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*Wie heeft baat bij de productieactiviteiten? Analyse van het geval Kuregem*

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## AUTHOR'S NOTE

We have received ERDF 2007-2013 funding via Metrolab Brussels, as well as from the European research project Cities of Making.

## Introduction

- 1 Since 2010, the role of productive activities in the city has become more and more a subject of discussion among many Brussels institutional and academic stakeholders dealing with urban and economic transformations. Among many others, let us mention the reports of the Observatoire des activités productives [2012; 2018], the Plan Industriel [2019], the Plan marchandise de Bruxelles Mobilité [2013], the Programme Régional en Économie Circulaire [2016] and the analyses of the Conseil Économique et Social de la Région de Bruxelles-Capitale [2012]. The regional situation is a cause for concern. According to the Observatoire des activités productives [2012; 2018], the Brussels-Capital Region (BCR) lost more than one million square metres of productive surface area between 1997 and 2011. The relocation of productive activities outside the urban environment is a phenomenon which is neither new nor specific to the case of Brussels, having affected many western European metropolises in the past [Vandermotten, 2014: 40-76]. However, the Belgian capital stands out due to the

intensity and speed of the process. While Brussels was still the country's leading industrial city in the early 1960s, productive activity became the city's weak function. Competition for urban space with housing, offices and retail trade is increasing while the regional economy is moving more and more towards the tertiary sector. Both phenomena are catalysed by regional interventions. The manufacturing sectors in Brussels still account for more than 22 000 jobs (3 % of total employment) [Lennertz *et al.*, 2018: 11]. At the same time, the population of BCR continues to grow, as does its demand for imported consumer goods [Merchandise Plan, 2013: 8], with various regional stakeholders becoming increasingly concerned about the issue of supplying the city and the future of productive activities.<sup>123</sup>

- 2 All of this is recognised by the vast majority of stakeholders in the economic and urban development of Brussels. There is a general consensus on the need to put in place an ambitious policy to preserve the remaining productive activities – or even to redevelop them. However, differences of opinion are clearly evident when the question of the definition of productive activities is addressed, and even more so when the means of ensuring their role in the city are discussed [Orban and Scohier, 2017; *Cities of Making*, 2018: 25-79]. Which activities does this concern? Which policy tools should be developed to support them? The issues deemed to be priorities differ, ranging from the competitiveness of the so-called “creative” sectors, the production of goods which meet the needs deemed essential to the population (e.g. food), the development of circular economy companies or the creation of low-skilled jobs. Each stakeholder defends its own vision, with the differentiation between types of productive activity in the urban environment at the heart of the debates [Orban and Scohier, 2017].
- 3 On the other hand, while the reconversion and demolition of industrial areas continues, some productive activities still manage to develop in urban areas. Moreover, there was a stabilisation of productive areas between 2011 and 2017 [Observatoire des activités productives, 2018: 41-42]. In Brussels, public institutions such as Citydev have been developing sites for productive activities for many years, whether on the outskirts (e.g. Galilei) or in the central neighbourhoods (e.g. Greenbizz). Private organisations are also investing in concrete manufacturing projects, whether in the reuse of existing sites (e.g. Audi Brussels) or in the emergence of new production spaces (e.g. the development of micro-breweries). The analysis of the Inventimmo property site provided by the Observatoire des activités productives [2012: 35] shows that there is a real demand for productive space in Brussels, mainly from companies already located in the capital.<sup>4</sup>
- 4 How, then, can we explain this apparent contradiction in Brussels between the continuation of the process of relocating certain productive activities outside regional borders and the development of new productive activities in the city? In order to answer this question, it is essential to analyse the locational factors which support or oppose the possibility for these different productive activities to remain in the city.
- 5 Moreover, productive activities are far from being merely abstract economic agents devoid of any social impact. They weave a multitude of interdependent links, whether in terms of jobs, suppliers or customers, which must be considered in order to be fully aware of their challenges [*Cities of Making*, 2018]. Moreover, productive activities sometimes participate in urban transformation processes with broader social and spatial repercussions – as has been observed in Montreal, for example, in the form of productive gentrification [Sprague and Rantisi, 2018] – or can sometimes be opposed to

them – as is the case in the context of the working-class centrality in Roubaix [Collectif Rosa Bonheur, 2016]. This leads us to question the social dimension of productive activities. Which social groups suffer or, on the contrary, benefit from this dual phenomenon of the relocation of productive activities? Or, in other words, who benefits from productive activities in Brussels?

- 6 Through the study of the Cureghem case, this article defends the existence of a “gap”, a significant difference in situation between two distinct groups of productive organisations. On the one hand, “old” productive activities, most of which were established before the early 2000s, are finding it increasingly difficult to remain in the city. On the other hand, “new” productive activities, dating back to the early 2000s and largely supported by the public authorities, are in a more favourable situation. The latter, unlike the former, claim to be based on economic models such as the circular economy, local production or sustainable development. The differences between these two groups of productive organisations are expressed both in their locational factors and their social impacts. This is why, after a brief review of the methodology of our study, we will first analyse the gap between old and new productive activities from the point of view of the elements which favour or oppose their continued location in an urban environment. Afterwards, we will show how this gap is also reflected in their socio-economic impacts.

## Methodology: a qualitative and comparative approach to productive activity in the context of Cureghem

- 7 While some studies have already focused on the theme of productive activities through the collection and analysis of quantitative data at regional level [e.g. Lennert, Tihon and Van Hamme, 2018], this article is based on a set of qualitative data analysed with an empirical and comparative approach. This approach makes it possible to gain a more detailed understanding of the contrasting realities behind the generic term “productive activity” and to understand what divides or brings these different activities together, beyond sectoral differences.

Table 1. List of productive organisations interviewed

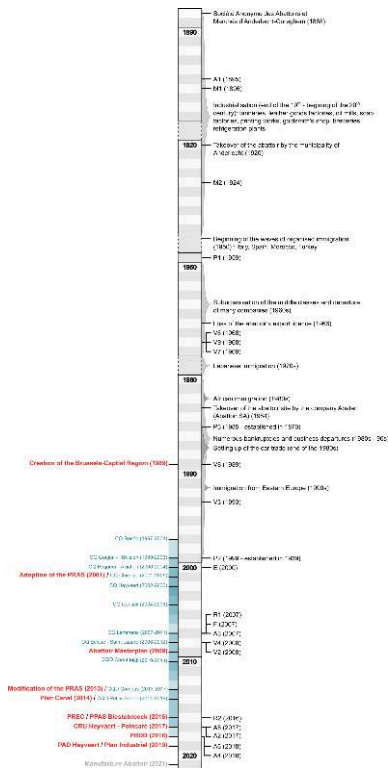
Code	Sector of activity	Occupancy status	Number of workers	Research project
<b>A - Food sector</b>				
A1	Brewery	Owner	12	Cities of Making
A2	Food production	Tenant	6	
A3	Food production and processing, carpentry	Tenant	120	
A4	Food production	Tenant	2	
A5	Food production	Tenant	5	

