high and low art.

(b) "Labour market and organization of production" approach. Creative economy is a forerunner of the restructuring of social and economic production forms [45]. Companies in creative industries are a part of a highly volatile market with high risk levels (market change and new trends in fashion) and of hypercompetition reflected in high dynamics of the process of new companies being created and the old ones closing down.

The economic structure is composed of a high number of micro and small flexible and specialised companies competing with big global players in the given sector [66]. In some cases companies (mainly multimedia), in order to eliminate risks, offer a wider product portfolio the structure of which can be changed in a flexible way [75]. The economic structure is "bifurcated" [67] and companies are integrated in locally decentralized and heterarchic networks [24]. Labour markets in these sectors are extremely competitive with a high number of employees working part-time [73] and labour force (mainly highly qualified) is organized within the framework of temporary projects [25]. One should bear in mind that the cultural industry represents a group of industries with their own specific features, different strategies [66], as well as ways of project organization [26]. The above mentioned characterization is necessary to be perceived in a spatially differentiated perspective. Labour market and production organization, or dynamics of the sector differs in dependence on character of the region or its location, because in such regions on one hand emerge less companies, but on the other hand their lifetime of survival is usually on average higher [67, 86] and the labour market flexibility is lower.

(c) "Creative index" approach. Creativity is growing in importance across sectors. Even a new social group can be identified which at present (year 2005) comprises 38.8 million employees in the USA representing 30% of the total productive workforce [19]. Innovation and education have become crucial for economic growth irrespective of sectors [18]. A drawback of this approach is its reductionism resulting in the introduction of inaccurate indices (such as the gay index) that omit the complexity of the cultural environment. At the same time, a broad definition of creativity displays parameters of a fuzzy concept [53].

A further approach to creative industries may be the definition in the context of a knowledge based approach [77]. Within this symbolic knowledge base innovation is a result of a new combination of an existing knowledge, and rarely of new technical methods or of new aesthetic quality, with products being of a very temporary quality. Flexible project organisation and knowledge and know-how creation via learning by doing in the job or learning by interacting are dominant [31].

It is also necessary to take into consideration the very character of the creative industries' products. Ebert and Kunzmann [16] distinguish between creative industries sectors oriented on market (e.g. advertising, printing, design), and sectors oriented on audience, e.g. theatre, cinema, or museums. Various character of the end users is then logically projected both into the spatial localization, i.e. closer to the market (customers) or respectively closer to the audience, as well as into organizational structures of companies.

2. Creative Industries in Spatial Perspective

The creative industries are concentrated mainly into urban areas [38, 59], creating in them specialized clusters [71, 88]. This generally high tendency towards spatial concentration can be explained by the so-called urbanization effects, which are counterbalancing the higher transport and operational costs of companies [50]. While the localization effects are generated by companies with similar production, the urbanization effects emerge from interaction between different sectors and activities [2]. Among the major urbanization effects can be mentioned:

Proximity of customers. CI companies produce in most cases (non-routine) one-off products or services, whose final shape is formed in close interaction with customers [39]. This interaction between the knowledge originators, clients, and companies require short geographical distance allowing for higher frequency of face-to-face contacts, which is for many reasons necessary due to the nature of CI production, particularly during the project initial and final phases [8,70]. Geographical proximity of a wider circle of customers improves the position of companies when winning orders, which reduces the risks for companies in this highly volatile sector [75]. At the same time, the customers can more rapidly choose their suppliers than in e.g. peripheral areas. Spatial proximity can also have negative impacts as illustrated by Bathelt and Jentsch [4] on the example of Leipzig - the excessive orientation on local market can lead to stagnation accelerated by too strong affiliations between suppliers and customers. Therefore, the companies must aim for creating extra-regional distribution channels.

Proximity of suppliers. Products and services are created practically exclusively through time-

-limited projects which require highly specialized knowledge often going beyond the company's portfolio. Spatial proximity of suppliers enables on one hand higher network redundancy supporting the ability of flexible adaptation in case of termination of existing business relations [28], and on the other hand preventing the so-called "paradox of embeddedness" [87]. Simultaneously, the geographical proximity can (but does not have to) contribute to creation of social, cognitive, or organizational proximity, or respectively to creation of the so-called "untraded interdependencies" [79] among companies. Concentration of companies does not necessarily have to be based only on cooperation, but also on competition and rivalry [24,52].

Access to information. Success of companies depends to a large extent on the ability to permanently renew information and knowledge, while the individual actors can acquire the information by means of the so-called local buzz. This local buzz is based on specific information and communication ecology created by regular face-to-face communication of individuals and companies within the same sector, area, or region. The key factor is represented by the fact that participation on local buzz is not connected with any special investments [3], which is crucial particularly for newly emerging companies. Grabher [25] uses in the context of information ecology the term "noise", by which the companies are surrounded and which they use not only for monitoring the competitors, but primarily for acquiring "concoction of rumours, impressions, recommendations, trade folklore, strategic misinformation."

