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DYNAMICS IN THE CREATIVE SECTOR BETWEEN ROME AND THE SEA

ABSTRACT: Over the last fifty years the tendency towards a dispersion of productive activities that emerged with globalisation and the advent of telematics have fuelled processes that are changing the structure of metropolitan areas across the world. Against the background of the general process of metropolisation, it is interesting nowadays to study the characteristics, structure and development trends of a vast "hybrid" area that has grown up around the established city of Rome. The subject of this work is an analysis of the creative sector between Rome and the sea, and the potential for future development in this area.

KEYWORDS: Metropolisation, creative sector, urban planning, economic development, Rome.

Creativity and metropolisation

The new geographies of centrality and marginality can be read in a metropolitan setting using several approaches. There is a rich body of literature which, since the 1990s, has considered the city a preferred place for the production of services and studies, its typologies, territorial distribution and relationship with the urban context (Roberts, 1999; Hanssens et al., 2011).

The organisation of urban spaces in the era of globalisation is clearly problematic; the process of functional specialisation for a territory goes hand in hand with the gradual segmentation of social behaviours that are being reorganised in increasingly isolated settings. The conditions of marginality and urban "dysfunctions"

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do not necessarily concern the peripheral areas of metropolitan systems. Academic debate seems to favour a line of thought that has discarded marginality as a dependent variable for the centre-periphery ratio in favour of accessibility (Amin, Thrift, 1994). Moreover, the centrality of an urban area is no longer measured by the characteristics of its concentrated functions, but rather by its capacity to integrate the multiple habits of a vast and ever changing community (Pavia, 2002). (Post)metropolitan urbanisation is increasingly understood as a product of opposing processes; the process of urban sprawl is to be read both in terms of decentralisation and concentration (Webber, 1964; Leinberger, 1995; Koolhas, 1997; Soja, 2000). Sprawl is not only an area with low and mainly residential density, a dilution of built-up areas and a horizontal landscape; it also has clumps or reference points that satisfy the need to give an area an identity and provide an emotional tie for those who have to live and work there.

Large metropolitan areas increasingly include western trends – spontaneous but also explicitly guided by planning institutions – of polycentric organisation, based on recovering the functional and symbolic specificities of individual sub-poles, in direct contrast to the standardising tendencies of the traditional centre-periphery model, which expresses the downgraded growth of the city that spreads like an oil spill (Camagni, 1998; Sohn et al., 2004).

The competitive advantage of metropolitan economies boosted by knowledge-intensive emerging industries and services (Porter, 1998) involves creative industries on a wide scale (Pratt, 2007; 2011). Creativity is now recognised as a driving factor in the economic growth of many countries, in contrast to the decline of manufacturing. Several reports have underlined the fact that the economic weight of the creative sector is growing in the GDP of developed countries. As a result, the concept of "creativity" has become a must for those who deal with economic, cultural and urban policies at the territorial level. Creativity is also, and above all, a social phenomenon and it is important because it has the power to influence people and sustain the processes of changes in the economic, social and cultural sphere (Hesmondhalgh, 2007). Creative people are important because "their presence encourages openness and tolerance" (Florida, 2002).

Despite the broad academic and political convergence on the importance achieved by the creative sector, Pratt (2007) maintains that "a deep understanding of creative industries has not yet been reached." There are problematic relationships such as public and private, formal and informal, production and consumption that deserve further analysis so that they can be placed in the broader context of the metropolisation process. The creative industry includes: means of communication (for example, films, television, music, publishing recording); consumer goods linked to fashion and design (for example, clothes, furniture and jewellery); services (for example, advertising, tourism and entertainment); a huge range of creative professions (for example, architecture, graphic arts and web page design); and collective cultural facilities (for example, museums, art galleries and concert halls). All these subsectors are characterised by the coexistence and overlapping of the products' symbolic and utilitarian features (Scott, 2010).

