There are still many Dissimilarities between Creative Industries and Cultural Industries

Il y a encore beaucoup de dissemblances entre les industries créatives et les industries culturelles

Todavía hay muchas diferencias entre las industrias creativas y las industrias culturales

Article inédit. Mis en ligne le 27 décembre 2017.

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Abstract

Twenty years after their first developments, the creative industries are still at the grand project stage. The hypothesis on which this article focuses is that including creative industries and cultural industries in the same category cannot be regarded as real or effective, any more than the emergence of a single category, i.e. creative industries. While the consistency of cultural industries is now relatively well known (the author cites five features that he considers to be essential), this is not yet the case for the creative industries, which remain highly heterogeneous. It is therefore possible to list the similarities and dissimilarities between these two categories of industry and even to identify a number of structural differences between them, and for them still to appear in 11 market segments whose data were available in 2014 for the 27 member states of the European Union. Under the present conditions, the quantitative pre-eminence of cultural industries is not about to end.

Keywords

Creative Industries, Cultural Industries.

Résumé

Vingt ans après leurs premiers développements, les industries créatives en sont encore à un stade de grand projet. L'hypothèse sur laquelle porte cet article est que l'inclusion des industries créatives et des industries culturelles dans la même catégorie ne peut être considérée comme réelle ou efficace, pas plus que l'émergence d'une catégorie unique, celle des industries créatives. Si la cohérence des industries culturelles est désormais relativement bien connue (l'auteur cite cinq caractéristiques qu'il considère comme essentielles), ce n'est pas encore le cas pour les industries créatives, qui restent très hétérogènes. Il est donc possible d'énumérer les similitudes et les dissemblances entre ces deux catégories d'industries et même d'identifier un certain nombre de différences structurelles entre elles, et pour qu'elles apparaissent encore dans 11 segments de marché dont les données étaient disponibles en 2014 pour les 27 États membres de l'Union européenne. Dans les conditions actuelles, la prééminence quantitative des industries culturelles n'est pas près de s'arrêter.

Mots clés

Industries créatives, industries culturelles.

Resumen

Veinte años después de sus primeros desarrollos, las industrias creativas todavía están en la etapa de gran proyecto. La hipótesis en la que se centra este artículo es que incluir las industrias creativas y las industrias culturales en la misma categoría no puede considerarse real o efectiva, más que el surgimiento de una categoría única, es decir, las industrias creativas. Si bien la consistencia de las industrias culturales es ahora relativamente conocida (el autor cita cinco características que considera esenciales), este no es todavía el caso de las industrias creativas, que siguen siendo muy heterogéneas. Por lo tanto, es posible enumerar las similitudes y diferencias entre estas dos categorías de industria e incluso identificar una serie de diferencias estructurales entre ellas, y que aún aparezcan en 11 segmentos de mercado cuyos datos estuvieron disponibles en 2014 para los 27 estados miembros de la Unión Europea. En las condiciones actuales, la preeminencia cuantitativa de las industrias culturales no está por terminar.

Palabras clave

Industrias creativas, industrias culturales.

Positioning

Two decades after the first initiatives of Tony Blair's government, creative industries are still at the "grand project" stage, although their recognition has been strengthened and undoubtedly gained legitimacy in much of the world, under the converging pressure of various international, global or regional, organizations. One of the main difficulties encountered in the implementation of the project lies in the vagueness of the very perimeter and above all of the content of this new category of industries, which is expected to have a promising future, despite the frequently unsuccessful efforts of specialists and international organizations to draw maps. What does one mean exactly when one uses the term, or the even vaguer on "creative economy" which is increasingly substituted for it? Promoters of current achievements and policy makers are still struggling to answer this question.

One of the aspects that leads to frequent confusion is that the creative industries (referred to hereinafter as ICREA) are linked to the cultural industries (referred to hereinafter as ICULT), which are much more easily identifiable, especially as most of the socioeconomic sectors considered to constitute this category, have been operating much longer, and even for several centuries in some cases. Strangely, some authors consider cultural industries as component of the creative industries, a part of the whole; others, fewer in number, believe a distinction must be made as their *modus operandi* is different and their potential customers dissimilar. Still others believe that they should be included in the same category, generally called "cultural and creative industries", but this view, which may be considered reasonable, is rarely justified. What makes them similar? Or makes them different? More often than not, these questions remain unanswered or, in any case, are unsupported by arguments.

