

博士論文 (要約)

MANIFESTATION OF CREATIVE INDUSTRIES
IN BANGKOK, THAILAND:
THE ANALYSIS OF INSTITUTIONAL ENVIRONMENT
AND SPATIAL AGGLOMERATION IN AN EMERGING MARKET

(タイ国バンコクにおけるクリエイティブ産業の出現：
新興マーケットにおける制度環境と空間的集積に関する分析)

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論文題目 Manifestation of creative industries in Bangkok, Thailand: the analysis of institutional environment and spatial agglomeration in an emerging market
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The notion of the creative industries has become an eye-catching among policy discourse for the last few decades to stimulate economic competitiveness, increase entrepreneurship, and enhance their global ranking in the competitive league of global cities. Creative industries have defined as a set of knowledge-based economic activities that generate revenues from trading and intellectual property. Creative industries use creativity and skills as main inputs in generating meaning, contents, and aesthetic attributes. Creative industries are characterized by scattered and fluid networks of creative producers. The collective action from institutionalization are associated with the geographical agglomeration of firms in creative industries, where is the location of the production system and political territories as well. The co-agglomeration of small and medium-sized firms can benefit from geographical proximity and cognitive proximity, which is crucial for interaction opportunity, diversity of complementary skills, and stimulate tacit knowledge transfer. The key component of tacit knowledge transfer is dependence on urban settings and the environment. However, the creative industries concept is notable as it is developed upon contexts of developed countries. In developing countries context, the rise of creative industries policies has been ambiguous and ungrounded policy. Therefore, this dissertation focuses on the convergence between economic development and urban development in creative industries in the emerging market by taking Bangkok as a case-study.

After the financial crisis in 1997, Thailand's policy discourse revolved around an intentional shift from a low-value industrial exporter in the global supply chain. The government in that time focused on strengthening the grassroots economic structures through value-added economies from local cultural resources in a small size business and modernization on the political landscape. Since then, the light of interest in the creative industries has been inspired. The ambition in the commercialization of cultural products for the sake of value-adding approach may lead to criticism of the interplay between the creative industries and the creative industries. The crux of creative industries in terms of Thailand's policy was diffused and overlapping over the idea of creative economies, cultural industries, and creative cities. The confusion of the creative industries' classification is one of the keys obstructed in driving policy implementation, which both may have a different development trajectory. Because traditional cultural policy focuses on protection and promoting untouchable status. Creative industries are broader, more diffuse, and market-oriented.

In terms of an urban setting, Bangkok has struggled in urban sprawl problems for many decades. The monotonous suburbs, as neglect of suburban development, supports the image of homogeneous development, which contrasts with the ideal environment for the creative class. The interest in attracting talent to settle is influenced by two powerful economic graphical concepts. First, the notion of Marshall-Arrow-Romer externalities focuses on industry specialisation in a certain region. Second, the notion of Jacobs externalities focuses on diversification of urban regions in facilitating innovation, improve productivity from tacit knowledge transfers in both direct and indirect interaction between different industries fields. The agglomeration economic advantages as mentioned above, are proximity effects from the dense network and density components, which endorse the importance of physical attributes. Research novelty represents an effort in connecting the notion of institutionalism and economic agglomeration in an intra-urban scale. Therefore, this research takes place from the policy level, macro-spatial level, and micro-spatial level. Three analyses aim to fulfill the goal of investigating the convergence of economic promotion policies and urban planning policies to support creative industries. Research questions have arisen, including the impact of policy implementation, the schematic of Bangkok's tacit knowledge transmission arena development, the uniqueness of the Thainess-creative industries, and Bangkok's key challenges regarding creative industries agglomeration.

First, the policy level: institutional analysis applied the historical institutionalism approach through path dependence and critical juncture tool to identify the self-reinforcing processes. The seeding grew from a foundation of an institutional and regulatory body in the first critical juncture from the late 1990s, which was initiated from the cultural industries promoting approach. Later in the early 2010s, the second critical juncture emerged as a strong policy tendency as the national pilot policy. Later it has been mentioned as a sub-category of the economic plan in the third critical juncture. The third and the current critical juncture was counted from 2016 when the new nation branding in the context of post-coup Thailand, which highlights digital technologies as a policy pilot in economic development. The result of path dependence and critical juncture analysis reveals three key findings of the policy trajectory. First, a missing linkage in the decentralization process creates a resonance with subsequent problems. The national government remains predominant in the policy-making process. However, the policy development process struggles in maintaining continuous direction because of political polarization from significant political vulnerable for the last two decades. The public organization body is the key actor in driving creative industries promotion from the national government. The public organization body is the inheritance of political reform of the bureaucratic system during the first critical juncture. However, an autonomous body could only be a shortcut path over a complicated bureaucratic system from the central government in the short term of an economic perspective. In the long term, the top-down from the central government approach is problematic due to a lack of collaborative action in different authority bodies and limited resources. Therefore, the second key finding is a low effort from the local authority body, which is the Bangkok Metropolitan Authority (BMA). BMA has played a role as a supporter or participant, instead of being an initiator and host institution of place improvement projects. The economic policy and urban planning are not consistent in developing a place-specific development framework. Infrastructure development in

building creative milieu to promote learning and creativity has been neglected. In terms of spatial viewpoint, the agglomeration pattern of creative industries in the city-wide level shows a polycentric agglomeration pattern. This is in line with the third finding of a confusion of the creative industries classification due to a lack of reinterpreting and applying the concept with regards to the nation's visions and limitations. The government plans focus on urban inner-area with high-level cultural heritage values through the urban regeneration plan, which mentioned creative industries as a sub-category issue.

