

Reconsideration on the Agglomeration Factors of Cultural Industries*

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Abstract : The early studies on the cultural industries had mainly emphasized the viewpoint of “efficiency” based on the “flexible specialization” theory, but they have gradually shed light on the viewpoint of “creativity”: creative human resources and various networks generating creative energies. Despite the importance of these studies, it is impossible to explain every cultural industrial agglomeration phenomena from specific and few viewpoints due to the diversity of each cultural industry.

This study describes the dissimilarity of agglomeration factors between the Japanese animation and home video game industries which form salient agglomeration in the same region.

Both industries share similar characteristics with industrial agglomeration of SMEs in Tokyo and close inter-firm relationships. However, they differ in their historical development paths and each firm’s behavior and strategy because of their own distribution systems and production processes. In particular, the difference in distribution systems clearly affects whether a company values “efficiency” factors of agglomeration advantage or “creativity” factors of that in case of locational choice.

The distribution sector of the cultural industry, compared with the production sector, has a tendency to value profitability rather than creation itself. Therefore, a cultural industry with the strong distribution sector tends to form the industrial system emphasizing profitability. The Japanese animation firm is apt to choose its location from the perspective of efficiency, which easily contributes to profitability, because television broadcasting stations are strong distribution sector. Conversely, the Japanese game firm chooses its location from the perspective of creativity due to the absence of strong distribution sector.

Keywords : animation industry, home video game industry, agglomeration, creativity, efficiency, Japan

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1. Introduction

The perspectives of early studies on the agglomeration of the cultural industries are classified into three types.

The first is “flexible specialization theory” (Piore and Sable, 1984). This theory has considered the cultural industry agglomeration to result from the developing vertical disintegration of the large vertical integrated corporation in order to deal with increasing uncertainty of market. Consequently, a lot of specialized small companies are established; then, the convenience of transaction networks and large local labor market are advanced as agglomeration advantages. In other words, this theory emphasizes the “efficiency” of production (Christopherson and Storper, 1986; Storper and Christopherson, 1987; Lash and Urry, 1994; Hesmondhalgh, 1996; Caves, 2000: 95-100; Mossig, 2002).

After flexible specialization theory, the concept of creative region has been considered as important (Landry, 2000; Florida, 2002; Scott, 1997, 1998, 1999, 2004; Power and Scott, 2004). This theory points out that there are institutions, culture and residential environment, which creative workers like, stimulate their creativity. Moreover, the environment which creative workers can show their creativity and the policy which generate such environment are considered as important. In short, the studies of the cultural industry have gradually emphasized “creativity” rather than efficiency.

The third perspective is relationships between distribution sector and production sector. This perspective does not always analyze or refer to the agglomeration, but the geography of the cultural

industry is heavily influenced by the characteristics of these sectors. Generally, large, oligopolistic and strong distribution sector firms greatly affect small and weak production sector companies’ managements and choices of location (Cornford and Robins, 1992; Coe, 2000a, 2000b, 2001; Coe and Johns, 2004).

Despite the contribution of these studies, their common defects are to underrate the difference in individual cultural industry’s characteristics: in particular, distribution system and products. In other words, their defects are to over-generalize the findings of detailed survey on just one cultural industry or superficial survey on many cultural industries. Therefore, rarely do they shed light on differences between cultural industries on the basis of detailed survey. Such behavior misleads argument about their agglomerations’ true nature.

In order to dissolve this problem, we compare the agglomeration factors and advantages of the Japanese animation and home video game industries (game industry). According to the early studies above, every perspective - flexible specialization, creative region, and distribution and production sectors - emphasizes the networks between firms. In other words, the most important agglomeration factor is inter-firm relationships. Moreover, inter-firm relationships can be subdivided into distribution system and production process, because the cultural industry consists of distribution and production sectors.

With regards to the distribution system, the relationships between distribution and production sectors are important. The degree of distribution sector’s power over production sector influences the independency of individual production company. Meanwhile, a lot of specialized

production firms are involved in each production process. Thus, the characteristics of production process determine the inter-firm relationships between production firms. On the basis of this subdivision, we examine their distribution system and production process in order to grasp the nature and difference of their agglomerations.