Existence of wide market of highly qualified labour force. Florida [19] even argues against the prevailing opinion that clusters are formed on the grounds of agglomeration advantages resulting from geographical proximity of companies, and claims that the clustering takes place in compliance with existence of qualified human resources which create the principal comparative advantage – knowledge [19]. However, the concentration of companies on the basis of existence of wide market of qualified labour force is generally respected [75]. At the same time, it is necessary to mention that the spatial concentration enables emergence of the so-called epistemological (knowledge) communities, which "transform noise into patterns of signal" [25].

Creative milieu. According to Florida [18] the creative milieu represents a habitat in which the tightly interconnected technological, entrepreneurial and artistic (cultural) creativity are stimulated. Such specific social and cultural environment attracts new creative people of all types and supports a dynamic transfer of knowledge and ideas (p. 55). There are two major (though not sufficient) aspects of a creative environment: concentration and diversity. Concentration can be understood as stimulation and acceleration of knowledge exchange among a high number of people concentrated in a specific area with a creative environment [22]. However, the term concentration does not imply quantity, but rather frequency and quality of interaction. The term diversity refers, mainly according to Jacobs [37], to structures, knowledge or people's activities as well as to city projects and city functions. City environment offers many opportunities for people to meet and exchange information, knowledge, ideas and seek innovation. The role of cafés, clubs or parks was dealt with by Oldenburg [61]. He uses the term „third places“, which refers to all places in a city milieu that enable informal encounter that stimulates communication and interaction. From his point of view home is the first dimension and work is the second dimension. The term “third places” comprises cafés, restaurants and other public places that are located in proximity to one's home or work. The third dimension plays a key role especially in creative industries, as creative entrepreneurs and their employees participate in the creation of such creative environment. In order to test the quality and the communicative or symbolic value of their intangible product, they have to introduce their products in the first line on an “informal market” represented by galleries, clubs, exhibitions or fashion shows [36]. The places of interaction (restaurants, bars, cafés, galleries, etc.) form the basis for both the long-term and temporary cooperation [42]. The main aspect is the fact that milieu ceases to be a mere positive externality in the context of creative industries and becomes an integral part of project ecology [27]. Creative milieu is present in urban areas with a high symbolic and aesthetic quality. Creativity can be stimulated not only by social relationships but also by means of physical environment and especially by its aesthetic [35] and symbolic value [15].

The mentioned urbanization effects surface in different degree both from the spatial perspective and the perspective of individual sectors. This is particularly due to the reason that the creative industries include strictly private companies (e.g. advertising) as well as companies oriented on public service (e.g. activities of libraries, public archives, museums, and other cultural facilities), which means that the firstly mentioned companies localize themselves on the basis of maximizing the profit, while the latter group on maximizing the utility of public service. Parallel logic also applies to the production cycle [46], as certain sectors (e.g. press) have various spatial preferences in relation to the age of the production cycle.

3. Creative Industries in Conditions of Old Industrial Areas

Old industrial areas represent a specific type of problem regions [85]. They were built on dominant industrial tradition and experienced a dynamic economic growth from approximately 1890s to the 1960s. Since the 1970s, these regions have experienced big problems with the adaptation to the post-Fordist system of production, or more precisely, they have either lost the ability of economic regeneration or the process of regeneration has not yet started [84]. The regions' reduced ability of adaptation tends to be caused by the strong negative path dependency [54] and from it stemming existence of functional, cognitive, and political lock-in [32], which limited the region's ability for “building the capacities for reflexive collective action” [79], which led to the fact that these regions got into the “trap of rigid specialization” [23]. Naturally, it is also necessary to mention the structural characteristics, such as dominant share of large companies in capital-intensive sectors at the end of production cycle [9], and low share of small and medium sized enterprises [1], or generally low ratio of development soft factors' quality [68]. Apart from this, the new sectors emerge particularly in regions which have a certain room for “windows of locational opportunity” [80], and as already presented Hall and Castell [11], brand new sectors (e.g. film industry, biotechnologies) of economy emerged mainly in regions without industrial history. Tödling and Wanzenböck [86] demonstrate on the example of Austria that old industrial regions

show low intensity of creation of new companies. Companies in these areas are characterized by the low educational level of entrepreneurs and their limited managerial experience. This negative situation is attributed to the strongly negative socio-economic structures formed by the long-term development. Stemming from the above mentioned facts we can deduce that the development of creative industries in the context of old industrial regions is markedly limited; but in spite of these barriers there exist industrial cities, where despite the "inimical milieu" occurred the development of creative industries [74]. Logically, there arises question of how the creative industries can contribute to regeneration of old industrial regions. In principle, we can distinguish two basic benefits. Firstly, they can assist by means of the so-called "spill-across" [20] to a higher innovativeness of local production systems and contribute to their essential diversification, which represents a significant precondition for overall competitiveness of regions [6]. Simultaneously, the newly created jobs can substitute the lost jobs in traditional sectors. The second benefit is then in positive impact on regeneration of physical, functional, and social structure of urban areas in these regions [48, 68].

