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*WINDOW ON THE NETHERLANDS**RECENT EMPLOYMENT TRENDS IN THE CULTURAL INDUSTRIES IN AMSTERDAM, ROTTERDAM, THE HAGUE AND UTRECHT
A FIRST EXPLORATION*

ROBERT C. KLOOSTERMAN

Universiteit van Amsterdam, Faculty of Social and Behavioural Sciences, Nieuwe Prinsengracht 130, 1018 Amsterdam, The Netherlands. E-mail: R.C.Kloosterman@uva.nl

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ABSTRACT

Cultural industries are becoming more important in advanced economies as sources of employment and economic growth more in general. In this paper, a quantitative exploration is given of recent trends in cultural industries in the Netherlands. The data show a rapid rise of employment in the cultural industries in the last decade. Moreover, the four largest cities, although losing some terrain, are important sites for cultural production. Furthermore, in terms of employment Amsterdam still turns out to be the undisputed cultural capital of the Netherlands. The Dutch capital has in all but one of the selected cultural industries clearly has the edge. The one notable exception is architectural services. Rotterdam, home base of many famous international architectural firms, is asserting its status as the most important place for this kind of cultural industry in the Netherlands.

Key words: Cultural industries, urban economy, employment, post-industrial

INTRODUCTION

In the not so distant past, the Netherlands was without the slightest doubt a world-class producer of cultural products. Many great museums around the world still boast a fine collection of Dutch 17th century painters. The astonishing blossoming of Dutch painting after 1600, can be seen as the outcome of a complex interaction between changes on the demand and the supply side of the market for paintings. The rapidly expanding bourgeoisie in the booming Dutch cities created a large demand for secular paintings supplanting (Roman Catholic) religious institutions, which, after the Reformation, had to quit the field. Painters responded to this growth market by shifting

towards more mundane subjects (e.g. scenes on streets, in kitchens, cafes, and even in bordellos), by making smaller paintings, and by using productivity-raising devices such as rigorous specialisation and standardisation (Israel 1995, pp. 546–564; Prak 2002, pp. 245–249).

Nowadays, cultural industries – ‘concerned with producing and marketing goods and services that are permeated in one way or another with broadly aesthetic or semiotic attributes’ – are seen as crucial components of advanced economies (Scott 2000, p. 2). To survive the increasingly ‘global’ competition, firms in the traded sector have to be either more efficient at producing standardised goods and services or more innovative regarding the products on a continuous base (Porter 2001). The latter

strategy includes creating 'unique' products in terms of quality, complexity or image. This can be rooted in high-tech skills (e.g. biotechnology), but can also be based on *conceptual* innovation. Creating new images and innovative symbolic qualities for a wide range of products, the core business of cultural industries, constitute first and foremost, conceptual, and not technological, innovations.

Innovation in, for example, *haute couture*, music, and advertisements may, of course, benefit from technological skills, however, their competitive edge is firmly located in conceptual innovation.¹ This kind of innovation, a distinct source of economic growth, does not necessarily depend on economies of scale. Research has shown that small firms and, increasingly, small (temporary) organisations that transcend the boundaries of firms constitute the main locus of such processes of conceptual innovation (Grabher 2001). Recent studies have also stressed the interrelationship between small organisations active in the same field, on the one hand, and proximity, on the other (Storper and Venables 2002). Spatial clustering takes place at the level of global urban regions and, within these urban regions, in specific areas forming local milieus of production (Scott 2000). These local milieus apparently offer the right combination of local resources for innovation and access to global markets (cf. Zukin 1995; Florida 2002).

Presently, the Netherlands and its larger cities again according, to many (foreign) observers, seem to offer a fertile environment for international competitive cultural production. This time not so much in painting as well as in, for instance, design. 'The best international design used to be Italian but today it is Dutch product designers who are making waves' according to Treffinger (2003) in *The New York Times* (see also Thackara 2003). But also Dutch advertising (Leslie 1997; O'Leary 2000), architecture (Lootsma 2000), and television programme production (Levine 2003) are currently making their mark in international markets. The increasing importance of these kinds of economic activities has, up to a large extent, escaped both researchers and policymakers. Just as the Physiocrats, the French economic school from the 18th century, neglected manufacturing, many contemporary observers have failed to

appreciate the wealth-creating potential of the cultural industries.