A fundamental characteristic of the creative economy is its being an urban phenomenon, given that creativity and its specific forms of expression are part of complex sociospatial relations and are rooted in the production, employment and labour market dynamics of cities (Storper, Scott, 2009).

Creative industries employ between 4 and 8% of the total number of employed people in the more advanced economies, and their relative importance is growing rapidly. In some large metropolitan areas such as New York, Los Angeles, London, Paris, Milan and Tokyo, the incidence of employment in the creative sector may reach 25–40% of the total. The other key characteristic of the creative economy is its tendency towards spatial concentration. The recent and rapid growth of activities that come under this category mainly occurs in large and dense urban areas, while Marshallian clusters have developed in many established metropolitan areas (Scott, 2010).

The land between Rome and the sea

The metropolitan city of "Roma Capitale" is a local government unit that replaced the Province of Rome on 1st January 2015, following an administrative process that began in the 1990s. It is the second largest concentration of residential settlement after Milan and is home to about 7% of the Italian population and 74% of the population of the Lazio region. It is a highly complex and heterogeneous urban region owing to its morphological, functional and settlement characteristics.

The territory that extends between Rome and the sea is one of the most dynamic in the Roman metropolitan system. It comprises many territorial realities that are distinct from one another, but at the same time interconnected and dependent on the marked centrality of Rome. The processes of physical and functional transformation consistently involve the whole territory, making it extremely difficult for such an environmentally fragile system of priceless historical value to survive.

The impetus for the profound transformation of this territory came during the twenty-year reign of Fascism, with the construction of the Roma-Lido railway (1924), the via del Mare (1927–28), the underground line connecting Termini station and the EUR area (opened in 1955), and the building of the Ostiense railway station. The expansion of housing between Rome and the sea in the postwar years occurred mainly along via Cristoforo Colombo, built in the 1940s to connect the EUR to the centre of Rome and to the sea (Fig. 1). This important infrastructure system was bolstered in the early 1960s by the construction of the Fiumicino Airport and a motorway to reach it, both of which have played an ever growing role over the years in supporting business activities across the area.

The area between Rome and the sea is a real patchwork of settlement typologies. Apart from the "historical" neighbourhoods such as Garbatella and EUR, which are now part of the consolidated city, there are important examples of public housing intervention, such as the INCIS di Decima neighbourhood, built and designed in the 1960s by Luigi Moretti, or the PEEP (Piani per l'edilizia economica e popolare: Plans for economic and popular housing) of Corviale and Laurentino 38 districts, constructed between the 1970s and 1980s, which included experimental, even utopian architectural elements that profoundly shaped their destiny.

Additional large-scale PEEP interventions, such as Spinaceto, Acilia, Dragoncello and Portuense, built up according to a variation of the Master Plan dating 1981, are in marked contrast to private housing neighbourhoods, such as the Magliana Nuova district, built in agreement with the Rome City Council on a bend in the Tiber river, or the "overspill neighbourhood" of Casalpalocco, an ambitious project carried out between the beginning of the 1960s and the mid-1970s by the General Real Estate Company (Società Generale Immobiliare), which offered the middle and upper classes a residential model inspired by the "American way of life."

Fig. 1. The route of via Cristoforo Colombo from the city towards the sea, 1941. The last offshoot of the established city southwards consists of the garden city of Garbatella (to the right of via Cristoforo Colombo). Please note how this road connects the city with the district of EUR, under construction

Source: ICCD Aerofototeca, volo Fotocielo.

Over the last three decades there has been no public intervention, while new neighbourhoods have been built through private initiatives beyond Rome's main ring road (Grande Raccordo Anulare or GRA), envisaged as functional mixes. An example of this is the area of Parco Leonardo near Fiumicino Airport, which combines residential functions with commercial and recreational ones.