The macro spatial dimension in city-wide level analysis on creative firm agglomeration investigates whether agglomeration processes were shaped by a top-down approach or self-organizing approach. The spatial technical methodology covers the intra-industries agglomeration pattern from the Hotspot analysis. The spatial dependency method between different industries is used to define what latent group of the co-agglomeration cluster using the Multivariate clustering analysis and Kd function, respectively. Lastly, the agglomeration factor analysis was performed in order to examine the agglomeration strategies of creative firms using spatial regression methods. This study performed two regression model including the Ordinary Least Squares (OLS) regression model and Geographically Weighted Regression (GWR) model. Results from city-wide level: macro-spatial agglomeration analysis reveals a polycentric spatial distribution of creative firms agglomeration. Creative industries tend to agglomerate around an urban core in city-fringe areas. Afterward, the agglomeration rapidly decays after the first 10-kilometer radius from the city center with some concentration in subcenter areas. The transportation network is predominantly shaping the agglomeration pattern. Expressway plays a key role in the center rotation and forms the main skeleton for an agglomeration, follow by railway transportation and boat transportation. Moreover, the result suggests Bangkok's creative industries classification in terms of spatial dimensions, which purpose tackle the absence of standard in industries classification. Six groups of compound industries consist of Lifestyle Commercial, Craft & Design, Show Business, Jewelry, Creative Fabrication, and CAD Studio (Computer-aided design). The agglomeration characteristics followed the concept of the distinctive by the knowledge-based type. First, the artisan knowledge-based type covers as craft & design, jewelry, creative fabrication group of compound industries. The synthetic knowledge-based industries cover shows business and CAD Studio, Show Business, and Lifestyle Commercial group of compound industries.

A variation of the correlation between exploratory variable and the agglomeration level in different industry group highlight a location specificity to support the creative industries agglomeration in distinct locations of the city. The distinctive characteristics are divided by the western and the eastern part of the city. The agglomeration from the artisan type emerges from the historical areas, expanding to the western part of Bangkok where is rich in the cultural capital. The expansion of manufacturing artisan knowledge-based goes to the western part. Findings from the spatial viewpoint draws a clear distinction between the cultural industries and the creative industries. Cultural industries are more agglomerated in the inner area with place-specificity in at small distances and rapidly decays as the distance increases. In opposite, synthetic knowledge-based industries are may originally emerge from the inner areas but later spread outward to different directions. The

agglomeration of synthesis type emerges in inner areas and city-fringe areas around the urban core in the eastern part. This cluster tends to be attracted in the lower density areas, which followed the auto-oriented in the eastern part.

The varying intensity of agglomeration among different industries allows me to compare and distinguish characteristics of agglomeration at a district level. The last analysis aims to understand the quality of place that supports creative industries agglomeration through understanding place itself from an urbanism researcher perspective versus a location decision-making process from a creative entrepreneur perspective. The data in this analysis used the site survey mapping, interview, and focus-group discussion. In this study, the quality of place follows by two elements of density and networking. The case-study selection criteria are selecting a certain district outstanding result from the macro-spatial agglomeration analysis and represent different urban location typology. Charoenkrung - Bang Rak district and Thonglor - Ekkamai district represent an inside urban core as an inner CBD and an outer CBD zone, respectively. Town in Town district and Bang Khae district represent a case from an outer urban core as a residential area and a subcenter, respectively. Case-studies from urban core areas have more diversity of building type and size compare to outside urban core areas. Moreover, a case within an urban core has more potential for accessibility with a variety of transportation choices as well as walkability from a walkable distance to public transportation. Cases outside an urban core are facing a struggle of inadequate accessibility. This is not the only challenge for creative entrepreneurs but is also a challenge to attract talent worker in creative labours pool. As a result, the development of infrastructure required by creative industries are rarely taken care of under any policy program and therefore, the ability to attract creative workers is questionable, because of the inadequate creative infrastructure in the city and district level. In terms of the institutional environment, Charoenkrung - Bangrak and Thonglor - Ekkamai district represent active local governance. However, it is based on ad-hoc projects and temporary events. The critical problem is the complexity of government structure, a confusion of the ownership, and lack of guidance of channel to participate. This could be in line with a result of the policy analysis in lacking collaboration platforms in the decentralization process.

In conclusion, results from three analysis points that the top-down approach from creative industries promotion policy has a lower influence than a self-organizing approach from a firm's decision in promoting an agglomeration. Because policy advocacy actors are highly concentrated in the national government level with a low effort from the local authority body to deliver a suitable infrastructure creative milieu. Although, a spatial agglomeration is not complete independence from policy formation. A polycentric pattern of spatial agglomeration is in line with an urban subcenter promotion area. As well as a center rotation reflects the development of the transportation network includes expressway and mass transit railway. This dissertation proposes three suggestions in order to promote creative industries agglomeration, cover three areas of 1) Developing strategic framework, 2) Promoting decentralization process through collaboration and strengthen the institutional capacity in different government levels, and 3) Providing creative infrastructure for both city level and local level.