'WORKING PAPERS' / 8

Clarifying the complexity and ambivalence of the cultural industries

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1 .. / Plea for epistemological clarity on the cultural industries

'Cultural industries', 'creative industries, 'creative economy', 'experience industries', 'content industries', 'entertainment industries', copyright industries', '(multi) media industries', … The conceptual apparatus in use since about a decennium to describe the evolutions within the industries that produce symbolic content, illustrates the growing centrality of these industries. Together with the explosion of concepts and the hype, one can even speak of mythologization. The cultural industries are said to be crucial in answering the declining economic position of Europe (e.g. Himanen, 2005). Which cultural and industrial sectors are referred to, and which policy measures should be taken to support these sectors is however not always specified.

The haziness and mythologization of the conceptual apparatus prevent a clear understanding of the complexity of the cultural industries that is crucial to academic research and policy making. This introductory paper contributes to providing a clarification of the concept of the cultural industries within an international context. Firstly, the economic, political, cultural and social context in which the cultural industries have been developing since 1945 will be examined. Secondly, the evolution of terminology since mid 20th century in both academic and policy literature will be outlined. Thirdly, the features and categories specific to the cultural industries will be investigated, which will lead to a conceptual design of the cultural industries.

2 .. / The development of the cultural industries in Europe

The context in which the cultural industries have been developing can be divided into three phases. The end of World War II marks the starting point of crucial social, cultural, political and economic changes. Linked to these changes, the developments of the cultural industries are already present in the period between 1945 and 1975, but will accelerate in the following two phases, namely in the period between 1975 and 1995 and in the period after 1995.

/ 1. Phase 1: 1945-1975

As a result of the new possibilities offered by technological reproduction (mostly developed in the context of war), the media markets expand rapidly from 1950 onwards. In this 'corporate professional era' (Hesmondhalgh, 2002), they are referred to in science and policy as media, audiovisual and information industries. From 1947 onwards, a distinction can be made between the philosophy, nature and degree of state intervention in the US and Europe in the field of the audiovisual industries as well as in the arts. European nation states install arts and broadcasting monopolies and establish state intervention and dominance by means of elaborated subsidy systems (Bennett, 1995; Biltereyst and De Smaele, 2000: 3-4; Feist, 2001). The US, that does not suffer from the economic effects of the war and therefore does not have to deal with European and Asian competition, honors the principle of 'free flow of information'. American transnational corporations set out the rules of the new world economy and benefit from their global market dominance. Although internationalization had started before World War II, this trend was fully stimulated with the advent of television in the sixties.

As for the arts, both the US and Europe develop a financing and subsidy system that favors mostly a handful of national, prestigious arts organizations (Benedict, 1991; Blaug, 1994; Boogaarts and Hitters, 1993: 162-177). Yet, already in this phase, a tendency grows in the US towards an expansion of the classical canon of the arts and a broadening of the concept of culture. In Europe (with exception of the UK) this trend will only become clear in the next phase.

Although the 'golden age of capitalism' comes to an end around 1970 and US dominance is threatened, the power of American transnational conglomerates in the cultural industries can still be felt today (Brenner, 1998: 1; Hesmondhalgh, 2002: 81-251; Marglin and Shor, 1992; Schiller, 1989: 11, 48, 111). Policy visions of Europe and US will be opposed increasingly. Whereas the US will promote full liberalization of the audiovisual sectors (film/television) within the GATT negotiations, Europe will defend protectionist measures. Moreover, the American idea of 'free flow of information' will also be adopted by Unesco as a democratic principle, not as a means of defending the interests of American transnational corporations (Herman and McChesney, 1997: 17; O'Hara and Biesecker, 2003: 281; Pauwels and Loisen, 2003).

The first signs of the mediatization of culture and the expansion of the traditional canon of the arts with so-called 'popular culture', that mark the beginning of the second phase between 1975 and 1995, become visible in Europe first in French, British and Dutch cultural policies. In most European countries, the cultural and audiovisual sectors develop in this phase towards a competitive market with private and public actors. Cultural industries themselves undergo two developments. Firstly, the cultural industries emerge also in sectors that up till then had exclusively belonged to government policy. Secondly, cultural industries come to full expansion in traditional sectors, such as the music and publishing industry.

Central to this period is the process of marketization (Hesmondhalgh, 2002: 108-135; Murdock, 2003: 15-22), itself the outcome of four processes. The first is one of the most important results of the rise of neo-liberalism: liberalization. Under the Reagan and Thatcher administrations, the US and UK withdraw from Unesco that puts the information needs of its members above the interests of transnational corporations (Schiller, 1989: 115-8; Tunstall, 1986: 3-6). Secondly, the privatization of state owned media organizations is the basis for a competitive European audiovisual market (Biltereyst and De Smaele, 2000: 1-14; Pauwels and Cincera, 2001). Thirdly, legislation regimes are being reoriented towards a general relaxation, which leads to the deregulation of the media and telecom sector. Deregulation, however does not imply an abolishment of legislation, but is to be understood as a re-regulation. The impact of formalized procedures such as new licensing rules or mechanisms of control should not be underestimated (Hesmondhalgh, 2002: 108-135; Murdock, 2003: 15-22; Tunstall, 1986: 3-6). Finally, a process of 'corporatization' characterizes this phase. A trend towards professionalization and commercialization has an impact on government policy towards non-profit cultural organizations. Professionalization stimulates government institutions to behave as commercial organizations (earned income and other performance indicators become crucial for subsidized organizations). Market success becomes a standard for all organizations (Fligstein, 1990: 261; Murdock, 2003: 15-22).