<b>A6</b>	Food processing	Tenant	10	
<b>E - Sheltered workshop</b>				
<b>E1</b>	Packaging, food processing	Owner	400	Cities of Making
<b>F - Fablab</b>				
<b>F1</b>	Wood and metal working (Fablab)	Tenant	±27	Cities of Making
<b>M - Metal sector</b>				
<b>M1</b>	Metal fabrication	Owner	1	Cities of Making
<b>M2</b>	Steel distribution and processing	Tenant	50	
<b>P - Paper and printing sector</b>				
<b>P1</b>	Printing	Owner	12	Cities of Making
<b>P2</b>	Paper distribution and processing	Tenant	10	
<b>P3</b>	Paper-making	Owner	12	
<b>A - Recycling sector</b>				
<b>R1</b>	WEEE recycling	Tenant	17	Cities of Making
<b>R2</b>	Recycling of wood materials	Tenant	6	
<b>V - Meat sector</b>				
<b>V1</b>	Management of the Abattoir production site	Owner / Tenant	50	Cities of Making
<b>V2</b>	Beef wholesaler	Tenant	18	Metrolab
<b>V3</b>	Beef wholesaler / Butcher	Tenant	19	
<b>V4</b>	Veal wholesaler	Tenant	3-6	
<b>V5</b>	Tripe butcher	Tenant	15	
<b>V6</b>	Meat wholesaler	Owner	25	
<b>V7</b>	Butcher	Tenant	12	
<b>V8</b>	Meat wholesaler / Butcher	Owner	12-14	
<b>V9</b>	Veal wholesaler	Tenant	3	

V10	Pork wholesaler	Tenant	26	
	<b>Old productive activities</b>			
	<b>New productive activities</b>			

- 8 The main source of information for our analyses was 26 semi-structured interviews from the Cities of Making project and a doctoral research project currently under way at Metrolab.brussels. These interviews were carried out with directors or managers of small- to medium- sized productive activities (companies, non-profit organisations, cooperatives, etc.) located in Cureghem, in the municipality of Anderlecht. In the remainder of this article, they will be referred to in the form of codes corresponding either to individual firms – by a letter and a number – or to all of the firms surveyed in a given sector – by a single letter (see Table 1). Furthermore, additional sources of information were also used (additional interviews with Brussels institutional officials, field observations and surveys, and urban planning documents).<sup>56</sup>
- 9 Cureghem is a working-class neighbourhood in the inner ring, located south-west of the city centre, between the canal and the South Station. The neighbourhood plays the role of a starting point and transit area, an access point to the city for new migrants seeking to settle there permanently or temporarily, while waiting for an improvement in their economic and social conditions [De Caluwé, 2013: 14]. This area is home to a fragile population and faces major socio-economic challenges, including a high unemployment rate and one of the lowest income levels in the Region. In addition, the neighbourhood is also confronted with issues related to the coexistence within this space of social groups with diverging needs and interests: former residents from the working classes, new residents from the middle classes, newcomers, workers and managers from various companies, etc.<sup>7</sup>
- 10 Moreover, this Brussels neighbourhood has a high concentration of various productive sectors (food, metal, printing, recycling) in a particularly dense, multifunctional environment marked by its industrial past. On a daily basis, Cureghem therefore experiences issues related to the coexistence of functions and their consequences for different social groups [Sacco, 2015; Senechal, 2015; Van Crieckingen and Rosenfeld, 2015].
- 11 In fact, despite the deindustrialisation process which the district underwent from the 1960s onwards, it still hosts a diversity of productive activities which have been able to remain there, particularly in the area between Chaussée de Mons and Rue de Birmingham, on either side of the canal, as this area has bigger workshops and storage spaces. Among these different activities, the meat sector, which has been present in the neighbourhood for more than a century, still plays an important role [Sénéchal, 2015; Sénéchal and Kinnaer, 2015; Sénéchal, 2019]. Although it has experienced a significant decline, the sector still has around twenty meat wholesalers and butchers concentrated around the site of the Anderlecht abattoir and in the streets adjacent to it.

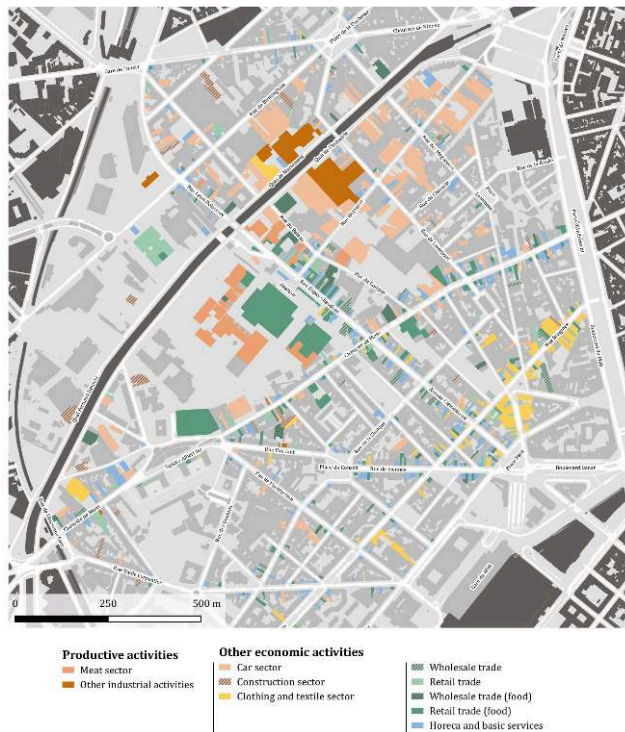
Figure 1. Timeline of productive activities in Cureghem and institutional context



Source: Interviews, De Caluwé (2013), Forum Abattoir, Perspective.brussels, Quartiers.brussels  
 Made by: Corentin Sanchez Trenado

- 12 In addition, the neighbourhood is also home to many other economic activities. Rue Heyvaert and the streets parallel to it, formerly occupied by meat wholesalers, are now home to numerous shops specialising in the import and export of second-hand vehicles [Van Crieckingen and Rosenfeld, 2015], while around Rue Brogniez and Rue Limnander there is a third centre of activity occupied mainly by clothing and textile wholesalers. In addition to these three centres of activity, the main commercial streets in the neighbourhood host a diversity of shops with a prevalence of the horeca and food sector, the latter being concentrated in particular around the site of the abattoirs. The area is also home to a number of wholesale businesses, including food and beverages. However, the car, textile and wholesale trade sectors were excluded from the analysis, as they did not fit our definition of productive activity, since material transformation processes play only a marginal role in these sectors, which are more related to trade.<sup>89</sup>

Figure 2. Map of economic activities in Cureghem



Source: Field surveys, 2017

Made by: Corentin Sanchez Trenado

- 13 Finally, while certain activities have remained in the neighbourhood, new ones are also settling there. From the 2000s onwards, there has been an emergence – sometimes at the initiative of projects supported by public authorities (e.g. Recy-K) – of SMEs or small-scale production organisations, active in particular in the food and recycling sectors. Cureghem is indeed at the centre of important urban transformations where the role of productive activities is debated among different private and public stakeholders. The priority of many projects is focused on housing production, the development of public spaces or the implementation of collective facilities, raising issues regarding the coexistence of the productive and residential functions [Sacco, 2015].<sup>10</sup>
- 14 Although these new activities are more recent creations which differ due to the rationale of their stakeholders, at first glance they seemed to share relatively similar professional practices and difficulties. Moreover, their sectors of activity did not allow them to be distinguished unequivocally: on the one hand, the distinction was clear for some sectors, between old (e.g. printing) and new activities (e.g. urban agriculture); on the other hand, some sectors were found in both groups, such as food processing or metalworking. It was therefore only after an in-depth analysis of our results that we noticed the existence of a gap between old and new productive activities, which could be seen in their locational factors and their social impacts, and that we created two categories of analysis, namely “old” and “new” activities, which are the focus of this article.