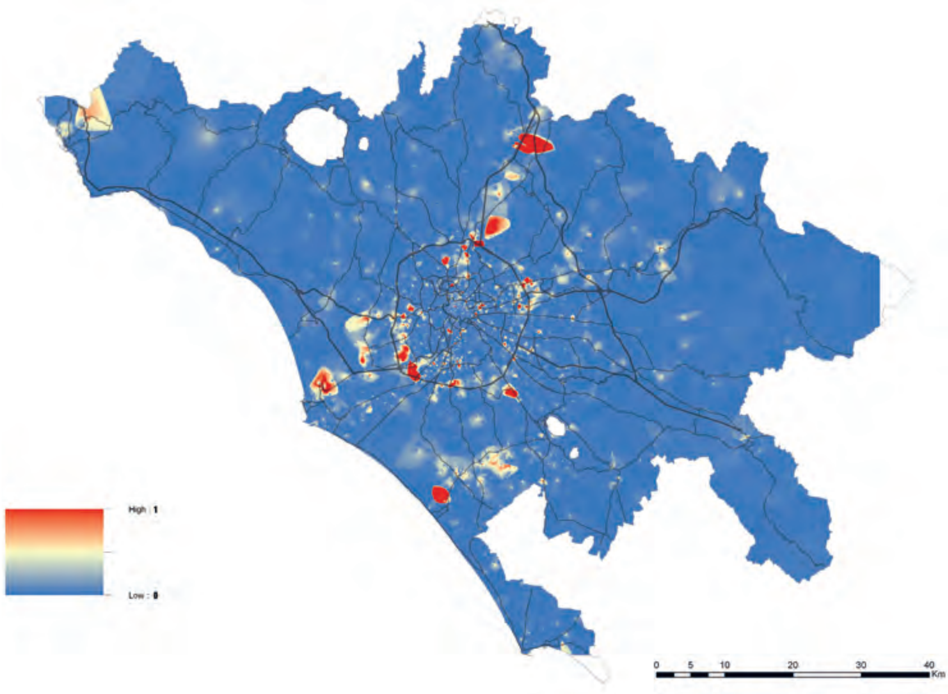
Urban sprawl has profoundly changed the nature of the morphological-environmental system and this is particularly evident between the Isola Sacra and the GRA, and along via Ostiense and via Colombo: Isola Sacra, Ostia Antica, Casal Palocco, Infernetto, Dragoncello, Acilia, Centro Giano, Casal Bernocchi and Vitinia that now form a continuum of settlements which have agglomerated along the main connecting routes to Rome, and then dispersed over the area, following the perpendicular routes based on the drainage network.

Land consumption is constantly increasing, but its utilisation is limited: in over one-third of residential areas, the built-up ratio (the ratio of built-up area to total land) is lower than 10%. The recent urbanisations of Piana del Sole and Valleranello are significant examples of this, precisely because of their extension.

The area's exceptional infrastructure and its strategic position make it particularly attractive for service functions. Over the last few decades, a number of activities have found a place between EUR and the GRA, and towards the sea. In particular, the sector along the main Rome-Fiumicino route has been overwhelmed by large complexes mainly dedicated to business, leisure and wholesale trade. Without going into too much detail, just in the area between Via Portuense and Via Ostiense we find the following: the Alitalia–Centro Toyota Business Centre (2002)–Hotel Ramada (2004); The Village-Parco de' Medici (2001); Commercity (2003); Cineland (1999); and the Nuova Fiera di Roma (2006).

The importance of this area for metropolitan production system is illustrated in Fig. 2, which shows the spatial distribution of the turnover of companies operating in 2009 in the Province of Rome. It is clear how, among the areas with the highest intensity of production firms, those in the sector between Rome and the sea stand out the most.

Fig. 2. Share of the production system in Rome's metropolitan area



Source: K. Lelo, based on Istat data.

The creative sector as a driver of local economic development

It is widely recognised that the patterns of geographical concentration for creative firms are highly dependent on urbanisation economies, labour force distribution, urban quality and the accessibility of typically urban functions and services. Recent developments at the European and world levels have shown a willingness to produce reliable and comparable statistics, which can evaluate the real contribution of this sector to economic and social development (ESSnet-Culture 2012).

