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THEORETICAL BACKGROUND OF NEW ECONOMIC GEOGRAPHY

Plans to create a common European market prompted research into the issues of spatial location of industries, changes in industrial specialisation in regions and members states, and within an integrating grouping as well as into the impact of these transformations on the centre-periphery relation. In this sense attempts have been made to answer the question of whether the process of change in location and specialisation leads to an increase in socio-economic cohesion between countries and regions. Debate was inspired by the work by P. Krugman entitled *Geography and Trade* [Krugman 1991], which laid the foundations of a new theoretical current – so-called new economic geography.

The discussion on the re-allocation of resources from the centre to the periphery turned out to be particularly valid after the EU's latest enlargement and the accession of countries whose level of development is remarkably low compared to the "old" members. One of the factors that could help to reduce this distance is direct investment, which might conduce towards faster rates of growth in under-developed regions. Nonetheless, it has to be emphasised that the reasons for location change are multifarious and a certain "resultant" tendency is the effect of many, often contradictory and mutually exclusive, factors.

The aim of the present article is to answer the question of whether localisation factors and relocation of industry still matter today, after EU enlargement. It attempts to examine whether trends in development of EU regions do not suggest that – notwithstanding the impact of the forces, as indicated in new geographic economy – traditional localisation factors still matter.

The first question that arises in the context of different approaches to the issues of location concerns differences between neo-liberal theoreticians and new economic geography. According to neo-liberals, location of business activity is conditionned by the distribution and accessibility of resources and the comparative ad-vantage (providing that factors of production are non-transferable, revenues are fixed and there exists perfect competition). Such conditions are conducive to the uniform distribution of production and there is no tendency towards the growth of agglomeration. In the theories of new economic geography stress is laid on the fact that economic growth, technological progress, liberalisation, globalisation and the significance of knowledge and skills modify to a large extent the original location reasons.

New economic geography most often centres on the following problems:

1. Relations between various sorts of costs (trade and transport costs, wages) and a tendency towards production concentration.
2. Impact of ever-closer integration on location changes and agglomeration and de-agglomeration processes.
3. Interrelation between agglomeration and concentration (referring both to location preferences of people as well as businesses).

The analysis of the interrelation between costs and location preferences points to the changes in assorted costs as integration progresses. Liberalisation opens up markets to companies situated both in the centre and on the periphery and exerts influence over their costs. In theory, as a result of the opening-up of an economy, it is the periphery that should benefit more as its scope of activity expands to a larger degree than the centre's. This advantage is closely related to the lower price of factors of production available there. However, the possibility of capitalising on the above advantage hinges on trade and transport costs. Krugman and Venables reckon that transport outlays still have a big impact on the location of businesses. If they are high, it is central regions that benefit most and the scale of production is the source of these advantages. This, in turn, spurs the concentration of business activity in the biggest districts, which leads to an excess of employment in the centre and a fall in employment on the periphery. In a bid to offset the effects of excessive concentration, diseconomies of scale and pollution in central regions, some industries made an attempt to re-allocate resources to the periphery. Nevertheless, this process concerned only selected industries, whose sensitivity to costs is particularly high. It transpires from the research by Koopman that industries for which centralisation is not attractive – thus a tendency to re-allocate them is relatively strong – comprise mainly traditional sectors, which cannot constitute engines of growth for under-developed regions.

Krugman and Venables make a simulation of the way the location and concentration of industry will proceed for three different levels of transport costs. If costs are high, industry is symmetrically divided between different countries. If transport outlays are reduced by 50%, each of the sectors is located in a different country[1]. If there is another reduction (to the one third of the original level), then the progress of concentration will depend on the original state. So if industry was located in a relatively symmetrical fashion, agglomeration process will not intensify. If, by contrast, the development of sectors was marked by asymmetry, a fall in transport costs will lead to concentration.

In regard to the European market, Krugman and Venables consider the possibility of three alternative scenarios:

[1] Save certain exceptional situations.

1. The European market will preserve its characteristic current polycentric structure and specialisation will not advance.

2. The structure of the European market will be shaped along American lines, which nonetheless will not result in the modification of its polycentric character.

