



KREATIVNA URBANA REGENERACIJA PRILUŽNOSTI V LJUBLJANSKI URBANI REGIJI
CREATIVE URBAN REGENERATION POTENTIALS IN THE LJUBLJANA URBAN REGION

KREATIVNA URBANA REGENERACIJA

Priložnosti v Ljubljanski urbani regiji
Potentials in the Ljubljana Urban Region

Kreativna urbana regeneracija
Priložnosti v Ljubljanski urbani regiji

Creative Urban Regeneration
Potentials in the Ljubljana Urban Region

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Mestna občina
Ljubljana



**Creative
Cities** 

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Predgovor

Aidan Cerar

Obdobje, ko je zadoščal par pridnih rok, se je v Evropi in Ameriki (vsaj za nekaj časa) poslovilo. Danes vsi stavijo na znanje, inovativnost in ustvarjalnost. Strinjali se boste, da se ustvarjalnost (s podomačeno tukjo: kreativnost) med naštetimi sliši najbolje. Vseeno je umik klasične industrije dejansko za seboj pustil ekonomsko, družbeno in prostorsko vrzel. Delen odgovor na vprašanje, kako omenjene vrzeli zapolniti, je tudi kreativna ekonomija – eden od hitreje rastočih ekonomskih sektorjev, kot dokazujejo mednarodne raziskave, narejene v Evropi in Združenih državah. Prav zato je kreativna ekonomija deležna podpore – vse več mest je, ki strateško spodbujajo njen razvoj in se pri tem pogosto tudi medsebojno povezujejo. Ljubljana oz. Ljubljanska urbana regija tako sodeluje v projektu Creative Cities – Kreativna mesta¹. Delo, ki ga imate v rokah, temelji na študiji Inštituta za politike prostora, izvedene v okviru omenjenega projekta za Regionalno razvojno agencijo Ljubljanske urbane regije.

Trditev, danes vsi stavijo na ustvarjalnost, jemljemo resno. Ker je razprava o kreativni ekonomiji kot generatorju gospodarske uspešnosti postindustrijskih mest in kot možnosti regeneracije degradiranih urbanih območij po svojem značaju nadnacionalna in do neke mere generična, so še bolj pomembne študije in analize v slovenskem jeziku, saj pojasnjujejo lokalno dogajanje in vključujejo strokovnjake in odločevalce na lokalni ravni. Po drugi strani takšne analize in študije omogočajo slovenskim mestom sodelovanje v mednarodni razpravi, primerjavo njihove politike s politikami drugih evropskih mest in skupno, nadnacionalno raziskovanje postindustrijskih družbeno-ekonomskih prostorskih fenomenov (tu ima lahko Ljubljana vlogo referenčnega primera).

Kljub internacionalnosti teme pa je upoštevanje lokalnih svojskosti nujno, še posebej v Evropi, kjer so tokovi med mesti zaradi kulturnih in družbenih razlik še toliko bolj specifični. K spodbujanju kreativne ekonomije v slovenskih mestih je potemtakem nujno pristopiti upoštevanje lokalne zgodbe. Delo, katerega predgovor berete, je ena prvih večjih analiz kreativne ekonomije v povezavi z lokalnostjo, torej t. i. mapping. Mapping je pogost prvi korak v spodbujanju kreativne ekonomije razvitih mest, saj stroki in odločevalcem daje vpogled v vzorce lociranja kreativnih podjetij in s tem povezane prostorske koncentracije, kar je gotovo izredno pomemben dejavnik v oblikovanju nadaljnjih politik. Teorija in primeri namreč potrjujejo, da je spodbujanje kreativne ekonomije najuspešnejše, kadar se nekje na sredini srečata pristopa od spodaj in od zgoraj, za kar pa je potreben (1) pregled dogajanja od spodaj in (2) analiza dejavnikov, ki razložijo prostorsko distribucijo kreativne ekonomije. Oboje je v knjigi obravnavano dovolj natančno, grafično pregledno in vsebinsko razlagalno, da tvori smiselno osnovo za nadaljnje korake v urbani regeneraciji.

¹ Projekt poteka v okviru programa Srednja Evropa, katerega delno financira Evropski sklad za regionalni razvoj. Slovenska partnerja v projektu sta Regionalna razvojna agencija Ljubljanske urbane regije in Inštitut za ekonomska raziskovanja.