The challenge of measuring the economic weight of cultural and creative industries is linked to the complexity of this sector, and to the fact that its boundaries are vague and vary according to the definitions and approaches used. Three constituent elements of the creative sector are recognised internationally: creative firms that are classified in the field of the arts – the "subsidised muses"

– mainly not profit-driven, which include visual arts, performing arts and historical and artistic heritage, the “cultural industries,” which refer to the industries of mass reproduction, distribution and the new media, and can be grouped into the following subcategories: publishing, music, radio and television, video, films and photography, software and video games, and the “creative industries,” which include fashion, architecture and advertising, in which the creative element is balanced by the utilitarian features linked to extra-cultural use.

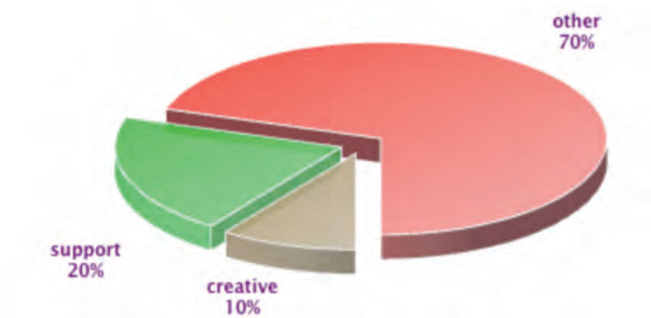
The data used to analyse creative firms in Rome’s metropolitan area come from the Archivio Statistico delle Unità Locali delle Imprese Attive (ASIA-UL), which is the statistical archive on active local firms and is provided by the National Statistical Institute (ISTAT). This is a registry of companies that is updated annually by integrating administrative and statistical sources. It provides identification data (name and address), information on the type of business activity (the ATECO code), and on the company’s structure (employees and self-employed, legal form, and turnover) for the local units of industry.[1] The reporting year is 2009.

The definition of creative categories is taken from the NESTA report “The geography of creativity,” adapted to the Italian ATECO categories. This definition considers creative firms as “those activities which have their origins in creativity and individual talent, and which have the potential to create work and wealth by generating and exploiting intellectual property.” The activities of the creative sector are classified into “layers,” which may be interpreted as links in a chain of creative value; the activities linked to the creation of content are at the “heart” of the chain, while those linked to production, distribution and trade are found on the “outskirts.”

In the observation year 2009, the metropolitan region of Rome had a creative sector that accounted for nearly 10% of total firms, while the share of the services sector reached 20% (see Fig. 3).

[1] The data describes the exact position in space of each firm (X and Y coordinates), its business activity (5 numbers from the ATECO code) and the number of employees in the local units dependent on the principal firm, active for at least six months during the reporting year.

Fig. 3. Share of the creative sector and the support sector connected to it, compared with the total of the metropolitan economy in 2009



Source: ISTAT ASIA-UL.

Table 1 summarises the number of creative firms and their workers using the abovementioned NESTA classification. The operational definition uses ATECO codes disaggregated at the fifth level, with the aim of obtaining a fine-grained representation for each creative sector and its activities.

Table 1. Metropolitan city of Rome. Distribution of the creative categories in 2009

Creative category	N. firms	N. employees
Architecture	11,512	18,263.45
Antiquities	2,086	4,339.37
Communication and branding	1,494	3,529.87
Design	1,906	2,525.51
Publishing	3,705	8,970.50
Music and performing arts	3,739	5,305.72
Radio and Television	292	11,294.05
Video, film and photography	2,306	15,599.74
Videogames and software	5,918	42,208.92
Total	32,958	112,037.13