3. Total re-allocation of resources will take place, thereby leading to the birth of regions – marked by a very high degree of concentration of production – which will serve an entire integrated market.

From the point of view of the elimination of regional disproportions, scenario 3 is the most worrying.

Likewise, the problems of the impact of costs on the re-allocation of resources are also discussed by Puga. What transpires from his analysis is that if trade costs are high, there is no asymmetry in the spatial location of businesses and they are uniformly located. If costs are average, the situation of regions diversifies as some areas become more attractive and "attract" more industries than others – but they do not attain full specialisation. This phenomenon is reinforced by the inertia of investment processes in the regional dimension, which manifests itself in the fact that re-investment makes up approximately 60% of investment outlays. It is disadvantageous for poor regions, which – due to their retardation – get caught in the vicious circle of under-investment[2]. This means that liberalisation – instead of de-concentration – often leads to the centralisation of production. The model suggests that in the preliminary phase the reduction of trade barriers leads to the concentration of production and the progression of the process takes the form of the letter "U" (normal or reversed). The situation of a local economy is illustrated by a point on the U curve. The source of strength of central areas is found in benefits, which are not, however, the exclusive privilege of the *core* regions and therefore their advantage can be of temporary character. A fall in trade costs below a certain threshold brings about the transfer of resources to the periphery, which is the effect of lower costs of factors of production.

Wages – alongside transport and trade costs – constitute the third kind of costs. As Krugman and Venables [1990] point out, trade liberalisation does not always lead to an increase in output and wages in peripheral regions. Despite the fact that European sectors are less concentrated than American ones, the advantages connected with such concentration are clear, which does not discourage the transfer of factors to the periphery. These advantages encompass [Porter, 1990]: flow of information, transparency, reputation, effectiveness, specialisation, accessibility of highly-skilled labour, innovativeness. The implementation of the "Market 1992" programme was supposed to enhance interest in production in less developed regions, where costs could be cut thanks to lower wages.

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[2] The financial market can be seen as a sort of illustration of concentration. When a common market comes into being as a result of the merger of relatively ineffective regional markets with a bigger and more effective one, not only is the excess of supply and demand of capital transferred to the new financial, but also the entire activity of lenders and borrowers (see [Kindleberger 1952]).

However, the decision where to locate surpluses is conditioned not only by labour costs, but also by economies of scale, which are achieved if production is spatially concentrated. Hence as long as differences in transport and transaction costs persist between locations, central regions – marked by the concentration of businesses – are preferred due to their better accessibility to the market (access becomes a more important criterion of choice than costs). Such decisions are favoured because in Europe poor areas are, on balance, situated farther from big markets. An increase in costs (negative agglomeration effects) and competition can encourage the re-allocation of resources to regions offering lower labour costs, thus to less affluent areas: from the centre to the periphery. The observation of the movement of capital in the EU indicates that some businesses transfer production (carry out direct investment) to countries and regions with lower labour costs[3].

That is why, in all likelihood, one can state that the flow of factors of production within the common market is directed towards those regions which have already gained a better position in the process of the creation of a free-trade zone and a customs union. At the same time, this constitutes an obstacle to the elimination of disparities in wages and welfare between regions. "Fewer barriers to trade (or the progress of liberalisation) can enhance the attractiveness of the transfer of production to peripheral regions with lower wages, which will enable them to grow; or, conversely, the preservation of production in the centre, which will cause a fall in wages on the periphery (...) Whatever constitutes an obstacle to the indispensable adjustments of relative wages will simultaneously intensify the tendency towards the concentration of production in the centre" [Krugman, Venables 1990].

There is no gainsaying that the tendency to the concentration of industry in agglomerations is weaker when the frontiers exist, because it is hampered by a number of barriers such as customs duties, quotas and all sorts of technical, cultural and linguistic differences[4]. This means that the progress of integration may intensify tendencies to the spatial concentration of capital, which is accentuated by Krugman and Venables [Krugman, Venables 1993]. Economic liberalisation alongside the advancement of integration considerably alters investment conditions; what is more, one can assume that as integration progresses, the tendency to the growth of agglomeration intensifies.

