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De Brusselse economie

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Synopsis nr. 7

The Brussels Economy

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I. Observations

1. *A global economic dynamics that is favourable once again*

Today's global economy is favourable to the nerve centres of command and control networks which are concentrated in the largest metropolises. Since 1995, two-thirds of the large metropolitan regions in the EU countries have recorded economic performance higher than that of their country. Those that do not reach this threshold are primarily cities hampered by a history of heavy industry and lack an adequate services sector. The metropolitan area of Brussels provided 32.7% of the national GDP in 2006, up from 31.5% in 1995. Although the most dynamic growth certainly occurred in the periphery, the Brussels-Capital Region (BCR) on its own produces 18.9% of the national GDP,¹ and registers growth that is similar, even slightly higher, than that of the overall Belgian economy, and ahead of Antwerp, Liege and Charleroi.

2. *The economic sectors*

- a. A strong degree of internationalisation linked to the presence of the European institutions

Brussels' rank among world cities is largely superior to what could be expected from the size of the city and the volume of the Belgian economy. The GaWC (2000) list, which is based on presence of offices of international consulting, marketing, publicity, accounting, etc. firms as well as on connectivity, ranks Brussels seventh among European cities. This position is behind the "global cities" of London and Paris, but holding its own with Milan, Frankfurt, Madrid and Amsterdam, and ahead of Zurich. The "European Cities Monitor", for which the CEOs of Europe's 500 largest firms were interviewed, places Brussels on the sixth place among European cities, trailing only London, Paris, Frankfurt, Barcelona and Amsterdam.

¹ This figure is underestimated since it does not include the activities of international institutions whose product is not registered in the national accounting. Including these activities would raise the regional product to approx. 19.7% of the adjusted Belgian product.

This sound position is primarily due to Brussels' hosting of European institutions, and secondarily to other international institutions, such as NATO. And this international presence is expanding. Beyond the value produced by the international institutions itself, they also pull in many other activities such as lobbying, consultancy, media, embassies, etc. and yields significant multiplier and induced effects, in business and tourism for example. Some 75% of business tourism in Brussels is linked to its European role. The international reputation of Brussels makes it one of the world's leading congress venues. Likewise, roughly one-third of leisure tourism itself (45% of overnight stays) is spawned by the presence of European institutions. This tourism fosters cosmopolitan cultural and creative development. All told, the presence of European and international institutions in Brussels and the induced and multiplier effects count for 13 to 14% of employment and of the Brussels GDP "adjusted" by adding activities that are not counted in national statistics.

- b. An economy dominated by national and international administrative functions, and financial and business-support services

The Region's economy is dominated by the public administration sectors. This is even more so when we factor in the international public function (over 21% of the total employment, without counting public status jobs such as teaching, healthcare, etc), as well as financial services and business-support services: a total of 48% of jobs. The weight of financial services derives from the presence of international services and specific Brussels niches (management of international financial transactions, skills in banking technology) and the heavy financialisation of Belgium's economy – which may become fragile in the current economic context. The surge in business-support services is closely related to the Region's international function, and these services are by far more integrated in international networks than in any other Belgian city (L. Aujean & al., 2007).

- c. The low number of company headquarters and R&D facilities

Although Brussels is well-placed for its role in regional and global networks and also serves as a prime location of regional offices of transnational companies, it nevertheless has a mediocre showing when it comes to hosting the headquarters of worldwide companies. This reflects the weakness of the country's national capitalism, which has been denationalised. Only 1.7% of the turnover of companies among the world's 500 top firms with headquarters in Europe is controlled from Brussels.

As a result of the low number of present headquarters the country also has a weak performance in research and development, which is particularly the case in Brussels. This sector accounted for only 1.8% of Belgium's GDP in 2005 (1.9% average for EU15, 2.1% in France and 2.5% in Germany). This share drops to 1.1% in Brussels, although it is slightly higher in the city's periphery. Brussels' weak performance may be surprising since large metropolitan regions in the developed world often tend to attract this type of activity. This said, the quality of Belgian scientific production is healthy and four major universities are located in Brussels itself or areas nearby. The relative inability, however, to transform this fundamental research is largely due to the weak national capitalism: R&D often resides near the headquarters of major companies.

d. Industry has disappeared

From the end of World War I to the early 1970s Brussels was the country's main industrial city, and in 1970 it still held 158,000 jobs in industrial manufacturing. During this period Brussels was home to some 12% of the national manufacturing jobs, a figure reinforced by adding employment in the canal industrial basin, from Vilvoorde to Clabecq.