In terms of policy-making, it is not necessary, as we know, to develop in a wholly transparent manner and we may be aware that those responsible for it are not primarily motivated by a preoccupation with conceptualization. But certain information may help to understand the constraints and obstacles encountered in the implementation of new development, especially since many of them are conducted in a local context. It is therefore a concern for transparency that lies behind this position, which insists on both the specificities and complementarities of the two categories of industry.

In order to approach this comparison between ICULT and ICREA, , we will rely on various individual and collective works, conducted over several years on the changes, even the essential mutations to ICULT (Cultural and Informational Industries), due to the emergence and development of the Creative Industries (ICREA), and especially with the book *L'industrialisation des biens symboliques- Les industries creatives en regard des industries culturelles (The Industrialization of Symbolic Goods, Creative Industries regarding Cultural Industries)*, (in collaboration with Philippe Bouquillion & Pierre Moeglin), Grenoble: Pug, Collection Communication, Media and Society, 2013.) In so doing, we find ourselves in the long-term perspective of a continuous extension of the industrialization of new symbolic goods, inserted into (or aggregated into) consumer goods.

It is important to stress, however, that we strongly differentiate our approach with thinkers of the modernity in Information and Communicational field such as Henry Jenkins (on convergence), Richard Florida (on creative class) Scott Lash & Celia Lury (on global culture), Jeremy Rifkin (on access or collaboration), with liberal cultural economists such as David Throsby or Richard E. Caves as well as specialists in management science,

And most of the proposals of experts or official agencies.

The hypothesis on which this article focuses is indeed that including ICREA and ICULT in the same category cannot be regarded as real or effective, any more than the emergence of a single category, i.e. ICREA. A complex process is currently at work; some components contradict the goal of homogenization and especially the tendency to unify ICREA and ICULT. We will endeavour to justify this hypothesis.

Main features of Cultural and Informational Industries (ICULT)

Five features can be identified, that we define in turn hereafter.

First feature: The remarkable diversity of cultural product merchandise relates to their different relationship with industrial products.

The world of cultural industry is very diverse and includes a multitude of products. How can cultural commodities produced according to artisanal and small-scale methods coexist with industrial production? Typologies were thus devised that combine technical and economic criteria (serialisation bringing market prices and value closer together) and social and cultural criteria (is the work of artists and intellectuals involved in the conception of the products?), as in the following cases:

- Reproducible products not requiring the involvement of informational workers to produce them (dealing here essentially with technical objects providing access to cultural and informational organisations);
- Reproducible products with the involvement of cultural (and informational) workers in their production, such as books, disks, admissions to cinemas, assistance with television programs, etc. We are here at the core of industrialised cultural merchandise;
- Semi-reproducible products supposing the intervention of artists, but for which reproduction is limited by technical or socially distinctive processes: lithographs, limited reproductions of fine arts, etc.
- Commodities that are unrelated to the cultural industries: variety shows, unique works of art, etc.

We should note that this typology gives a central position to the notion of reproducibility, also considered the industry's first mark. It tends to abolish the traditional distinction made between goods and services according to which industrial work is reduced to material series, while industrial organisations have to be taken into account, especially since the arrival of digitalism.

Second feature: the unpredictable (or uncertain) character of cultural (or informational) use values generated by industrialised cultural products is one of their structural marks

A significant proportion of cultural and informational products happen not to be consumed, or distributed at all (in other words, they find no outlet among user-customers), and that proportion is bigger than in other categories of industrialised day-to-day products. To attempt to control the effects of such a situation due to the uncertain character of product value, the industrial has devises a series of backfire : cost per series or catalogue (qualified as tube and catalog dialectic) rather than per product; price fixing with wide margins, beyond usual norms; not paying wages to design staff (see below); the distribution of economic risks to smaller subcontractors called on to take artistic risks and innovate in a generalised tendency towards subcontracting; close stock management; confinement in protected linguistic or national spaces; refinement of the targets with the help of various audience studies; etc. These original traits are somewhat structural and justify a separate treatment for cultural and informational industries amongst other industrial fields, not as an archaic field but as an irreducible one, at least until now, with the traditional forms of industrialisation.