## Remaining in the city: a difficult context for unequally supported productive activities

- 15 In the context of Cureghem, not all of the productive organisations now located in the city centre fare equally well. In particular, older activities are finding it increasingly difficult to remain in the neighbourhood and are under growing pressure to move, largely due to competition from the residential function. While new activities sometimes share common concerns with older ones – for example about access to land, labour, suppliers or customers – they differ in some respects and often benefit from much greater support from the public authorities.
- 16 First of all, concerning land issues, both old and new productive activities benefit from the availability of large production spaces, a legacy of the industrial history of the neighbourhood and adapted to productive functions. However, this type of space is becoming increasingly rare in Brussels, which limits the possibilities of relocation within the region [P2, M2 - see Table 1]. Productive organisations which want to expand often have difficulty finding land [A4, F1, P3, V6] and must therefore sometimes make do with existing spaces which are not always suitable for their activity [A3, A6, E1, R1, R2] or require major works to bring them up to standard [A6, M1, P2, R2, V]. Furthermore, spaces designed for public or private projects often favour small, modular buildings which can only accommodate small, creative or experimental organisations, have a high return per square metre and are based on easily movable equipment. While new productive activities may meet these criteria, other types of production are often excluded.<sup>11</sup>
- 17 With regard to the cost of land, it should be noted that many of the oldest productive organisations own their land, purchased when it was still affordable, as is the case with paper and printing activities [P1, P3]. However, land ownership is not in itself a guarantee of continued activity, as business owners may possibly become property developers. Moreover, in the case of tenants, particularly on the site of the abattoirs, some of the older companies complain of high rent levels. On the other hand, the new activities in the neighbourhood benefit for the most part from public or private support (loan of buildings, funding) which enable them to benefit from affordable rents [R1, R2, F1, A2, A3, A4, A6].<sup>12</sup>
- 18 What is the situation with workers? Some of the old activities take advantage of the availability of a low-skilled workforce in Brussels [M2, P1, P2]. Others rely more on workers with a certain level of qualification or at least with a lot of experience in the trade, and have difficulties in recruiting. The lack of training courses or their inadequacy in relation to the needs of SMEs, competition from large industrial groups in terms of recruitment and the weakening of the family business model are often mentioned by the respondents as obstacles to the renewal of the workforce, or even to the takeover of these companies [V, P3, M1]. This is the case in particular in the meat sector where training courses keep close ties with mass retail and large industrial groups, and taking over the family business is not always guaranteed. On the other hand, new activities employing mainly low-skilled workers, with the exception of management staff, generally do not experience these difficulties. Moreover, the latter often use public or private recruitment agencies and can generally rely on subsidised jobs, as is the case for example in the food sector [A2, A3, A6] as well as in other productive organisations [R1, E]. Finally, the outsourcing of certain tasks also

sometimes makes it possible to meet the labour needs of both old and new productive organisations [V, V4, A6, P2].

- 19 As far as supply and marketing logic is concerned, old activities are generally based on stable networks of suppliers and customers, based on fairly long-standing relationships of trust [V, P1, P2, M2]. However, in the face of competition from large industrial groups and mass retail, many have opted for specialisation strategies. In this respect, the cultural diversity of the neighbourhood and of Brussels as well as the high proportion of the population with an immigrant background constitute a niche market which allows certain businesses to survive. This is the case, for example, of meat companies which benefit from the Abattoirs market customers [V], in particular through the sale of halal meat. In addition, some old production organisations sometimes benefit from advantages in terms of product quality (labels, certifications, etc.) [V6, V10, P2], know-how and technical advantages [P1, P3, A1]. A final strategy is to organise paid visits of the production process [A1], which can be a significant source of income. As regards new productive activities, they have adopted similar practices (labels, technological innovations, organisation of paid visits, etc.) to cope with the same constraints, although generally based on other types of product (often higher quality), supplier and customer [A1, A4, A5].
- 20 While some of the old activities supply chains of shops and supermarkets [P3, V], business with mass retail remains very limited. Trading with the mass retail sector can be a risk for producers whose margin of negotiation shrinks when dealing with these stakeholders, capable of imposing lower purchase prices. Some meat wholesalers explain that they choose not to enter into partnerships with them [V4]. On the other hand, some directors of new urban agriculture companies do not share this concern and, sometimes considering themselves limited in their possibilities for growth, do not hesitate to call on mass retail to increase their outlets.
- 21 In addition, the location of the neighbourhood provides easy access to the ring road and the city centre, which can be an advantage for certain activities, both old and new [V, A1, P3, E1]. However, many companies are increasingly affected by congestion problems in the Brussels urban area, as well as by public mobility policies aimed at limiting motorised freight traffic [M1]. While these measures affect all activities, they affect the older ones more, as they often have a bigger fleet. However, the meat sector [V] is an exception in this respect, as staggered working hours prevent congestion problems. The increasing use of new communication technologies [V, P1] and sub-contracting in distribution are also strategies for reducing logistics costs frequently mentioned by new and old productive activities [M2, P2, A1, A5, A6, R1].
- 22 Apart from specialisation and mobility issues, some of the older productive activities also benefit from economies of agglomeration. This is the case in particular in the meat sector [V] where the concentration of activities encourages cooperation between companies (trade in products, workers, pooling of infrastructures or vehicles). This concentration of activities and their technical expertise also contributes to attracting customers and giving them a certain visibility. However, this is often restricted to the sector in question and often remains limited with the public and the authorities. For their part, the new activities – particularly in the food sector – also collaborate with each other, particularly in terms of marketing and logistics [A1, A5], event organisation [A1, A5, A6] and team building. However, they have very little contact with the old activities in the neighbourhood which, on the contrary, are sometimes perceived as a

nuisance in terms of image or security [A1, A5]. These new productive activities also enjoy greater visibility, in particular through the organisation of visits and types of support from public or private stakeholders, for example through the promotion of these activities on their websites.<sup>131415</sup>

