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The Creative Economy: Key Concepts and Literature Review Highlights

Edited by the Policy Research Group



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Introduction

This document reproduces selected text and discussion from two government-sponsored literature reviews on the creative economy in recent years, one supported by the Government of Nova Scotia and the other supported by the Government of Canada (Canadian Heritage – PCH). The accompanying bibliography includes all sources from these two literature reviews as well as sources from a third, French-language literature review supported by PCH:

L'économie créative – Revue de la littérature francophone (2010). Produced by Elsa Vivant, Université Paris 8 and Diane-Gabrielle Tremblay, Téléq-Université du Québec à Montréal

This integrated bibliography has also been updated by the Policy Research Group (PCH) with new sources dating from 2010 to spring 2013.

The purpose of this synthesis of key concepts, literature review highlights, and bibliographic references is to provide the Creative Economy F/P/T Working Group with a common reference of basic information on the creative economy.

Part I: Key Concepts and Highlights

From: Creative Economy Literature Review (2012). Presented by the Creative Nova Scotia Leadership Council in Partnership with the Nova Scotia Department of Communities, Culture, and Heritage

What is the Creative Economy?

Context

The rise of the creative economy is reflective of the larger shift occurring within the global economy – the shift from economies based on the production of goods to economies based on the provision of services. This change is expected to be as big and as challenging as the transformation in the 1700s from agrarian to industrial societies (MPI, 2009).

Developed countries around the world have now transitioned into functioning within a knowledge economy where information and knowledge are important drivers of economic growth. As we navigate this move to a post-industrial knowledge economy, from an economy solely based on the production of goods to an economy significantly fuelled by ideas and innovation, the role of creativity in shaping and fuelling that growth can no longer be ignored. This refined understanding of the drivers beneath the post-industrial economy has spurred the evolution of the concept of the knowledge economy into that of the creative economy – a notion that recognizes the greater value and desire being placed on expressive content in goods and services. In fact, as this literature review outlines, evidence suggests that the creative economy is revitalizing manufacturing, services, retail, and entertainment industries. It is also changing what work people do and want to do as well as where they want to live.

Concepts

Multiple definitions of the creative economy have developed over the past ten to fifteen years which are contributing to further understanding of the knowledge-based economic activities upon which the ‘creative industries’ are based. This literature review outlines the key definitions and models that are informing policy decision-making around the world in developing this important sector.

The ‘Creative Economy’

The creative economy concept has emerged as a means of focusing attention on the role of creativity as a force in contemporary economic life, stating that economic and cultural development are not separate but can be a part of a larger process of development.

The term first appeared in John Howkins’ 2001 book, *The Creative Economy: How People Make Money From Ideas*, where he defined the creative economy as “the transactions of creative products that have an economic good or service that results from creativity and has economic value” (p. 8).

Today the most often cited definition of the creative economy is from the UK Department of Culture, Media and Sport (DCMS). They define the creative economy as “those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property” (DCMS, 1998, p.3).

For the United Nations Conference on Trade and Development (UNCTAD), the creative economy is an evolving concept based on creative assets potentially generating economic growth and development (2008):

- It can foster income generation, job creation and export earnings while promoting social inclusion, cultural diversity and human development.
- It embraces economic, cultural and social aspects interacting with technology, intellectual property and tourism objectives.
- It is a set of knowledge-based economic activities with a development dimension and crosscutting linkages at macro and micro levels to the overall economy.
- It is a feasible development option for innovation, multidisciplinary policy responses and inter-ministerial action.
- At the heart of the creative economy are the creative industries.

The 'Creative Industries'

Further understanding the creative economy becomes challenging due to the debate that surrounds the term 'creative industries'. Initially used in a 1994 Australian Report entitled Creative Nation, the notion of the 'creative industries' gained wider exposure in 1997 when policy makers at the UK's DCMS set up the Creative Industries Taskforce. This term has broadened the scope of what are generally considered the 'cultural industries' beyond the arts to the potential of commercial activities (UNCTAD, 2004). What can be agreed upon however is that in whatever form the industries are defined, they lie at the centre of what can be labeled, in broader terms, the creative economy.

The following seven models were regularly encountered in the literature that was reviewed and are key in illustrating the variety of ways in which the creative industries are defined and have been refined over time. Table 1.1 outlines in more detail the categories each model offers:

- Howkins model. In his watershed publication in 2001, Howkins broadly outlined 15 industries that contribute to the creative economy by generating creative products and services, ranging from the arts to science and technology. He defined these industries as providing "an economic good or service that results from creativity and has economic value."
- UK DCMS model. As mentioned above this model was developed by the UK defining the creative industries as those requiring "creativity, skill and talent with the potential for wealth and job creation through the exploitation of their intellectual property" (DCMS, 1998).
- Concentric Circles model. This model asserts that creative ideas originate in the core creative arts in the form of sound, text and image and that these ideas and influences diffuse outwards through a series of layers or concentric circles, with the proportion of cultural to commercial content decreasing as one moves outwards from the centre (Throsby, 2001).
- WIPO copyright model. This model is based on industries involved directly or indirectly in the creation, manufacture, production, broadcast and distribution of copyrighted material (World Intellectual Property Organization, 2003). Here the emphasis is on intellectual property as the result of the creativity invested in the

making of the goods and services included in the classification. A distinction exists between industries that produce the intellectual property and those that distribute the goods and services to consumers. A further distinction is made of a category of partial copyright industries where intellectual property is only a portion of their goods and services.

- UNCTAD model. This model is based on enlarging the concept of 'creativity' from activities having a strong artistic component to "any economic activity producing symbolic products with a heavy reliance on intellectual property and for as wide a market as possible" (UNCTAD, 2004). UNCTAD makes a distinction between 'upstream activities' (traditional cultural activities such as the performing or visual arts) and 'downstream activities' (closer to the market, such as advertising or publishing). From this perspective, cultural industries are a subset of the creative industries.
- National Endowment for Science, Technology and the Arts (NESTA) model. This model was created to further refine the DCMS model of creative industries for policy purposes under the auspices of a national policy review for the sector entitled the Creative Economy Program. It incorporates greater awareness of the differences between and within sectors, and is intended to draw out commonalities based on the ways in which commercial value is created, where this value is located, and consequently how it can be enhanced. This model places the creative industries at the heart of a wider economy that increasingly relies on creative processes and services for its competitiveness. It augments analysis in the report *The Economy of Culture* prepared by KEA European Affairs for the European Commission (2006), which explores the relationship between the creative industries and the less profit-driven cultural sector.
- Conference Board of Canada/Statistics Canada model. Developed in 2008, this list of industries and activities was a first step in measuring and understanding Canada's creative economy. It closely reflects John Howkins' understanding of the creative industries as well as the UK's earlier DCMS model.

Howkins' model, the earlier UK DCMS model, and the Conference Board of Canada's model make no distinctions between the industries included, but the other four delineate various categories to organize the industries.

Comparing these models illustrates that the relationships between the various components that make up the creative economy are not straightforward and can be understood in multiple ways. Each model can be utilized for various purposes, for instance, the concentric circles is a helpful model in understanding the role of creativity and art in relation to the more industrial facets of the creative economy whereas it is suggested that the NESTA model is more useful in the policy making realm.