Below, a first quantitative exploration of the cultural industries in the Netherlands is offered.² The development of the employment in eight selected cultural industries is shown for the Netherlands as a whole for the period from 1993 to 2001. In addition, these employment trends are explored separately for the four largest Dutch cities – i.e. Amsterdam, Rotterdam, The Hague, and Utrecht.

DEMARCATON OF THE CULTURAL INDUSTRIES

Commodification of culture, i.e. culture becoming more and more subject to market forces, is anything but new. The Golden Age of Dutch painting after 1600 was strongly driven by this process. However, more recently a new stage seems to have been reached as the symbolic value of products more in general is surfacing as the essential selling point in many consumer markets in advanced economies (Scott 2000). The aesthetic qualities of, for instance, coffee-makers, toothbrushes, pushchairs, but also of cafes and hairdressers are now crucial selling points. Determining which economic activities should fall under the label *cultural industries* has thus become more difficult. The difficulties increase even more, when one wants to go beyond a more theoretical debate and undertake empirical research. Official statistics are, obviously, not very well suited to this new kind of breakdown.

In his seminal study, *The Cultural Economy of Cities* (Scott 2000, p. 9), Allen Scott has come up with an estimate of the importance of cultural industries in the United States by looking at their share in the total employment. Below, a somewhat similar approach is taken, this time, however, also showing changes over time. Scott used a rather wide selection of cultural industries. In his view, for example, all kinds of clothing production fall under the heading of cultural industries. Clothing definitely includes the production of cultural goods, but it may also include a significant chunk of highly standardised products lacking in cultural value. The US classification of economic activities (SIC), in addition, does not completely fit the Dutch one, and therefore this paper has opted for a more

Figure 1. Overall total employment and total employment in selected cultural industries in the Netherlands, 1993–2001 (Index numbers 1993 = 100; overall total: 100 = 5,508,500, and total selected cultural industries: 100 = 157,500).

limited selection of industries as listed by the Dutch *Central Bureau of Statistics* (three-digit level) that leaves somewhat less room for doubt with respect to the ‘cultural’ aspect of the economic activities concerned. The eight selected industries (including SIC code) are: (221) publishers, (742) architectural services, (744) advertising, (921) movie and video production, (922) radio and television programme production, (923) performing arts, (924) news agencies and journalists, and (925) libraries, museums, nature protection. Still activities may be included, that are not dedicated to adding *symbolic* value and vice versa. It encompasses, however, the most important cultural industries and should, hence, offer us a suitable window on the main trends in cultural industries in the Netherlands.

The *Central Bureau of Statistics* (CBS) publishes data on the number of employed persons for three-digit level industries on a yearly basis. Due to changes in definitions, this study can only go back as far as 1993. The data span the years 1993–2001, the booming 1990s in fact. To capture some of the spatial differentiation within the Netherlands, the CBS has supplied

us specifically on our request with employment data for these selected industries for the four largest cities in the Netherlands, the G4.³ More finely grained information cannot be obtained from the CBS and further spatial differentiation will require other data sources.

TRENDS IN THE CULTURAL INDUSTRIES IN THE NETHERLANDS

During the 1990s, the Netherlands experienced a very strong growth of employment. The total number of employed grew from 5,508,500 in 1993 to 7,011,900 in 2001, an increase of no less than 27 per cent (see Figure 1). The total number employed in the eight selected cultural industries rose even stronger in that period: from 157,500 to 222,100, a rise of 41 per cent.⁴ In the first years, the growth in the cultural industries lagged behind the national trend, but after 1995 and, even more pronounced, after 1997, employment in the cultural industries increased more rapidly. This coincided with a, mainly consumption-driven, acceleration of the already high rate of growth of the Dutch

Figure 2. Number of employed persons in selected cultural industries in the Netherlands, 1993, 1997, and 2001 (x 1,000).

economy. This might indicate that part of the growth in the cultural industries has a significant cyclical component. The fast expansion of the cultural industries resulted in an overall share of the eight selected industries in the total, national, employment of just over three per cent in 2001. To make just one comparison: total employment in the Dutch ICT sector – another, much more studied set of post-industrial activities – amounted to about 270,000 persons in 2001.⁵

If we take a closer look at the trends in the individual industries, the picture becomes more complex (see Figure 2). All selected industries show increases from 1993 to 2001, but the relative growth rates differ considerably. Activities that are directly linked to the burgeoning consumer culture clearly stand out as strong growers. From a mere six per cent employment growth in (925) libraries, museums, nature protection, which is mainly part of the public sector to a near doubling of the employment in the (923) performing arts (from 15,700 in 1993 to 30,200 in 2001). Strong growth could also be observed in (922) radio and television programme production (76 per cent), (744) advertising (57 per cent), and (921) movie and video production (52 per cent). Relatively moderate growth was recorded for (221) publishers

(35 per cent), (742) architectural services and (924) news agencies and journalists (both 30 per cent).