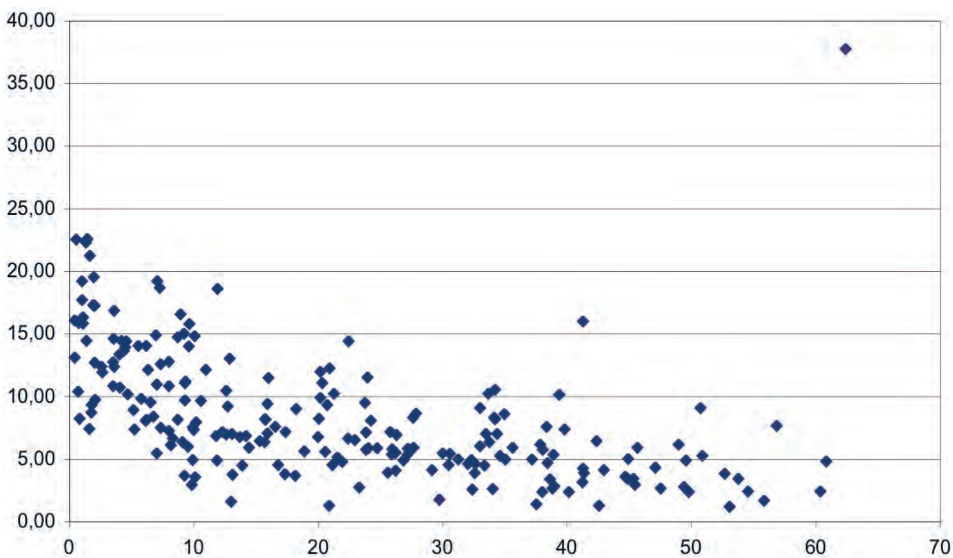
Source: ISTAT ASIA-UL 2009.

The data from ASIA-UL has highlighted the fact that 81.14% of businesses in the creative sectors are one-man firms, 17.26% of firms employ between 2 and 20 workers, 0.86% between 21 and 50 workers, and 0.74% more than 50 workers.

These figures should not come as a surprise; the city is a natural place for small firms to develop, because they can find necessary externalities in terms of infrastructure and services (Leone and Stryuk, 1976). In the creative sector the phenomenon of micro-enterprises is even more pronounced compared with other economic contexts, owing to the presence of a greater number of creators of content, who work independently (Hegsmondhalgh, 2002; Pratt, 2011). In the case of Rome, this characteristic is extremely striking, however, given that the share of self-employed people is considerably higher than 60–70%, which is a reference point at the European level (KEA 2006).

If we look at the proportion of creative firms in the total population of firms in territorial units depending on their distance from the city centre, we notice a clear inverse relationship: the number of units with a higher share of creative firms decreases as the distance from the centre increases (Fig. 4). We can therefore assume that the distribution of creative industries in the metropolitan region of Rome reflects the monocentricity of its urban structure. Instead, large firms (with more than 50 workers) are almost entirely located within the municipality of Rome, particularly in the city centre, in the EUR district and along the main routes leading to the sea.

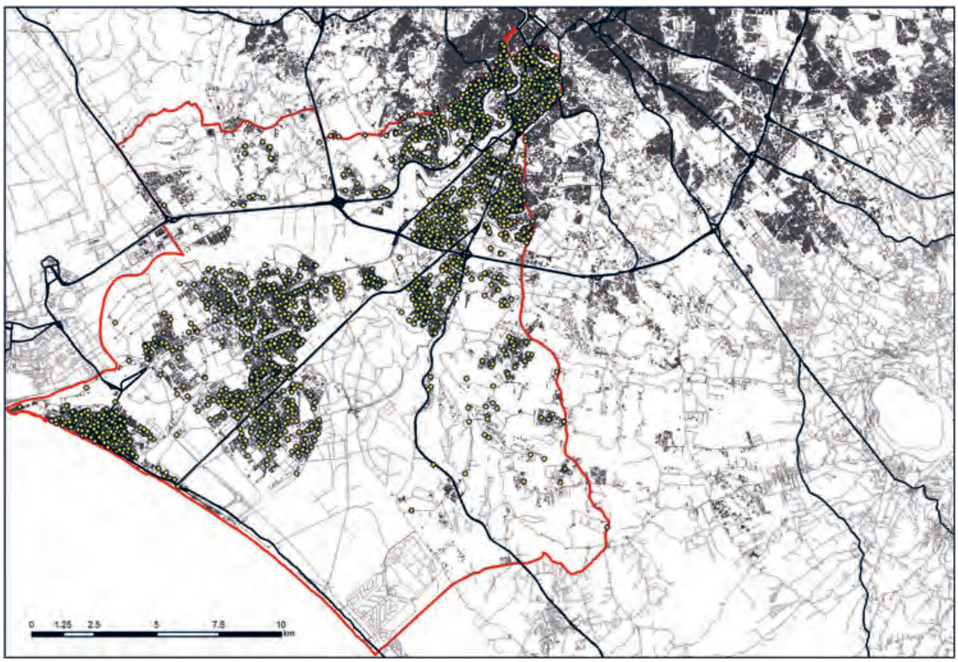
Fig. 4. Number of businesses in creative industries in the total business population in territorial units, in terms of their distance from the centre of Rome (km), 2009