It is important that each region or jurisdiction seeking to foster the creative economy become clear on the model that best suits its context. Some agreement upon form or definition is necessary for comprehensive policy making and the collection of comparable statistical data when the creative economy is nested within the whole economy.

Culture, the Arts & the Economy

In the years since the Creative Industries Taskforce was launched in Britain in 1998, the relationships between the arts, the culture sector and the newly defined creative industries have been subject to much debate. Some of the more simplistic models above, such as Howkins' and the early DCMS definitions, have provoked a flurry of other models (exemplified in the NESTA, Concentric Circles and UNCTAD models) in order to tackle questions such as: Does the sector hang together? What is the relationship between 'the arts' and the creative industries? What are the differences, similarities, and connections? And, most importantly, how can we place this debate on grounds more appropriate to the complex issues that confront us?

Today, the arts are generally understood as publicly-funded activities and institutions such as galleries, concert halls, symphonies and literature. In light of the creative economy literature, where is the line between the arts and commercial culture? Some view it as a spectrum with art on one end and commerce on the other, or in a hierarchical form such as the concentric circles model outlined above.

In developing their own understanding of the relationship between the arts and the creative industries as a part of policy development, in a way that acknowledges the complexity of how the various components overlap, collaborate and coexist, Scotland's Government concluded that:

The rather more messy, but more exciting reality is that traditional performing arts and cultural organizations are increasingly being drawn into the creative content dimensions of the creative economy – with playwrights, musicians, and a host of performers becoming more interested in how to develop intellectual property (IP) 'beyond the show', and to use the full range of social and broadcast media to reach the widest possible audience (Kneill, 2008, p.7). This illustrates the reality that most artists move between various kinds of projects, businesses, values, aspirations, techniques and products in the day-to-day aspects of their career (Australia Government & Australia Council for the Arts, 2011).

The Conference Board of Canada, along similar lines, suggests that there is a growing understanding and appreciation of the relationship between the arts, the cultural industries and broader society stating that "a creative economy extends beyond the culture sector to harness creativity in order to bring about positive social and economic changes across a broad spectrum of industries, sectors and social organizations" (The Conference Board of Canada, 2008, p.3).

From these debates, the key role of the cultural sector has been more recently emphasized and recognized for its importance within this new economic landscape. The 2006 KEA report, *The Economy of Culture in Europe*, aimed to shed light on the culture sector's importance by showing how culture drives economic and social development as well as innovation and cohesion. This was reiterated by the 2010 UN report which states that: "adequately nurtured, creativity fuels culture, infuses a human-centred development and constitutes the key ingredient for job creation, innovation and trade while contributing to social inclusion, cultural diversity and environmental sustainability" (p. xix). All of this rich discussion underlines how expressive value is concentrated in the core creative fields, recognizing how it permeates into the creative industries and the economy as a whole.

As described later, these debates have also influenced how the socio-economic performance of the sector is measured, also a relatively recent trend. Public perception continues to view the arts as a matter of enlightenment or entertainment – a view that has marginalized the sector in terms of its economic contribution and thus confines it to the realm of public intervention. This may explain to a large extent the lack of statistical tools available to measure the contribution of the cultural sector (KEA, 2006).

Creativity & the Creative Class

Florida's 'creative class', Howkins 'creative economy', and the UK government's 1998 'creative industries' have established themselves at the confluence of some powerful and evocative contemporary discourses. So, where did the whole concept of 'creativity' come from?

The term 'creativity' gained traction in professional disciplines in the 20th century in educational theory and psychology, drawing on models of artistic practice and perception to suggest different forms of learning and understanding from those of 'linear' rationalist thinking. With the advent of the knowledge economy in the late 20th century, Richard Florida and John Howkins were placing these knowledge workers under the banner of the 'creative class' and 'creative economy' by the late 1990s (Oakley, 2009). At this time the notion of creativity became linked with innovation.

Recent research has sought to provide evidence for this connection. A 2008 NESTA report, *The Art of Innovation: How Fine Arts Graduates Contribute to Innovation*, identifies three main ways in which artistic labour is linked to innovation, including:

- Artistic labour has the attitudes and skills that are conducive to innovation – fine arts graduates are more willing to try new things, have a tolerance for ambiguity and act as social brokers across disciplines.
- Artistic labour impacts innovation in the way that it is organized – project work and portfolio work are increasingly the norm and closely resemble the organization of artistic labour (which can arguably be positioned as a model for the rest of the economy).
- Artistic labour impacts on innovation through the widespread 'culturalization' of activities – as cultural ideas and images become increasingly a part of non-cultural products and services, artistic labour provides content that requires 'artistic creativity'.

Also drawing on this recent research, the Nova Scotia Cultural Action Network (Nova Scotia CAN) produced a report in 2009 that presents the arts and cultural industries as propelling the economy in three ways:

- By driving innovation through core creativity and cultural industry activities.
- By driving the economy through wealth creation.
- By positively impacting the quality of life in a given region, which in turn attracts more innovators.

In addition, these connections were highlighted by the UK's Cox Review of Creativity in Business based on David Throsby's work, a national report which concludes that "the ability to innovate depends on the availability and exploitation of creative skills...for sustained

innovation and growth, companies need to be able to draw on the talents of a flourishing creative community” (2005).

Indeed, Richard Florida’s 2002 book, *The Rise of the Creative Class*, suggests that human creativity is the defining feature of contemporary life and is powering one of the great ongoing economic changes of our time. His description of the emerging creative class and creative entrepreneurs has considerably broadened the modern notion of ‘the creative arts’ to include a cohort of professional, scientific and artistic workers whose presence generates economic, social and cultural dynamism. This understanding is more specifically comprised of people in science and engineering, architecture and design, education, arts, music and entertainment - whose economic function is to create new ideas, new technology or new creative content.

Criticism has been raised about Florida’s work but no doubt he is playing a key role in advancing public discourse. Critics from the left argue that focus on an elite global mobile class leaves out insight into the impact of attracting such a class on the low-wage service sector required to keep them, or the growing gap between rich and poor. Some conventional labour economists have problems with his underlying premise that jobs follow people (Murray, 2009). His later work addresses these and other criticisms and his new partnership with Roger Martin and the Martin Prosperity Institute shows a compromise. The notion of the creative class continues to gain ground as characterizing successful, talented, entrepreneurial people who are able to transform ideas into creative products or services for society (Hagoort, 2007).

In his most recent book (2009), John Howkins presents a further development in creativity-led thinking. He introduces the idea of creative ecology – an approach that explores the relationship between organisms and their environment. This approach is based on applying a model of ecological conditions (particularly the cycle of diversity, change, learning and adaptation) to understanding how innovation occurs, is nurtured, and finally develops or fails.

Creative Cities & Urban Renewal

An increasing number of municipalities all over the world are using the concept of creative cities to formulate urban development strategies for reinvigorating growth with a focus on cultural and creative activities.