4. Moravian-Silesian Region as an Old Industrial Area

The area of interest for our empirical research is located in the Moravian-Silesian Region (NUTS IV) in the northeast part of the Czech Republic bordering Poland and Slovakia. The whole area of the region is 5,427 km² and represents 7% of the national territory. The population of the region is 1,250,255 inhabitants, 12% of the total population of the Czech Republic [CZSO, 2008]. The Moravian-Silesian Region (MSR) represents a classical old industrial region [81] of peripheral character, in particular in relation to western markets [69]. The core of the region is formed by the poly-centric agglomeration of Ostrava [82], surrounded by two rural sub-regions (Beskydy and Jeseníky). The transformation process (approximately 1990/93-2003) brought about a decline in the region's relative importance in the framework of national economy of the Czech Republic (generally about the situation in the CR) [40]. Nevertheless, the unemployment rate was relatively low due to hidden aid granted to a number of enterprises

by state banks through soft loans in the so-called bank socialism. The crisis of the region deepened in 1997, the year of culmination of the overall economic recession of the country. There has been a gradual economic recovery in the region since 2004. Positive development trajectory of the region reflecting itself in the decrease of unemployment, growth of regional GDP, or growth of real estate prices was disrupted by the world economic crisis which struck the region significantly. The decrease of economic activity in the region can be documented by the interannual growth of unemployment from 8.3 % (April 2008) to 11.1 % (April 2009), in the process of which the recovery of the labour market can be only hardly expected in the foreseeable future. The traditional sectors are among the most struck sectors in the region, which can in the future increase the demand for new "sectors", such as e.g. creative industries.

5. Research methodology

For the needs of empirical research in the region, we made use particularly of the sectoral approach; however, for the purposes of wider explanation, we also partially used the organization of production approach. Despite the fact that the software is also used to be classified among creative industries, we did not include it into the study sample, as it represents the synthetic and not only symbolic knowledge base, including different project organization [26]. Other approaches to studying the creative industries in the territory of Moravian-Silesian Region (MSR) have a significantly limited information capability, and possibility of their quantification is limited by the existing databases as well as by the methods used for this paper. As a principal source of data, we utilized the secondary information from the Register of Economic Subjects (RES) [13] and the creative industries were defined by the categories CZ-NACE 22, 74 and 92. At the same time, it is necessary to mention that we worked with the CZ-NACE classification, since the harmonization with NACE had not been fully implemented in the time of the empirical research. Relating to the theoretical part of the paper, we did not limit ourselves only to spatial distribution of creative industries companies in the Moravian-Silesian Region, but we also narrowly focused on concentration tendencies at lower hierarchical levels. Specifically, we focused on the core area of Ostrava agglomeration, created by the city of Ostrava, as well as the district

Moravská Ostrava – Přívoz [56], which forms its very core [55]. The subject of interest was to register the intensity of creative industries concentration as a sector, as well as concentration tendencies of individual branches of creative industries. In spite of the limited possibilities of the data base, we attempted to provide partial contextual explanation of evolution of creative industries companies' emergence, as the localization itself does not explain the social, cultural, and economic processes on whose basis the spatial organization is established. For the needs of outlining the explanation, data concerning the establishment and closing down of companies, recorded in the RES database, were used. The analysis of the size structure was based on the categories of organizations according to the number of their employees used by the Czech statistical office (CZSO) (e.g. record code 110, 120, etc.). The length of operation of creative industries companies on the regional market was registered also by means of the data recorded in RES database.

6. Creative industries in Moravian-Silesian region

According to the data in Register of Economic Subjects [13], there were in the second quarter

of 2008, according to our specification, about 1,185 creative industries companies on the territory of the Moravian-Silesian Region (see Tab. 1). From the viewpoint of individual sectors, there was a markedly predominant number of companies dealing with architectonic and engineering activities and designing (480). The high share of companies in this sector can be associated with the strong industrial and technical tradition of the region, as well as with the process of region's revitalization based predominately on the reindustrialization process [78]. At this point, it is necessary to remark that activities of these companies are generally summarized as industrial design. If we take into consideration until now relatively weak vertical disintegration of industrial companies, where majority of production is still integrated (the so-called "in house"), then this sector would even increase its share. The second largest share in representation displayed companies realizing activities in the field of advertising (315); in this case it is a practically new branch without wider historical foundations. The third with largest share of representation were the sectors united under CZ-NACE 22, i.e. publishing houses, press and reproduction of recorded media (in the table divided into 22.1, 22.2, 22.3). The