Prologue

Aidan Cerar

The times when a pair of diligent hands was all one needed are gone now in Europe and America, at least for the time being. Nowadays, everyone bets on knowledge, innovativeness and creativity. You will agree that, among these, the word “creativity” sounds best. Nevertheless, the withdrawal of classical industry left a gap in the economic, social and spatial perspectives. A partial answer to the question of how to fill this gap can be found in creative economy, which is according to the results of international studies carried out in Europe and the USA, one of the faster growing economic sectors. As such, creative economy is a recipient of support – on the level of city policies, more and more cities are offering strategic stimulation to the development of creative economy and often participate in it. Hence, Ljubljana, or the Ljubljana Urban Region, is participating in the project Creative Cities.¹ This book is based on a study carried out in the framework of the above-mentioned project by the Institute for Spatial Policies for the Regional Development Agency of the Ljubljana Urban Region.

The statement “nowadays, everyone bets on knowledge” was meant in all seriousness. Since the discourse about creative economy as a generator of the economic success of post-industrial cities and about methods of regeneration of degraded urban areas is by nature supranational and to some extent generic, studies and analyses in the Slovene language are even more important in terms of explaining local events and bringing experts and local-level decision makers into the discourse. Moreover, the preparation of such analyses also enables Slovenian cities to take part in the international discourse and compare their own policies with those of other European cities. At the same time, it offers opportunities for international collaboration in researching post-industrial socio-economic spatial phenomena where Ljubljana can stand as a referential case.

In spite of the supranational nature of the topic, local specifics must be taken into account, particularly in Europe, where the flows between cities are, because of the cultural and social differences between them, much more distinctive. In stimulating creative economy in Slovenian cities, local stories should therefore never be ignored. This book presents one of the first comprehensive analyses of creative economy in connection with locality, the so-called mapping. Mapping is often the first step in stimulating creative economy of developed cities, offering professionals and decision makers an insight into case studies locating creative businesses and the spatial concentrations connected with them, which is certainly an extremely important factor in establishing future policies. Both theory and case studies confirm that stimulation of creative economy is most successful when the bottom-up and the top-down approaches meet somewhere in the middle; however, this calls for (1) a survey of bottom-up events, and (2) an analysis of factors explaining the spatial distribution of creative economy. The book handles both with enough precision, graphic clarity and explanation to provide a reasonable foundation for the next steps towards urban regeneration.

¹ The project is part of the “Central Europe” programme and is financed partially by the European Regional Development Fund. Its Slovenian partners are the Regional Development Agency of the Ljubljana Urban Region and the Institute for Economic Research.

Uvod

Študija, predstavljena v publikaciji, je nastala po naročilu Regionalne razvojne agencije Ljubljanske urbane regije v okviru mednarodnega projekta Creative Cities. Prispeva pomemben vpogled v prostorsko razporeditev kreativnih industrij v Ljubljani in njeni urbani regiji ter ovrednoti lokacijske dejavnike, ki na to razporeditev vplivajo. Rezultati so lahko dragocen prispevek k okrepitvi kreativnega gospodarstva na eni strani ter k načrtovanju urbanega razvoja na drugi strani – pri slednjem še posebej v zvezi z urbano regeneracijo. Izsledki so uporabni pri razvoju kreativnih četrti, ki so pomembno orodje tako kreativnega gospodarstva kot urbanega razvoja.

Delovna hipoteza, preverjana skozi študijo primera, predpostavlja, da kreativne industrije v Ljubljanski urbani regiji predstavljajo priložnost za urbano regeneracijo. Pri tem je pomembno, da kreativne industrije niso razmeščene enakomerno ali naključno, ampak se zgoščajo glede na dejavnike, opisane v strokovni literaturi, ter da se zgoščajo v območjih, ki jih lahko opredelimo kot degradirana oziroma katerih uporabna vrednost je zaradi različnih razlogov zmanjšana.

Pomen publikacije je predvsem v predstavitvi širši javnosti slabo poznane teme, ki je pomembna tako za urbani razvoj mesta Ljubljana kot za njegov gospodarski razvoj. Hkrati omogoča primerjavo znotraj širše urbane regije, predvsem pa daje izhodišče za primerjavo na področju kreativnih industrij z drugimi mesti po Evropi in svetu. Posebna vrednost publikacije so tudi priporočila, podana v zaključku, ki ponujajo osnovo za pospešen razvoj kreativnih industrij v Ljubljani ter za vzpostavitev učinkovitejše politike urbane regeneracije.