Charles Landry in his 2000 seminal work *The Creative City* argues that the most critical resource a city has is its people: “Human cleverness, desires, motivations, imagination and creativity are replacing location, natural resources and market access as urban resources. The creativity of those who live in and run cities will determine future success” (p.51).

Here the understanding of creativity is broad and can come from any citizen in any profession or sector. According to Landry it includes creative bureaucracy, creative individuals, organizations, schools, universities and so on. Encouraging creativity in this wider way is key to a creative city agenda.

Creative cities are approaching their creative potential in unique ways, building on the strengths that already exist. Some function as nodes for generating cultural experiences for locals and visitors through the presentation of heritage assets while others use festivals to shape the identity of a whole city. Other cities are better suited towards the media industries to provide employment and to act as centres for urban and regional growth while in other

cases a more pervasive role for culture rests on its capacity to foster urban quality of life, social cohesion and cultural identity.

The Creative Cities Network was launched by the United Nations Educational, Scientific and Cultural Organization (UNESCO) in October 2004 with the purpose of promoting the social, economic and cultural development of cities in both the developed and the developing world. Cities apply to the network and, once appointed, can access new opportunities through a global platform, notably for activities based on the notion of creative tourism. According to the UNESCO Creative Cities Network, a key ingredient is the creation of public/private partnerships that help unlock the entrepreneurial and creative potential of small enterprises, which play an important role in the new economy. To underpin their development, small creative businesses also need innovative talent, and therefore cities with strong contemporary art, fashion, craft, music and design schools are most likely to flourish (2011).

In 2010, over 60 cities worldwide called themselves 'creative' including London (UK), Toronto, Vancouver, Ottawa, Brisbane in Australia, Auckland in New Zealand, and Cincinnati, Tampa Bay, and Washington in the US (UN, 2010). While this list spans large cities, the approach is also being applied in smaller cities, towns and rural regions. In Canada, over 100 cities and towns are members of the Creative Cities Network of Canada (2011).

Rural Creative Economies

Only more recently has the rural creative economy attracted attention and research. One common argument is that rural areas have many of the place-based amenities that attract creative workers and therefore are well-situated to take advantage of the creative economy (Stolarick, 2010). This has resulted in the main principles of creative cities being adapted for rural areas and disadvantaged communities.

Prince Edward County (PEC), Ontario –“Canada’s first creative rural economy” – has built on its local strengths to grow a successful agri-tourism industry of wine making, regional cuisine and specialty food products (The Corporation of Prince Edward Country, 2010). Since then a variety of rural and smaller urban centres in Ontario have developed creative economy strategies including Haliburton and area, Brampton and area, Durham and area, and Eastern Ontario’s newly coined “Creative Corridor”.

The most recent Martin Prosperity Institute research on the rural creative economy concludes that focusing on tourism alone is a limited vision for rural economies. The example of PEC and others illustrate that regional amenities and quality of place characteristics can be used not only to attract tourists but also to attract residents. Therefore, strategies focused on attracting the creative class to the region can further leverage regional amenities to attract new residents and their families to the region (2009).

Some factors that have been identified in attracting artists in significant numbers to Canadian towns and villages include: access to urban markets, local sources of employment (e.g. part-time jobs), agglomeration economies enabled by a local organizational catalyst (e.g. a university) or the overall size of the community-region, an appealing landscape, and the existence of aboriginal artistic concentrations (Bunting & Mitchell, 2001). More recently, the availability of broadband internet access is also a key enabling factor. Conversely, artists also move to smaller communities and rural areas as they flee the high rents of urban centres and seek a rural/small community “quality of life”.

Creative Clusters

The terms creative clusters, networks and districts all refer to the beneficial spillovers that occur when sectors work in close proximity to one another. As Allen Scott argues (2005) “by clustering together, firms are able to economize on their spatial inter-linkages, to reap the multiple advantages of spatially concentrated labour markets, to tap into the abundant information flows and innovative potentials that are present wherever many different specialized but complementary producers are congregated.”

In theory, groups of creative firms (e.g. music, film, visual arts, fashion and design) can converge in this way if the conditions for the development of a creative cluster exist. As Michael Porter (1990) points out, the production of creative goods and services under these circumstances can be shown to enhance efficiency and growth and promote sustainable development. This has been observed in the cities of London, Los Angeles, New York and Paris, and more recently in Shanghai, Bombay and Mexico City. It can also be applied in smaller cities, townships and rural regions (UN, 2010).

The Social, Cultural, and Environmental Benefits of the Creative Economy

The core culture sector that drives the creative economy has long been regarded as a key ingredient in the quality of life for individuals and communities. More recently, and in light of the growing creative economy, studies are linking the arts, culture and the creative sectors to positive impacts in the areas of employment growth, social inclusion, youth retention, diversity, education, and the environment. These benefits – along with the positive economic impacts identified above – are shaping the policy directions of regions and jurisdictions across the globe committed to fostering the creative economy.

A significant social impact of the creative economy is its contribution to employment with the creative industries generally accounting for around 2 to 8 per cent of the workforce in the economy (UN, 2010) (including Nova Scotia at around 4.5 per cent and Canada at 3 per cent). The creative industries are both knowledge intensive, requiring specific skills and high level qualifications, and labour intensive (such as the theatre or film industry) where high creative output occurs. According to Florida, the quality of these kinds of jobs may provide greater work satisfaction because of the creative skills required – therefore driving innovation in the wider economy (2002).

Another important social aspect of the creative economy, particularly the cultural industries, is its role in fostering social inclusion. Throsby proposes that culture plays a pervasive, socially integrating role in fostering community identity, creativity, cohesion and vitality (2001). Furthering this line of inquiry, Janet Ruiz of the Scottish Executive Education Department (2004) undertook an extensive literature review of the social benefits of culture and the arts to support policy development, finding that:

- Participation in cultural activities instills self-confidence, pride and personal well-being.
- Arts and culture promote personal, community and national identity.
- Social networks generated through arts and cultural activities provide a sense of belonging.
- Arts and culture help promote social cohesion and reduce isolation.

- Arts and culture provide creative mechanisms for individuals to express their individuality engage with others and celebrate diversity.

Important links have also been made to education. In schools, the role of arts and culture in forming the social attitudes and behaviour of children is well recognized and in the realm of adult education it can be used to enhance the understanding of society and how it functions (Evans, 2006). The role of the education system also becomes highlighted as it is responsible for training individuals for the creative skills needed in the new workforce. This has implications for the kinds of 'arts learning' incorporated in K-12 education as well as post-secondary approaches. Recognizing the necessary artistic and cultural inputs into education that facilitate preparing students for the contemporary societies in which they live is needed (UN, 2008).

Youth Retention is a challenge many rural and smaller communities face and some recent literature is positing that fostering the creative economy appeals to a younger, more creative demographic. While there are few sure answers and many unevaluated efforts and strategies, jurisdictions are increasingly making connections between the creative economy and providing opportunities for youth to remain in their own communities.

Traditionally, youth engagement in the arts has been connected to cultural development and social inclusion, strengthening leadership skills and community building. While these social and community-focused aspects of meaningful cultural engagement are still important, emerging recommendations and initiatives indicate that these traditional views on the contributions of arts activities are diversifying to include the development of cultural/creative employment and enterprises (Dunphy, Overton, & Varbanova, 2009).