- 23 Moreover, with respect to the feelings which the stakeholders of these productive organisations have regarding their neighbourhood, we note that those in older activities often have a certain emotional attachment to their neighbourhood [V6, P2, A1]. However, this relationship can sometimes be conflicting, and many of them complain about the safety of the neighbourhood, reporting numerous observed or experienced crimes [V2, V3, V6, P1, P2]. Although serious crime is apparently declining [V, A1, P1, P2, R2], there is a general impression of neighbourhood deterioration, sometimes associated with the decline of certain sectors and the long period of being neglected by the public authorities [M2, A1, V6, P2]. On the other hand, those involved in new activities do not have the same experience of the neighbourhood and see it rather as an area with development opportunities. In fact, they often wish to see a revitalisation of the neighbourhood and, more generally, promote a model of an endogenous circular economy [A1, A5, A6].
- 24 Conversely, the perception of these activities by local residents can also be a source of conflict. The coexistence of productive and residential functions can lead residents – at least those with sufficient cultural, social, financial, etc. means – to lodge complaints with public authorities against productive activities, in particular the oldest ones, which sometimes forces some of them to have to move or modify their way of working [P2, M1, V7]. The increase in the number of additional housing projects by both private and public operators, mainly aimed at a middle-class public, as well as the development of public space in favour of the residential function, may therefore further accentuate these tensions [P2, M1, V3, V7].
- 25 Finally, different productive activities do not receive the same support, both private and public. From a financial point of view, while older companies rely mainly on private family capital, newer productive organisations are much more dependent on government funding and/or investments from the financial and property development sectors [A4, A5]. Moreover, through various regulations, the public authorities also encourage the development of these new activities, unlike the older ones which face difficulties in renewing their environmental permits [M2], frequent and costly inspections by the FASFC [V] or changes in mobility or land-use plans [P2].
- 26 Beyond a simple time-based criterion, the distinction between “new” and “old” activities thus corresponds to a true gap between two models of productive organisations. While older productive organisations enjoy certain advantages linked to their age and anchoring in the local context, for example by being able to rely on well-established supply, distribution and recruitment networks, their position in this central neighbourhood of the city is increasingly threatened. The increase in the number of projects which give pride of place to the residential function and the implementation of regulations which are unfavourable to them can affect their operations which, for these small businesses, sometimes adds to an already difficult general competitive context. On the other hand, the newer productive organisations, while also having to face some of these constraints, receive much greater support from the public authorities, particularly in terms of reduced rent costs, recruitment of

labour and increased visibility, and are better integrated into the residential projects developed in the neighbourhood.

Table 2. Summary of socio-economic impacts of productive organisations

	Old activities	New activities
Property	<ul style="list-style-type: none"> <li>• (+) Presence of large industrial areas</li> <li>• (-) Spaces not always suitable</li> <li>• (-) Difficulty to expand</li> </ul>	
	<ul style="list-style-type: none"> <li>(+) Land ownership</li> <li>(-) Property speculation</li> <li>(-) High rents</li> <li>(-) Measures to promote small modular production spaces</li> </ul>	<ul style="list-style-type: none"> <li>(+) Affordable / subsidised rents</li> <li>(+/-) Measures to promote small modular production spaces</li> </ul>
Workers	<ul style="list-style-type: none"> <li>• (+) Low-skilled local labour force</li> </ul>	
	<ul style="list-style-type: none"> <li>(-) Shortage of skilled labour</li> <li>(-) Weakening of the takeover model for family businesses</li> </ul>	<ul style="list-style-type: none"> <li>(+) Support from recruitment agencies</li> <li>(+) Subsidised jobs</li> </ul>
Supply and marketing	<ul style="list-style-type: none"> <li>• (+) Stable supplier and customer networks</li> <li>• (+) Proximity to the ring road and the city centre</li> <li>• (-) Competition from industrial groups and mass retail</li> <li>• (-) Traffic congestion</li> </ul>	
	<ul style="list-style-type: none"> <li>(+) Older networks based on relationships of trust</li> <li>(+) Niche market (ethnic or specialised products)</li> <li>(+) Know-how and technical expertise</li> <li>(+) Cooperation between old activities</li> <li>(-) Relative invisibility outside the sector</li> <li>(-) Developments to the disadvantage of big fleets</li> </ul>	<ul style="list-style-type: none"> <li>(+) Partnership with major private and public stakeholders</li> <li>(+) Niche market (local products) or mass retail</li> <li>(+) Technological innovation</li> <li>(+) Cooperation between new activities</li> <li>(+) High visibility and marketing support from public and private stakeholders</li> </ul>
Emotional attachment	<ul style="list-style-type: none"> <li>(+) Long establishment in the neighbourhood</li> <li>(-) Image of deterioration and insecurity</li> </ul>	<ul style="list-style-type: none"> <li>(+) Perception of the neighbourhood in terms of opportunity</li> </ul>
Coexistence of functions in the neighbourhood	<ul style="list-style-type: none"> <li>(-) Tensions with residential function</li> <li>(-) Projects in favour of housing and the quality of public spaces</li> </ul>	<ul style="list-style-type: none"> <li>(-) Projects in favour of housing and the quality of public spaces</li> </ul>

Forms of support	(+) Private family capital (-) Regulations and supervisory bodies	(+) Public and private financial support
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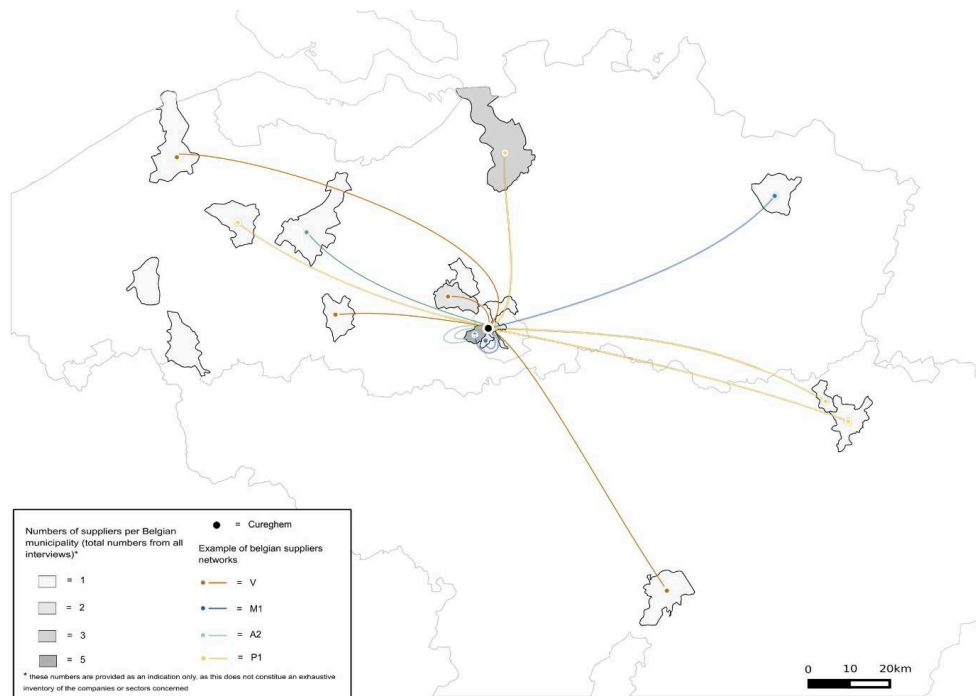
(+) Element favouring the continuation of the activity

(-) Element opposing the continuation of the activity

## Different productive activities, different social impacts

- 27 Beyond the differences observed in the continued location factors, this differentiation between new and old activities exists partially in terms of the different social groups which benefit from them. These two models of productive organisations are not neutral with respect to social and spatial impacts. They often involve different stakeholders, be they suppliers, customers or workers, and do not always involve (directly or indirectly) the same spaces, social classes and social groups.
- 28 First of all, as regards the types of supplier, it appears that almost all productive organisations, whether old or new, benefit national distributors considerably. Most of them are distributors located mainly in Flanders (see Figure 3), to a lesser extent in Brussels and very infrequently in Wallonia, supplying themselves abroad, or possibly in Belgium. However, the new productive activities, in particular those based on a logic of circular economy [A3, R1, R2], benefit small and medium-sized Belgian productive stakeholders more often. In the sectors of materials recovery [R1, R2] and urban agriculture [A1, A3], the suppliers which benefit from their presence are often located in Brussels as well.<sup>16</sup>