Kot ugotavlja študija, je namreč nizka prostorska in funkcionalna diverzifikacija kreativnih industrij tudi rezultat »inkrementalnega« pristopa, ki ne sledi izdelanim razvojnim strategijam kreativnih industrij v globalnem kontekstu, pač pa se zgolj odziva na trenutne razmere, omejeno na lokalno in regionalno tržišče. Glavno priporočilo v zvezi s podporo kreativnemu gospodarstvu tako naslavlja potrebo po usmerjenih strategijah, namenjenih specializiranim vejam kreativnih industrij.

Z vidika urbane regeneracije je glavno priporočilo, da četudi se kreativne industrije zgoščajo v mestnem središču, le-to ni najbolj potrebno regeneracije – urbana politika bi se morala osredotočiti na podporo kreativnih četrti zunaj centra. Največji potencial za razvoj kreativnih četrti in torej tudi za urbano regeneracijo tako predstavljajo sekundarna žarišča in žarišča nekaterih specializiranih vej, kot so radio in televizija, programska oprema, prodaja umetnin in starin ali pa video, film in fotografija, ki so razporejena na razmeroma malo lokacijah izven mestnega središča. To je še posebej pomembno za dva velika projekta urbane regeneracije, ki jih razvija Mestna občina Ljubljana: Partnerstvo Šmartinska in Partnerstvo Celovška.

Publikacija ima štiri poglavja. V uvodnem so opredeljeni osnovni teoretski koncepti kreativnih industrij, kreativnega razreda in kreativnih mest ter njihovi potenciali za urbani razvoj. Prikazan je po eni strani pomen urbanih politik za spodbujanje kreativnih industrij, po drugi strani pa priložnost uporabe kreativnih industrij za spodbujanje urbane regeneracije. Opredeljena in kritično ovrednotena so v svetu najpogosteje uporabljena orodja za spodbujanje kreativnih industrij v mestih. Posebej so obdelane tudi nevarnosti gentrifikacije ob aplikaciji politike spodbujanja kreativnih industrij za urbano regeneracijo.

V drugem poglavju je na podlagi relevantne domače in tuje literature opisano privlačno okolje za kreativna podjetja. Na podlagi literature in tujih primerov so opisani dejavniki, najpogosteje razumljeni kot pomembni za ustvarjanje privlačnega okolja za kreativna podjetja in ustvarjalne posameznike. Ti dejavniki opredeljujejo osnovo za razvoj kreativnega mesta.

Tretje poglavje prinaša raziskavo prostorske umeščenosti kreativnih industrij v Ljubljani in njeni urbani regiji. Na podlagi statističnih klasifikacij, predvsem Standardne klasifikacije dejavnosti (SURS), so določene skupine sorodnih dejavnosti znotraj polja kreativnih industrij, ki opredeljujejo podpodročja za analizo. Umeščenost vsakega od enajstih podpodročij je na osnovi podatkov Poslovnega registra Slovenije (AJPES), ob pomoči podatkov Registra nepremičnin in hišnih števil ter teritorialnih enot (GURS) posebej raziskana in ovrednotena na obeh ravneh. Opravljene so dodatne analize stopnje prostorskega grozdenja kreativnih podjetij ter pripravljene karte in dodatni grafični material. Posebej so obdelane izbrane mikrolokacije, verodostojnost in uporabnost uradnih podatkov pa je preverjena z anketo.

Karte so s prostorsko analizo distribucije kreativnih podjetij podrobno proučene, stanje v prostoru pa je ovrednoteno s stališča relevantnih dejavnikov. Ocenjene so priložnosti, ki jih kreativne industrije predstavljajo za razvoj kreativnih četrti in urbano regeneracijo.

V zadnjem poglavju so predstavljene sklepne ugotovitve študije s poudarkom na priložnostih, ki jih urbana regeneracija v povezavi s podporo kreativnim industrijam v ustvarjalnih četrtih ponuja v Mestno občini Ljubljana in Ljubljanski urbani regiji. Sestavni del zadnjega poglavja so Priporočila oblikovalcem politik s poudarkom na zaključkih študije in na nadaljnjem razvoju ustvarjalnih četrti.