At the global level, the UN is linking the creative economy with the promotion of cultural diversity. This is considered to be of crucial importance with the fast pace of globalization and concerns around loss of cultural identity. The Convention on the Protection and Promotion of Cultural Expressions specifically identifies the cultural industries as essential to the achievement of the benefits of culture diversity in developed and developing countries alike (UNESCO, 2005).

The creative economy is also being linked to positive gains on the environmental front. From an environmental perspective, the creative sector is relatively low impact. Cultural activities are most often experience-based rather than material-based and require less infrastructure over other industries. With a more recent trend towards ethical consumerism, producers and consumers are questioning the true cultural, economic and environmental values of what they create, buy and sell. Pier Luigi Sacco takes this a step further by suggesting that "the arts and culture as an economic sector may contribute to a reorientation of economic development towards more sustainable perspectives" (2007).

The UN sums up the connection between the social, cultural and economic benefits in saying:

The creative industries that use resources [inherent in arts and culture] not only enable countries and regions to tell their own stories and to project their own unique cultural identities to themselves and to the world but they also provide these countries with a source of economic growth, employment creation and increased participation in the global economy. At the same time, the creative economy promotes social inclusion, cultural diversity, and human development (2010).

Part II: Key Concepts and Highlights

From: L'économie creative: Bilan scientifique et analyse des indicateurs de la créativité (2010). Produced by Christian Poirier and Myrtille Roy-Valex, INRS.

This review consists of four sections. The first section presents the general evolution of the concept of the creative economy, while the second addresses the multiplicity of definitions, in particular the complex relationships between culture and economy. The third section presents two main types of approaches, and the fourth discusses the primary issues and challenges associated with the notion of creativity itself, as well as the development of indicators.

As this review represents only one part of a larger study of creative economy indicators and how to measure them, the first two sections overlap in approach and content, more consistently, with the excerpts from the Nova Scotia paper above, while the second two sections focus more on the measurement aspect. This becomes particularly more pronounced from the sub-section entitled "The Field of Study" on page 17.

Understanding and measuring the creative economy: A new “case file” for culture

The concept of creative economy remains a source of great deal of confusion and ambiguity. Indeed, what should be included in this notion, and what should be excluded? What types of activities, products and occupations are to be considered? Undeniably, the development of creative economy indicators and their uses are intimately linked with the answers given to these questions. In order to clarify these aspects, it is important to establish when the discourse concerning the creative economy emerged and examine how it has developed, in addition to its accompanying interpretive horizon (Roy-Valex, 2010).

From cultural industries to creative industries

The term “creative industries” first appeared in an economic study, the *Creative Industries Mapping Document* (DCMS/CITF, 1998), completed by the Creative Industries Task Force (CITF) on behalf of the UK’s Department for Culture, Media and Sport (DCMS). At the time, the DCMS was a recent creation of the British Labour Party under Tony Blair and the document was to serve as the reference framework for the politics of development in the United Kingdom.¹ Following the publication of the document and its updated version in 2001 (DCMS/CITF, 2001), the neologism rapidly spread in the Anglo-Saxon world (United Kingdom, Australia, United States, Canada), into Europe (Denmark, Germany, Austria, etc.) and then into certain Asian countries (Taiwan, most notably). Numerous ministers, government institutions and other organizations in the private and associated sector subsequently implemented research initiatives. A report produced by the URBACT Culture

¹ The origin of this concept and its initial objectives has been discussed by numerous authors, including Hartley (2005), Pratt (2005), O’Connor (2007) and Hesmondhalgh (2007a). Debate surrounded these objectives, because renewing the prestige of the Labour Party was especially important to the government of Tony Blair in support of well-oiled electioneering rhetoric, making use of the pivotal themes of “modernity” and “creativity” (McGuigan, 1998; Garnham, 2005; Schlesinger, 2007).

Network in 2008 compiled a list of over 150 studies conducted on the theme in Europe alone, including 60 in the United Kingdom (Urbact Culture, 2008).²

Central to the emergence of the concept was the awareness that the various “creative” sectors which the label encompasses were becoming more and more economically important. It also resulted from the desire to support an otherwise disparate domain of activity using a sectoral approach with the goal of gaining export markets. A second objective was also proposed; it concerned the urban regeneration of industrial areas through the development of creative and cultural “clusters.” In terms of the creative industries, the approach would present additional decisive advantages from a political point of view and for those “entrepreneurs” affected, particularly with regard to the recognition of intellectual property and regulatory intervention by the State in new activity sectors related to digitalization. In all instances, the origin of the concept was essentially political and a strategic “vision” made creative industries an economic sector in their own right, officially categorized according to a “Standard Industrial Classification (SIC) Code.”

DCMS defined creative industries as industries that are “based on individual creativity, skill and talent,” and which have “potential for wealth and job creation through the generation and exploitation of intellectual property” (DCMS/CITF, 1998: 3, DCMS/CITF, 2001: 5). These industries bring together thirteen areas of activity: (1) advertising, (2) architecture, (3) arts and antiques, (4) handicrafts, (5) design, (6) fashion, (7) cinema production, (8) leisure software, (specifically, video games), (9) music, (10) the performing arts, (11) publishing, (12) software engineering, and (13) radio and television. The area covered is large and eclectic, but it is nevertheless exclusive: heritage, for example, is not included in the list. Subsequently, between 1998 and 2006, orientation documents produced by DCMS/CITF surveyed the variable number of creative sectors, modifications made within the original conceptual framework essentially summarizing the reorganization of certain groupings.³

While the new classification system blurred the traditional boundaries between industries and services, it also brought about a revision of the usual understanding of the relationships between commercial and non-(directly) commercial relationships in the arts and culture. In effect, the analytic meaning of the term combines two concepts: the *creative arts* and *cultural industries*. In doing so, it was tempting to combine the arts in their traditional sense, more or less extended into new practises (performance art, video art, electronic art, etc.), and mass cultural production, a “commodities” or “industrialized” culture: fashion, design, leisure and entertainment industries, etc. Consequently, activities in the private commercial sector and non-market public sector were strongly connected within a single industrial activities classification system, in a manner unprecedented up till that point.

² Most “culture observatories,” policy research institutes, “think tanks,” exchange forums or circles, most often organized into international networks, initiate, take charge and/or distribute studies and reports. The most active and best-known culture observatories include: Comedia/Demos, The Work Foundation, UNESCO Creative Cities Network, Urbact Creative Clusters Network, Eurocities, the Centre for Arts and Culture – Americans for the Arts, etc.

³ Thus, for example, the DCMS *Creative Industries Statistical Estimates Bulletin* (DCMS, 2006) reduced the number of sectors considered to eleven. ‘Film and Video’ became ‘Film, Video and Photography,’ ‘Music’ and ‘Performing Arts’ was joined together to form ‘Music and the Visual and Performing Arts’, while ‘Interactive Leisure Software’ was integrated with ‘Computer Services’ to form an eleventh sector, ‘Software, Computer Games and Electronic Publishing.’