An increase in competition – spurred by the creation of the common market – may be a factor, related to the progress of integration, that influences the intensification of agglomeration processes. Theoretically, the elimination of barriers

[3] Allowing for the non-waning importance of market incentives, it is possible to argue that – as far as capital attraction is concerned – regions located not far from highly-developed areas are in the best position. They offer average labour costs and easy access to big markets (of final and semi-manufactured goods).

[4] As mentioned above, it is the reason behind higher concentration of industry in the USA than in Europe.

between countries raises the share of foreign markets in firms' sales, which diminishes competition in a region. Yet higher proceeds from sales is only the preserve of business situated in *core* areas. If an increase in foreign demand is the result of the expansion of industry, then the share of a region in the global resources augments. At the same time demand for factors of production goes up, which – fuelling price increases – exerts pressure on location change.

Still, as the results of research indicate, businesses intent on new investment often look for new locations also in the centre. Hence in a common market the problems faced by peripheral regions get exacerbated since resources flow to the areas offering the best conditions for investment location, which includes access to highly-qualified employees too.

Knowledge is a factor whose significance for regional development is now especially pertinent. It makes up the integral part of capital (together with capital goods and human capital). Economic growth depends on the rate of the accumulation of capital, while the equilibrium of the entire system – on the degree of liberalisation and the capacity to disseminate knowledge. If the process of the dissemination (spilling-over) of learning does not exist, then – when disturbing external factors come to the fore – there is a risk that the whole system will become destabilised. In this case, economic growth will lead to the preservation of regional disproportions. This process advances according to the following pattern: asymmetry in knowledge resources spurs more dynamic development of a given sector in one country (region). A fall in costs will bring forth the tendency to increase investment. Relatively higher wages – given a lack of barriers to the flow of workers – will result in the transfer of labour to more developed regions, which enhances the resources of areas endowed with a certain advantage.

If the process of knowledge spill-over does exist, the system gets stabilised, both with a high degree of protectionism and trade barriers being dismantled (then the spill-over of knowledge intensifies). If this spill-over reaches a certain level, agglomeration tendencies disappear since externalities wane. Given a certain combination of variables (trade liberalisation and knowledge spill-over), the system can lose its balance. In such a case, endogenous economic growth will lead to the spatial concentration of business activity, whereas knowledge spill-over prompts divergence. In the long run, this will favour de-concentration as well as social and economic cohesion.

Given a combination of two factors – exchange of goods and spill-over of knowledge – development in an ever-integrating union can proceed according to three scenarios:

1. As a result of the progression of integration, trade costs systematically fall, which can lead to the spatial concentration of business activity and aggravate regional disproportions.

2. On the one hand, integration brings about a reduction in transaction costs and, on the other, raises the cost of exchange of information. In this case, the ten-

dency towards the concentration of production in agglomeration gets considerably weaker.

3. The process of knowledge spill-over can lead to de-agglomeration tendencies, which will result in the dismantlement of the existing core-periphery relation.

Evidence from the latest research confirms the great role agglomerations play not only in regional development, but also in attracting resources [Scott, Stoper 2003]. R&D activity, scientific potential creation and co-operative netorks between industry and academia all take place in the most significant centres. This, in turn, stimulates further development of aglomerations, which become engines of growth for entire regions. This sort of development patterns can be detected not only is less favoured regions, but also in well-developed ones.

These trends somehow condict the theories which hold that technological progress is a factor that weakens/slow down urbanisation processes [Scott 1998]. Less developed regions can benefit from these processes, only provided that they are capable of cashing in on technological progress generated in agglomerations. The transfer of technology can be achieved in two ways:

1. Through investment in modern capital goods
2. Through investment in human capital: well-qualified employees are able to adopt and use new technologies, as well as create new ones [Armstrong, Taylor 2000].

Another important issue often brought up by new economic geography theoreticians is the relation between production location and the distribution and behaviour of businesses. Tendencies to the concentration of companies are confirmed by Neveu's research (1990), which bears out the fact that economies of scale and externalities are especially significant for the European economy. This is corroborated by the location (distribution) of big businesses. In more industrialised countries (and regions) there are much more big companies that are closer to minimum effective scale than in less developed ones. According to Scotchmer and Thisse (1992), it is increasing economies of scale that seem to explain convincingly the non-uniform distribution of economic activity. The concentration of business activity in the area of so-called *hot banana* from London to Milan is testament to the role of economies of scale and externalities [Cuadrado, de la Dehesa 1992].