Figure 3. Examples of Cureghem's productive activity supplier networks

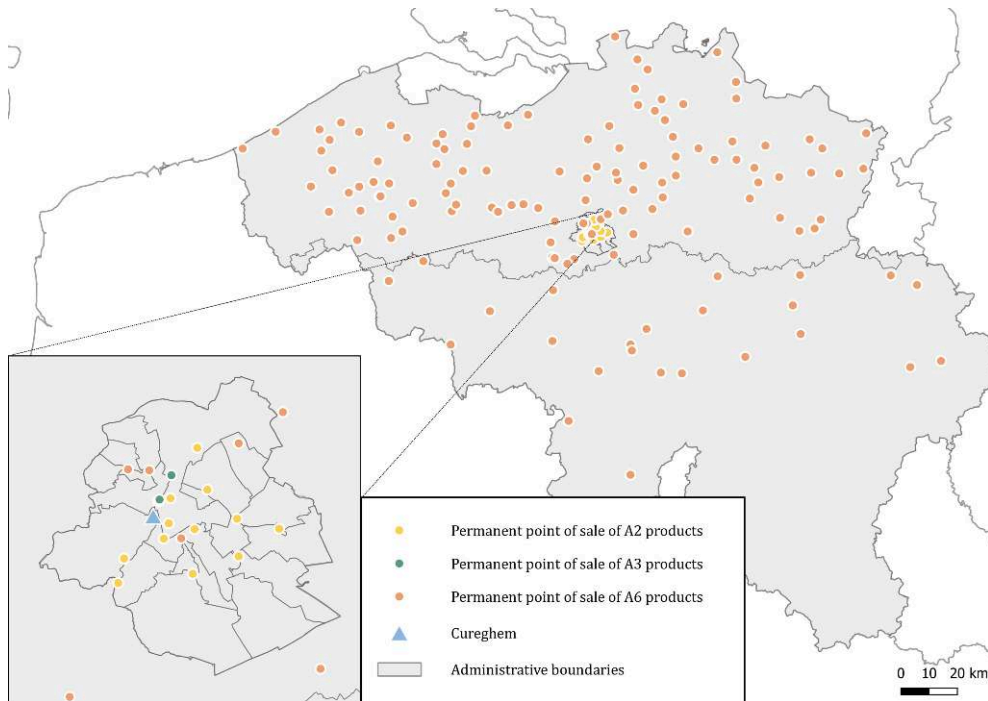


Source: Cities of Making and Metrolab interviews

Made by: Alexandre Orban

- 29 On the other hand, direct involvement with large international companies is more frequent among older productive activities, sometimes integrated into larger-scale distribution networks [P2, M2]. Thus, some of the meat wholesalers, in search of specific products (sheep or lamb, Spanish meats, and sometimes even chicken and beef), tend to favour international suppliers.
- 30 However, this tendency for new activities to contribute to the local economy should be qualified further. Indeed, not all of them benefit local suppliers and some even use international companies, in particular for certain specialised food products [A4, A5]. Conversely, it is not uncommon to see old productive activities [A1, M1, V] which significantly benefit small and medium-sized Belgian productive stakeholders, without having a short supply chain approach to their marketing.
- 31 Unlike the supplier networks, the customers who are supplied by the various old and new production activities in Cureghem often come from the Brussels Region, particularly in the case of productive organisations offering finished products which are ready for consumption. In general, customers located in Flanders or Wallonia are fewer in number, sometimes due to language difficulties. Finally, as with suppliers, some older productive activities also supply some of the larger international stakeholders, particularly those selling wholesale [M2, P2] or purchasing specialised products (see Figure 4), meeting a demand in other countries [A1, P3].

Figure 4. Points of sale of a productive organisation in the food sector (excluding meat) from Cureghem

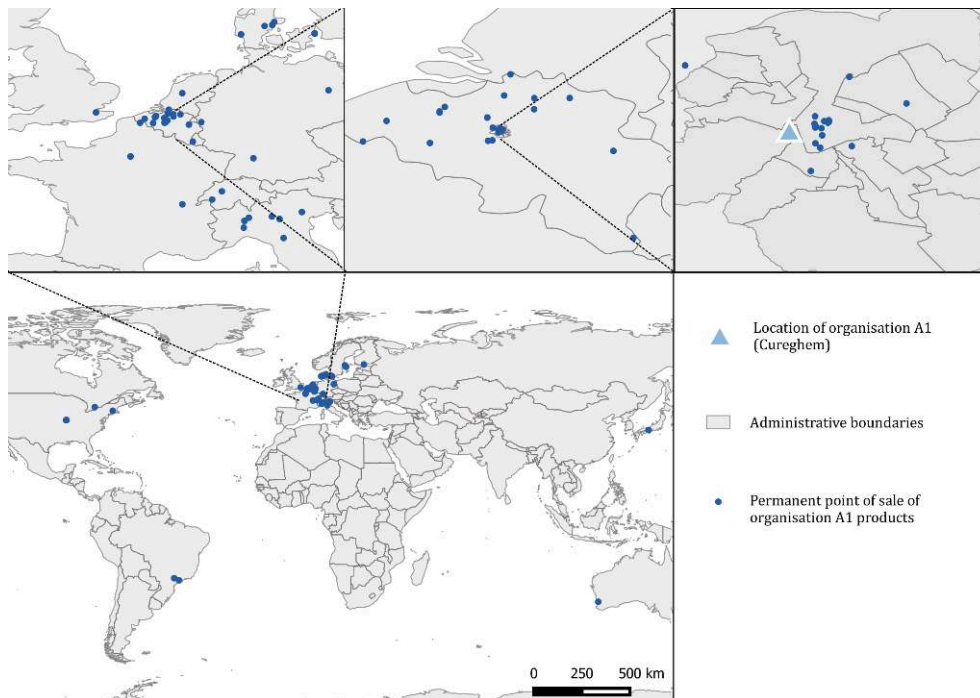


Source: Cities of Making interviews

Made by: Alexandre Orban

- 32 However, in the case of older activities, they sometimes also support networks of local SMEs located in neighbourhoods near their workshops [P1, R2, A3]. This is the case, for example, of meat wholesalers which have often maintained lasting links with the local commercial fabric (butcher's shops, Abattoirs market), particularly through the halal and kosher market. Conversely, new businesses often have difficulty reaching customers in their own neighbourhood. For example, the various (non-meat) food companies at the Abattoirs site, targeting a middle- and upper-class clientele, charge prices which are too high for the Abattoirs market and the local working-class population [A1, A5]. They are therefore forced to sell their products in other neighbourhoods of the capital, or even outside it, or to do business with mass retail stakeholders [A5, A6], chains of shops [A4] and wholesalers [A1]. These different companies therefore do not benefit Brussels customers exclusively (see figure 5).<sup>17</sup>

Figure 5. Networks of points of sale of three productive organisations in the non-meat food sector in Cureghem