The original data used in this paper was collected from July to December in 2000 on the animation industry and from May to November in 2002 on the game industry. Both data consists of questionnaire and interview surveys. The animation industry survey's respondents are 71 of 287 firms (response rate is 24.7%) and interviewees are 33 firms. The game industry survey's respondents are 54 of 441 (12.2%, likewise) and interviewees are 49 game firms and 1 game school.

2. Location Patterns

Cultural industries and cities are inseparable because they are reliant upon external economies derived from regional agglomerations (Scott, 2000). The location patterns of the animation and game industries in Japan do not deviate from this expectation. Most firms in these industries are located in Tokyo prefecture with a population over 11 million, and Osaka prefecture with a population of 8.8 million is grossly underrepresented (Table 1). Even if such deflection can be sustained by the overconcentration of manifold urban activities in Japan on Tokyo, the animation and game industries' extreme concentration in Tokyo reflects deeply rooted specific industry-related internal factors that are revealed in separate analyses of

Table 1. Locations of animation and game firms in Japan

prefecture	Animation		Game	
	no.	%	no.	%
Tokyo	220	80.9	309	72.4
Osaka	8	2.9	33	7.7
Others	44	16.2	85	19.9
Total	272	100.0	427	100.0

Source: 1) <http://itp.ne.jp>(in June and July, 2000)

2) Risuto seisaku iinnkai., eds., *Animage anime pokketo deta 2000*, Tokuma Syoten, 2000

3) Questionnaire survey.

4) Web site of each game company.

their location patterns.

Within Tokyo almost all animation firms are located in the western suburbs of Tokyo, whereas the agglomeration of game firms is in the central area (Figure 1). This locational difference arises from divergences in the development paths of animation and game firms.

As most animation firms have been cloned from existing ones, their roots can be traced back to the pioneering firms: Toei Animation and Mushi Production, I should say. These firms were the two most influential ones during the early days of animation series, although Mushi Production was indebted to Toei Animation for its original staff. Many firms and workers were derived from these two companies, which were accidentally established in the western suburbs of Tokyo¹. Hence, the offshoots are located in same area. Another locational factor is that the animation firms need to be close to flagship commercial television stations, and major processing stations that are located in Tokyo.

The antecedents of games firms are more diverse. Excluding home video games, about 40%

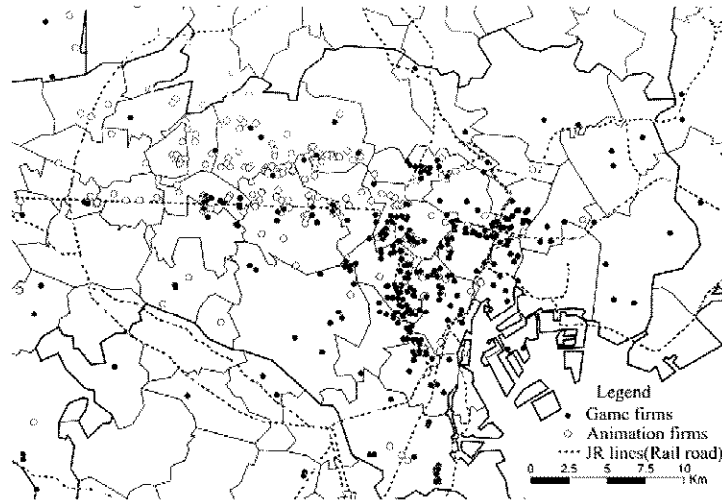


Figure 1. Location patterns of animation and game firms in the Tokyo region

Source: See Table 1.

of game firms (23 of 61) in our survey entered the game industry from another industry. They were developed from: a combination of arcade games, manufacturing of amusement machines and arcade administration (6 firms); production and release of personal computer (PC) games (5 firms); system development (5 firms), production of animation or computer graphics (CG) (4 firms); other manufacturing industries (3 firms), etc. As a result, their origins' locations are also divergent. In other words, Agglomeration within the game industry is related more closely to the nature of the inter-firm relationships than the nature of their origins. Obviously, similar overriding factors make it difficult for animation firms to disperse their operations from Tokyo too.