An ambitious programme of privatisation in the broadcasting sector launched in the early 1990s has evidently helped to boost growth in radio and television programme production and in related industries such as advertising and performing arts (Groep 2002). The creation of more competitive markets in the audio-visual sector has also made firms more vulnerable to international competition. However, as the process of market making is certainly not confined to the Netherlands, Dutch firms have become more aware of the export potential of cultural products with Endemol as the outstanding example of a firm conquering foreign markets (O'Leary 2000; Levine 2003).

Cultural industries tend to display specific location patterns. According to Scott (2000) they resemble other post-industrial/post-Fordist activities in their spatio-organisational structure. Cultural industries consist of small firms, which are part of vertically disintegrated complexes that thrive under conditions of spatial concentration of similar and related activities. These localisation economies generate not only static (cost efficient) but also dynamic agglomeration economies that pertain to the potential

for innovation (Capello 2001). In this case, proximity facilitates face-to-face contacts and enables co-institutional development, which are both pivotal in cumulative learning processes that underpin innovation. In addition, proximity of entrepreneurs in the same line of business stimulates the release of the 'animal spirits', which drive innovation.

At this stage of our research project, we can only map the spatial distribution of the cultural industries at a fairly high level of aggregation, namely that of the four largest Dutch cities. Examining the spatial footprint of innovation requires a finer resolution – the next step of our research project. However, by identifying broad patterns of concentration we are already able to assess empirically the plausibility of the importance of clustering in Dutch cultural industries. Figure 3 shows the total employment in the selected cultural industries in absolute numbers in 1993, 1997 and 2001 in each of the four cities.

The data definitely show a spatial concentration of cultural industries in the four largest cities and in Amsterdam in particular (Table 1). A first observation concerns the overall share of the G4. In 1993, 27.5 per cent of total employment in the selected cultural industries was located in the four largest cities against an overall share of these cities in total national employment 18.6 per cent. In 2001, the relative position of the four largest cities had declined to a share of 25.1 per cent against a share in total employment of 18.1 per cent. Overall growth in the cultural industries in the G4 between 1993–2001, hence, lagged behind the national rate. This lag, however, was solely the result of stagnation between 1993 and 1997. After 1997, employment growth in the cultural industries in the G4 surpassed that of the nation as a whole (27 per cent against 24 per cent). The stagnation, as Table 1 shows, was mainly caused by an absolute decline in Rotterdam (publishers, museums, etc.) and in The Hague (architectural services, museums, etc.). Growth in Amsterdam (notably in advertising, movie and video production, and performing arts) and in Utrecht (especially in architectural services) could barely make up for these losses. To put it briefly, growth in the cultural industries in Amsterdam and Utrecht continued between 1993 and 1997, while Rotterdam and The Hague, on the contrary, showed significant

decreases. As the two latter urban economies were doing much worse than the other two, this could suggest a relationship with the overall local economy through consumer spending, but it could also be explained by a deterioration of the business climate with firms in the cultural industries moving to other places.⁶ Further research should shed light on these interrelationships.

Between 1997 and 2001, growth occurred in all four cities, especially in Rotterdam with an increase in employed persons of 51 per cent. The increase in Rotterdam after 1997 was mainly driven by rises in architectural services and in performing arts. Continuing expansion in Amsterdam was mainly due to growth in advertising, movie and video production, and performing arts. The Hague saw growth mainly in publishers, architectural services and performing arts, whereas Utrecht's growth was concentrated in architectural services and performing arts.