The process of marketization is stimulated by two developments that will become clear at the end of the second phase. Firstly, digitalization and the development of new media technologies lead to integration of cultural, multimedia and telecommunication industries. Simultaneously, digitalization is at the basis of the emergence of new cultural industries, such as video and computer games industries, the internet and software industries (Bagdikian, 2000: 5) Marketization is subsequently accelerated by the emergence of a new global economic field in which geographic, social and ideological boundaries are surmounted, a process referred to as spatialization (Mosco, 1996: 173-177; Murdock, 2003: 15-22).

Marketization has major consequences for the production of culture within the cultural industries. First of all neo-liberalism, privatization and deregulation stimulate horizontal and vertical concentration movements and synergy of ownership structures in the cultural industries. Marketization facilitates the emergence of large-scale multimedia-industries that incorporate both old and new multimedia industries, Secondly, there is a trend towards diversification and convergence (Alger, 1998: 31-35; Bagdikian, 2000: 6; Hesmondhalgh, 2002: 108-135; Murdock and Golding, 1990: 12-13; Schiller, 1989: 115-118; Tunstall, 1986: 3-6; Wasko, 1994: 4, 2001). The emergence of large-scale conglomerates does not imply that small companies vanish. Small scale and local companies are at the core of production within the cultural industries as scenes of creative independence (Alger, 1998: 31-35; Bilton, 2000: 273-287; Burnett, 1990:20; Fligstein, 1990: 261; Frith, 1992: 66). Thirdly, the growing convergence of ownership brings new players to the market that concentrate on infrastructure instead of on the production of cultural goods (Murdock, 2003: 17). Finally, the growing consumer demand for services on the one hand, and more sophisticated market strategies on the other, lead to both an expansion of the market and to a proliferation and market fragmentation, an evolution often referred to as 'post-Fordism'.

/ 3. Phase 3: 1995 - 2005

The third phase, since 1995, does not introduce a new situation, but indicates a more complex continuation of the second phase. Tendencies that originated in the first phase and became more important in the second, culminate today. Complexity has become the key word to describe contemporary cultural spheres, of which the cultural industries are fully part.

From 1990 onwards, changes in the context of the process of cultural production, have accelerated. This process is characterized by (1) a reshuffling of the relationship between private and public organizations, (2) a transformation of the criteria and instruments for government investments and support of cultural activities, (3) the rise of different categories of 'cultural entrepreneurs', (4) the growing inequality on global markets, (5) the movement towards concentration and expansion of scope of businesses, and (6) the development of new distribution and reproduction techniques (Beck, 2003: 13; Picard, 2002).

Changes also become manifest at the level of consumers. Most obvious is the emergence of the 'experience economy' at the expense of the service economy (Gilmore and Pine, 1999: 5). Within the symbolic society (Elchardus and Glorieux, 2002), the individual develops his/her personality through the selective cultural consumption of a wide range of cultural activities, in which the experience factor is decisive. The growing cultural consumption shows two apparently contradictory patterns. One the one hand, time spent on the media is growing, especially as part of the so-called 'culture d'appartement' (Garnham 1990: 158-159; Vogel, 2004: 5-10). The development of home-entertainment industries as individualized mass culture is stimulated by new technologies (Farchy, 1999: 97-99; King and Sayre, 2003:17; Garnham, 1990: 158-9; Rutten and Smeets, 1997: 14; Vogel, 2004: 5-10,). On the other hand, the consumer is increasingly attached to collective experiences through participation in large scale live events of all kinds, such as sports events, theme parks, concerts, ... All aspects of life are becoming part of the experience economy and leisure is the center of it. Consequently, different leisure activities (sports, tourism, culture, entertainment) merge into one 'attention economy' (Mommaas, 2000b: 42-44). Within the attention economy there is a growing competition for the attention of the consumer, who becomes increasingly ungraspable (Carpentier, Pauwels and Van Oost, 2004; Rutten, 2000: 16).

3 . . / Explosion of terminology

The analysis of the context in which the cultural industries arise and develop, makes clear that the above described transformations result in increasing complexity. This complexity is reflected in the terminology of both academic and policy literature. Most authors dealing with the cultural industries agree on the fact that the concept ‘cultural industries’ does no longer correspond with reality. The explosion of concepts through which the recent transformations in and of the cultural industries are approached is to be considered characteristic for the 21st century. A historical overview of the emergence and evolution of these concepts in both academic as policy literature is necessary to generate a clear overview of the concept apparatus.

In order to represent the evolution in terminology schematically, this overview departs from two figures (Huijgh and Segers, 2005). These figures indicate when which concepts were introduced, in academic and policy literature, departing from the three phases pointed out above. From these graphics, we examine more closely the path of each concept in academia and policy. Successively, we pay attention to the academic and policy writings on the cultural sectors that belong to the cultural industries, the audiovisual and (multi) media industries, the cultural industry in singular, the cultural industries (in plural), the service industries, the copyright industries, the entertainment industries and the experience industries. For each of these concepts, we briefly analyze their meanings and how they relate to the concept of cultural industries. At the same time, we will look for the reasons behind the terminological transformations, policy-wise and academia-wise. We will investigate whether changes of concepts coincide with pragmatic choices or emphasis concerning content. This part is concluded with an instrumental scheme, in which the cultural industries and related concepts are hierarchically situated.