Within the political field, as well as academia, efforts to clarify the concept resulted in a variety of proposed classification systems. First, this highlighted not only the polysemy of the term and the recurrence of its use, but also, and to diverse degrees, the rejection of the dichotomy existing in the opposition between elite culture and popular culture, art and industry, culture and entertainment, and individual creativity and industrial innovation. Revealingly, many recent publications, whether from researchers or official institutions, accepted a fairly general definition of creative industries—those in which “the product or service integrates meaningful artistic or creative components” (*unofficial translation*, Caves, 2000: 1; Greffe, 2002: 19)—and situates them, without any additional distinctions, “at the interface between art, culture, business and technology” (CNUCED/UNCTAD, 2008: 30). In New England, the term “creative economy” was specifically used to describe and characterize the new area of economic activity resulting from the coming together of the commercial and non-commercial segments of cultural production (Mt. Auburn Associates, 2000). Figure 1 provides an overall synthesis of the general evolution of the creative economy.

Figure 1: General evolution of the creative economy



An emerging field of research

This “new” model of the creative economy was not without impact on the cognitive, normative and instrumental frameworks of political action, as demonstrated by recent reorientations of long-standing work on cultural statistics and indicators. The *International Symposium on Culture Statistics* held in Montréal in October 2002, provided an opportunity to debate—if not the concept of creative economy itself (the term was never used in presenters’ texts)—at least the idea of “creative industries” (Institut de la statistique du Québec and UNESCO Institute for Statistics, 2003). That same year, two American federal agencies, the National Endowment for the Arts (NEA) and the Appalachian Regional Commission (ARC) jointly organized a forum called *Building Creative Economies: The Arts, Entrepreneurship, and Sustainable Development in Appalachia* (Americans for the Arts, 2003). The following year, UNESCO sponsored a second international conference with the goal of defining the contours of the new “creative” sector as well as its contribution to economic growth and development: *The International Creative Sector: Its Dimensions, Dynamics, and Audience Development* (UNESCO and University of Texas, 2004).

Since then, the issues and challenges surrounding the “measuring” of the cultural/creative sector have generated vast intellectual output in the form of colloquiums and scientific publications.⁴ The operationalization and measurability of the concept of the creative economy has also been added to the programs of multiple seminars, conventions and other

⁴ Citations over the course of a few months: *Creativity, Innovation and the Cultural Economy* (Pratt and Jeffcutt, 2009); *Creative Economies, Creative Cities. Asian-European Perspectives* (Kong and O’Connor, 2009); *Spaces of Vernacular Creativity. Rethinking the Cultural Economy* (Edensor, Leslie, Millington and Rantisi, 2009); *The Economics of Creativity: Efficiency, Competitiveness and Development, International Review of Applied Economics*, Special Issue, (Sacchetti and Sugden, 2009); *Creative Cities, International Management*, Special Issue (Cohendet, Simon, Parellada and Pasola, 2009); *L’alphaBEM des industries créatives* (Gombault, Livat-Pécheux and Durrieu, 2009); *Cultural Expression, Creativity & Innovation* (Anheier and Raj Isar, 2010); “Creative industries & Innovation policy,” *Innovation: Management, Policy & Practice*, Special Issue (Potts, 2010). The present study reports many other recent publications.

recent events, questioning the specific manner in which arts and culture make their contributions to the so-called “new” economy.⁵

Research conducted within the framework of this report clearly shows that these types of initiatives have multiplied during the past several years. These undertakings are typically the product of close collaboration between university research centres, national and supranational government bodies, as well as associations and private organizations in the cultural domain. The field of the creative economy is in fact difficult to define and comes up against a large number of international definitions, thus posing an intrinsically difficult terminological problem and challenge. The next section takes a closer look at these issues, the question of indicators being closely linked to that of the definition of the creative economy itself.

The blurred contours of a poorly outlined economic landscape

The concept of the creative economy is an emerging construct for which the component content has yet to be stabilized. It elicits a number of definitions for which there is no consensus, coexisting in the policy sphere as much as in the scientific field. In addition, the classification systems of the so-called creative activities and industries are derived from different conceptual models, developed and promoted by numerous national, supranational, regional and interregional organizations and authorities.

A multitude of international definitions

At the supranational level, the United Nations Educational, Scientific and Cultural Organization (UNESCO) through the Global Alliance for Cultural Diversity (GACD), launched in 2002, plays a major role in the development and promotion of public policies targeting the creative industries. UNESCO also collaborates with other United Nations specialized agencies, often operating in concert: United Nations Conference on Trade and Development (UNCTAD, 2008), UNESCO Institute for Statistics (UIS, 2005), and the World Intellectual Property Organization (WIPO, 2003). Development of strategic approaches to address the creative economy is also a concern of international organizations not related to the UN. Among the most active of such organizations are the Organisation for Economic Co-operation and Development (OECD, 2007), the Inter-American Development Bank⁶ and, most recently, the European Union, represented by various institutions and bodies including the European Commission and the Leadership Group on Cultural Statistics.⁷

Mixed in with the definitions of the creative economy provided by supranational organizations are those offered by a prolix field of “expert-consultants”—new economy prophets and gurus all at once. At the beginning of the 1990s, a group of researchers revolving around Comedia, an urban planning consulting agency founded in 1978 by British sociologist Charles Landry, proposed the notion of the “creative city” to support the idea that development of a creative culture is to be viewed as a motor of urban development in a now-competitive global

⁵ Among such initiatives having an international scope, we cite: 1) *Measuring and Understanding the Creative Economy in the Regions: Methodological Approaches and Issues*, Southampton, United Kingdom, September 24-25, 2008, The International Forum for Regional Development and Policy Research; 2) *The International Forum on the Creative Economy*, Gatineau, Canada, March 17-18, 2008, Conference Board of Canada; 3) *Can Creativity Be Measured?*, Brussels, Belgium, May 28-29, 2009. European Commission and Centre for Research on Lifelong Learning (CRELL).

economy. In this view, highlighting the economic potential of culture results in widespread acceptance of the notion, as defined through artistic and cultural industry activities, and in accordance with each individual's ingenuity and capacity for invention. Consequently, the presence of art and artists in a place is seen as a facilitator to break with routine, develop creative thought and encourage invention (Landry, 1990; Landry and Bianchini, 1995; Hall, 1998).⁸

The advent of the 'Creative Economy'

In 2001, John Howkins, a consultant familiar with the media and entertainment industries, used the term "creative economy" to link the ideas of cultural creativity and economic innovation (Howkins, 2001). Howkins proposed a definition of creative industries based on the four fields of intellectual property law: patent, trademark, industrial design and copyright. This approach is in keeping with the initial definition proposed by the DCMS/CITF, although it is potentially much more open: contrary to the DCMS, Howkins did not establish, *a priori*, a list of the sectors to include.⁹

The political and scientific interest paid to creativity and its impact on economic and territorial development increased with the 2002 publication of Richard Florida's book on the social ascension of the "creative class."¹⁰ The focus is no longer simply on an economic sector, but also addresses occupations. Moreover, he expands the concept of creative economy to a significant degree. For Richard Florida, advanced industrial societies have entered a new economic era in which the primary motor of growth is innovation, not only its artistic dimensions, but also the (techno)scientific and entrepreneurial arenas. According to this mindset, the creative class, as the new productive class under formation, is above all defined on an economic basis (function). It refers to a vast group of socio-professional categories: artists, engineers, programmers, entrepreneurs, inventive managers, lawyers, and health and finance professionals.