If we look at the importance of the employment in the selected cultural industries relative to the total employment in the cities, again Amsterdam stands out as the cultural capital. In 2001, as in 1993, 5.9 per cent of total employment in Amsterdam was to be found in these cultural industries. In Rotterdam, however, the employment in these cultural industries together in relative terms was somewhat more than half that of Amsterdam: 3.3 per cent in 2001 (same in 1993). The Hague, administrative capital and a historical centre of conspicuous consumption, showed a higher share: 4 per cent in 2001 (4.5 per cent in 1993). Utrecht, a rapidly growing city, displayed a fast rising share in cultural industries: from 1.7 per cent in 1993 to 3.1 in 2001.

The local importance of specific economic activities can also be gauged relative to the national share of these activities. Location quotients (LQ) are commonly used as indicators to show the relative degree of concentration of particular activities.⁷ If the LQ exceeds 1.0, it indicates a surplus in that specific activity (Clark 2003, p. 238). This could imply that at least a part of the economic activities in this particular activity are basic, i.e. dedicated to 'export'. If the LQ is less than 1.0, a 'shortage' exists and this could indicate that all production in this case is non-basic. Local demand, then, is

Figure 3. Total employment in the selected cultural industries in absolute numbers in Amsterdam, Rotterdam, The Hague and Utrecht (1993, 1997 and 2001).

not met by local production, which necessitates ‘import’. These are rather crude inferences that have become more questionable with the growing interconnectedness of places by all kinds of flows. However, an LQ exceeding 1.0 is still to be taken quite seriously as an indicator of

concentration. In Table 2, the LQs for the selected cultural industries in the four cities exceeding 1.0 are shown for both 1993 and 2001. The dominance of Amsterdam is once more confirmed. In 1993, the LQs of no less than six of the eight selected cultural industries

Table 1. Numbers of employed persons in selected cultural industries in the Netherlands, Amsterdam, Rotterdam, The Hague, Utrecht, and the G4, 1993, 1997 and 2001. Absolute numbers (x1,000), and shares as a percentage of the total number employed in that industry nationally.

Industry	The Netherlands			Amsterdam		Rotterdam		The Hague		Utrecht		Total G4	
	Abs.			Abs.	Share	Abs.	Share	Abs.	Share	Abs.	Share	Abs.	Share
1993													
221 publishers	28.2			7.5	26.6	2.0	7.1	0.4	1.4	0.3	1.1	36.2	
742 architectural services	64.3			4.3	6.7	4.2	6.5	4.9	7.6	1.1	1.7	22.6	
744 advertising	19.2			3.5	18.2	1.0	5.4	0.6	2.9	0.3	1.4	28.0	
921 movie and video production	4.4			0.9	21.0	0.2	5.4	0.2	5.4	0.3	6.0	37.8	
922 radio/television programme production	7.1			0.5	6.6	0.1	1.5	0.0	0.6	0.0	0.4	9.1	
923 performing arts	15.7			2.7	17.4	1.0	6.4	1.0	6.6	0.3	1.9	32.3	
924 news agencies and journalists	1			0.3	30.0	#	#	0.3	30.0	#	#	60.0	
925 libraries, museums, nature protection	17.6			2.1	11.9	1.2	6.8	1.5	8.5	0.4	2.3	29.5	
Total selected cultural industries	157.5			21.8	13.9	9.8	6.2	9.0	5.7	2.7	1.7	27.5	
1997													
221 publishers	34.1			8.3	24.3	#		0.7	2.1	0.5	1.5	27.8	
742 architectural services	72.7			4.1	5.6	4.4	6.1	3.3	4.5	3.1	4.3	20.5	
744 advertising	20.6			3.9	18.9	1.0	4.9	0.6	3.0	0.4	1.7	28.5	
921 movie and video production	4.9			1.2	23.8	0.3	5.7	0.2	4.3	0.3	6.6	40.3	
922 radio/television programme production	8.9			0.5	5.7	0.2	1.7	0.0	0.4	0.0	0.4	8.3	
923 performing arts	21			4.2	20.1	1.0	4.8	1.4	6.7	0.4	1.9	33.5	
924 news agencies and journalists	1			0.3	30.0	#	#	0.1	10.0	#	#	40.0	
925 libraries, museums, nature protection	15.5			1.8	11.6	0.5	3.2	0.9	5.8	0.2	1.3	21.9	
Total selected cultural industries	178.7			24.3	13.6	7.3	4.1	7.3	4.1	4.9	2.7	24.5	
2001													
221 publishers	38.2			8.1	21.2	1.2	3.1	1.6	4.2	0.6	1.6	30.1	
742 architectural services	84.2			4.3	5.1	5.6	6.7	4.0	4.8	3.5	4.2	20.7	
744 advertising	30.2			4.8	15.9	1.6	5.3	1.0	3.3	0.7	2.3	26.8	
921 movie and video production	6.7			1.8	26.9	0.4	6.0	0.2	3.0	0.4	6.0	41.8	
922 radio/television programme production	12.5			1.0	8.0	0.3	2.4	0.1	0.8	0.1	0.8	12.0	
923 performing arts	30.2			5.9	19.5	1.4	4.6	1.7	5.6	1.0	3.3	33.1	
924 news agencies and journalists	1.3			0.2	15.4	#	#	0.1	7.7	#	#	23.1	
925 libraries, museums, nature protection	18.8			2.1	11.2	0.6	3.2	1.1	5.9	0.3	1.6	21.8	
Total selected cultural industries	222.1			28.2	12.7	11.1	5.0	9.8	4.4	6.6	3.0	25.1	