The deindustrialisation process that began in the late 1960s is still continuing. Only 38,000 manufacturing jobs are left in Brussels, a mere 5% of the Region's total employment. Audi-Forest is the only large industry remaining in the area. Moreover, the remaining "manufacturing" activities in Brussels mainly consist of headquarters or management and maintenance activities rather than production per se: in 2006 51% of those on Brussels' manufacturing payrolls were "white collar", compared to 35% nationally. The economy of Brussels' periphery is now hardly more industrial than that of the Region,² with 54% of its so-called industrial jobs "white collar". While the Brussels-Capital Region lost 30,000 industrial jobs from 1991 to 2006, the rest of former Brabant also lost 24,000 jobs over the same period.

e. A deficit in job creation, especially low-skill employment

The Region's new dynamic economy has generated few new jobs. Employment increased at an average of 0.8% per year from 1995 to 2006, with a 2.1% increase in GDP (compared to 1.7% and 3.4% respectively in the peripheral districts of Hal-Vilvoorde and Nivelles). The economy, based on strong gains in productivity, continues to sacrifice the least qualified jobs. (the metropolitan Region on the whole is the most productive in Europe). Because of the relative level of property costs and traffic congestion, public administrations or those jobs that require a high degree of visibility and top-level inter-personal contacts have a greater tendency to be located in the Region's territory. The periphery tends to have a higher share in the lower productivity sectors or those less able to bear the heavy costs entailed by a central location.

f. A fragile commercial sector

Brussels' commercial sector is fragile: the number of jobs dropped from 97,000 in 1991 to 76,000 in 2006 in this sector, whereas the RDP hoped to see an increase. Although a large part of this decrease can be imputed to an inevitable process of wholesale business moving outside the Region, the situation for retail businesses is not all that bright either. Retail employment appears to be rising in recent years, although many of these jobs are part-time. Growth in the horeca sector (21,000 to 26,000 jobs) can not make up for losses in the rest of the commercial sector. The relative fragility of retail business in Brussels is primarily due to the gradual development of retail structures in the periphery.

In the city ethnic businesses are developing in neighbourhoods undergoing social mutation and losing their original population. The emergence of these businesses can be seen as a process related to local survival strategies. The enterprises can often be

² 14.0% of the GDP in former Brabant, excluding Brussels, was provided by manufacturing industries in 2006 (21.0% in 1975) ; in Brussels, these figures are respectively 6.4 and 15.7%.

found in fragile sectors which offer little potential, face heavy competition, and target a public with low purchasing power (snack shops, telephone boutiques, etc.).

3. *The socio-spatial situation*

a. Competition from the periphery and failure to manage the situation coherently

Certain economic activities, such as logistics, business-support services, and even R&D and not industrial activities have relocated out of the Brussels Region, a deconcentration that has happened in many larger cities. This relocation occurs without institutionalised concertation at the metropolitan level, while private firms see Zaventem, the periphery's most dynamic area, or Brabant-Wallon, as integral parts of the Brussels area.

It would be misleading to reduce this deconcentration to a phenomenon caused merely by activities relocating out of Brussels. Instead this is more a facet of the periphery's own dynamics. Some 81% of the large firms found in the BCR in 1996 were still there in 2006. Of the 19% no longer in Brussels, 12% were firms that closed down and only 7% moved to other areas in Brabant (d'Andrimont C. & al., 2007). Moreover, this negative balance due to closures and relocations was almost entirely compensated by new activities created in the Region and a few rare activities moving from the periphery to Brussels. In the periphery, 9% of the large firms found there in 2006 had moved from the BCR in the past decade, while 22% were activities created over the same period.