⁶ See <http://www.iadb.org/>

⁷ Initiated by the European Commission the *Creative Economy Report 2008* (UNCTAD, 2008) was the first study presenting the point of view of the United Nations on the matter. UNCTAD, UNDP, UNESCO, the World Intellectual Property Organization and the ITC participated in its completion.

⁸ Charles Landry was to summarize his ideas from a practitioner's vantage point ten years later (2000).

⁹ This definition is both supported and opposed in the scientific community. Numerous observers believe that the main issue for the "new economy" effectively comes down to issues related to intellectual property rights. In contrast, however, a definition appearing to be too inclusive has also been questioned because this would preclude any sort of analysis which would make it possible to distinguish between cultural creation and economic, technical and scientific innovation (Pratt, 2005; Galloway and Dunlop, 2006, 2007), as well as contemporary mutations and articulations of the cultural sector proper (Healy, 2002; Hesmondhalgh, 2007b).

¹⁰ Quickly receiving media coverage on both sides of the Atlantic, the theory became known outside of the scientific community following the publication of three successive works by publishers for the "general public" (Florida, 2002, 2005a, 2005b). We will return to these theses later in this section. Note that the ideas defended are promoted by a private consulting business, Catalyx, established by the researcher, as well as through activities of various organizations and firms that he oversees, including the Creative Class Group (CCG) and The Creative Communities Leadership Project (CCLP). An Internet site, regularly updated with content by Florida and his emulators (<http://creativeclass.com/>), gives the researcher an active presence in the local and national media. In addition, pursuing a prolific career in parallel to that of a professional lecturer ensures that the theory is promoted to the economic and political elite, as well as to the general population.

Government involvement

With regard to attention paid by national government bodies, Great Britain was the first country to raise the idea of reconsideration of the role of the economic activities of art professionals in the development and economic growth of territories. This was accomplished through the model of the “creative city,” developed by the Comedia think tank in analyses based on “creative industries” (DCMS/CITF, 1998; 2001). Australia then adopted the new nomenclature (QUT CIRAC and Cutler&Co, 2003), which would subsequently come into widespread use on both sides of the Atlantic.

In 2007, a study commissioned by the Netherlands government (EURICUR, 2007) compiled a list of nearly one thousand guidance and policy documents specifically on the so-called creative industries. In addition to the United Kingdom and Australia, a number of countries are responsible for the abundance of studies and reports: Germany, Belgium, Canada, South Korea, Denmark, Spain, Finland, France, Ireland, New Zealand, Norway, the Netherlands, Portugal and Sweden. Singapore must also be included. Analysis of these documents reveals the involvement of policy decision-makers, as much cultural as economic. It shows, however, the absence in most countries of a strategic national framework for the creative economy. The approaches taken are most often sectoral and not “integrated.”

In 2009, a study produced for the European Union confirmed the ongoing and growing interest of government bodies in the paradigm of the economy and the creative industries (KEA, 2009). The research completed for that report closely matched the conclusions of our own study. It also showed the explosion of interest in China (Hong Kong) (Xiaodong and Hanlux, 2009), all while pointing out its rather surprising absence in Japan.

The field of survey

The conceptual models of the creative economy all aim to document a segment of social and economic life that is under-evaluated in its contribution to local, regional, and national development, and to development itself. However, the contours of this economic territory greatly fluctuate from one study to another, according to approaches, methods and objectives. If, as a general rule, a distinction is made between the “creative economy” and the “creative industries”—the latter constituting a more restricted sector—this specification is nevertheless not absolute. Numerous international studies compare the creative economy to the emergence of a new type of activities—those called the creative industries.

In addition, there is sometimes considerable overlapping between the “creative industries” and “cultural industries” concepts. As several authors already noted in a report concerning the creative industries in Brisbane (Cunningham *et al.*, 2003), it is not in fact rare to see the terms used almost interchangeably. The literature from French researchers also tends, for the time being, to confuse the two meanings (Liefoghe, 2010: 182). Nevertheless, the general idea of the creative economy is clearly more extensive than that of creative industries, and all the more so for cultural industries. Furthermore, a significant debate has ensued about the tendency to excessively “extend” the sectors subsumed under creativity, with certain countries incorporating amusement parks as well as casinos into the creative economy, for example. Does this not threaten to dilute the notion of culture itself? This is, in any case, a question that arises from a review of the literature on this subject.

Studies making abundant use of official statistics relating to job sectors add to the general imprecision of the concepts. Under the heading of creative industries—or any other concept popularized through discourse about the “new economy”—the studies incorporate realities that are in fact very different, with regard to modes of production, their institutional frameworks, as well as the creative, inventive or innovative resultant “products” (Uricchio, 2004; Hesmondhalgh and Pratt, 2005). The adaptation to the domain of cultural creation of concepts deriving from the industrial economy sometimes leads to a mixing of the terms (artistic) “creativity”, (scientific) inventiveness and (industrial) innovation without greatly distinguishing between them.¹¹

As a result, while the growing importance of “creative” human resources in contemporary economies and societies are invariably highlighted (Azmi, 2002; Center for an Urban Future, 2002; Venturelli, 2003), the figures proposed in support continue to fluctuate from one study to another, and comparison remains difficult. The same is true for statistical indicators of the economic “weight” represented by the creative economy in the activities of cities, regions and countries, in terms of both direct employment and the economic performance of these sectors.¹²

The differences in results reflect variations in the “scientific views” on the research subject more than concrete disparities (Daviet, 2008). In line with DeNatale and Wassall (2007), a distinction must be made between the two types of definitions of creative economy or “visions” of relationships between culture and society. The authors refer to them as “The Economic Nature of Cultural Enterprise,” on the one hand, and “Creativity as the Generation of Innovation,” on the other. The first aspect emphasizes the economic production of cultural goods and services, whereas the second highlights the role of intellectual innovation.

Economization of culture and culturalization of the economy

Scientific and political interest in the potential of culture within the context of a “creative economy” is somewhat fed by two relatively distinct fields of study which differ, firstly, by the type of activities considered (Leifooghe, 2010). On one hand, research on the creative economy is an extension of previously completed studies on the economy of culture (Scott, 2000; Throsby, 2001; Greffe, 2006; Hesmondhalgh, 2007a; Costa, 2008). This research addresses economic issues related to the cultural sector, defined by a sectoral perimeter of a size varying according to the meaning ascribed to the term “creative industries.”

Transcending the conflicting dialectic between artistic creation and the economic value of this creativity is justified by an explosion of the cultural and media markets. The phenomenon is partly associated with the development of a mass culture, born out of industrialization and

¹¹ The propensity of promoters of the creative economy and industries paradigm to prefer the term “creativity” over “creation” is *a priori* problematic since creativity refers to a quality or potentiality rather than an activity involving design and production. In this sense, the term “creation” would appear to be more correct and better adapted in terms of methodology: “to mistake the first for the second is to confuse virtuality and reality” (Tremblay, 2008: 84, *unofficial translation*).