Note: # no data available as either the number of firms or the number of employed persons is too small for publication by the CBS.

Table 2. *Location Quotients for Selected Cultural Industries (> 1.0) in Amsterdam, Rotterdam, The Hague, and Utrecht, 1993 and 2001.*

	Amsterdam		Rotterdam		The Hague		Utrecht	
	1993	2001	1993	2001	1993	2001	1993	2001
221 publishers	4.0	3.1	1.3			1.2		1.4
742 architectural services			1.2	1.4	2.1	1.4		
744 advertising	2.8	2.3		1.1				
921 movie and video production	3.2	4.0		1.2	1.5		2.1	2.0
922 radio/TV programme production		1.2						
923 performing arts	2.6	2.9	1.2		1.8	1.6		1.1
924 news agencies and journalists	4.5	2.3			8.4	2.2		
925 libraries, museums, etc.	1.8	1.6	1.2		2.4	1.7		
Total selected cultural industries	2.1	1.9	1.1	1	1.6	1.3		1.0

Amsterdam were greater than 1.0. In The Hague, the LQs of five selected industries exceeded 1.0; in Rotterdam four and in Utrecht only one LQ was greater than 1.0. In addition, as Figure 3 shows, the LQs in Amsterdam were on average (much) higher than in the other three cities.

In eight years, in 2001, Amsterdam has added one more cultural industry with an LQ exceeding 1.0 (radio and television programme production). Only architectural services remain relatively underrepresented in Amsterdam. Its already strong position in movie and video production and in performing arts has further strengthened. In The Hague, again, five cultural industries were relatively overrepresented but its overall importance as indicated by the LQ for the total of the cultural industries declined. In Rotterdam just three cultural industries jumped the hurdle of 1.0, and its overall LQ declined. Utrecht clearly improved its position by going from one to three of the selected cultural industries with LQs greater than 1.0. Moreover, Utrecht's overall LQ nearly doubled to almost 1.0.

CONCLUSION

Cultural industries are becoming more prominent in advanced economies and they tend to be oriented towards urban centres. This finding can be, at least partly, corroborated with the data for the Netherlands presented above. Employment in cultural industries is growing faster than overall employment. Furthermore, using different ways of assessing quantitatively

the role of the four largest cities, a picture emerges that confirms the G4 as important sites of cultural production. More than a quarter of total (national) employment in these eight selected cultural industries is found in the G4. The position of Amsterdam stands out clearly with 12.7 per cent of total national employment in these cultural industries of total national employment in the selected cultural industries. One in seventeen of all employed persons in Amsterdam works in these selected cultural industries if we look at the importance of relative to total employment in the city itself.

Looking at the dynamics, however, a more subtle pattern surfaces. Although employment has grown in all four cities between 1993 and 2001, their importance relative to the Netherlands as a whole has not increased from 1993 to 2001, as national growth exceeded this. The share of the G4 in national employment declined between 1993 and 1997, due to decreases in Rotterdam and The Hague, but picked up again without reaching the level of 1993. In addition, if we should go by the LQs as indicators for spatial concentration, one can only point to Amsterdam as a more comprehensive site for cultural industries with overrepresentation in seven out of eight selected cultural industries. Apparently only Amsterdam possesses the thick institutional web necessary for a more permanent dominant position (i.e. *path-reproduction*, Mahoney (2000)) in a broader set of cultural industries.⁸ Nonetheless, even Amsterdam is losing some ground as its overall location quotient in the selected cultural