Third feature: the resort to artistic and intellectual workers for product conception operates mainly according to artisan modalities that are supposed to guarantee autonomy in creation.

It's important to note the recurring particularities of payment terms for most of those involved in product design: artists (authors and interpreters), freelance and occasional journalists, technicians contributing to the editing of the first draft of books to be reproduced, etc. Payment for the majority of them falls outside the scope of the wage system (although it is a norm to which most workers under capitalism are subject) and they are forced to accept being paid by systems such as copyright, freelance wages, etc. There are some permanent workers (statutory) in newsrooms, and more generally in the media, as well as in publishing houses and audio-visual production companies, but in every company, the employment of statutory workers is doubled with the employment of workers without any status, precarious and intermittent workers. This trait is not to be considered as a reminiscence, it is an established trait that helps to provide fluid management of strong artistic and intellectual workforces that need to be able to adapt at any time to any number of fresh demands: genres, forms, standards... This system creates permanent insecurity and it is the existence of a real reservoir of workers whose expenses is only partially borne by industrial concerns always ready to work under minimum conditions; yet it is evidently accepted by a minority of stars who receive extra revenue, owing to its proportionality to actual sales (with royalties, but also with basic allowances).

Fourth feature: Two fundamental models (generic), the editorial model and the flow model, form the basis of the exploitation of industrialised cultural merchandise (from creation to consumption)

The world of cultural and informational products is therefore extremely diverse. In these conditions, it is not surprising that the encounter between producers and consumers, between artistic and intellectual workers and technicians, on one hand, and with readers, listeners, viewers and Internet users, on the other, occurs in very diverse ways.

These considerations and others led to a fundamental distinction between an *editorial model* (originally book-, disc-, and film editing) and a *flow model* (originally mass radio and television).

A model could also be considered an ideal-type. Situations are very variable and cannot be considered purely as belonging to one model or another. Which may be less and less obvious these days. Thus, let us examine various possibilities, such as the following: *Print News* with an almost complete series of situations moving between both editorial and flow models; *Online documentary products*; *Club logic* that allows subscribers to access a certain number of services, specially TV programmes, for the duration of the subscription; *Brokerage*, for which an intermediary, a broker or some kind of representative negotiates with distributors which products may be of interest to the consumer; *Online special portal provider* with variable payment option; and above all, since the recent development of online social networks, *platforms* that can be used to "manage" audiences.

Fifth feature: Moderate internationalization partially respecting national cultures as well as the private interests of firms in which they contribute to the organization.

At the beginning of the 1970s, we witnessed two relatively homogenous strategies working on behalf of capital: a growing concentration and internationalization of appliances and objects, on the one hand (type 1 products), edited products (type 2), that provide a space for lively competition between national and foreign capitals, more in terms of for recorded music, audio-visual products and games, than for book publishing or news broadcasts targeting the general public. The challenges were as much industrial as they were political, cultural or linguistic, yet the trans-nationalization that was mainly the initiative of major American companies and East Asian conglomerates, was already growing, although it was encountering strong resistance because of the specific characteristics conveyed by information and cultural products, thus leaving space for nationally and regionally based companies to develop. This growth was encouraged by the standardization of technical equipment, the emergence of communication networks (and companies) and the strategic importance of distribution rights.

However, unlike the basic view which has, up to now, ignored their diversity and complexity, the insertion of cultural industries into global markets did not follow a simple course and undisrupted progress. The negotiations that subsequently took place within regional and international authorities (such as GATT and the WTO on cultural merchandise and UNESCO on cultural diversity) would later confirm it.

The ICULTs have regularly undergone change and even true innovation. This was the case throughout the 20th century and even in the last few years. We are not used to considering them as a whole and they are generally viewed in their socioeconomic sectors (French *filières*, e.g. book publishing) or even from their sub-sectors (e.g. novels or comics), but beyond their obvious differences and specificities, they retain an overall consistency to which our attention must be drawn. However, to avoid the dispersion and heterogeneity of approaches (branches, sectors, socioeconomics sectors, industries – plural or singular – are employed, more or less indifferently, without conferring a well-assured meaning on the appellation) we need a framework common to the different industries that makes it possible to differentiate and categorize them, while taking into account similar or common practices and strategies ; this framework must take into account the organization of activities and professions as well as their economic structure (ranging from creation to product consumption), and the sets or entities thus distinguished must be easily dissociated and opposed to other groups and entities, in a relatively ongoing way.