3. Distribution System

Table 2 shows the size of firms in the animation and game industries. Both industries contain many medium and small enterprises (SMEs). However, there are more large companies in the game industry than in the animation industry. Also several game companies outstrip the largest animation company in size². These differences can be partially ascribed to the absence of animation firms and the existence of game ones in each distribution sector.

Given the need to absorb the high marketing risks and the occasional existence of law regulation, only a small number of distribution companies exist (Aksoy, 1992; Lash and Urry, 1994: 113-120; Sadler, 1997; Pratt, 2004; Scott, 2004). Invariably, the distribution sector dominates production sector through the power of its capital input and by controlling distribution. Thus, the cultural industry's distribution sector constitutes a

“legal oligopoly.” Of course, the degree of oligopoly will differ between individual cultural industries and different countries. For instance, television is the prime market for Japan’s animation industry; besides the ground-based broadcasting - there is a limit to airwaves - is the most prosper broadcasting way in Japan. Consequently, the industry is reliant on Japan’s flagship television stations for distribution. In turn, these flagship stations exercise a marked influence on the nature of production by animation firms. These uneven power relationships between the distribution and production sectors are typical of the cultural industry as a whole.

Conversely, the game industry does not have such a “strong” distribution sector. It is interesting to note that some interviewees pointed out the low profitability of the distribution sector in the game industry though the risk of excess stock is never

low. This raises the question: why do companies enter such a distribution sector? The answer lies in the game industry’s unique release and distribution system. The companies like Nintendo Sony Computer Entertainment and Microsoft which manufacture - or outsourcing under their management - not only consoles but also media (CD-ROM, DVD-ROM etc.), are called “platform holder”. As the output of the other game firms is restricted to software they are obliged to outsource under contract the fabrication of all media to a platform holder. Coupled with the consoles, the fabrication of the media is a main profit-making center for platform holders. These holders do not regard distribution sector as profitable. The only reason they participate in the distribution of products is to exercise to control over the market. By monitoring supply and demand trends and regulating the entry of software firms (Fujikawa,

Table 2. The size of the firms in our survey

Parameter	Category	Animation		Game	
		no.	%	no.	%
Total Sales (million yen)	0~100	20	39.2	13	23.6
	100~500	23	45.1	18	32.7
	500~1,000	2	3.9	2	3.6
	1,000~5,000	4	7.8	11	20.0
	5,000~	2	3.9	11	20.0
	Total in subset	51	100.0	55	100.0
Employment size (both temporary and permanent)	1~19	36	52.2	24	38.7
	20~49	20	29.0	12	19.4
	50~100	7	10.1	9	14.5
	100~	6	8.7	17	27.4
	Total in subset	69	100.0	62	100.0

Source: 1) questionnaire survey

2) interview

3) financial reports of each firm

1999). A platform holder confirmed during the survey that the reason for maintaining an unprofitable distribution sector was to promote its consoles (interview on September 2, 2002). Meanwhile, the quantity of games software sold by large software firms is so great that they have developed their own distribution sector to the save on the costs of marketing their own goods. Moreover, as revealed by the survey, they distribute not only their own products but also those from other firms to obtain economies of scale (interview with a large software house on August 28, 2002).

Therefore, the game industry's distribution sector is not designed to benefit from its own existence. As noted, Platform holders' profits are derived from selling their consoles and manufacturing media sourced from game software firms. Thus, it is inappropriate for platform holders severely to rule the game software firms. Consequently, the game software firms, which have distribution sector, cannot contract with the other game firms under over-advantageous conditions for them. This "weak" distribution sector is untypical in the cultural industry.

4. Production Processes

Both the animation and game industries produce cultural products in which knowledge is embodied, but their production processes have also relatively simple and routine work (Figure 2). Many features are not dissimilar to labor-intensive manufacturing industry. Both the "original picture" in the animation industry, and "main program" and

"graphic" in the game industry require a large manpower. However, the production process in the animation is much closer to manufacturing than that of the game industry, because of the difference in "reversibility". The production process in animation is likened to a "waterfall process". Stemming originally from the software industry, this term means that the whole process is clearly divided into two parts: upstream processes and downstream processes. As the specifications and the designs are intimately defined in the upstream processes, the flow of products is one-way and the task does not return again for further reprocessing. Therefore, a multiple hierarchy subcontracting system characterizes downstream processes (Iwamoto, 1998). These explain fits operations in the animation industry well. "Plot and setting" and "storyboard" are processes that not only define specifications and the designs, but also the direction of the rest of processes. Within each process there are many trials and errors but radical changes about content are defined at the outset and there are no reverse flows.