Source: Cities of Making interviews

Made by: Alexandre Orban

- 33 The situation for workers who benefit from the presence of these productive activities is complex. First of all, it is complex with regard to qualification levels. While some of the older productive activities employ mainly low-skilled or unskilled workers [M2, P1, P2, E1], often trained “on the job” and originating from BCR, this is not the case for all of them. Some older companies rely more on skilled workers [M1, P3, V]. They do not necessarily have a vocational education diploma, but are often relatively old and already have many years of experience. This worker profile is becoming increasingly rare in the metropolitan labour pool. As there are not enough training courses in the sectors concerned [M1, V], these skilled workers are often trained in companies.
- 34 New activities, on the other hand, often employ low-skilled workers [A1, A3, A6, E1, R1], as this type of worker is much more common in BCR. Some productive organisations involved in a social economy approach also choose to hire low-skilled workers with the intention to train them [A3, A6, R1]. In addition, it should be noted that certain “target groups” (the disabled, people in professional reintegration, the long-term unemployed) also benefit from jobs in some of these organisations [A3, A5, A6, E1]. However, the impact on employment of the new productive activities mentioned here must be put into perspective, as the jobs remain relatively fragile due to the fact that they are heavily subsidised. Moreover, the contracts often end after the training (which lasts between 6 months and 1 year) and generally do not lead to a permanent job. This seems to contrast sharply with a number of old productive activities which have been able to provide better quality jobs in these areas.
- 35 In addition, some new productive activities mainly involve highly skilled labour. This is the case in particular for organisation F which, in addition to a minority of entrepreneurs who are not necessarily highly qualified (about 30%), has a large



- proportion of members from artistic and intellectual circles. In the same logic, company A4, which focuses on the automation of the production process, is based mainly on the work of the two founders of the company, both from the Vlerick Business School. However, in general, managers of both new and existing companies and their administrative staff often have a higher level of qualification.
- 36 If we look at national origins, we also see the significant proportion of workers of immigrant origin – especially from southern Europe and northern Africa – in many mainly but not exclusively older sectors [A1, A5, E1, P2, V]. These activities, both old and new, provide employment opportunities both for populations which have been in Belgium for a long time (Moroccans, Italians, Spaniards) as well as for newcomers (Syrians, Romanians, etc.). They therefore participate in the dynamics of the “host neighbourhood” [Collectif Rosa Bonheur, 2016] which Cureghem represents for these populations, which can then move to other neighbourhoods in the capital.
- 37 Regarding the gender of workers, and from what has been said in the interviews, it does not seem that there is a particular difference between new and old productive activities. In general, there is the same gender division of labour. Men are in the majority among workshop workers, while women are often involved in administrative and management tasks [M2, V].<sup>18</sup>
- 38 Finally, the productive activities in Cureghem maintain ties with the other economic stakeholders and the inhabitants of the neighbourhood. Firstly, productive activities, both old and new, can benefit local businesses, in particular the horeca sector, through the consumption habits of their workers. Their workers sometimes eat or go shopping in the neighbourhood, especially on market days [A6, M2, R1]. On this subject, we wonder to what extent certain new activities and their workers could help to attract high-end businesses, which are not always accessible to all. Meanwhile, the workers from the older activities sometimes make purchases in small local shops or at the Abattoirs market, but this is not always the case [M2, P3, V].<sup>19</sup>
- 39 Secondly, apart from the exchange of goods, some productive organisations benefit other productive organisations in the neighbourhood by collaborating, outsourcing certain tasks and exchanging workers [A6, F1, E1, P2, M1, V], as discussed in the previous section.<sup>20</sup>
- 40 Thirdly, regarding the issue of nuisances caused to the inhabitants of the neighbourhood, several managers of older productive activities report complaints which have been addressed to their company with regard to noise (cars, lorries, machines) [P2], odours or fume emissions [M1]. At first glance, new productive activities seem less likely to generate this kind of tension among residents. It should be noted that the situation at the site of the abattoirs is in itself somewhat different. Because the activities are relatively isolated from the rest of the neighbourhood, they have little contact with local residents [A1, V], except on market days. In this respect, the hypothesis whereby preserving spaces dedicated exclusively – or almost exclusively – to productive activities and which are relatively isolated from housing areas could allow this type of conflict to be avoided, seems to be of some relevance.<sup>21</sup>
- 41 However, the presence of older productive activities in the neighbourhood also seems to have benefited the residents. For a number of meat wholesalers, the presence of the meat sector in the neighbourhood has allowed a form of social control for its various users. The use of public space by these activities, their visibility and the existence of networks of inter-knowledge has therefore contributed to generating a sense of

security around their workplace. Similarly, the deterioration of the neighbourhood since the 1960s is sometimes associated with the exclusion of a certain number of older productive activities which contributed to this “protective” effect for the inhabitants [P2]. The disappearance of various companies contributing to “neighbourhood life”, for example through ties with cafés or local festivities, is also deplored by some company managers [A1].<sup>22</sup>

- 42 Fourthly, if we look at the issue of the gentrification of the neighbourhood [Van Crieking and Rosenfeld, 2015], it appears that new productive activities seem to contribute to this process in Cureghem, while the old activities have always been somewhat of an obstacle to it. The development of new food activities [A1, A4, A5] on the site of the abattoirs contributes more and more to increasing the visibility of the neighbourhood in the eyes of the middle classes through visits and events organised in the framework of their activities. Attracting a new public to the site of the abattoirs also benefits the Abattoir company itself, in the context of organising its own events, also aimed at the middle and upper classes (Boeremet, inauguration of Foodmet, exhibitions, etc.). Similarly, the events and productive activities at the Recy-K site seem to attract mainly a well-to-do public, according to our interviews with workers and users of the site. The R2 association, an exception among the new activities, avoids contributing to the ongoing gentrification process, by reaching out exclusively to local residents.<sup>23</sup>

Table 3. Summary of socio-economic impacts of productive organisations

	Old activities	New activities
Suppliers	Purchases from a diversity of stakeholders, from small and medium-sized national productive stakeholders to large international companies Ubiquitous use of national distributors	Purchases from regional suppliers (circular productive activities)
Customers	High proportion of Brussels customers (> Flanders and Wallonia)  Sales to local and international customers Finished products intended for the working classes Limited business with mass retail and chains of shops	Difficulty reaching out to a local clientele Finished products intended for the middle classes Business with mass retail, chains of shops and wholesalers
Employment	Low-skilled workers, often from Brussels, trained within the company <ul style="list-style-type: none"> <li>• High proportion of workers of immigrant origin</li> <li>• Men are in the majority among workers, while women are in the majority among administrative staff</li> </ul>	

Employment

	<p>Skilled workers not exclusively from Brussels, trained on the job.</p> <p>Stable jobs</p>	<p>Social economy enterprises specifically targeting a low-skilled public (disabled, people in professional reintegration, long-term unemployed)</p> <p>Jobs which do not usually lead to a permanent position</p> <p>Certain highly skilled jobs</p>
Coexistence of functions in the neighbourhood	<p>Promotes local business</p> <ul style="list-style-type: none"> <li>• Mutual benefits, linked to the presence of other productive activities</li> </ul>	
	<p>Nuisance (noise, odour, fumes) for residents</p> <p>Contribution to forms of social control and “neighbourhood life”</p> <p>Obstacle to the gentrification process</p>	<p>Up-market shopping attraction</p> <p>Relative isolation from the neighbourhood</p> <p>Contribution to the gentrification process</p>