The constraints posed by activities moving outside regional borders should not be overestimated, for the following reasons:

- with over 700,000 jobs, the Brussels Region is not lacking employment in absolute terms;
- employment continues to grow in Brussels, even if at a slower pace than in the periphery;
- in terms of impact on regional and local financing, the shift of economic activities to the periphery has less impact than the transfer of its inhabitants, although admittedly the former can encourage the latter.

b. A dramatic socio-spatial dualisation

The Brussels-Capital Region suffers from a triple dualisation:

- a social dualisation between the Region and its periphery (with average income per inhabitant respectively at 85% and 117% of the Belgian average);
- a dualisation inside the Region itself, between the western and eastern neighbourhoods. Communes in the second ring in the east and southeast, from Woluwe Saint-Lambert to Uccle, have an average income 129% of the regional level, compared to 83% in the communes of the "poor crescent" which circles the Pentagon from north to south and to the west - Saint-Josse, Molenbeek, Koekelberg, Anderlecht et Saint-Gilles. If the dualisation between the eastern and western neighbourhoods of the second ring is somewhat attenu-

ated, it is acute in the first ring, where gentrified neighbourhoods contrast with those holding a high concentration of immigrant populations.

In relation with the two above points, there is a stark dualisation in the job market. 47% of regional employment is found in top-skilled service sectors. This has an immediate impact on the possibility to recruit the capital's least educated inhabitants, especially since these people also suffer from lack of bilingualism and discrimination linked to their ethnic origin. For job seekers holding identical diplomas, the unemployment rates are noticeable higher in the poor crescent in western Brussels than in the rest of the Region (Roesems T. & al., 2006).

We thus find an unemployment rate of approx. 17%, that rises to 35% for those under 25. At the same time six-tenths of the jobs in Brussels are held by commuters. Likewise, the unemployment rate in the Hal-Vilvoorde arrondissement is approx. 4% and in Brabant-Wallon 9%. Even more preoccupying is to see that the generally high level of education has failed to lower the unemployment rate for Brussels residents, which has continued in negative patterns compared to the conjunctural fluctuations of unemployment in Belgium since 1995 (Roesems T. & al., 2006 ; Baromètre conjoncturel, 2008 ; Vandermotten C., s.d. [2008]). The Region thus lacks the types of jobs that could provide employment for its least qualified inhabitants. But neither can activities in the periphery offer a solution. We should not overestimate the potential this zone would have to reabsorb Brussels' unemployed when the periphery's job market was better integrated with that of the Region. Out of 36,000 Brussels residents working in Flanders, 46% are highly qualified and only 26% low-skilled.

4. A shift in the Region's political priorities

In 1995, the options of the first Regional Development Plan (RDP) were based upon a few major concerns, such as the continuing economic decline which spawned a certain nostalgia for a lost industrial base. Brussels at that time was faced with 25 years of massive depopulation, the result of four decades of anarchistic speculative town planning: the RDP thus also called for steps to keep the middle class within the Region. In addition to these two concerns, there were also misgivings about the advisability of building new offices.

Today's dynamics are the opposite: the population has grown by nearly 100,000 people over the past ten years. This growth, however, is mainly due to a highly positive migration balance deriving from migrants from abroad. There is also a natural balance due to the young age of the new residents and a higher fertility rate among the population of foreign origin, while at the same time the suburbanisation continues at a steady pace.

In this context, and more generally in the light of globalisation, the Region has shifted its political priorities. In economic matters, it refers less to the RDP than to the new International Development Plan (IDP, 2007) which has less political legitimacy since it was not published in its entirety nor submitted to a public enquiry. The main objectives of this Plan focus on enhancing the image of Brussels and its position in international ranking systems, improving the integration of international institutions in the city, proactive development of the potential for business tourism and events and congresses, including the necessary infrastructures (Tour&Taxis, Heysel), and hosting of international financial activities, emerging country firms, etc.

II. Questions-issues

1. *Is the Brussels economy potentially fragile?*

The Brussels economy, despite its prosperity, may appear to harbour elements of fragility, such as the endogenous character of its high level services sector and the heavy dependence on the presence of European institutions. These tendencies cannot be denied, but can they be seen as weaknesses? The last two decades have demonstrated that it is an illusion to imagine that large metropolises in developed countries have their economy primarily based on industrial activities. Also large service firms, as events have shown in recent months, can collapse unexpectedly, even if they had a reputation to be the best guarantee for stability,. Consequently, one may assume that the presence of European institutions is the best guarantee of stability for the Region's international position, all the more so if the regional authorities and Brussels players welcome these institutions and if they can improve their integration in the city. Nonetheless this obviously does not mean that their development should be allowed to affect the quality of life in the city. The importance of the Belgian public sector in the Brussels economy is another guarantee for stability, obviously, as long as dramatic evolutions do not lead to the country's break-up.