This interrelationship is also confirmed by [Pratten 1988], who pointed to the advantages that stem from the process of making companies bigger and production lines longer. Benefits are generated by a new kind of specialisation typical of highly--developed economies. They are also favoured by imperfect competition, intrasector trade, considerable product differentiation and economies of scale.

Together with economies of scale, there are also (marginal) external benefits, which are mainly capitalised on by big firms situated in agglomerations. These companies band together and thanks to vicinity to sale-and-provision markets gain an additional advantage as a result of better access to highly-qualified labour and specialist knowledge concentrated in geographic centres of business activity.

Hence the tendency to the concentration of industry intensifies through self-driven *backward* and *forward* ties. They result form the combination of inncreasing economies of scale, trade costs and connections (interconnectedness) between businesses [Krugman and Venables, 1995]. Companies operating in regions fall into two categories: *downstream firms* and *upstream firms*. If international trade entails high costs, a great number of *upstream* firms concentrated in one place is able to lower the prices of factors of production. Such a mechanism creates a *forward* connection. *Downstream* firms, in turn, create a bigger local market for *upstream* firms, which augments their sales and profits. This generates *backward* connections. All this bears witness to the fact that trade costs are also a force (which can likewise spur the spatial concentration or de-concentration of production) [Forslid et al. 1999].

The latest research by Lundvall suggests that it is businesses concentrated in space that are able to accelerate knowledge accumulation as well as speed up its transfer to other entities. Innovation and knowledge are of systemic and collective character, thereby creating networks of co-operating institutions.

The concept of innovative systems was ysed to analyse the process of innovation, which fosters creation of links between businesses and R&D institutions. It transpires from this research that innovation processes and learning processes are interdependent and originate from production [Lundvall 2003].

It is reckoned that the most important factor neutralising the tendency to the concentration of economic activity in central areas is a free movement of labour, which is one of the freedoms of the common European market. These relations were examined by Puga[5]. He assumes that intra-regional migration and outlay-result interrelations have a big impact on agglomeration processes. The following conclusions can be drawn from his model:

- comparison between the situation "with" and "without" migration indicates that the tendency towards the growth of agglomeration is stronger, if there is a flow of workers to the location characterised by higher real wages;
- lack of intra-regional migration influences the weakening and delaying of de-agglomeration processes within an integrating grouping;
- if differences in wages are not eliminated by migration[6], this leads to an increase in costs in businesses situated in the areas where the concentration of industry is significant, which can impede excessive agglomeration tendencies;
- with integration progressing, companies perceive higher local wages as increasingly discouraging and, with low trade costs, the price of non-tradable factors becomes the principal determinant of location.

[5] In this model he makes use of his previous works as well as those by Krugmana and Venablesa.

[6] According to Puga, Europeans' reluctance to migrate can provide an explanation of why employment in non-agricultural sectors in Europe is geographically less concentrated than in the USA. Still income disparities are bigger between EU regions than US states.

The transfer of labour in the common market programme was, as mentioned above, regarded as one of the most important factors minimising disproportions in regional development, but in practice it hardly contributed to their elimination. The reason being that employees' motivation to migrate is not strong enough. There are many reasons to migrate [Stark 1991]. From the point of view of the impact of this phenomenon on the socio-economic situation, the following remarks are of interest:

1. Migration is positively correlated with the relative process of impoverishment and with considerable regional inequalities (there exists a group of *push* factors, which enhance the likelihood of emigration from relatively under-developed regions).
2. People's propensity to migrate is connected with skills (education) and with the risk those individuals or groups are inclined to take with a view to gaining greater benefits in a different place; that is why university graduates have better prospects in a host region than those without a degree.
3. Migration can be seen as a location decision akin to that taken by businesses while choosing a place of investment. While making a decision, employees consider different *pull* factors, for instance employment prospects, wages, perks and other facilities.
4. It is possible – by analogy with investment decisions – to calculate rates of return from migration, which differ in function of a migrant's skills and adaptive capacities. They are also conditioned by the character of demand for labour in a host region. The more integration-oriented the emigration community in a region and the more assistance they are offered[7], the easier adaptation to a new life proceeds. Also worth mentioning is a system of encouragements and incentives created in host countries' markets[8].
5. It is impossible to determine unambiguously the impact of emigration on real wages. Immigrants can compete with locals in certain professions, which exerts downwards pressure on wages. In other situations their skills are complementary, which generally raises wages.