The emergence of a new entity is thus a rather exceptional phenomenon, since it is the lasting result of the implementation of typical techniques, the involvement of largely specific professional activities, contributing to the production of particular goods and easily identifiable, as well as appropriation of the former by experimental users and then by regular consumers/users. In this sense, this framework must therefore attempt to represent a structured set of professional practices, both artistic and technical, managerial, intermediate and distributive; we may even consider the existence of professions that incorporate both artistic and managerial components, such as publishers, producers or programmers, as a specificity of these industries.

The approach is multi-criteria. And it would be a mistake to define one of these sets by a single technique (only the book, in its rise, satisfied that this characteristic); the jobs of the "technical" industries of cinema, television and even audio-visual communication are now clearly interpenetrated. Not only must the production-consumption chain(s) (which includes a range of activities and jobs) be taken into account, but we must also be ensured that they bring about regular and sustainable autonomous production. This requirement, as outlined below, applies to all cultural industries (ICULTs), but not to all creative industries (ICREAs): it is sometimes technically and even socio-professionally chimerical or impossible to distinguish between design and furnishings, the architecture of the construction, even arts and crafts aimed at cultural tourism.

The notion that best satisfies these conditions is that of socioeconomic sectors. Used mainly in certain professional circles, it has been taken on board by official agencies, including at international level. Thus, the FAO uses it with the following clarifications:

"*Economic analysis by sector is the analysis of the organization, both on a linear and complementary level, of the economic system of a product or a group of products; it is the analysis of the succession of actions carried out by actors to produce, transform, sell and consume a product. This product can be indifferently agricultural, industrial, artistic, data processing, etc.*" (FAO, http://www.fao.org/DOCREP/003/X6991E/x6991e04.htm, accessed 05/01/12)".

Here, the emphasis is placed less on production units than on the organization of the product production chain and, more especially, of a group of products, until consumption. The specificities of industrialized and non-industrialized cultural and information products, as well as those related to the former (e.g. live shows), are therefore better covered.

In search of what is at the heart of Creative Industries (ICREA)

Obviously, the same approach is more difficult with the ICREA, and even out of reach for some of them (architecture, advertising and even design), for the following reasons:

- The creative dimension of economic activities like creative industries (and even more so for those that are specifically linked to the creative economy) cannot be placed on the same level as the social and symbolic dimension and imaginary dimension that is at the foundation of the cultural industries; in any case, the social recognition and, therefore, the legitimacy, of this creative dimension is less assured, more diffuse, than those associated with ICULT, even if this varies from one culture to another. Simply put, creativity is a value that is essentially attached to production and economic activity. Culture and even information are primarily recognized in that they give rise to practices outside working hours, in the private sphere and in the social sphere. This has not always been the case, and this characteristic is quite recent. But it is not so for creativity hitherto essentially confined to activities managed by means of managerial techniques or, quite differently, within the framework of artistic education.

- There is considerable heterogeneity between the various productive activities that authors classify as creative industries. And most of the time, these activities are not individualized and are combined with others. It has already been pointed out that this is the case of design and architecture, but it is necessary to add creative work in advertising and, to some extent, the fashion industry (even Haute Couture) and the clothing industry to a greater and greater extent. What is identified as ICREA is therefore either inseparable from the mass industrial activities, in which they are the design phase (often referred to as creation rarely as conception), or even at some remove from activity in the industrial sphere (for example visual arts).
- Historically, it is true that, in industrialized countries, official services, experts and, of course, the business community have not been concerned with finding common aspects in today's creative activities; their approaches have been exclusively sectoral. Thus, it should not be surprising that it is now difficult to identify legal norms, professional references or operating methods that easily allow us to bring the luxury goods, design and arts and craft industries closer together.