These characteristics enable each process to be clearly distinguished from the other processes and each animation firm to specialize in individual process. Therefore, 34 of the 71 firms (47.9%) surveyed did not operate more than two processes (Table 3). Moreover, even if an animation firm has all or almost all processes, it generally cannot accomplish its works by itself due to the lack of quantitative production capacity. As a result, the outsourcing rates of the firms in the upstream processes are very high (Table 4). More than 50% of upstream firms' outsourcing rates are over 50%. Meanwhile, 40% of downstream firms do not outsource any work because they are small end

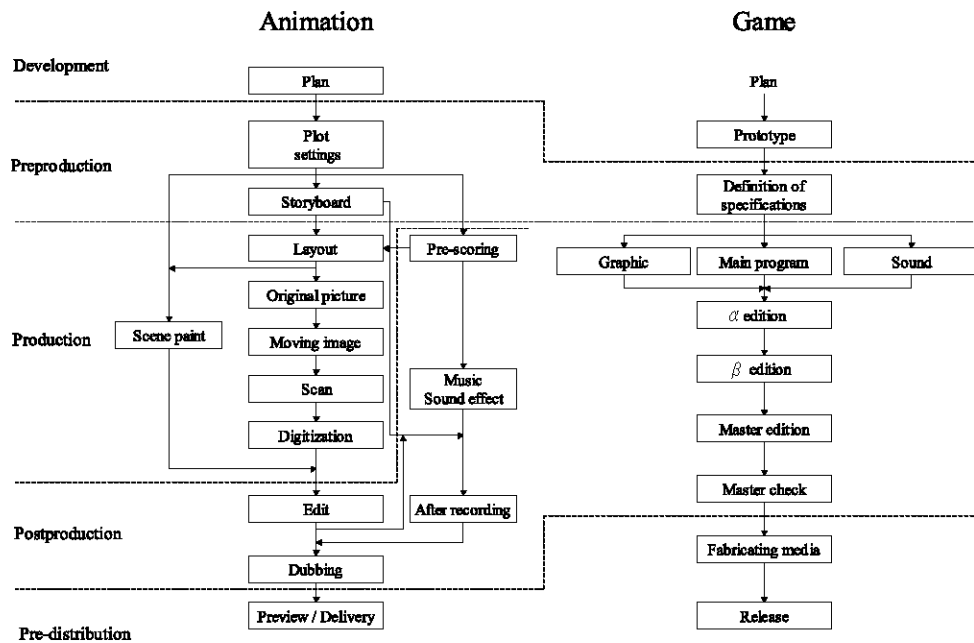


Figure 2. The flowchart of the animation and the home video game

Source: compiled by author from

- 1) Nikkei BP sya gijyutsu kenkyuu bu eds., Anime bijinesu ga kawaru, Nikkei BP sya, 1999, p172.(J)
- 2) URL:http://www.meti.go.jp/policy/media_contents/downloadfiles/producer/New_Folder/3/03-17.pdf(8 August, 2004)
- 3) Asano,K., Gemu gyokai kiki ippatsu!!, Syoueisyu, 2001.(J)
- 4) Takahashi, K., Gemu no zen shigoto 2002., Shinkigensya, 2001.(J)

subcontractors.

Paradoxically, the game industry's production process, which is surely one of the software industries, is the antithesis of the "waterfall process". One refers to it as a "revised process" (Sunagawa,1998). The flowchart of the game is simpler than its animation counterpart; moreover " α edition", " β edition", and "master edition" are identified they are essentially the same product derived from "graphic" and "main program"³. In other words, these processes are intricately related to each other. This inseparability stems primarily from the obscure nature of the specifications. As a rule of thumb, the greater number of trials and

errors, the better the game software output. Therefore, at the outset the specification sheet is either imperfect, or unwritten. Consequently, many tasks shuttle between "graphic", "main program", and "definition of specification" stages. This difficulty in defining the intimate specifications at the outset blurs the borders between processes and the distinctiveness of preproduction, production, and postproduction stages. Thus, the game industry is essentially a knowledge industry that is less related to manufacturing, which is distinguished by progression through a set of clearly defined processes and formulaic tasks.