Despite the fact that Europe is regionally diversified, considerable flows of workers from high-unemployment areas to low-unemployment ones have not been observed. The possibility of finding a job, therefore, is not the main driving force behind migration in Europe; hence another factor – namely wages – needs to be examined. As theory suggests, the transfer of employees should be directed to highest-wages regions.

In the context of wages, it has to be stressed that highly-qualified employees from prosperous regions are unwilling to change a job, and if they choose to do so,

[7] The conduct of the Portuguese community in Luxemburg is a case in point.

[8] It seems that such a system functions in a very selective manner in the case of highly-qualified employees (such as IT specialists). As for workers and other low-skilled migrants, instruments to encourage migration are not used.

it is always for an equally well-paid or even better-paid post. Very often, however, high wages are not offered outside *core* regions. In a sense, the same conclusions are drawn by Meade [Meade 1995]. He points out that the bigger the difference between wages in "old" and "new" place of work and the aggregate costs of transfer and the so-called elusive costs of migration, the stronger the propensity of employers and employees to migrate[9].

This determines the direction of migration of well-educated employees mainly within developed regions. Even if the best staff were willing to migrate to less developed areas, then companies would incur considerable costs related to their outflow [Stiglitz 1986]. These costs are connected with new training sessions, temporarily lower productivity and mistakes made by new employees. Employers have to consider whether it is more economical to maintain high wages or to bear the above-mentioned costs. This applies also to firms situated in under-developed regions, for which the only possibility of retaining highly-qualified personnel is to maintain high wages, which – raising costs – does not conduce to the enhancement of the ability to compete and, consequently, contributes to an increase in regional disproportions.

"Small" migration can cause the reinforcement of wage disproportions, and thus differences in the cost of production. This transpires from the following premises:

- local workers (*insiders*) are endowed with greater purchasing power;
- they have much more bargaining power in wage negotiations than immigrants, whose interests are brushed aside or take second place [Lindbeck, Snower 1988][10].

A significant factor restricting labour mobility in the EU is a lack of adjustment of the structure of demand for and supply of employees. Better-developed regions usually demand highly-qualified staff, while it is low-skilled workers that are characterised by the highest propensity to migrate. The tendency of the demand for low-skilled labour to fall in the EU was observed by Beam [Beam et al. 1990]. A spike in demand for employees capable of working in new posts is brought about by profound structural changes in industry, the need to utilise new production techniques, the liquidation or scaling-down of declining traditional sectors. Employees with core competences and transferable skills are best placed to compete on the labour market as this is what rising sectors demand. This means that migration may increase rather than decrease regional disproportions. The outflow of the most competent employees reduces the reserves of human capital in poorer areas, thereby weakening their development potential [de la Deheza 1992].

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[9] Elusive costs of migration are connected with all the incommensurable inconveniences faced by anyone changing their job. These include: difficulties with adaptation and efforts to overcome cultural differences, traditions and prejudices, etc.

[10] Lindbeck and Snower rightly point out that after a certain period of time immigrants gain the status of *insiders*, while *insiders* turn into outsiders the moment they lose their jobs.

Posts are also created in the tertiary sector, but in modern services required qualifications are of particularly high calibre, whereas traditional services entail contact with a client, which – considering linguistic differences – can render immigrants unemployable[11]. Likewise, a considerable number of jobs is generated by the public sector, which, however, is not open to foreigners[12].

To recapitulate, examination of migration processes within the EU reveals an evident "disparity" between the principle of free movement of people and its actual implementation. According to the original idea, the freedom both to choose a place of living and a job was supposed to foster development of poorer regions. Meanwhile, after 1992, the scale of migration failed to live up to the expectations. It transpires both from theoretical and empirical analysis that there does not exist one obvious factor stimulating "small" migration processes within the EU.

In the light of the research discussed, there are doubts as to whether effective „catch-up", convergence processes will materialise.