Tab. 1: Nominal representation of CI companies in MSR

Codes	CZ-NACE	Quantity
22.1	Publishing, printing and reproduction of recorded media	24
22.2	Printing and service activities related to printing	109
22.3	Reproduction of recorded media	9
74.1	Other business activities	22
74.2	Architectural and engineering activities and related technical consultancy	480
74.4	Advertising	315
74.8	Miscellaneous business activities n.e.c	31
92.1	Recreational, cultural and sporting activities	24
92.2	Radio and television activities	6
92.3	Other entertainment activities	125
92.4	News agency activities	1
92.5	Library, archives, museums and other cultural activities	39
Total		1185

Source of data: CZSO. 2008. Register of Economic Subjects (RES). [CD ROM]. [cit. 10. 10. 2010].

number of 142 companies reflects a long tradition of this sector (typically labelled as Printing industry) in the region [33], being on the third spot in importance after Prague and Central Bohemia Region, and its share in employment oscillates around 7 % [56]. In a strong position are also artistic and entertainment activities (125); this number reflects the high number of inhabitants in the region, but not being an economic (production) base of the region.

A closer look on the spatial distribution of companies in the framework of the region in relation to individual places of residence provides the following outputs. The highest number of companies, i.e. 599 (51.55 %) is concentrated in Ostrava, while the biggest share reaches the core of the city of Ostrava with the total count of 259 companies, which is 21.86 % of MSR, or respectively 43.23 % in the framework of Ostrava itself. The second largest number of companies is situated on the territory of cities of Opava with 77 companies (6.57 %) and Frydek-Mistek (62). Low number of companies in larger cities of the Moravian-Silesian Region located in the hinterland of Ostrava, such as Karviná (19), Orlová (15), or Bohumin (3), comparable to the number of companies in peripheral cities such as Bruntál (15) or Krnov (18), seems to be quite interesting. With relatively large cities, the low number of companies can be explained by the proximity of the dominant centre; however, for example the low number in the case of Bohumin would deserve a deeper

analysis, because the existence of only 3 companies is rather striking.

As the Tab. 2 shows, the highest share of spatial concentration shows the production and distribution of films. The high concentration share is caused primarily by the existence of the Czech Television branch in Ostrava, as practically the only large company, to which other companies in the region are linked. Advertising activities have also a high concentration ratio, where the share of companies concentrated in Ostrava is over 55 %. In the framework of this sector becomes apparent the dominant position of the city core of Ostrava not only within the city, but even within the whole region. An important role plays here the presence of main regional customers, as well as the presence of suppliers. Practically identical is the share of concentration on the regional level for the sector of architectonic and engineering activities; nevertheless, the concentration within the core in relation to the region is lower. It is necessary to mention that in both sectors prevail micro-companies (see below), with which their increased concentration reduces the risk of their demise. It is also possible to suppose that the high ratio of concentration influences the environment, as the city core comprises of a mixture of block buildings from 19th and 20th century with relatively high symbolic and aesthetic value and varied functional mix (bars, cafés, etc.). Quantifiable factors such as generally lower prices of office space in older buildings than in new buildings

Tab. 2: Concentration of companies in the framework of MSK

CZ-NACE	Total number of companies MSR	Ostrava	Core in MSR	Core in Ostrava
Architectonic and engineering activities etc, and related	480	55,63 %	20,63 %	37,01 %
Advertising activities	315	55,87 %	27,62 %	49,43 %
Artistic activities	125	31,20 %	14,40 %	35,89 %
Printing and related activities	109	49,95 %	17,43 %	39,58 %
Miscellaneous business activities n.e.c.	31	45,16 %	22,58 %	50 %
Production and distribution of films	24	75 %	29,17 %	38,89 %
Publishing	24	41,17 %	29,17 %	50 %

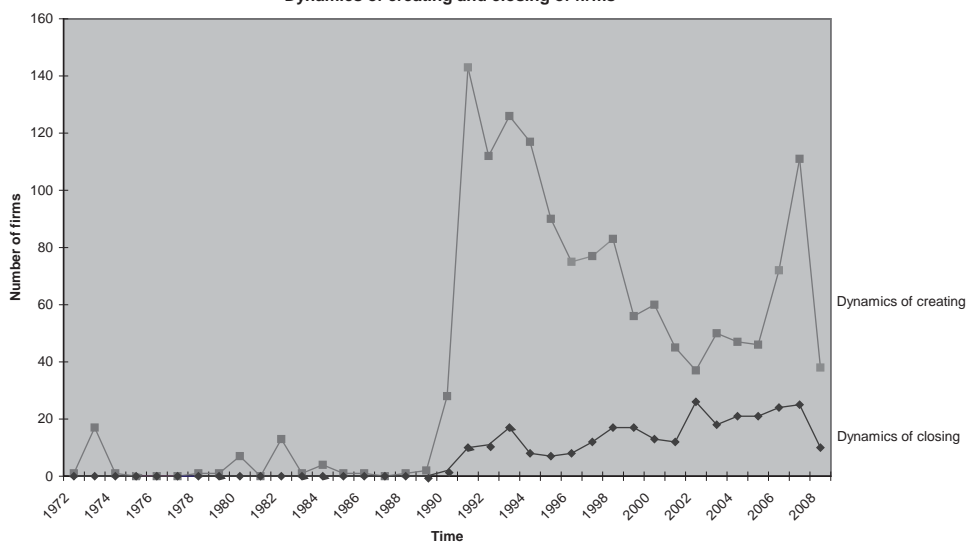
Source of data: CZSO. 2008. Register of Economic Subjects (RES). [CD ROM]. [cit. 10. 10. 2010].