Figure 1: Evolution of the use of the concept of cultural industries and related concepts in academic literature

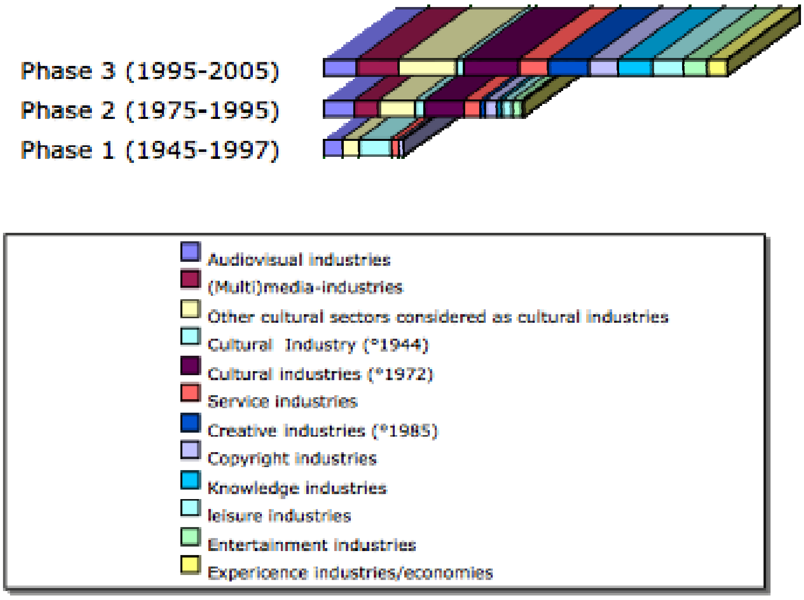
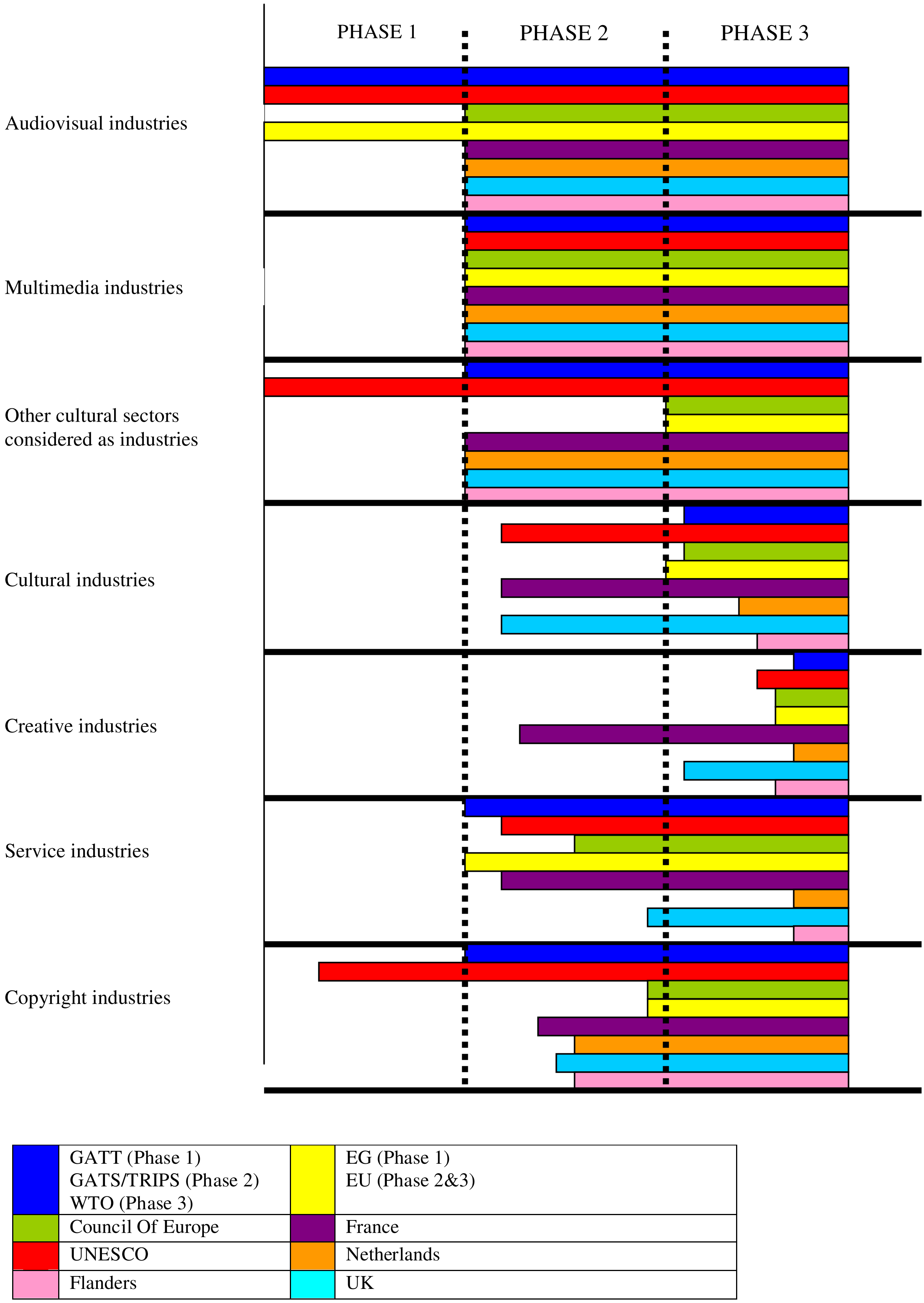