Nonetheless, the results of the research conducted by Forslid, Haaland and Midelfart Knarvik [Vorslid et al. 1999] for 14 industries located in 10 EU regions[13] point to the reversed U-shaped relation between trade liberalisation and the concentration of branches of production activity. This does not bear out worries that the progress of liberalisation and the progression of integration lead to an increase in regional disproportions. Those results show that the location effects of economic integration are regionally and industrially specified, with some sectors functioning mainly thanks to comparative advantages, while others – thanks to the forces of agglomeration coupled with economies of scale and outlay-result ties. At the same time, there were shifts in the prices of factors and, consequently, in welfare levels between regions and sectors.

The above-mentioned research was carried out in 1994; yet they are still being cited and the conclusions are regarded as valid. To sum it up, the considerable development gap, which came into the fore after the last enlargement (and will be even more salient after the next one in 2007), has enlivened debate, which was inspired by new growth theories. Considering the development chances of new Member States prompts the question of the possibility of appearing real catch-up processes. This assumes particular significance in the context of The European Commission's estimates, according to which approximately 50% of all the funds earmarked for R&D is concentrated in so-called innovation islands. (Amsterdam, Rotterdam, Ile de France, Ruhr Basin, Frankfurt, Stuttgart, Munich, Lyons, Grenoble, Turin, Milan and Barcelona). Lack of dissemination effects could suggest that, for a certain period of time, the existing gap between new and old Member States is

[11] This is confirmed by OECD research (1994), according to which the ability of host countries to absorb unskilled labour radically diminishes due to economic, political and social reasons.

[12] Some of the few restrictions on the free movement of people in the common market concern the public sector.

[13] The CGE model was used in the research.

likely to widen. If such trends do happen, they may inspire a new debate – unfavourable for new member States – on a two-speed (two-track) Europe and on the rationale of structural policy. Some theoreticians (Boldrina-Canova) claim that – as a result of lack of convergence between regions – it is legitimate to assert that structural funds fail to boost economic growth and de facto are of social-policy character as they take the form of social transfers to the poorer. Likewise, Sapir points to the absence of correlation between regional-policy assistance and an increase in convergence rates.

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TEORETYCZNE PODSTAWY NOWEJ GEOGRAFII GOSPODARCZEJ

Streszczenie

Nowa geografia gospodarcza najczęściej koncentruje się na następujących problemach:

1) powiązaniach pomiędzy rozmaitymi rodzajami kosztów (kosztów transakcji i transportu, płac) oraz tendencji do koncentracji produkcji,

2) wpływie coraz ściślejszej integracji na zmiany lokalizacji, procesy aglomeracyjne oraz deaglomeracyjne,

3) wzajemnych powiązaniach pomiędzy aglomeracją a koncentracją (odnoszącymi się do preferencji lokalizacyjnych zarówno ludzi jak i firm).

Badania nad zjawiskiem przenoszenia zasobów z centrum na peryferia stały się szczególnie ważne po ostatnim rozszerzeniu Unii Europejskiej i przystąpieniu do UE państw, których poziom rozwoju jest zdecydowanie niższy niż „starych" członków. Wyniki badań empirycznych nad tendencjami delokacyjnymi nie dają jednoznacznej odpowiedzi na pytanie, czy i w jaki sposób przenoszenie działalności gospodarczej do regionów słabiej rozwiniętych będzie przebiegało w przyszłości. W świetle przedstawionych badań istnieją wątpliwości, czy faktyczne „doganianie" (*catch-up*) i proces konwergencji będą miały miejsce. Inne badania wskazują, że efekty lokalizacyjne wynikające z integracji gospodarczej są uwarunkowane regionalnie i sektorowo, przy czym pewne sektory funkcjonują głównie dzięki przewagom komparatywnym, podczas gdy inne – dzięki siłom aglomeracyjnym połączonym z ekonomią skali oraz relacjami nakłady–wyniki. Jednocześnie obserwuje się zmiany cen czynników produkcji, a w konsekwencji – zmiany w poziomie dobrobytu pomiędzy regionami i sektorami. Sytuacja ta zmieni się wraz z postępem liberalizacji gospodarek.

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