It is thus possible to compare the socioeconomic sectors of ICULT and the activities associated with ICREA.

Book publishing	The fashion industry (and high fashion)
News and information	Luxury goods industries (more than thirty)
Cinema and audio-visual	Arts and Crafts
Recorded music	Design (in furniture and furnishings)
Video games	Architecture
And info-mediation	Design in advertising

Table 1 - The socioeconomic sectors of ICULT and the activities associated with ICREA.

Similarities and dissimilarities

While similarities and trends towards rapprochement can be observed between cultural industries and creative industries (the main ones being incentives for creativity and the call for collaborative work in the design phase), these findings ignore a whole series of differences which are all the more evident, like the "legal systems" (on the one hand, copyright law, on the other, trademark law and intellectual property) continue to be distinct.

Indeed, the product consistency seems to be similar if not analogous, but in both categories of industries, analogies mainly concern semi-reproducible products (which remains a minority type within ICULT) and quite rarely on reproducible products (so-called mass and very widespread products constitute only a part of this). And a significant difference emerges as to the very nature of these products: if both use creativity in the design phase, the products of the creative industries (ICREA) are also backed by the heritage they reproduce, and even extend, to be exchanged and resold (as is the case in the luxury goods and even the fashion industry); this is only rarely the case for cultural products (ICULT), with "secondary markets" for passionate collectors. As for the management of creativity, if the phenomena of the star system (= starization) are apparently common. It reveals notable dissimilarities. It concerns the creators in the creative industries, and above all the leading interpreters in the cultural industries. Moreover, the entrepreneurial form is now largely dominant in the former (ICREA), from the business staff in craftsmanship to the firms and even groups in the luxury goods and fashion industries; creation is done largely in-house (even if the work retains traits of the small craft industry) and this is explained by the backing from the firm and the brand; it is different for cultural industries (ICULT), where the conception phase continues to be –

usually - outsourced (book publishing, recorded music and cinema), except in those which are organized as media industries (press, radio and television) and in the “new” industries (video games and info-mediation). It is true that both have to ensure a permanent and regular renewal of the use values of the products offered; but even at this level, certain peculiarities appear: one does not buy Gallimard, but a novel by a particular author, under contract with the prestigious publishing house like tens or hundreds of other authors; and the uncertain or volatile nature of use values does not lead to the same results and practices in the case of mass markets, although segmented, such as books or films, and in markets for creative goods again (very) socially and economically selective. It should also be remembered that in the cultural industries there is still a very large gap between what is produced and what is consumed (unsold books are destroyed) and that the adjustment of supply and demand is always made *ex post* (in spite of all the methods used) and with an enormous loss of production. In reality, it is with the cultural media industries, the "historical media", that rapprochement has to be made; it is with them that the socio-semiotic (as well as practical) information which is at the heart of brand strategies, probably generates the most addictive effects; it is also here that the public identifies most with particular names, presenters or entertainers.

Finally, if we look at the distribution of products, we note that the distribution of products from the creative socioeconomic sectors (ICREA) seems to obey the very specific rules that differentiate them from the cultural industries (ICULT). All these creative companies are obliged to reserve a large part of their resources for fixed assets such of a real estate nature; as customers still prefer to go out shopping, remote sales via websites are not yet up to speed in terms of competition. On the other hand, within the ICULTs, only cinematographic exploitation, which in some countries only presupposes major fixed assets.

Between the two categories of industries there thus remain significant differences: the products of the creative industries are backed by patrimonies and they are most often acquired for resale; the star-system mainly concerns creators and not well-known performers as in the cultural industries; the design of creative products is largely internalized (done in-house) whereas the reverse is true for cultural products; brands and trust in brands is essential in the formation of use values, while they are concerned with the cultural products themselves where their volatility leads to a significant and regular loss of production which is not consumed; finally, the distribution of products from the creative industries requires the implementation of a physical distribution device and remote access to products remains marginal.