This ambiguity in the border of processes makes

Table 3. The number of each firm's processes in the animation industry

Number of having processes	no.	%
1	23	32.4
2	11	15.5
3	7	9.9
4	5	7.0
5	4	5.6
6	7	9.9
7	7	9.9
8	5	7.0
9	2	2.8
Total	71	100.0

Note) The firms having "plan" or "direction and scenario" are positioned in the upstream processes (Group U), and ones having other processes are in the downstream processes (Group D).

Source: questionnaire survey.

a game firm difficult to outsource a task of individual process to a lot of small specialized subcontractors. Therefore, about 38 of the 54 firms (70.4%) operate more than 5 processes (Table 5). Outsourcing within the game industry is subdivided into two types: "whole-transactions" and "partial-transactions." Whole-transactions imply that the total production process is outsourced; partial transactions mean that only part of the process is outsourced. Generally, most firms prefer in-house production to outsourcing the entire production since creators want to produce their own products by themselves. However, outsourcing the whole transaction enables them to overcome the stumbling block of releasing new genre and conserve their own production resources, particularly where they have a stock of new ideas and popular characters. Although the whole-transaction involves switching large funds from outsourcer to subcontractor⁴, compared with

Table 4. Outsourcing rates in the animation industry

Outsourcing rates(%)	Group U		Group D	
	no.	%	no.	%
0	3	9.7	9	40.9
0~20	4	12.9	4	18.2
20~50	8	25.8	4	18.2
50~80	8	25.8	5	22.7
80~100	8	25.8	0	0.0
Total	31	100.0	22	100.0

Note) The firms having "plan" or "direction and scenario" are positioned in the upstream processes (Group U), and ones having other processes are in the downstream processes (Group D).

Source: questionnaire survey.

the partial-transaction, close and continuing information exchange between outsourcers and subcontractors is less necessary because only a limited number of orders for a software production are involved and the subcontractor is chosen on the basis of past reliability. Because of this needlessness, the distance between them is immaterial. On the contrary, the necessity of intimate face-to-face communication in partial-transactions due to the ambiguity of specifications and borders between processes leads outsourcers and subcontractors to being located in close proximity to each other, and also makes it difficult to do outsourcing. Consequently, compared with the animation industry, the partial-transaction is not active and absolute.

The findings on their production processes are summarized as below. With regards to the animation industry, there are clear boundaries between processes. This characteristic leads to the developed vertical disintegration and division of labor. As a result, about a half of firms operate just one or two processes. Moreover, "multi-layered"

Table 5. The number of each firm's processes in the game industry

Number of having processes	no.	%
1	2	3.7
2	6	11.1
3	3	5.6
4	5	9.3
5	10	18.5
6	16	29.6
7	12	22.2
Total	54	100.0

Note) Definition is as below. The firms having "plan" or "direction and scenario" are in the upstream processes (Group U), and that ones having other processes are in the downstream processes (Group D).

Source: questionnaire survey.

transactions are common, in other words a prime subcontractor usually outsources a part of its works to second subcontractors, and these second subcontractors outsource usually a part of their works to third subcontractor. Such multi-layered transactions are maintained by flexible specialization system. With regards to the game industry, its boundaries between processes are obscure; therefore, it is difficult to produce one game with a lot of subcontractors. Moreover, game firms prevent primary subcontractors outsourcing to second subcontractors for fear of losing control of proprietary material. As a result, most game firms have almost all processes, while specialized firms always exist in exceptional processes (mainly CG movie, sound and debugging). Hence, the transactional system of relations within the game industry is "single-layered" contrary to the multi-layered pattern exhibited by the animation industry. Consequently, a firm's project members - subcontractors and employees - are fixed. At best,