Introduction

The study presented in this publication has emerged as a result of the commission by the Regional Development Agency of the Ljubljana Urban Region in the framework of the project Creative Cities, funded by the European Union. It contributes an important insight into the spatial distribution of creative industries in Ljubljana and its urban region as well as evaluates the location factors influencing this distribution. The results can be a valuable contribution to policies supporting creative economy, on the one hand, and to urban development policies on the other, in particular in relation to urban regeneration. They are thus useful in relation to supporting creative quarters, this being an important tool for both policies.

Working hypothesis, which was tested through the case study, assumes that creative industries in the Ljubljana Urban Region present a potential for urban regeneration. It is important in this respect that they are not distributed evenly or randomly, but concentrate in specific areas according to the factors, described in the literature. It is also important, that they concentrate in areas in need of regeneration.

The importance of the publication is particularly in its presenting a key theme for the urban as well as economic development of the city of Ljubljana that has up to now not been presented to the wider public in its entirety. At the same time, it enables comparisons in the field of creative industries within the wider urban region and in particular within the context of other cities in Europe and around the world. The particular added value of the publication are the recommendations, presented in the conclusions, which offer the basis for accelerating the development of creative industries in Ljubljana and for setting up more efficient urban regeneration policies.

As the study suggests, low spatial and functional diversification of the creative industries is also the result of the “incremental” approach, which does not follow any development strategies for creative industries within the global context but instead only responds to the current situation and is limited to the local and regional market. The main recommendation in relation to supporting creative economy thus addresses the need for specific strategies dedicated to specialised branches of creative industries.

The main recommendation in respect to urban regeneration is that, despite the concentration of creative industries in the city centre, this area may not be the most in need of regeneration, so the focus of urban policies should be on the support of creative quarters outside of the centre of the city. The highest potential for the development of creative quarters, and consequently also for urban regeneration, is thus presented by the secondary hotspots and the hotspots of some specialised branches, such as radio and television, software, arts and antiques markets and video, film and photography, which are located in relatively few locations outside of the city centre. This may be of particular importance for the two large urban regeneration projects developed by the City Municipality of Ljubljana, namely the Šmartinska Partnership and the Celovška Partnership.

The publication has four chapters. In the introductory chapter, the basic theoretical concepts of creative industries, creative class and creative cities are defined as well as their potential for urban development. On the one hand, the importance of urban policies for supporting creative industries is presented, and on the other hand, the opportunities for using creative industries for stimulating urban