Source: Author's analysis on Census data and Asia-unità locali, ISTAT.

The study area to be analysed in more detail extends to the southern part of the metropolitan territory and includes parts of municipalities VIII and IX, and municipalities X and XI. The irregular urban network that "hosts" business activities covered by the study extends along the main routes to the sea: via del Mare, via Cristoforo Colombo and part of via Pontina. Territorial units that are part of this network are defined by ISTAT as homogeneous aggregations of census units (Fig. 5). This territory accounts for about 6% of the area of the metropolitan city of Roma Capitale and, in 2009, was home to nearly 13% of the population, 12% of creative firms, and 16% of the creative sector's workers.

Fig. 5. Localisation of creative firms in the area studied in 2009



Source: K. Lelo, based on Istat data.

The most marked characteristic of the creative sector is the high number of firms in the sector producing software and videogames. They account for about 60% of the total number of creative firms surveyed between Rome and the sea in 2009. There are also high numbers of firms active in architecture (26%) and publishing (9%).

The importance of the area in terms of the share of creative firms operating in various subsectors compared with the entire metropolitan area is shown in Table 2, in which the strong localisation trend for software and videogame firms between Rome and the sea is immediately clear, with 46% of firms and 70% of workers operating in the sector located in this area.

Table 2. Share of each creative category in the territory between Rome and the sea compared with the metropolitan area in 2009

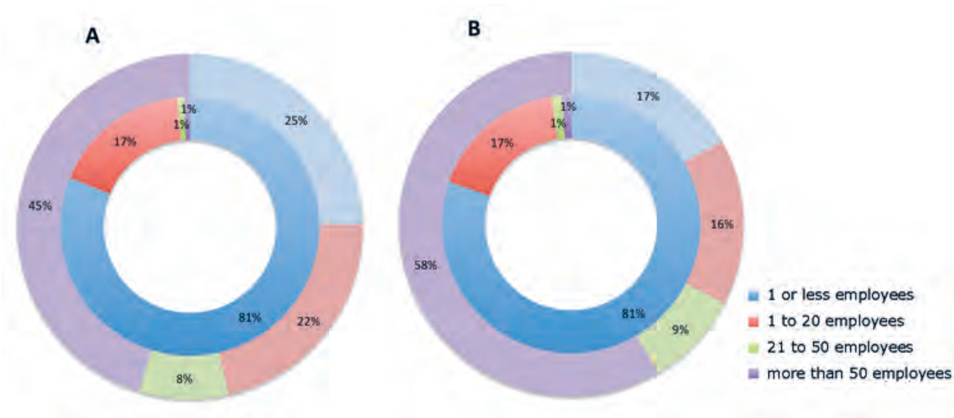
Creative category	% firms	% employees
Architecture	11.41	17.79
Antiquities	8.10	9.60
Communication and branding	11.71	13.13
Design	10.18	12.12
Publishing	6.13	10.58
Music and performing arts	11.87	11.74
Radio and Television	7.19	0.79
Video, film and photography	46.10	70.26
Videogames and software	3.58	1.67
Total	11.58	15.85

Source: ISTAT ASIA-UL 2009.