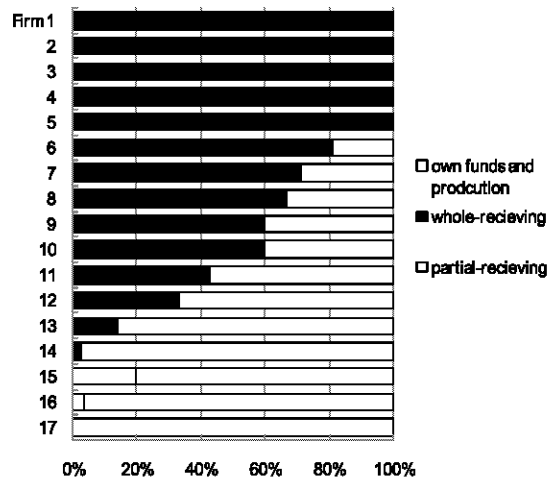


Figure 3. Classification of receiving orders of game developers in Tokyo metropolitan area

Note) The number of each firm's titles (from 1999 to 2001) classified by types of orders is counted.

Source: questionnaire survey.

only a few firms are involved with a single project. Thus, most game firms have fewer, but more permanent, inter-firm relationships compared with the animation industry.

5. Discussion

Concerning the animation industry, the power of distribution sector is so strong that proximity to the distribution firms is important for production firms. Moreover, flexible specialization theory can explain its production system and the basis of the agglomeration. There are dense networks between firms.

As opposed to the animation industry, the power of distribution sector in the game industry is so weak that production firms are indifferent to the

proximity to the distribution firms. However, although partial-transactions are not always common, the reason why the agglomeration is established is the convenience of partial-transactions and the existence of huge local labor market.

Surely, locating in close proximity to outsourcers and subcontractors make it easier to operate partial-transactions than locating in distant. About a half of tasks managed by Game “developers” - this term means game firms which basically do not produce game software with their own funds - in Tokyo metropolitan area consist of partial-transactions (Figure 3). Younger game firms have relatively smaller trust than older ones. Therefore, they have to show their capability and gradually obtain larger trust from outsourcers through partial-transactions because partial-transactions, compared with whole-transactions, pose lower risk to outsourcers. Consequently, locating in Tokyo metropolitan area increases opportunity to receive tasks from outsourcers for younger developers. Tokyo is good place to establish new game firms.s

The mid-career labor market is more prosperous in the game industry than in the animation industry. Many workers to leave game firms get jobs with similar industry. However, animation workers with higher skill levels often become freelancers or establish their own firms, while unskilled workers in the animation industry seek employment in other activities. Usually, workers in the game industry seek jobs through public information sources, including the websites of prospective firms rather than personal networks. Headhunting is not prevalent. Hence, it is appropriate to examine the preference of workers in seeking jobs rather than concentrating on the

recruitment methods used by individual firms. Most game workers, particular those in mid-career, favor working in central Tokyo, whereas employees in the animation industry are relatively indifferent to workplace location. Why are workers in the game industry so location specific? There is no clear explanation of this phenomenon, but some interviewees commented that workers in the game industry prefer living and working in, or adjacent to, a vibrant area. The unwillingness of mid-career workers to work in suburban locations has prompted game firms to seek locations in central Tokyo. Conversely, the locational tastes of workers in the animation industry are less decisive in the geographical behavior of firms. Hence, networks between game firms and labors are weaker than animation ones. In short, game firms have fewer inter-firm relationships and less flexibility in changing subcontractors than animation firms.

Interestingly, flexibility in these cultural industries is considered to be useful for the efficiency in production. My interviewees said that in-house production was most effective for creativity, but it required large fixed-costs. On the basis of their comments, we should pay attention to cultural industry firms’ compromises between creativity and efficiency in production. In this sense, deciding locations, the animation firm values efficiency rather than creativity, while the game firm values creativity rather than efficiency. In other words, the animation firms’ agglomeration advantage is based on efficiency, while the game firms’ one is creativity.