## Conclusion

- 43 At the end of these analyses, various elements can be highlighted.
- 44 First of all, we observe a gap between two models of productive activities based on their locational factors. While older activities – which have been anchored in the neighbourhood of Cureghem for more than 20 years – have until now been able to benefit from a series of advantages linked to their urban location (proximity to the ring road and the city centre, abundant low-skilled labour, niche markets, systems of cooperation between different organisations, etc.), they are now experiencing increasing difficulties in order to remain there. Various specifically urban dynamics are involved, such as property pressure favouring the residential function and development plans oriented towards the middle classes and the associated vision of “quality of life”. Older productive activities also have problems renewing their workforce and sometimes suffer from a relatively negative media image with the public. This precarious situation is compounded by a series of additional difficulties (traffic congestion, competition from large groups, areas unsuitable for production, etc.), which call into question the possibility for older productive activities to remain in the city. While the new activities which have appeared more recently are also faced with these difficulties, they benefit from much greater public and private support which allows their activities – limited but nevertheless substantial – to develop. This results in easier access to land, significant funding and investments in production, subsidised employment, etc.
- 45 Secondly, this gap between new and old productive organisations also has repercussions in terms of social and economic impacts. Although in some aspects the new productive bodies favour the endogenous economy as much as the old ones do (creation of local low-skilled jobs, use of local suppliers, local customers, etc.), this is not the case as regards other criteria. As such, the idea that one productive activity is

the same as another should be questioned. Indeed, as new activities are also subject to market constraints, they are often not limited to the local market and, moreover, tend to favour products of a higher standard, aimed at a middle-class clientele. Moreover, although the jobs created within the framework of these new productive organisations are partly aimed at disadvantaged populations, they remain relatively fragile as they are heavily subsidised and generally do not lead to a permanent position. The issue of the contribution of the productive sector to the gentrification of Cureghem also seems crucial to us. The new productive activities attract a more affluent public through communication, events and products designed for them. Finally, these new activities are more easily integrated into property developments which promote housing (fitting into small spaces, generating less nuisance) and the consumption habits of the much coveted middle classes.

- 46 While the main analysis of the distinctions between productive activities in Cureghem involved the use of the categories “new” and “old” throughout this article, we wonder about the essence of this gap. Based on all of our results, we feel that we can formulate the hypothesis that the continued existence of a productive activity depends fundamentally on how well it reconciles with the interests at the heart of the main urban development project and their expression in social and spatial terms. In Brussels, this mainly involves prioritising functions which promote attractiveness in the competition between regions, such as residential projects targeting the middle or upper classes, the production of offices for high-level services, the organisation of events and the construction of large-scale cultural or sports facilities, etc. These functions have been at the centre of the urban development of Brussels over the last thirty years and have been developed by powerful stakeholders in regional development, both private and public [Vandermotten, 2014]. The productive activities which are least in line with the interests of these stakeholders are most likely to be pushed out of the city. This hypothesis has been confirmed recently by other studies in Brussels [De Boeck, Degraeve and Vandyck, 2020]. We invite researchers to evaluate its relevance through qualitative empirical studies and quantitative research.
- 47 In the meantime, public stakeholders in Brussels openly favour new small productive organisations with questionable social impacts. If the objective of these policies is to promote a common good through the development of productive activities which are more oriented towards equitable social impacts, simply promoting a return of the productive function in the areas assigned to it is not enough. By considering the socio-economic impacts analysed here in its metropolitan context, we invite Brussels institutions, both public and private, to take a stand in order to promote a more endogenous and more working-class oriented economy. Sustainable measures should be implemented, such as the promotion of productive activities which partly meet the social challenges of Brussels or the public supervision of the property market. The aim is to avoid as soon as possible the increasingly advanced expulsion of old productive activities from the city, and the harmful social consequences which this entails.

*We would like to thank the various people interviewed for sharing their daily lives with us, as well as the teams at Metrolab Brussels, Cities of Making, IGEAT (ULB), Cosmopolis (VUB), Inter-Environnement Bruxelles and Forum Abattoir.*

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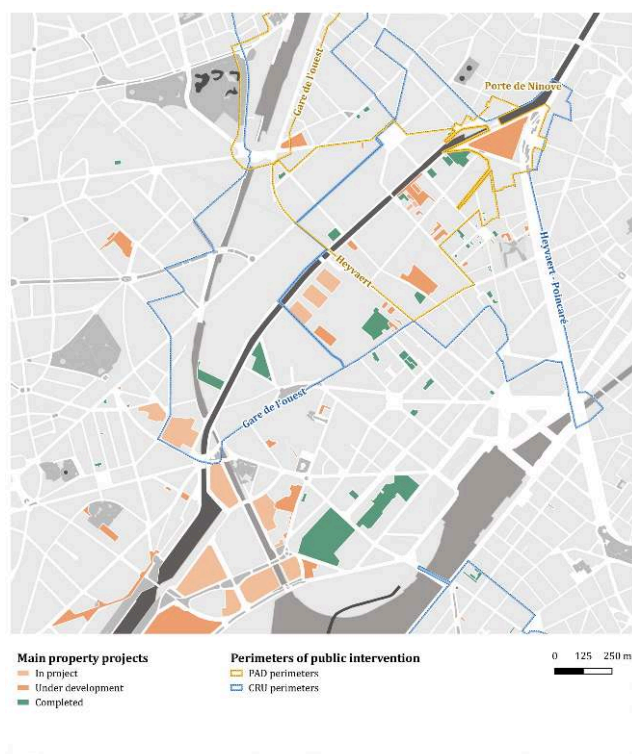
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## APPENDIXES

### **Projects and scope of public intervention in the neighbourhood of Cureghem**

Following a long period of disinvestment by the public authorities, the neighbourhood of Cureghem is now receiving increasing attention from the regional authorities. After multiple Neighbourhood Contracts, Cureghem is today the subject of an Urban Renovation Contract (2017) and a Master Development Plan (2019). For its part, the site of the abattoirs in Anderlecht is also part of a master plan drawn up in 2009 by the company managing the site. On the other hand, the neighbourhood – which is located in the Canal Plan area – is also seeing an increase in the number of major property projects, both public and private, in its immediate vicinity, whether they are carried out by the public authorities (Porte de Ninove, PPAS Biestebroeck, City Gates, Gare du Midi) or by private property developers looking for housing production opportunities. Finally, over the last decade, Cureghem has also been the subject of relatively significant investment by the European Union through regional support funds such as ERDF (Recy-K & Abattoir (Foodmet) - ERDF 2007-2013, *Médecin du Monde* and Abattoir (Manufakture) - ERDF 2014-2020).

Figure 6. Projects and scope of public intervention in the neighbourhood of Cureghem



Source: Perspective.brussels, Metrolab

Made by: Corentin Sanchez Trenado

## NOTES

1. The case of Zones d'Entreprises en Milieu Urbain (ZEMU) is emblematic of this competition for space and the influence of the public authorities: in the framework of a revision of the PRAS in 2013, large industrial areas in Brussels have been converted into mixed areas, thus opening the door to housing and service activities which threaten the possibility for productive activities to remain in these areas. See the study by Inter-Environnement Bruxelles (IEB) in 2013 on the case of Biestebroek and its ZEMUs [Babar and Scohier, 2013].