and relatively good transport accessibility also cannot be omitted. On an example of printing and activities related to printing, where is also a high concentration tendency towards the city of Ostrava, we can seek for an explanation just in the later phase of the production cycle. These activities are predominately an industrial production, specific for the increased demands for production space. A proof of the de-concentration tendencies may be the construction of printing works of Ringier company in an industrial zone Hrabová on the city's periphery. Relatively low share of concentration then show on the contrary artistic activities, which is caused by the fact that these are oriented on audience, and therefore the distribution is relatively symmetric in the framework of the region due to covering the demand (in other words, these correspond more to generally lower concentration of inhabitants than companies).

To record the dynamics of creating and closing companies we included in the studied sample even companies which have already stopped their activities. From the total of 279 closed companies 51.67% of them were closed down in Ostrava, and 31.89% in the core itself. From the perspective of size structure of the closed companies (however, 92 companies did not provide the number of employees) from the overall sam-

ple, the most closed companies were in the size category 110 (i.e. without employees) (39.04%), followed by the companies of category 120 (1-5 employees) (27.81%). Excluding the size category 210 (10-19 employees) which had share of 11.76% on the total number of closed companies, the share of other categories did not exceed 5%. Average age of the closed companies was approximately 8.5 years, which means that these were stabilized companies, even in the highly risky sectors such as advertising activities (average age of 8.9 years). Spatial and structural analysis of the closed companies shows that the absolute majority of companies were closed down in Ostrava. Uncertainty and instability of the creative industries is documented by the 74.68% share of micro-companies from the total number of closed companies. From the viewpoint of time, the most critical was the year 2002 in which 26 companies were closed down and the lowest number of new firms were established (see Fig. 1). The highest number of companies was created in 1991 (143), in the process of which negatively surfaced the unknowingness of the market and low level of know-how on the high share of closed companies (54). Nominal growth continued until 1994, resulting in creation of 117 companies in this period. This significant increase in creation of companies

Fig. 1: Dynamics of creative industries companies in MSR
Dynamics of creating and closing of firms



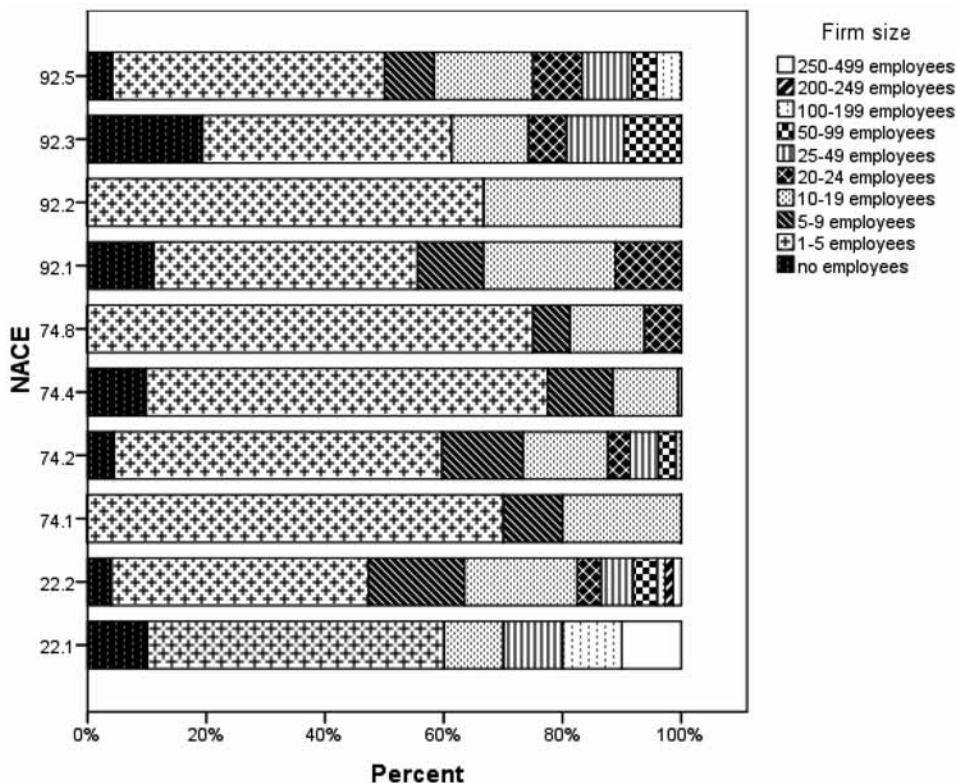
Source of data: CZSO. 2008. Register of Economic Subjects (RES) [CD ROM]. [cit. 10. 10. 2010].