6. Conclusion

We have contrasted two Japanese cultural industries' agglomerations - animation and home video games - by examining their distribution systems and production processes. These key factors are not only interrelated but also combine to create two distinctive industrial geographies. Both industries are concentrated in small firms within Greater Tokyo and both exhibit close inter-firm relationships, though most animation firms are located in western suburbs, whereas most game ones are in the central area. It is caused by the difference between these industries in the degree of connections with the firms of similar industry. Most animation firms have been cloned from existing ones and must deal with a lot of the other animation firms for lack of some (or most) production processes within themselves. Concerning game firms, their roots are ascribed to the various industries, besides they can produce one game software product with no firm or only a few ones because of the difficulty in subdividing their processes into each part. Therefore, the strength of animation inter-firm "bonds" makes that firms agglomerate around the birthplace of the industry - Toei Animation and Mushi Production, while the weakness of game ones does not always lead to the free location decisions of game firms because of the mid-careers' preference to working in central Tokyo. Moreover, game firms have fewer inter-firm relationships and less flexibility in changing subcontractors than animation firms.

As a result, prior agglomeration factors and advantages of these industries are different. These differences originally ascribe to the diversity of

characteristics between the Japanese animation and game industries. Each firm within the Japanese game industry is free to manufacture its product without interference from the distribution sector. Conversely, production in the Japanese animation industry is dominated by a strong distribution sector. Therefore, the sharp differences between the two industries stem from their peculiar distribution systems - the existence of TV flagship stations of "legal oligopoly" in the animation industry and "platform holders" in the game industry and production processes - "waterfall process" in the former and "revised process" in the latter, which influence each other and the behaviors of their component firms. The characteristics of distribution system and production process determine what are important factors and advantages.

Hence, the true nature of the agglomeration of the cultural industry cannot be grasped on the basis of one point of view on the agglomeration factor - for example, flexibility or creativity. Rather, we need a typology of agglomerations of the cultural industry. This typology can be derived from the investigation into the characteristics of the inter-firm relationships in individual cultural industry.

Acknowledgement

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Notes

- 1) Toei Animation was established in a part of the Tokyo film studio (in Ooizumi gakuen, Nerima ward) of

- Toei, whose parent company, Mushi Production was founded in the home of TEZUKA Osamu's own (in Fujimidai, Nerima ward).
- 2) Toei Animation has total sales of about 16 billion yen and 260 employees in 2004 (simple body, from Toei Animation website), while the total sales of five of our surveyed game companies are larger than that of Toei Animation.
- 3) "α edition" is first edition, with which several data-like graphics and programs - is integrated. By investigating and improving it, you finally produce "β edition," which is nearly final edition. Then, you improve it again and complete "master edition," which is submitted to the "platform holder."
- 4) The standard production budget of PlayStation2 software is about 2-3 hundred million yen.

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文化産業の集積利益の再検討

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日本語抄録

文化産業集積に関する既存研究は、当初「柔軟な専門化」論に基づいた「効率性」の観点からの言及が目立ったが、徐々に創造的な人材や、創造的な活力を生む各種ネットワークなど、「創造性」の観点からの研究が中心となってきた。しかし、これらの研究は重要だが、産業ごとに特性は多様であり、単純に特定の研究視角で全ての産業集積現象を説明するのは不可能である。

本稿では、日本のアニメーション産業と家庭用ビデオゲーム産業を事例にして、同じ地域に顕著な産業集積を形成しながらも、その集積形成要因が一樣ではないことを明らかにする。

これらの2産業は、東京において多くの中小企業からなる産業集積を形成し、緊密な企業間関係を構築するなど、似通った特徴を持っている。しかし、それぞれに固有の流通体制と制作工程を有するため、歴史的な発展経路に加え、個別企業の行動や戦略にも大きな相違がある。特に流通体制の違いは、産業集積利益の効率性もしくは創造性に寄与する側面のどちらに重きをおいた立地選択をするのかという点に強い影響を及ぼす。

文化産業の流通部門は、生産部門と比較して、創造行為そのものよりも収益を重視する傾向にある。それゆえ、流通部門の力が強い文化産業では、収益性を重視した産業体制が構築されやすい。日本のアニメーション産業には、テレビ局という強力な流通部門が存在しているため、収益に繋がりやすい効率性の観点からの立地選択が顕著になる。一方、家庭用ビデオゲーム産業には強力な流通部門が存在しないため、創造性の観点からの立地選択が行われている。

主要語

アニメーション産業, 家庭用ビデオゲーム, 集積, 創造性, 効率性, 日本

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