In analogy to what is observed at the metropolitan level, in the study area: 80.33% of businesses in creative sectors are one-man firms, 17.21% of firms have between 2 and 20 workers, 1.31% between 21 and 50 workers, and 1.15% have more than 50 workers. The similarity in values is shown in Fig. 6: the inner circles of the graphs show the percentages of the number of creative firms by size class; the outer circles show the respective percentages of the number of workers. The percentage differences between the outer circles in Fig. 2 highlight the fact that, unlike the number of firms which remains similar as far as business size is concerned, there is a higher number of workers in the highest size range. This testifies to the presence of a higher number of workers in the study area compared with the metropolitan average.

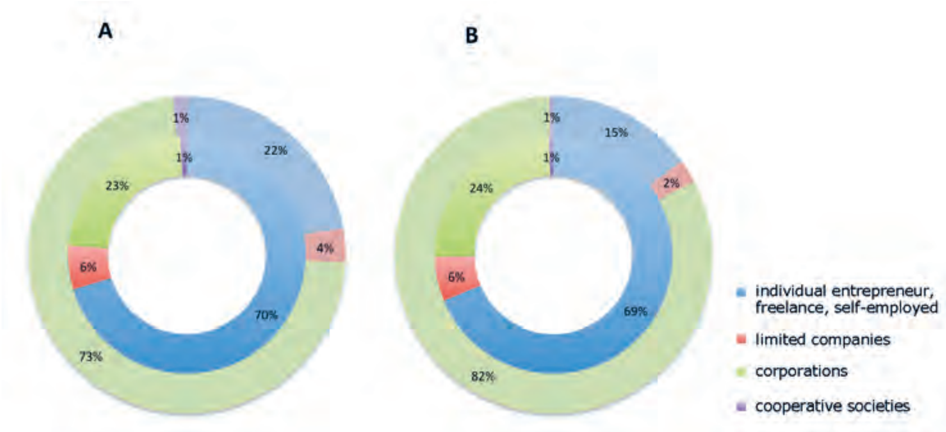
The legal form of the firms reflects the previously illustrated size structure (Fig. 7). In contrast to the small proportion of limited companies, there is a large proportion of 70% of individual entrepreneurs and/or self-employed professionals. In this case too, the proportions between the metropolitan territory and the area studied are entirely similar, while with regard to workers there is a higher number of people employed by limited companies in the studied area.

Fig. 6. Distribution of creative firms by class of workers in 2009. A) in the metropolitan area; B) between Rome and the sea. The inner circle shows the number of creative firms, while the outer one shows the number of workers



Source: Author's analysis on data Asia-unità locali, ISTAT.

Fig. 7. Legal form of creative firms by size class in 2009. A) in the metropolitan area; B) between Rome and the sea. The inner circle shows the number of creative firms, while the outer one shows the number of workers



Source: Author's analysis on data Asia-unità locali, ISTAT.

Even though there are contrasting reports on sectorial data, it has become apparent that industrial production in high-tech sectors is a significant part of the economic weight of creative industries (Frontier Economics 2012).

The case study illustrated here provides evidence of the presence of an economically relevant cluster of creative firms operating in the software and videogame sector in the territory between Rome and the sea. This evidence could be a stimulating starting point for further investigations to identify the characteristics and vocations of the territory which, if correctly integrated into territorial policies, could contribute to improving its socioeconomic performance. The challenge for modern urban planning is to treat the outskirts as an integral part of a wider process of spatial organisation of housing, production and work. The different territorialities of work, production and housing call for new and more complex forms of interaction between the various approaches to territorial problems.

Over the last decade, creative industries have been recognised as having some "winning" characteristics which promise their successful integration into economic and territorial policies. The main tendency emerging at national level is the growth of creative clusters that encourage innovation through strong links between art, the new media and technology, education and firms.

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