can be put into connection with the “after-revolution” euphoria and coming of the free market. Nevertheless, since 1995, there was a gradual decrease of new companies’ creation. The lowest number of companies was created between 2001 and 2003, when only 132 companies were established (less than in year 1991), whereas the absolutely lowest number of companies (37) was created in 2002. Positive turn occurred only in 2006 and 2007, when 72, respectively 111, companies emerged. Then, in the first two quarters of 2008, 38 companies were established. Evolution of new companies’ creation into a large extent reflects the economic development of the region, which is documented by the decrease of regional GDP compared to national average between years 2001 and 2003. An interesting finding is the fact that in intensity of creation of new companies, we can observe certain lagging

behind the economic recovery of 2004, because a significant increase in number of companies occurred only in 2007. Strong sensibility of the creative industries to the state of regional economy implies two major risks. Strong orientation on regional market limits the growth potential of the sector and increases the risk of emergence of the so-called overembeddedness. It can also be assumed that the economic crisis will have negative impact on development of creative industries in the MSR, as it already happened in the past.

From the total number of 1,185 companies, we can study the size category only with 696 companies, as the rest of companies did not state the number of their employees. In the limited sample of creative industries on the territory of the Moravian-Silesian Region dominate micro-companies with up to 10 employees (73.13%) and the share of small and medium enterprises

Fig. 2: Size structure of creative industries companies in MSR by sectors

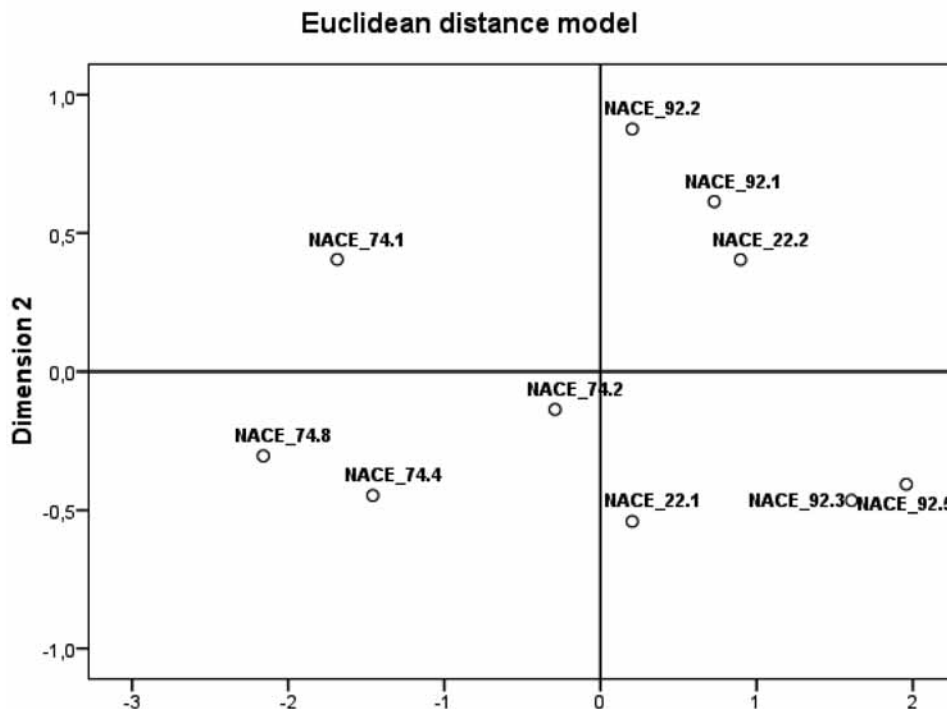


Source of data: CZSO. 2008. Register of Economic Subjects (RES). [CD ROM]. [cit. 10. 10. 2010].
 (for more information on the sectors, see Tab. 1, we excluded categories 22.3, 92.4 – small amount of firms)