Figure 2: Evolution of the use of the concept of cultural industries and related concepts in academic literature



During and after World War II, academic and policy literature hardly used generic terms. Initially specific cultural sectors were designated as industries. In the first period, most attention was paid on international, European and national level to the audiovisual (radio, film, television) industries, publishing and recording industries. Today, these industries are still considered the core of the cultural industries in academic and policy literature. On international and European level, attention for and intervention in the audiovisual industries is stimulated by the GATT negotiations (Pauwels and Loisen, 2003). After the end of the broadcasting monopolies, the audiovisual industries also come to the attention of national governments.

In the second phase, multimedia and advertising industries appear in academic and policy literature and research. When market initiative arises in different cultural sectors in the third period, research in and policy attention for the telecommunication, computer, video/DVD/CDR, internet industries is stimulated, as well as research into entertainment, fashion, design industries and industries in the sector of performing arts, virtual and plastic arts, architecture, etc….

In 1944, the first generic term appears. Horkheimer and Adorno 'invent' the concept of 'the culture industry' (in singular), described as an instrument of the capitalist elite that deprives both the artist and the work of art of its artistic value and that transforms the consumer into a pseudo-individual. The product and the sectors that are part of the culture industry (radio, film and television) do not show any difference from one another (Adorno and Horkheimer, 1977: 349-83; Rose, 1978). The impact of the term launched by Horkheimer and Adorno on European national cultural policies cannot be underestimated. From the perspective of the cultural imperialism these, the culture industry would lead to an 'Americanization' of culture. European policymakers therefore chose not to intervene in, nor to support the cultural industry in any way. In 2005 Adorno's and Horkheimer's vision on the culture industry still resounds in some European national cultural policies, but only as a far echo. In Flanders it will take until 2004 before the taboo on intervention in and support for the cultural industries slowly starts to disappear. Today, the term 'culture industry' (in singular) has almost completely disappeared in both English-language policy documents and academic literature. In the Dutch-language literature however, the term can still be found.

From 1972 onwards, academics - that is to say mostly French sociologists such as Huet, Miège, Lacroix, Tremblay, Mattelart (Huet, Ion, Levèfre, Miège and Peron, 1978: 26-27; Lacroix and Tremblay, 1997; and Mattelart, 1979) and more in particular Girard (in the report he wrote for the Unesco in 1972 (Girard, 1972; 1978: 598)) - launch the concept of 'cultural industries' (in plural). They are followed by American labor and cultural sociologists, such as Hirsch (1972, 1990), Peterson (Peterson and Berger, 1971; Peterson 1976, 1982) and by political and cultural economists such as DiMaggio (DiMaggio and Stenberg, 1985; DiMaggio, 1986) Schiller (1989), Garnham (1990) and Crane (1992). From 1985 onwards, cultural economy researchers too will pay attention to the cultural industries; Myerscough (1984, 1988) is the first one to map the economic impact of the cultural industries in the UK and other European countries.

The changing terminology reflects the conviction of these academics that Adorno's and Horkheimer's vision no longer corresponds to an increasingly complex reality. The cultural sectors included in the concept of cultural industries cannot be treated as a unity; the complexity of the production process (technological mediation, concentration movements, labor division and organization), consumption patterns and esthetic form need a specific approach and analysis (Miège, 1989: 9-12). Characteristic of this period is therefore (1) the expansion of academic research in the distinguishing production and distribution processes, products and organization cultures and patterns, (2) the view of cultural industries as a network of chains from creation to consumption. In policy circles, the terminological shift towards the use of 'cultural industries' (in plural) is followed firstly by Unesco in 1980, and by the UK and France around 1982. Other international institutions such as the WTO and the European institutions will only adopt the plural term in the third phase. The adoption is closely linked to the acceptation of the potential economic and cultural value of the cultural industries. The growing impact of the globalization thesis (which stresses the importance of the local, and which brings along a more positive approach of the cultural industries), will lead to the inclusion of the cultural industries in international, European and national cultural policies.