¹² Significantly, a report produced by the United Nations Conference on Trade and Development (UNCTAD, 2008): 101) estimates that creative industries contribute to a percentage of the GDP that is between 2% and 6% according to the definitions used by each country. With the explicit objective of measuring the size of the creative economy in all regions of the world, this report highlighted the large variability of the possible definitions, recognized the largely subjective quality of the notion and, in short, positioned itself at the first steps of a “work in progress.”

favoured in the second half of the twentieth century by the continual emergence of new media. In this mindset, particular attention is paid to the forms of production and cultural diffusion resulting from the development of information and communications technologies (ICT): digital arts, interactive media (video games, online museums, online learning with cultural content, etc.). Located as they are at the intersection of ICT and creative practises, these digital creation sectors call for a new semantic mechanism.¹³ By and large, the impact of the digital economy and information services on the growth of the global economy continues to draw attention.¹⁴

The strengthening of “creative” activities in contemporary economies and, in a related fashion, the continually growing extension of cultural domains (art, culture, heritage, etc.), are explained in large part by the contemporaneous growth of the social demand for cultural products and services. The latter phenomenon would be corollary to the emergence of a consumer culture that is more and more heterogeneous, diversified and fragmented. Some authors attribute the change to the rise in individualism in contemporary occidental societies and to the *stylisation* resulting from lifestyles lived in accordance with individual “taste” (Featherstone, 1991; Lash and Urry, 1994).

We also see the affirmation of an “experience economy” (Pine and Gilmore, 1998) in which consumers attempt to immerse themselves in extraordinary experiences rather than procure simple products or services.¹⁵ In this view, the rise in cultural tourism and the economic value of artistic practises and heritage become two closely linked themes.¹⁶ In this way, the luxury, fashion and architecture industries are, *inter alia*, taken into account. Facing the dynamism and growing importance of the cultural/creative industries, the potential they offer for economic growth and territorial development (with impacts expressed in economic terms: job creation, tax revenues, etc.) becomes overinvested with the same promises as were the information and electronic industries during the 1980s (Scott, 2004: 463). The argument of culture as a lever for economic and territorial development is generally accepted today. Nevertheless, it presents a problem when it is strictly reduced to this single dimension, leaving aside more cultural and social aspects.

Moreover, research on the creative economy is increasingly following that of the experience economy and the knowledge society. The research highlights the contribution of creative industries to innovation, established as an essential driver of growth (Hall, 2000; Florida, 2002; Scott, 2007; Cooke and Lazzarotti, 2008). Briefly summarized, the basic idea posits that the transition from the current productive paradigm to a “cultural” and “cognitive”

¹³ Although not as widely known as the notion of “creative industries,” ITCP, standing for *Information Technology Creative Practice* (Mitchell, Inouye and Blumenthal, 2003), is another proposed original denomination that seeks to take into account a new activity domain resulting from structural changes related to the convergence of new technologies, on one hand, and the cultural sector as an economic activity sector, on the other.

¹⁴ The digital distribution of cultural content, specifically music, opens up new markets on a worldwide scale. In addition, new communication technologies (digital, telephone-related and Internet) give birth to a generation of users who, far from being content with broadening cultural experience, also try their hand at creation.

¹⁵ A series of other socio-economic and socio-cultural factors come into play to explain the contemporary growth of social demand for cultural products and services. Among them are the general increase of the standard of living, on one hand, and the demographic factor on the other, while the ageing of the population has a positive effect on cultural consumption, in particular in the most well-off segments of society.

¹⁶ A recent OECD report (2009) thus promotes the notion of “creative tourism” to reformat the territorial offer of urban regions in the direction of new “omnivorous” consumers, and thereby establish the link between culture and tourism, on the one hand, and competitiveness and attractiveness, on the other.

paradigm, specifically integrating the “creative” dimension of action, goes hand in hand with the affirmation of a competitive system founded on innovation and differentiation. The new economic system would have the primary effect of inscribing the field of cultural economy in a more extensive economy, whether knowledge, information or immaterial. In a context of increasing competition, in part due to the development of market globalization, acquisition of competitive positions seems to be obtained by efforts to increase the complexity of supply. The adoption of this type of strategy of differentiation toward the top, which depends less on radical technological innovations than on incremental ones, induces a considerable increase in the “cultural components” of production (Crevoisier and Kebir, 2007: 16).

In view of “commodifying difference” (Boltanski and Chiapello, 1999), the business strategy in the services sector, as well as in the traditional specialization sectors (furniture, clothing, clock making, the automobile industry, etc.) tends to abandon functional and standard production (Fordist) in favour of the development of communicational, aesthetic and symbolic aspects of the final products. The cultural content of economic production allows an evolution toward products with a greater added value since they are carriers of a much sought-after semiotic dimension in addition to having a use value. In its artistic dimension, creativity thus finds itself at the base of the productive system not only as *output*, i.e., the extremity of the production process, but also as *input*, or the product of “intermediary consumption”. The totality of cultural “products” constitutes, *de facto*, an inventory of ideas, references, images and sounds which a diversity of economic sectors draw from (Howkins, 2001; Hesmondhalgh, 2007b). This economic perception of culture as an “enriching” factor of non-cultural products leads to the prediction of strong potential for growth in the design sector (industrial, fashion, digital, etc.).

Consequently, the “creative communities” and “creative exchange social networks” become of interest for their strategic intermediary role in the circulation, transmission and “commodification” of artistic creativity in commercial goods and services. The question concerns “cross fertilization” and other “creative synergies” between industries as much in the cultural/creative sector as in other sectors of economic life.¹⁷

Delimiting the classification domain and models: two primary types of approach

Consequently, the manner of “framing” the perimeter of an economic analysis of culture greatly varies, not only according to the definition attributed to the sector, but also to the way in which its contribution to the general economy is perceived (KEA, 2009: 49). Two major types of approach can be discerned on these bases: i.e., the sectoral approaches, on the one hand, and the more transversal or “integrated” on the other.

¹⁷ In a study addressing the role of creative industries within a knowledge- and innovation-based economy, Müller, Rammer and Truby (2009) advance three reasons for finding a catalyst of innovative creativity in these industries. “First, Creative Industries are a major source of innovative ideas and thus contribute to an economy’s innovative potential and the generation of new products and services. Secondly, they offer services which may be inputs to innovative activities of other enterprises and organizations within and outside the creative industries. Thirdly, Creative Industries are intensive users of technology, and often demand adaptations and new developments of technology, providing innovation impulses to technology producers.”

Sectoral approaches

Generally, sectoral classifications group the arts, as a non-commercial or semi-commercial enterprise under the same heading as industrialized forms of creativity. Although not necessarily denying the social and cultural “value” of the goods and services under consideration, the perspective is more economic or, at least, this is the question that has kept the attention of several countries.