2. *What place should be given to Research and Development?*

How to make use of the important scientific potential concentrated in Brussels' metropolitan area? It is undoubtedly an illusion to imagine Brussels turning into a major international R&D centre or dream of a "silicon valley" along the Senne or a "digital capital of Europe", concepts born more out of marketing purposes than that it resembles reality. Nevertheless, the BCR should not neglect possibilities offered by spin-offs in liaison with the university potential, for example in biotechnologies or medical engineering, together with the university clinics. We should bear in mind, however, that this is a niche activity and that its development does not contribute to solving the problem of employment among Brussels low-skilled population.

3. *Does the economy need cultural and heritage investments?*

Cultural investment, preserving and enhancing the city's heritage, promoting it and developing creative industries all emerge as priorities to develop an attractive post-modern urban economy and represent profitable investments for the wider public. Also these matters could make the difference in the choice companies make when having to weigh the advantages of relocating to various cities. And these matters are key factors for a steady growth in leisure tourism as well. In Brussels, unfortunately, these goals cannot rely on a sufficiently strong and coherent political base, because the responsibilities in this particular area are divided among regional and local institutions. In order for cultural activities to flourish the urban environment must be improved and the city better kept. These efforts could provide work for low-skilled inhabitants.

4. *How to boost the "downstairs" economy and fight against dualisation?*

It is an illusion to imagine that employment problems for the least qualified can be noticeably improved solely through a "trickle down" from growth in the dominant economy. On the contrary, the development of an "upstairs-downstairs" economy may widen the already unacceptable social gap. Eventually this could degrade the city's image to the extent that it would be less attractive and as a consequence accentuate the flight of the middle class.

The issue is thus to recognise that the "downstairs" economy contributes to prosperity and social stability, bearing in mind that a considerable portion of this economy resorts to more or less informal employment. This informal employment should be reoriented to avoid its perverse effects, both on the general employment market and on those who are forced into the informal sector. Among other activities, this economy relies on ethnic businesses, some of which merit support on the same standing as that provided to "classic" core businesses (this is already the case through the ATRIUM outlets, although it attempts to reproduce ill-adapted marketing schemes). Informal employment is also active in sectors of construction, repairs, maintenance, horeca, tourism, and home services, which are all lacking in innovative guidance policies. Lastly, there is a flagrant deficit in the sectors of non-sales proximity employment and social and health management, which could be served by a local non-skilled workforce.

5. *What role for "industrial" training and activities?*

The low level of qualification of a part of Brussels' workforce, together with linguistic requirements, are major factors of exclusion from the job market. One can also notice the degree of exclusion and wide disparity in the level of education in Brussels. These issues should be dealt with in a regional, rather than local, authority. There is a lack of qualitative technical training, which would also be better served with coherent regional policy. However, improving education will not solve all problems. The overall increase in the level of education in Brussels over the past two decades has not closed the social gap, but merely raised employers' expectations. Addressing the question of training and education also implies addressing two related issues simultaneously and resolutely: discrimination of possible future employees and the preference often given to workers who do not live in Brussels.

6. *What is the future for office space?*

The Brussels economy employs / occupies a vast stock of offices: 12.5 million m² in the regional territory (A. Doornaert & al., 2008), in addition to another 1.5 and 1.9 million m² in the periphery. Some 70% of surfaces are concentrated in central administrative neighbourhoods. Centrally-located quality office space in Brussels still enjoys a strong potential to attract businesses.

Control over the location of offices has been reinforced. Fears as recent as the 1990s over the uncontrolled proliferation of offices and the consequential vulnerability of residential areas have abated, except for concern over the continued pressure on residential parcels around the South Station. Requirements to drastically restrict regulations on parking availability are needed to avoid an increasing number of cars as a result of more office development. Consideration should also be given to a

reasonable reduction in office space per job, aiming for 10-12m² per job instead of the present 20-25m².

A new phenomenon reflects a growing interest in city living by the more well-off and mobile segments of the population: obsolete office buildings are being renovated and turned into housing. Nonetheless, this does not erase the persistent negative balance of migration towards the periphery and the continuation of middle class migration to the suburbs. The issue, in general, is how to keep inhabitants in the city, either in new mixed use buildings, or older office buildings which are unsuitable for modern requirements and could be reverted to housing (for example in the European quarter). This is all the more feasible as the gap between residential and office prices is closing, and from a promoter's point of view residential real estate holds the advantage of having clearly longer life span.