is no fewer than 94.68%. In the framework of categories of organizations according to the number of employees, the most represented (with more than 10%) are companies with 1-5 employees (55.30%), while among other categories we can trace down a more significant share with companies of size category 10-19 employees (13.9%) and category 5-9 (11.5%). Analysis of an internal structure of individual sectors of creative industries provides the following information. Structure within architectonic and engineering activities imitates from a large part the structure of the whole sector, as the majority share have the companies in the size category of 1-5 employees (55.22%), and representation of companies with over 50 employees amounts only to 3.9%. As for advertising activities the share of companies of size category 1-5 goes as far as 67.60% and companies with over 50 employees are not represented at all. Printing

and related activities have from the three main sectors the lowest share of companies in the size category 1-5 (42.7%) on one hand, but simultaneously also a bigger share of companies with over 50 employees (7.9%), which again corresponds with the tradition and maturity of the sector. The more detailed view on other sectors is contained in the Graph 2 (Fig. 2). The comparative evaluation of size categories is provided in the Graph 3 which demonstrates similarities and differences of internal size structures between individual sectors. Except for printing and publishing we can trace down concentration of the related CZ-NACE in individual quadrants. This graph illustrates the similarity of organizational structure of production in sectors oriented both on market (advertising, photography, industrial design) and on audience. The introduced overall structure of companies is to a certain extent analogical to the empirical studies carried out on

Fig. 3: Internal structure of organizations' categories according to number of employees of creative industries companies in MSR by sectors



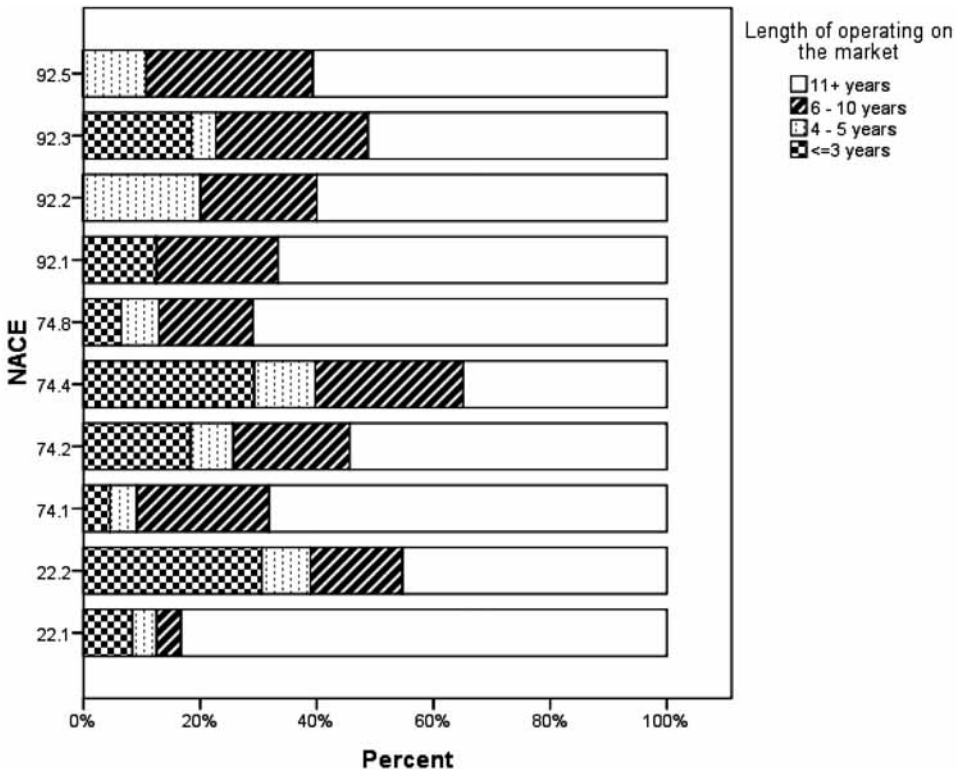
Source of data: CZSO. 2008. Register of Economic Subjects (RES). [CD ROM]. [cit. 10. 10. 2010].
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this topic, with the difference that in the region are not located any exclusive actors with multi-national character (the structure is not bifurcated), which is not surprising with regard to the vertical and horizontal location of the region or its structure.

Attention was paid to also to the age of creative industries companies in order to attempt to record the duration of companies' operation in the region in relation to the high volatility of the whole industry. Average age of companies in the region amounts to approximately 9.2 years, the oldest companies operating in the publishing sector (13 years), and on the contrary youngest are in the sector of reproduction of recorded media (7.1 years). Companies in the sector of advertising activities are also of relatively below-average age (7.4 years), and surprisingly even in the sector of printing (8.4 years). For more detailed information concerning

individual sectors, see Graph 4. If we compare the length of operation of existing and closed companies we can observe that relatively high age of closed companies on one hand, and high age of existing companies does not correspond too much with the generally supported high dynamics in relation to creation and closing of companies in this industry. However, it is also necessary to take into consideration several regionally differentiated factors. One is the peripheral location of the region, particularly in relation to the western markets; fewer companies are usually established in these regions, but their period of survival tends to be longer. Further on, it is the rigidity of a regional market which creates structural barriers against creation of new companies, non-existence of innovations support infrastructure, non-existence of institutional support from the side of regional institutions, and lower regional demand.