2. When the construction and circular economy sectors (repair, recycling, etc.) are included, the proportion of salaried employment in BCR rises to more than 8 %. These two sectors, as well as food processing, have significant proportions of low-skilled jobs [Observatoire bruxellois de l'emploi, 2016b: 59; Lennertz *et al.* 2018: 11], in a region with a high and growing unemployment rate, where 24 % of jobseekers in 2015 had a low level of education [Observatoire bruxellois de l'emploi, 2016a: 42]. However, the Brussels Region showed a net loss of low-skilled jobs (-41 %) between 1989 and 2007, while the number of high-skilled jobs increased sharply during the same period (+62 %) [Agence de Développement Territorial, 2011: 106].

3. In Brussels, this includes public institutions such as Perspective and Citydev, research centres such as the Chaire en Économie Circulaire at Université libre de Bruxelles and Metrolab, and associative groups such as Inter-Environnement Bruxelles and Brussels Entreprises Commerce & Industry.

4. See for example the study by De Boeck, Degraeve and Vandyck [2020] on the construction sector in Brussels.

5. These are interviews with Brussels institutional stakeholders working on the theme of productive activities, from the exploratory phase of Cities of Making in 2017.
6. This visual survey was carried out in 2017 as part of the doctoral research conducted at Metrolab.brussels. It lists all economic activities (productive or commercial) as well as the different types of services to the population (public services, associations, cultural or sports infrastructures, etc.) visible from the street. The interiors of blocks are therefore not included in this.
7. 36,95 % and 14 031 euros (median annual taxable income) in the statistical neighbourhood of Cureghem Rosée in 2015, compared to 21,31 % and 19 088 euros on average in Brussels, according to the Monitoring des Quartiers (IBSA). See also the historical analysis of Cureghem's social and spatial polarisation by Mistiaen, Meert and Kesteloot [1995].
8. In the rest of this work, we have decided to adopt the definition of productive activities established by the Regional Land Use Plan (PRAS), with the exception of activities for the production of immaterial goods, the latter having social and spatial characteristics which are more similar to office services. It should be noted that many services which are closely integrated into production processes are considered in our analysis as secondary to productive activities (logistics, administrative services, research and development), but do not represent the central subject of our work.
9. This statement was confirmed by Martin Rosenfeld, specialist in used car trading activities in Heyvaert (e.g. Rosenfeld, 2013), in an interview conducted on 23 January 2019 as part of the Cities of Making research project.
10. See annexe.
11. In the same logic, the regulatory component of the Heyvaert Master Development Plan (PAD) also tends to limit the size of the spaces dedicated to productive activity.
12. As has already been observed in the second-hand car trade in Heyvaert, according to an interview with Martin Rosenfeld in 2019.
13. On site, this involves various shared infrastructures such as the refrigerators used by meat wholesalers.
14. In organisation F, this collaboration takes the form of sharing spaces, pooling machines and collaborations between members.
15. The only exception we encountered was the joint composting of organic waste organised by the site manager of the Anderlecht abattoirs, concerning both old and new businesses.
16. By this we mean companies which specialise in importing products and selling them throughout Belgium.
17. The fact that the ownership of V1 includes small investors, with their own meat-related economic activities in the neighbourhood, has played an important role in the historical link between this site and the neighbourhood.
18. However, sexist behaviour reported in some companies is said to be on the decline, which is linked in particular to the fact that women are gradually occupying a greater proportion of workshop positions [M2].
19. This hypothesis comes from the example of the Kantine du Canal, a bar located on the Recy-K site, which charges prices which are too high for the low-skilled workers of certain production organisations and is aimed rather at the more well-to-do staff from the site or from external companies such as Veolia.
20. This is the case in particular for A6, calling on organisation E to help them meet certain large orders, workers from F sometimes cooperating with a related association, or from P2, working with the neighbouring small company.
21. Some interviewees mention the absence of neighbourhood conflicts or complaints about the noise from their activities [A3], but attribute this tranquillity to their location in a disadvantaged neighbourhood close to social housing, and not to the characteristics of their business. The



hypothesis is that lower-class residents would be less likely to complain about nuisances and that middle- and upper-class residents would have an easier time getting their complaints resolved, or even make greater demands in relation to these problems. See Emmanuelle Lennel's further analysis of these aspects in the case of Cureghem [2015].

22. According to R2, it was the used car dealers in Rue Heyvaert who requested the establishment of a police station in order to put an end to the gangs which were demanding ransoms from the businesses.

23. In terms of rationale, organisation F, for example, sees its productive space as a meeting place and not simply as a work space.

## ABSTRACTS

With the growing popularity of the image of the “productive city” both in political and academic circles in Brussels, the need to keep – or even redevelop – productive activities in the city is becoming more and more widely accepted. However, while public stakeholders favour the implementation of new activities through their policies regarding productive activities and spatial planning, these transformations sometimes take place to the detriment of existing activities. Yet these productive activities are not identical in terms of location factors and their social and economic impact. This work is the result of collaboration between two research projects, and is part of a comparative and qualitative empirical approach aimed at understanding the realities which these different types of old and new activities correspond to, as well as the issues related to their continued existence or development.

Avec le gain en popularité de l’image de la « ville productive », tant dans les milieux politiques qu’académiques bruxellois, la nécessité de maintenir – voire de redévelopper – les activités productives en ville fait de plus en plus consensus. Cependant, si les acteurs publics, au travers de leurs politiques en termes d’activités productives et d’aménagement de l’espace, favorisent le déploiement de nouvelles activités, ces transformations se font parfois au détriment des anciennes. Or toutes ces activités productives ne sont pas identiques, tant en ce qui concerne les facteurs de localisation que du point de vue de leurs répercussions sociales et économiques. Ce travail, issu de la collaboration entre deux projets de recherche, s’inscrit donc dans une démarche empirique comparative et qualitative visant à comprendre les réalités auxquelles correspondent ces différents types d’activités, anciennes et nouvelles, ainsi que les enjeux liés à leur maintien ou à leur développement.

Gezien de toenemende populariteit van het imago van de “productieve stad” zowel in politieke als in academische kringen in Brussel, is men het er steeds meer over eens dat de productieve activiteiten in de stad moeten worden behouden en zelfs opnieuw moeten worden ontwikkeld. Maar terwijl de publieke actoren – via hun beleid inzake productieve activiteiten en ruimtelijke ordening – de ontwikkeling van nieuwe activiteiten stimuleren, gaan die veranderingen soms ten koste van de oude activiteiten. Al deze productieve activiteiten zijn echter niet identiek gelijk wanneer we kijken naar de lokalisatiefactoren maar ook naar de sociale en economische gevolgen. Dit artikel, dat het resultaat is van de samenwerking tussen twee onderzoeksprojecten, sluit bijgevolg aan op een kwalitatieve en vergelijkende empirische benadering om meer inzicht te krijgen in de realiteit waarmee deze verschillende soorten van

activiteiten – zowel oude als nieuwe – overeenstemmen, alsook in de uitdagingen die gepaard gaan met het behoud of de ontwikkeling van die activiteiten.

## INDEX

**Subjects:** 6. économie – emploi

**Mots-clés:** cureghem, développement économique, développement territorial, gentrification, politique régionale, urbanisme

**Keywords:** cureghem, economic development, territorial development, gentrification, regional policy, town planning

**Trefwoorden:** kuregem, economische ontwikkeling, territoriale ontwikkeling, gentrificatie, gewestelijk beleid, stedenbouw

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