Since the emergence of the concept around 1945, 'the copyright industries' have been of utmost importance for the Unesco. Today, copyright-based cultural industries make up a more substantial part of the national product of most industrialized countries in comparison to traditional goods in terms of export. In this respect, the Unesco takes a leading role in the realization of important conventions for the protection of intellectual property rights, such as the 'Berne Convention for the Protection of Literary and Artistic Works' (UNESCO, 28th September 1979) that will be at the basis of the TRIPS. The Agreement on Trade-Related Aspects of Intellectual Property Rights, as adopted during the Uruguay round (1986-1994) assures that intellectual property rights (copyright, patents, trademarks, etc) fall within the scope of WTO (Pauwels and Loisen, 2003; Towse, 2000). Especially in the third period, academics link the concept of copyright industries to the durability of products of the cultural industries (Hesmondhalgh, 2002; Negus, 1996, 1997; Shuker, 1998; Throsby, 2001; Towse, 2003; Wolff, 2000). Cultural economists and sociologists describe the copyright industries as cultural industries with a specific emphasis on intellectual property (Bettig, 1996; O'Connor, 2002; Throsby 2001). Academics (Towse, 1997, 2000, 2003, 2004) as well as policy makers (cf. the British DCMS, 1998) consider copyright as being the core activity of cultural industries, and therefore the most adequate criterion for distinguishing the different cultural sectors belonging to the cultural industries. In reality however, authorities concerned with copyright (mostly media or economic departments) are separated from authorities concerned with the cultural industries (mostly cultural policy departments).

Academic and policy researchers agree on the fact that cultural industries produce both cultural services and experiences (Caves, 2000; Garnham, 1990; Gilmore and Pine, 1998; Hesmondhalgh, 2002; Murdock, 2003; Negus, 2002; O'Connor, 2002; Pratt, 1997; Rutten et al., 2004; Scott, 2000; Towse, 1997, 2003; Wolff, 2000). Therefore, on the one hand, the cultural industries are a part of the service and experience industries. But on the other hand, they are distinct from the latter industries because they produce symbolic material with a specific cultural meaning and a specific production and consumption practice (Murdock, 2003; Pine & Gilmore 1999; Prindle 1993; Rutten, 2000: 20). Other service industries produce services of which the meaning is essentially related to the primary features of the product itself. While experiences are already included within the cultural industries at an early stage, the aspect of experiences is now also integrated within traditional service industries (Gilmore and Pine, 1998: 97-105).

The concepts of experience and service industries are different. They differ both in the nature of their products and in their introduction into academic and policy literature. The service industries have been a subject of political debate since 1986. Through the GATS, the WTO aims to submit also service industries to the international trade regulations and liberalization measures as agreed on for goods (Pauwels and Loisen, 2003). Regarding the cultural industries, audiovisual industries in particular, EU and US do not agree on liberalization commitments as well as on subsidy systems. The debate on services, more in particular the Directive on services, was high on the agenda of the European member states in 2005.

The experience industries have a longer history, since the concept was introduced already in 1967 by the situationist movement, more in particular by Guy Debord in his 'Société du spectacle' to bring under attention the growing impact of spectacle on mass society (Debord, 1967). Yet, this concept can only recently be found frequently in scientific and policy literature, as a part of the explosion of terminology. It was Gerhard Schulze who understood Debord's 'spectacle society' as the 'Erlebnisgesellschaft' ('experience society') (Schulze, 1993: 35-36). Cultural economists state that the production of experiences has become the fourth economic good, which lead them to the concept of 'experience economy' (Gilmore and Pine, 1998; Pine and Gilmore, 1999) or 'experience industries' (Mommaas, 2000). Experience industries result in tight alliances between virtual media and the material world (clothes, toys, theatre, restaurants, theme parks, shopping malls, sports halls) (Mommaas, 2000: 27-28).

The entertainment industries are part of the experience industries (Clarke, 2000; King and Sayre, 2003; Modleski, 1986; Vogel, 2004; Wolff, 2000). Gilmore and Pine (1999: 29-38) see entertainment as a specific form of experiences, next to educational, esthetic and escapist experiences. Entertainment is hereby the form, in which the audience is passively undergoing the experience through sensory perceptions (Gilmore and Pine, 1998: 97-105; Pine and Gilmore, 1999: 29-38). According to Luhmann (Luhmann and Cross, 2000: 58-62), entertainment creates an alternative reality, in which the audience is engaged in a noncommittal way. In business economist research, the cultural industries are often referred to as entertainment industries because of their emphasis on entertainment (Shuker, 1998: 82-3; Vogel, 2004: 3-9). The boundary between entertainment and leisure industries cannot always be clearly drawn. Although for specific sectors belonging to the leisure industries entertainment is a fundamental aspect, far more sectors (e.g sports or tourism) are counted to the leisure industries than to the cultural industries, (Fleming, 1999; Henry, 1990; Roberts, 2004; Weiermair and Mathies, 2004).

So far, very little has been published on the differences and resemblances between cultural and creative industries. In academic and policy literature, both concepts are often randomly used, together or as synonyms. According to Unesco, the choice for one term is dependent on the specific context and jargon. What specific kind of context and jargon are implied, is not specified however (Unesco, 2007). Not only Unesco, but also other institutions such as the EU use both terms at random. Emphasis on a specific characteristic or sector, but especially the (political) goal of the author(s) seems to determine the use of both concepts.

As to the characteristics, cultural and creative industries do not show any fundamental differences. The characteristics Caves (2000) attributes to the creative industries are the same as these listed by Hesmondhalgh (2002), Murdock (2003) and Throsby (2001) to describe the cultural industries. Academics agree that both to cultural and creative industries their cultural and economic ambivalences are central. On the level of production and distribution process, the position of the artist and the cultural intermediaries, the macro structure, the consumer, the product and the surplus value, cultural and creative industries show the same features. These resemblances explain why cultural and creative industries are mostly mentioned in one breath.