Fig. 4: Length of creative industries companies operation in MSR by sectors



Source of data: CZSO. 2008. Register of Economic Subjects (RES). [CD ROM]. [cit. 10. 10. 2010].
 (for more information on the sectors, see Tab. 1, we excluded categories 22.3, 92.4 – small amount of firms)

Conclusion

Based on the up to now achieved theoretical knowledge, results of empirical research, and practical experience from selected foreign regions of the world's most developed countries, we can observe a high growth of importance (mainly from the economic perspective) of creative industries and its contribution to the regional competitiveness. Professional public pays currently considerable attention to questions of its spatial organization and possibilities of its stimulation precisely in the interest of strengthening the competitive position of individual areas. Lower degree of completion and hence of clarification of the problematic issues can be found with the problems of spatial organization of creative industries in the framework of old industrial regions. These represent specific areas with distinct rigidity in the framework of change of economic structures, institutions and societal climate.

The presented results of research focused on problems of existence, spatial organization and evolution of creative industries in the Moravian-Silesian Region are necessary to be accepted with a certain degree of tolerance, particularly due to their predominately descriptive character. To the set research questions, we can deduce, by means of the achieved results, the following knowledge. Primarily it is in particular confirmation of the theoretical assumption of the tendency of creative industries towards concentration both into the region's main centre as well as into its core. This demonstrates that the impact of urbanization advantages strongly influences concentration of creative industries companies even in specific conditions of traditional industrial regions. Further on, it was ascertained that the creative industries are strongly linked to the regional demand which brings along considerable risks and limitations for its further development or growth. Benefit of the executed analysis is its time aspect, because the research was carried out using the data from the second quarter of 2008, which therefore brings possibility to identify impacts of the economic crisis on creative industries in the region. Internal analysis of size and time structures of companies confirmed the specific regional context, i.e. industrial character and peripheral location.

For further discussion in the framework of theoretical and empirical research, we deem advisable

a more precise definition of creative industries in conditions of the Czech Republic. In accord with the current theoretical and methodological discussions, it is necessary to aim the research in direction to hermeneutic approaches [7], because creativity is not individual, but a collective ability emerging in the framework of project-oriented networks [63], "embedded" in specific context [29]. In a way, utilization of qualitative research, mainly due to insufficient quality of secondary statistic data, appears to be a more appropriate method for understanding processes, context, evolution, and contingency of creative industries within regions.

From the perspective of practical implications for the needs of practice, we can state that the creative industries can contribute through the concentration tendencies to regeneration of the Ostrava's inner city. Concentrated fiscal and institutional support should be aimed at strengthening industrial design (business climate) in relation to regional production system (the so-called "related variety"), and sectors oriented on audience ("people climate"). Possibilities of other sectors' development are with regard to the regional production structure and vertical position of the region in urban system limited. In this context, potential successful candidature of the city of Ostrava for the European Capital of Culture 2015 can become an important milestone, as this event would have an important influence on stimulation of creative industries.

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ABSTRACT

CREATIVE INDUSTRIES IN SPATIAL PERSPECTIVE IN THE OLD INDUSTRIAL MORAVIAN-SILESIA REGION**Petr Rumpel, Ondřej Slach, Jaroslav Koutský**

The growing importance of creative industries has logically surfaced also in professional interest in the area of local and regional development. Close attention is paid to questions of spatial organization of creative industries as well as possibilities of its stimulation in the interest of strengthening the competitive position of individual areas. A little less attention is usually paid to the role and spatial organization of the creative industries in diverse geographical conditions, such as old industrial or rural regions. Old industrial areas represent a specific type of problem regions and there are questions of how the creative industries can contribute to regeneration of old industrial regions. The principal focus of this paper is mainly on factors and processes influencing the spatial organization, or respectively the concentration of creative industries in the framework of Moravian Silesian Region as an old industrial region. The Moravian-Silesian Region represents a classical old industrial region of peripheral character, in particular in relation to western markets. The traditional sectors are among the most struck sectors in the region, which can in the future increase the demand for new ones, such as e.g. creative industries. Attention is further paid, on one hand, to internal structural characteristics of creative industries in the comparative perspective, and on the other hand to explanation of evolution in this sector in the region of interest. The objective is not to provide a comprehensive analysis, but more to attempt to articulate the initial principles and to outline possible trends of research in the conditions of the Czech Republic.

Key Words: Creative industries, Old industrial areas, Regional development, Moravian-Silesian Region.

JEL Classification: R11.