7. A centralised or multi-pole development?

Recent Brussels planning projects tend more towards developing decentralised sites in the aim to spread economic impetus throughout various parts of the Region. A global vision is missing however: these sites are seen as separate blocks, isolated in their foreseen neighbourhoods with no connection to the city centre. Decentralised offices, moreover, are more open to competition from offices in the periphery. Decentralised locations do not encourage use of public transport and at the same time they are harder to reach by car than peripheral locations. In any event, it is advisable to concentrate any new office complexes in a minimum of sites that are as accessible by public transport as central locations (such as the gare de l'Ouest/ Weststation). In addition, new decentralised complexes should not further weaken existing commercial complexes.

III. Policy options

1. *Create and formalise a mode of metropolitan management, in a relationship that is mutually advantageous for the Region and its periphery*

The Brussels-Capital Region is impeded by its restricted territory. The situation on the whole appears favourable, judged by the measure of the whole metropolitan area, an employment force covering the former Brabant, without its northwest section polarised by Leuven, the Dender region, northern Hainaut and the province of Namur, and even a few communes to the west of the province of Liege. Consequently the following should be stated:

- an integrated metropolitan management structure, extended to the "RER zone", endowed with planning capacity and financing. This necessity should be negotiated completely outside other institutional and linguistic questions. An integration structure such as this could be founded on the awareness that both the Region and its periphery have something to gain, after all, the dynamism of the periphery depends on the centre's prosperity. The advantages of the periphery partly stem from its good urban planning and a sparing use of land. A not adequately integrated public transport system would hamper future development in the periphery, while this area would also be better served by improved integration to the job markets;
- a fiscal system that taxes commuters for the daily use they make of the city;
- a strategy for office and company location that is integrated and negotiated at the level of the overall metropolitan region.

2. *Strengthen commercial businesses in Brussels*

The objectives put forward by the RDP - to strength luxury and top level businesses in the heart of the city, to focus efforts in other zones on existing commercial cores (shopping streets, shopping districts in former village centres), and to not develop new shopping centres - have not all been attained / implemented. Implementation should continue in order to still benefit from decisive and coherent efforts already made. From this point of view, the project for a large shopping centre in the Heysel complex hardly seems coherent. If the plans are governed by a fear that failing to build it in Heysel would only lead to a similar structure nearby in the Flemish region, then the issue should be debated in the framework of the metropolitan cooperation described above, in an overall context of commercial overcapacity. The terms of the RDP objectives should be differentiated, not only to maintain the specific features of various sections of the city's heart, but also to integrate the notion that a number of businesses are adapted to a lower-class or multi-ethnic clientele. It would thus be inefficient to adopt projects which are based on an qualitative increase of commerce and increased presence of nationwide brands. (reproduce funding schemes aiming to increase the quality of the shops and an increased presence of nationwide outlets). This also means taking advantage of the business talents of the people living in the area rather than thinking merely in terms of American-style shopping malls.

3. *Reinforce the cultural and creative dimensions of international integration*

It would be advisable to install a policy to support the creative and cultural sector, cultural events, and local educational projects which could also create opportunities for jobs, participation and social involvement for the disadvantaged segments of the Brussels population.

4. *Promote research and development by reinforcing cooperation with and among the Universities*

The universities should be encouraged to set up interdisciplinary teams, transcending linguistic and philosophical divides. This process could lead to spin-offs.

5. *Reinforce proximity economy and home services*

This option means making use of proximity jobs, public or subsidised, and granting ample means to meet social needs that are not covered at present, such as building nurseries, home services, social services, etc.

6. *Rethink education and training*

A solution to the problem of under-employment among Brussels residents requires radical political choices and considerable investment by public authorities, but not necessarily in the present form. This calls for:

A general revalorisation of education and a resolved fight against inequality in the school system;

Integration of the teaching system in effective multilingualism, one that is not reserved for elite groups of students;

A search for solutions that avoid dependency traps, but that absorb informal work with due leniency. This phenomenon is all the more abundant in Brussels because the sectors in which it thrives are highly represented in Brussels (tourism, small shops, construction, maintenance, repairs) and the formal economy is demanding when it comes to qualifications.

7. *Show greater resolve in fighting various forms of discrimination and linguistic, ethnic, or geographic hurdles to employment*

This struggle implies easing certain linguistic requirements for hiring, making companies aware that it is in their interest to cooperate in open hiring practices, and encouraging the recruitment of Brussels residents whenever possible.

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