Yet, both show some clear differences. To begin with, the concept of cultural industries has had a longer history than that of creative industries. The concept of the creative industries is launched within policy literature only in the mid 1990's - although French Minister of Culture Jack Lang held a plea for intervention in the creative industries as early as 1981 (Lang, 1983: 4-7). From 1995 onwards, creative economy and creative industries are much used concepts, mainly within local policy writings and in academic research on local economy (Comedia, 1992, 1997; DCMS 1998, 1999). Because of the different context in which they emerged, both terms have a different connotation. Introduced by Horkheimer and Adorno to describe a negatively evaluated evolution, the cultural industries carry more pejorative connotations that the recent concept of creative industries. There is also a clear linguistic distinction between the prefixes 'creative' and 'cultural'. The prefix 'creative' offers possibilities for policy makers to introduce economic aspects within cultural policy.

In contrast, the introduction of economic aspects into the concept of cultural industries is often rejected by the cultural field. Economic policy makers and economists therefore prefer the term 'creative industries', whereas cultural industries is more often found in the language used by cultural policy makers and sociologists. In 2005, the creative industries seem to slowly overcome the term cultural industries, which is probably informed by political motives. The introduction of the term creative industries is usually the expression of image politics of newly installed governments (from conservative to more liberal thinking).

In academic and policy literature, in most cases, the same cultural sectors are included both in the creative and cultural industries. An analysis of the sectors that were counted as both cultural and creative industries by academics from 1945 till 2005, results in the two following figures (Huijgh and Segers, 2005). They show some, but no fundamental differences. Mainly radio, television, film, publishing, advertising and music are included both within the cultural industries and within the creative industries. Performing arts are more likely to fall under the cultural industries, while fashion, design, architecture and ICT applications (digital art forms and platforms) are more frequently mentioned in the context of the creative industries. In that respect creative industries are a broader concept, although the sectors included also depend on the countries to which they refer to. Territorialization seems to stimulate sectorialization, and pragmatic choices influence sectorialization.