industries dropped slightly between 1993 and 2001. The explanation behind this phenomenon still has to be found. It could be that the individual cities of the Randstad, the great conurbation in the western part of the Netherlands are converging with respect to their economic profile and Amsterdam's leading position is eroding (cf. Kloosterman and Lambregts 2001). It could, though, also be the case that small innovative firms start in city centres, especially in Amsterdam, but if successful move to other places (to, for instance, nearby Amstelveen, where many large advertising firms can be found). Such a pattern would corroborate the role of the city centre as an incubator milieu once again, but this time for cultural industries.

The trends presented here show a growing number of persons employed in the cultural industries in the Netherlands. However, one should not only judge cultural industries as a direct source of employment. Cultural industries can contribute to the competitiveness of the local and the national economy by not only bestowing products with aesthetic qualities, but also by improving the locational qualities of cities. Cultural industries and their workers help to support an intricate fabric of galleries, cafes, restaurants, theatres, music halls, etc. Not only those who work in the cultural industries use these places for crucial face-to-face contacts, but also other high-skilled workers (Zukin 1995). Moreover, cultural industries help to create an open and tolerant atmosphere conducive for creativity which attracts innovative firms and their (high-skilled) workers but also urban tourists (Florida 2002). Cultural industries are also from this perspective strategic components in the dynamic machine of urban competitiveness.

Notes

1. The introduction of, for example, the now almost globally popular dance music in the 1980s was enabled by new technology (e.g. samplers), but it required primarily a radical new conception of the way music is produced, performed and listened to (Toynbee 2000).
2. This exploration is part of a long-term research project – spatial footprints of path creation and path reproduction. Mapping processes of globalisation and localisation in cultural industries in the dutch delta metropolis. In the next stages, we

will explore the 'spatial footprint' by mapping the different forms of (social) embeddedness of innovative processes in cultural industries and also examine potential continuities (path-dependencies) in localised cultural production.

3. Hilversum, the main seat of Dutch television production, is therefore excluded from this breakdown. For a first analysis of the relationship between audio-visual production in Amsterdam and in Hilversum see Groep (2002).
4. All basic employment data are obtained from the CBS Enquête werkgelegenheid en lonen (Survey of the employment and wages) of the Dutch Central Bureau of Statistics unless indicated otherwise.
5. Quoted in de Volkskrant, 2003. In addition, it should be noted that the demarcation of the ICT activities runs into similar difficulties as in the case of the cultural industries.
6. The total number of persons employed in Amsterdam rose continuously from 364,800 in 1993 to 476,100 (30.5 per cent). Utrecht also showed a nearly monotonous increase (a very slight dip from 1999 to 2000) with 158,900 persons employed in 1993 to 212,200 in 2001 (33.5 per cent). Rotterdam, however, first displayed a decrease from 300,600 in 1993 to 292,200 in 1995 and a subsequent rise to 339,100 (12.9 per cent). The Hague showed a somewhat similar pattern: a decline from 197,600 in 1993 to 195,800 in 1995 and after that a rise to 244,800 persons employed (23.8 per cent). Source: CBS (2003).

$$7. \text{ Location quotient} = \frac{\text{Employment in City A in Industry I in year T}}{\text{Total employment in City A in year T}} \bigg/ \frac{\text{National employment in Industry I in Year T}}{\text{Total national employment in year T}}$$

The location quotient method compares the local employment share of a particular industry to the national share of that industry. If, for example, as in our case, the location quotient for the movie and video production in Amsterdam is 4.0 than that city has relatively four times more persons employed in that industry as compared to the share of that industry nationally.

8. It might be the case, however, that we are now witnessing a moment of path-creation with the emergence of a cluster of spectacularly internationally

successful architecture firms in Rotterdam with Rem Koolhaas as the most famous representative (Lootsma 2000). In April 2000, Koolhaas won the prestigious Pritzker Architecture Prize. According to Pritzker Prize jury chairman, J. Carter Brown 'Rem Koolhaas is widely respected as one of the most gifted and original talents in world architecture today. The leader of a spectacularly irreverent generation of Dutch architects, his restless mind, conceptual brilliance, and ability to make a building sing have earned him a stellar place in the firmament of contemporary design' (*ArchitectureWeek*, 2000).

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