Although not completely relevant, data reflect these structural differences

Despite obvious methodological shortcomings, there are significant information and knowledge elements in the various global data available, especially in a recent comprehensive study “Creating growth - Measuring cultural and creative markets in the EU”, December 2014, GESAC (European grouping of 32 authors’ societies whose mission is to promote and protect authors’ rights in Europe in the fields of music, audio-visual, visual arts and literary and dramatic works)[1]), supported and endorsed by the European Union; admittedly, GESAC is a professional federation and not a statistical institute, but in the absence of overall statistical work its investigation deserves consideration, subject to subsequent verification. This is an initial approach and we will certainly point out some obvious limitations.

Overall, the 11 cultural and creative market segments evaluated represent 4.2% of the GNP (Gross National Product) of the European Union, with 7,060 million jobs and 540 billion euro in turnover.

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[1] http://www.creatingeurope.eu/en/wpcontent/uploads/2014/11/study-full-fr.pdf

	Employment / 100,000	Turnover in billion euro	Observations
Books	646	36.3	Including libraries
Newspapers and magazines	483	70.8	Including press agencies
Music	1168	25.3	Including Performing arts activities, non-profit sector
Performing arts	1234	31.9	
TV	603.5	90	Including creation, production, postproduction and pay TV
Film (excluding performing arts)	641	17.3	Including production and distribution as well as DVD and VOD
Radio	97	10.4	
Video games	108	16	Including on line
Visual arts	1231	127.6	Galleries, photographic art, design, arts and crafts, museums
Architectural activities	493	36.2	Including monitoring of constructions
Advertising activities	818	93	Including commercial communications agencies

Table 2 – Breakdown of the Data for these 11 market segments

This leads to the following comments:

The approach adopted is roughly in line with the perspective of the category "cultural industries and creative industries" as we have specified above (§ 2 and 3), with some significant differences: (1) Does not make a clear distinction between what is related to the industry and what does not belong to it (this is particularly the case for cinematographic production and music production, which are not separated from performing arts); (2) It combines the commercial sphere and the non-commercial sphere (thus, in the segments concerning the Visual arts, where galleries are placed on the same level as museums, part of which is non-market and takes part in the non-profit sector; And also for music); (3) It integrates commercial communication with creative advertising activity; similarly for the monitoring of construction work which is involved in architectural creation. Methodologically, these "mixtures" should be considered as damaging confusions, unless they are explained by a concern to "inflate" the activity of creative industries.

More fundamentally, we can draw important conclusions about the relationship between ICULT and ICREA:

The non-correlation between jobs and market turnovers in connection with capital intensity: the phenomenon is observable in several instances, for example, in books, music and, obviously, in the performing arts where employment is at a high level compared with technical and financial capitalization, which is low; but strangely, the visual arts lead to a different conclusion, probably due to the composite composition of this segment. What will happen in the future? To the extent that heavy investments will be concentrated in the (already powerful) communication industries and will probably be relatively less important in the ICULT and especially in the ICREA, this does not guarantee the level of activity or regular employment in these two categories. We can forecast the extension of developments at the limits of financial profitability.

The still (very) dominant position of the historical cultural socioeconomic sectors (ICULT), according to the indicators used; the dominant socioeconomic sectors retained clear pre-eminence throughout the previous century , but it is not clear how ICREAs, difficult to identify based on the available economic and market data, could reverse this largely unfavourable situation in a predictable way. This prognosis would imply a fairly complete disorganization of the historical ICULTs under the influence of the new communication industries; it is found among some successful publicists and technology specialist, but there is no convincing evidence.

The difficult quantitative emergence of the ICREA socioeconomic sectors, and the disputed or disputable empowerment of some of them (e.g. design). This is clearly reflected in the market segments listed here, whether they involve questionable and contentious areas (such as architecture and advertising) or identify activities that have been known for a long time but not very well or not industrialised (such as Performing Arts, Visual Arts and Arts and Crafts).

The "deconstruction" of ICULT in favour of ICREA, is not a guaranteed trend, especially as long as copyright and the royalties continue to go global, and as long as they are not challenged by the other modalities of the law of intellectual property; and it does not appear that the issue will be considered in the near future. On the other hand, it is on the side of the conquering and often winning strategies of the communication industries and particularly the digital social networks that we must look, because the new forms of intermediation are likely to bring about significant changes. But it is also true that the communication industries have as much need of ICULT (certainly more than ICREA) to develop; hence the initiatives they have already taken in the very successful production of films and books.

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