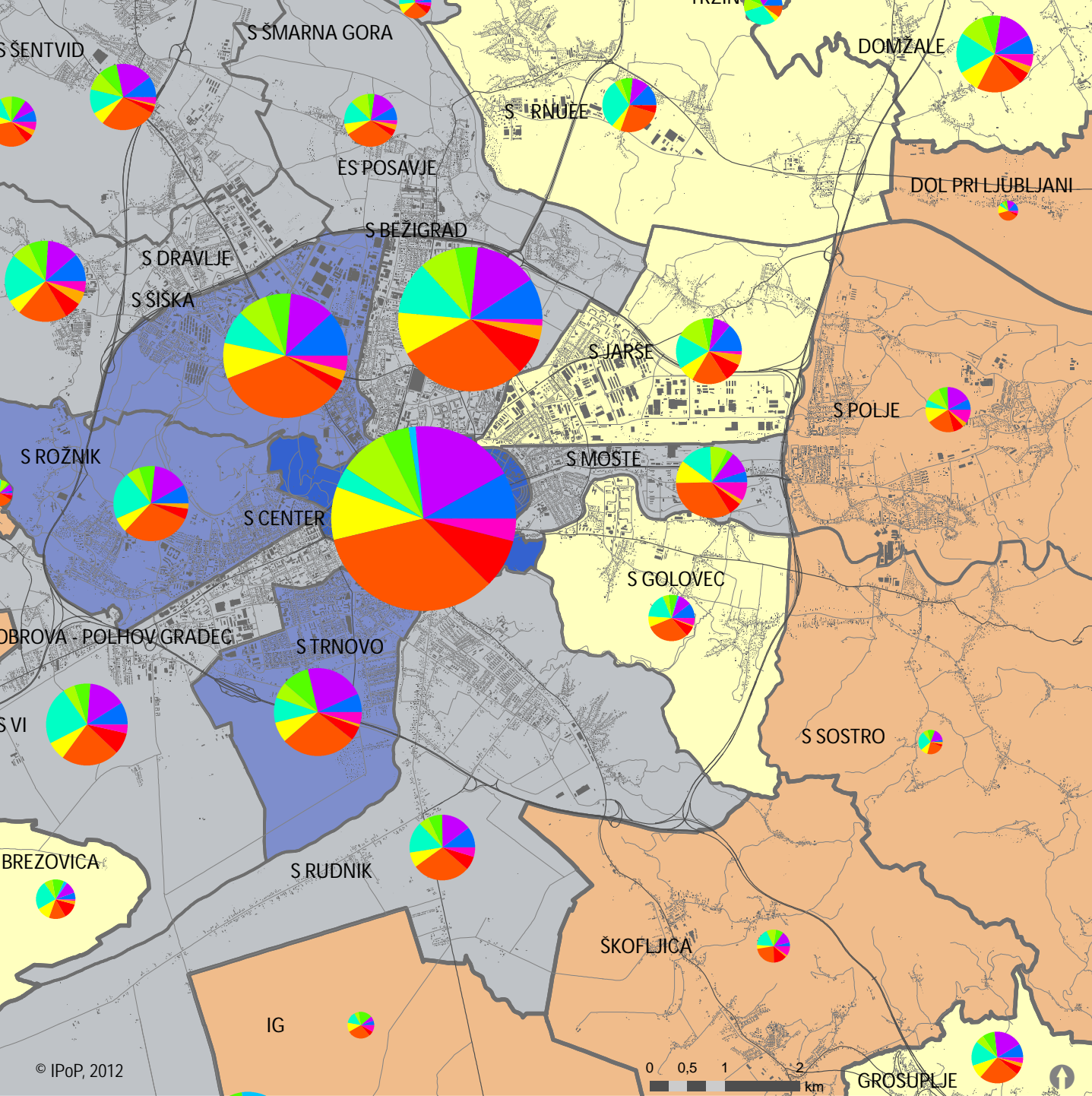
regeneration are explained. The most commonly used tools for supporting creative industries in cities are described and critically evaluated. In particular, the dangers of gentrification by applying policies using creative industries for urban regeneration are dealt with.

In the second chapter, the attractive milieu for creative enterprises is described on the basis of relevant domestic and international literature. On this basis, the factors most often understood as crucial for creating an attractive milieu for creative companies and individuals are also described. These factors define the basis for the development of the creative city.

The third chapter presents the analysis of the spatial distribution of creative industries in Ljubljana and its urban region. On the basis of statistical classifications, mainly the Standard Classification of Activities (SURS), the groups of related activities within the field of creative industries are set up, defining the sub-branches for the analysis. The distribution within each of the 11 sub-branches is analysed and evaluated on the basis of data from the Slovenian Business Register with the help of data from the Register of Real Estate. Selected micro locations are researched in more detail and the credibility of the official data is checked through a special survey.

The maps depicting the spatial distribution of creative enterprises are thoroughly interpreted and evaluated from various relevant points of view. The potential of creative industries for the development and setting up of creative quarters and thus for urban regeneration is assessed.

In the last chapter, the conclusions of the study are presented, with the emphasis being on the opportunities for urban regeneration in connection to support for creative industries through creative quarters in Ljubljana and the Ljubljana Urban Region. The integral part of the last chapter are also the recommendations for policy makers, based on the results of the study and directed towards the development of creative quarters.



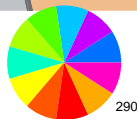
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Legenda/Legend

Std. dev. % K.I./
Std. dev. % CI

- < -1,5
- 1,5 - -0,50
- 0,50 - 0,50
- 0,50 - 1,5
- 1,5 - 2,5
- > 2,5

- oglaševanje/advertising
- arhitektura/architecture
- prodaja umetnin in starinarnice/
art & antiques market
- dizajn/design
- video, filmska in foto produkcija/
video, film, photo



290

- računalniško programiranje/software
- glasbena in vizualna produkcija/
visual, perf., music
- umetniška produkcija/arts creation
- založništvo/publishing
- radijska in televizijska produkcija/
radio & TV
- institucije na področju kulture
in umetnosti/institutions