Figure 3: Sectors counted within the cultural industries

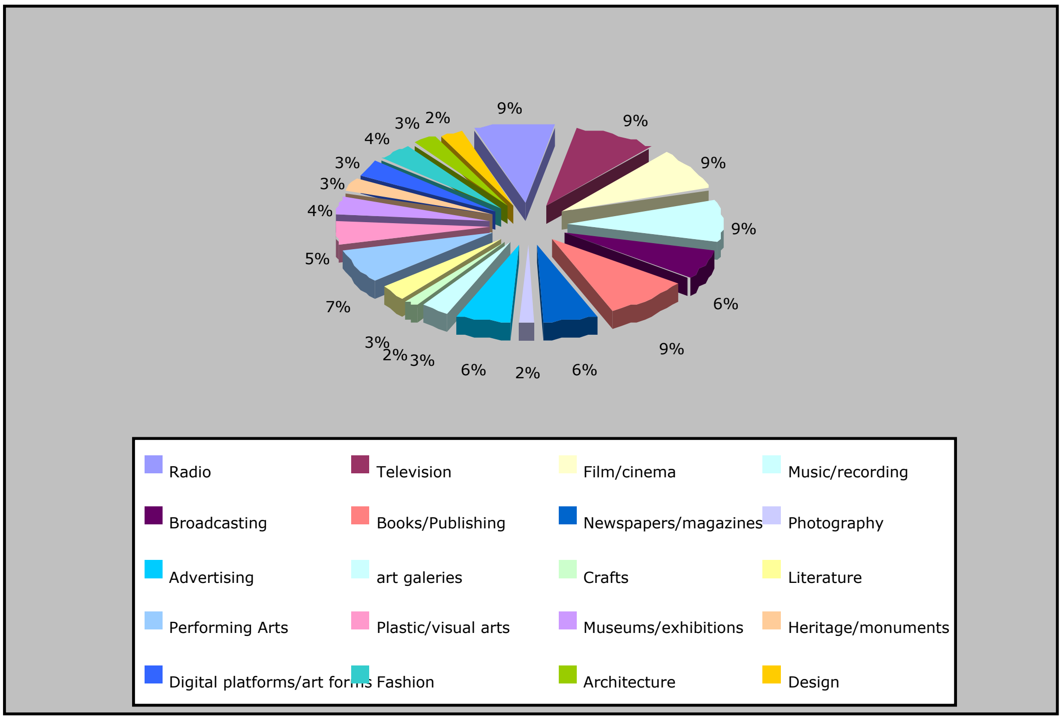
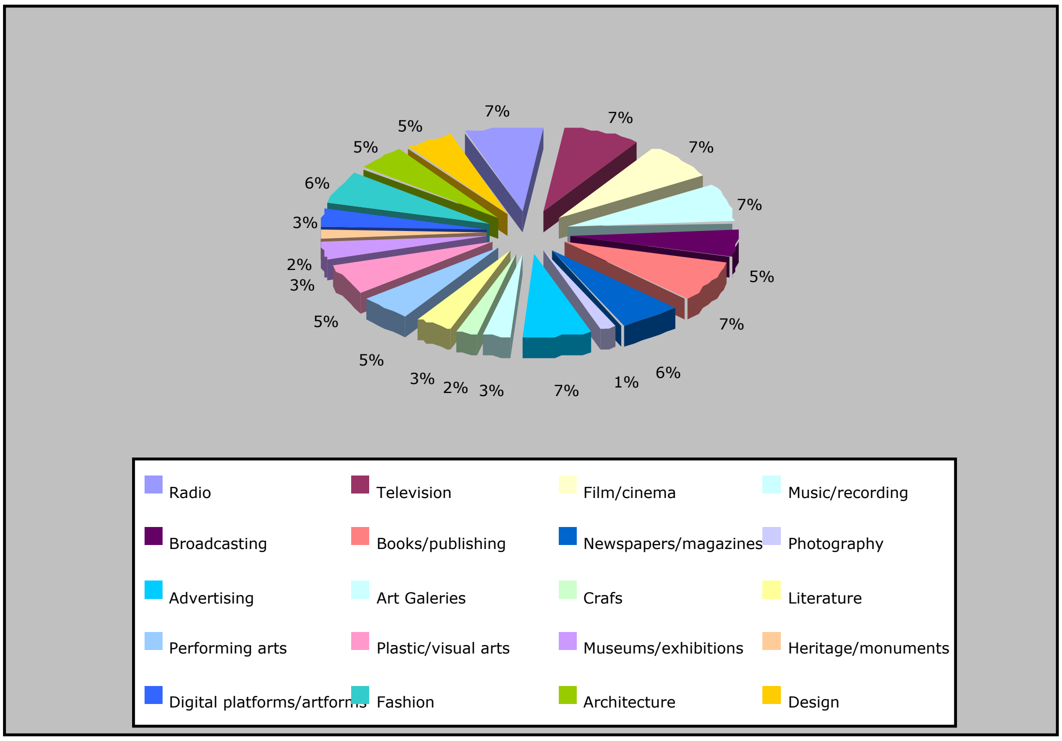
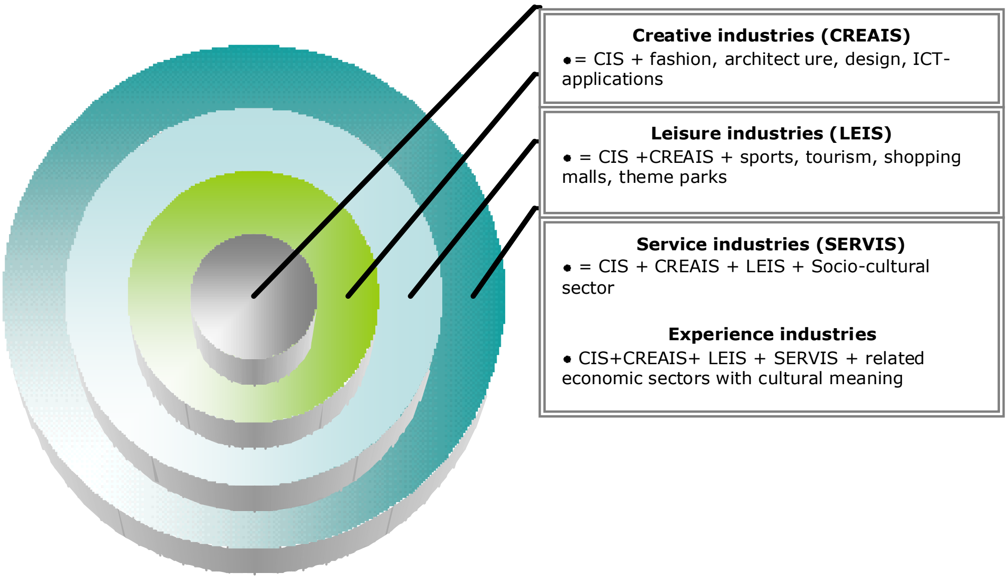


Figure 4: Sectors counted within the creative industries



In conclusion to these findings on the evolution of the cultural industries and related concepts and their relationships, we propose the following classification.

Figure 5: Classification of the cultural industries and related concepts



In this classification of terminology, the cultural industries are situated in the very centre, whereby copyright industries and entertainment industries are considered to be part of the cultural industries. This classification leads us to the use of the concept of cultural industries.

4../ Features and categories of the cultural industries

Research on the cultural industries is characterized by a large variety in scope and research methodology of the different scientific disciplines that are concerned with the specific features of the cultural industries. Although the scientific disciplines that conduct research on the cultural industries (political and cultural economy, sociology of culture, labor and organization, etc.) usually try to take into account the largest possible scope of aspects (production and distribution process, characteristics of labor division, consumptions, changes in institutional structures and the changing character of the national, transnational and global structures in which they operate), such research leads to conclusions that are highly time- and space-based.

In recent research, several propositions have been presented to map the structure and mechanisms of the cultural industries (mainly the mediated cultural industries) in order to distinguish them from traditional industries. From an economic perspective, a mapping of the cultural industries has been presented on basis of the investment possibilities (Vogel, 2004), the business aspects (Caves, 2000), spatial distribution and production aspects (Scott, 2000), and aspects of employment (Benhamou 1999; O'Brien and Feist, 1997). Sociologists and political economists have tried to link the industrial organization of the cultural industries and cultural diversity (Flichy, 1980). Thirdly studies have been carried out on the organizational structures and market strategies of global conglomerates and governmental bodies involved in cultural production (Ryan, 1992). Fourthly, empirical and qualitative research has been done on the organization of creative workers and cultural intermediaries, and ethnographic studies are carried out through observation to uncover internal pressure and power relations on the productivity of creativity (Murdock, 2003: 17-18).