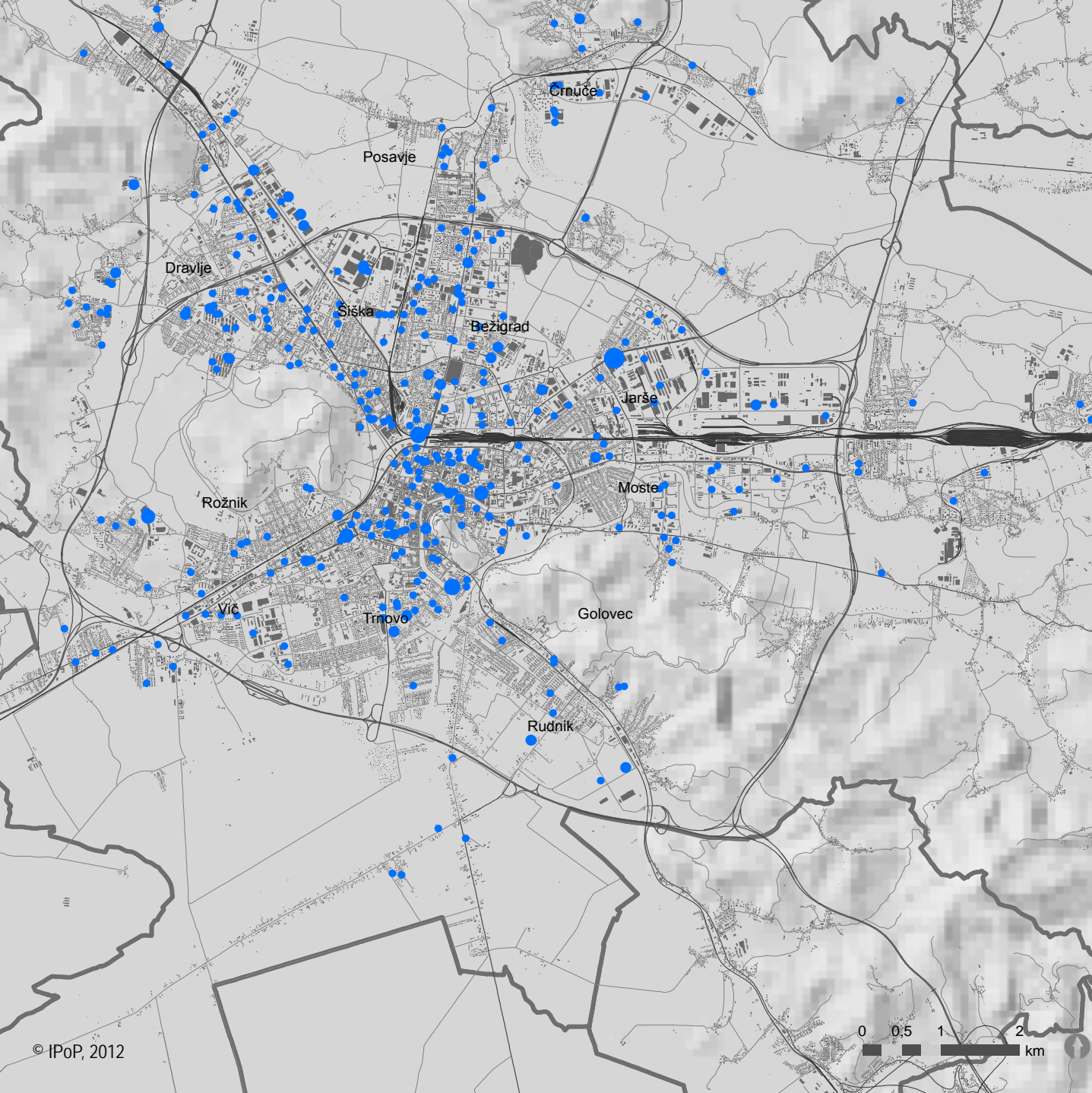
Karta 4:

Delež podjetij iz navedenih panog med kreativnimi industrijami in delež kreativnih industrij med vsemi podjetji v Ljubljani

Map 4:

Share of companies in listed branches among creative industries and share of creative industries among all companies in Ljubljana

Vir podatkov/Data source: GURS, SURS, AJPES, 2011



Legenda/Legend

Število podjetij na posameznem naslovu/
No. of companies at individual address

- 1
- 5
- 10

Karta 5:
Naslovi z oglaševalskimi podjetji v Ljubljani
Map 5:
Addresses with advertising companies in Ljubljana

Vir podatkov/Data source: GURS, SURS, AJ PES, 2011

Kreativna urbana regeneracija: Priložnosti v Ljubljanski urbani regiji
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