Mapping the specific features of the cultural industries can be fruitful in trying to clarify their complexity. This mapping however, has to start from the conceptual eclecticism that is characteristic for research on the cultural industries. Therefore, below a mapping of the specific features and categories that characterize the cultural industries is presented. It is based on a broad and eclectic literature study. We assume that the different academic approaches of the cultural industries do not replace one another, but are complementary:

> 'Although these various traditions of analysis work at very different levels of generality they should be seen not as self-enclosed domains of study but as a set of Chinese boxes' (Mills and Wright, 1970: 14)

In the overview below, we present the specific features and categories of the cultural industries in order to operationalize this complex and abstract concept and to make it workable for further research and empirical mapping. It departs from the core aspects of the cultural industries: production and distribution process, internal structure, division and organization of labor between artists and cultural intermediaries, the product, the consumer, the macrostructure, and added value.

Table 1: Features and categories of the cultural industries

CORE ASPECTS	SUB ASPECTS	FEATURES	CATEGORIES
MACRO STRUCTURE		Public/private	Degree of subsidies/support
		Profit/non-profit	Profit motive
			Nature of distribution of profit
			Nature of risks
PRODUCTION	Production process	mediated/live	Degree of media-dependency
			Technological benefits
			Raise of production and reproduction costs
			Reproduction potential and difficulties
			Increase of productivity
			Increase of costs
			Capital-intensitivity
		Large/small scale	Mass/nich production
			Global/national/local production
		Time and space attached/free	Complexity of product and composition team
			Production term
			Flows/artifacts production
			Continued/fragmented production
			Degree of durability (copyright)
	Corporate structure	Corporate level	Vertical/horizontal integration/synergy
		Internal structure	Complex network of chains/people from creation to consumption
	Division of labour	Job position	Job certainty
		Labour relationships	Autonomy creative class
			Control by/support of cultural intermediairies

Table 1: Continued

PRODUCT		Esthetic aspects	Fashionable, traditional, ...
		Appearance	Cultural good/service, experience, hybrid
		Spinn-offs	Mediated/live cultural products
			Reproduction potential and diffficulties
			Durability
			Public/private cultural products
DISTRIBUTION		New/traditional	Exploitation of cultural product as independent entity/spinn-off
			Exploitation of new/traditional media
			Physical/symbolic/hybrid
CONSUMER		Features	Active/passive
			Inpredictabilty of consumer taste
		Dimensions	Local/international
			Niche/mass
SURPLUS VALUE	Economic surplus value	Large/small scale	Employment
			BBP
			Welfare
			Countries position in international economy
			Export/foreign trade
			Local, regional, urban economy
			Open, innovative climate

Table 1: Continued

SURPLUS VALUE	Cultural surplus value	Small scale/national/local	Democratisation of culture
			Participation in culture
			Cultural development
			Degree of cultural diversity
			Image of the country
			Collective identity
			Meaningfulness of products
			Position in cultural field and experiences
		Large scale	Meaningfulness of products
			Position in cultural field and experience

Each of these aspects is filled in with specific features and categories. Each of the core aspects is dynamically linked to one another whereby (1) specific features of one core aspect have consequences for the other aspects, and (2) numerous combination possibilities occur.

The overview presented in table one, is the outcome of an effort - inevitable incomplete and open to discussion and modification – to grasp the complexity of the cultural industries. It allows to (1) distinguish the cultural industries from other industries, and (2) to clearly understand and research the mechanisms at the core of the cultural industries. The complexity of the whole has to be the starting point of definition, study and classification of the cultural industries. From this overview, we present the following global conceptual interpretation of the cultural industries, in which is recognized that (1) their core is based on their economic and cultural ambivalences, and that (2) the interpretation is the outcome of research that is highly time and space specific.

- The cultural industries contain all organizations that are profit-oriented or not, whose core activities are centralized around the symbolic meanings of their products (goods, services, experiences and hybrids) that are capitalized through intellectual property rights.
- The process of (re)production, distribution and consumption can be mediated, live, large, small scale, time- and space-attached or free in different combinations.
- The cultural industries are associated with, or part of, global conglomerates.
- They are characterized by their cultural and economic ambivalences, a high capital intensity and a strong risk factor.
- These characteristics are at the one hand consequences of the unpredictable taste of the diversified consumer (mass, niche, global, local).
- On the other hand, they are the effect of both the uncertain outcome of the complex and intensive organization and division of labor, that is structured around the work of relatively autonomous creative workers and of the contingency of income from the specific rewarding system, namely intellectual property rights.

This definition does not allow for a statistical approach towards the sectors that can be considered part of he cultural industries. Nor can - based on this definition - be determined what sectors of the cultural industries should be included in schemes of government support. In international perspective there is no standard answer to either of these questions, because it is a controversial issue in the cultural field and because of the pragmatic choices this selection implies. Moreover, because of the growing interweaving of the sectors and the organization structures, hybrid cultural industries arise that surmount the boundaries between mediated, live, large, small scale, time- and space-based and free cultural industries. The constant updating of definitions and the (re)analysis of features of the cultural industries will therefore remain essential in future research.

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