The cultural industry approach is the oldest.¹⁸ The field of observation is that of cultural activities and structures issuing from the cultural domain itself, according to the traditional perimeter defined by cultural politics and institutional surveys. According to the definition used by UNESCO, cultural industries are those that involve the creation, production and marketing of creative and immaterial contents of a cultural nature protected by copyright which can be related to a good or service (UNESCO/GACD, 2006). These industries are generally protected by literary and artistic property rights and not as intellectual property. Most European countries, Canada, Korea and Taiwan have adopted this nomenclature with certain regional variations. In France, specifically, the definition used by the Département des études, de la prospective et des statistiques (DEPS, 2006: 7), combines economic and technical criteria (the reproducibility of works or the use of communication techniques) with a legal criterion (protection by literary or artistic property). Correspondingly, the field of cultural industries constitutes a subgroup of industries based on literary and artistic property.

The approach in terms of creative industries considers a larger number of activities and occupations. Defined, a *minima*, as those whose “product or service integrates meaningful artistic or creative components,” (Caves, 2000: 1, *unofficial translation*) creative industries group in the same category the so-called cultural industries and all production activities having a cultural or artistic dimension. They also take industrialized and less-industrialized forms of cultural production into account, in addition to the “non-traditional” creative activities: handicrafts, fashion, design, architecture, cultural tourism, and even sports. Located at the interface of arts, commerce and technology, the creative industries also encompass the new domains of digital creation: video games, web design, cinematographic special effects, etc.

The copyright approach emphasizes the economic value of intellectual property rights to a greater degree. It is founded on the methodology of the World Intellectual Property Organization (WIPO) used for the establishment of the profile of industries controlled by copyright.¹⁹ WIPO divides these industries into four main concentric levels according to the relative share of global value of the merchandise generated by intellectual property rights: (1) core copyright industries, (2) partial copyright industries, (3) interdependent copyright industries, and (4) non-dedicated support industries.

The perimeter of the core copyright industries overlaps with that of the “cultural industries” of which it constitutes a “subdomain.” The partial copyright industries are those whose products make use of, or are partially covered by copyright: textiles and shoes, jewellery, furniture, small household equipment, glass and porcelain, carpets and wallpaper, games, architecture, engineering, interior design and museums. The interdependent copyright industries are

¹⁸ Not to be confused with the theoretical frameworks associated with cultural industries. So, in this case, it is a question of sectors and not theoretical developments.

¹⁹The first recognized benefit of this approach was that it provides a definition conforming to the categories used by national classification systems.

subdivided into two groups: the core interdependent copyright industries (televisions, video cassette recorders, radios, DVD players, computers, musical instruments, etc.) and the partial interdependent copyright industries (photographic and cinematographic instruments, recording equipment, etc.). The fourth level, that of non-dedicated support industries, clearly extends outside the copyright field. The activities under consideration are related to the domain of protected works, but they issue from the business services sector (wholesale and retail, transportation, telephony and Internet, etc.). Nevertheless, it may be appropriate to take this domain into consideration, to the extent that it partly accounts for the general impact of the creative industries (Héraud and Rafanomezantsoa, 2009: 117). The approach taken by WIPO has been applied by the United States, Singapore and Canada.²⁰

Other conceptual frameworks of the socioeconomic impact of the creative sector tend to favour a more specific aspect of the creative economy. A first approach places the digital and interactive content creation sectors at the centre of economic analysis. The most telling example is provided by the Australian government which, in 2001, launched a joint research initiative to examine the economic potential of the digital sectors. Four domains were included: 1) interactive gaming; 2) multimedia; 3) advertising; 4) digital content in the educational domain (Pattinson Consulting, 2003). Strictly speaking, indicators to evaluate the impact of creative industries were not used, but creation of a certain number of them was recommended.

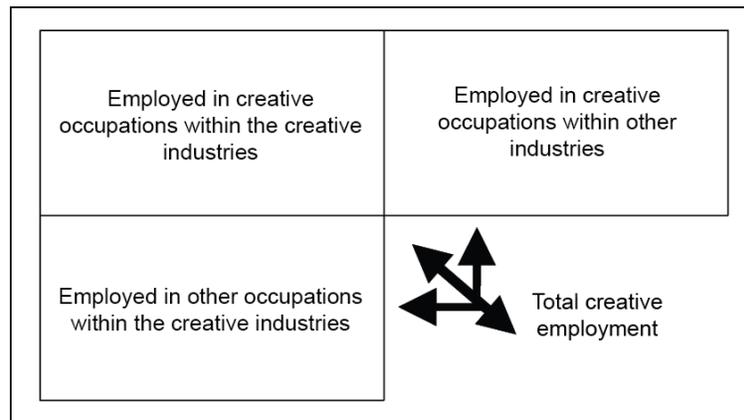
A second approach seeks to take into account an economy that makes the most of a consumer society and the increasing demand for experiences (leisure, arts and cultural events, tourism, etc.) The economic impact of the so-called creative industries is compared to an “experience economy” and the products and services, both traditional and new, which it generates: architecture, performing arts, visual arts and graphic arts, design, publishing, culinary arts and gastronomy, interactive gaming, media, fashion, music, photography, journalism and literature, advertising services and marketing communications, tourism, etc. The analysis framework adds a perspective oriented toward consumption (“demand side”) to a perspective centred on the productive dynamic (“supply side”). The Nordic countries, Denmark, Sweden and Norway, explicitly make use of this approach, whereas Italy emphasizes consumer “taste” for culinary dishes (Santagata, 2009).

These different sectoral models—“cultural industries,” “creative industries,” “copyright industries,” “digital content industries” and the “experience economy”—are related to the key concepts of the analysis of the current social and productive paradigm mutations: the “economization of culture,” the “culturalization of the economy,” the ascent of a new type of work and workers, the “digitalization of the economy, the diversification of lifestyles and modes of consumption. On a practical level, the main differences between these approaches reside in the definition of the sectors and occupations that should be taken into account in the statistics. The question has been debated in political and academic spheres since the concept of creative industry was first formalized by the DCMS (1998, 2001). Nevertheless, in guidance and policy documents a general broadening of the sectoral perimeter traditionally devoted to culture can be seen.

²⁰ It also presents strong congruencies with the approaches developed by John Howkins (2001) and Richard Florida (2002), if the activities and occupations encompassed by the “core creative industries,” as defined by Howkins, on one hand, and the “Super Creative Core,” as defined by Florida, on the other, are taken into account.

The Creative Trident approach follows this trend.²¹ The ARC Centre of Excellence for Creative Industry of Queensland University of Technology chose the following objectives: 1) How to provide “defensible” evidence of the extent and contribution of the Creative Workforce to the economy?; 2) How to reliably measure the level of Intermediate Outputs from Creative Industries to the rest of the economy. Figure 2 presents the model developed by Higgs and Cunningham (2008a).

Figure 2: The Creative Trident



Source: Higgs and Cunningham, 2008a.

Lastly, that the pragmatic application of the models also depends on a geographic variable, in which local particularities can determine the enlargement of the domains to be included.²²

Beyond sectors and occupations: more transversal approaches

Cultural/creative sector models enumerating a list of activities and occupations or based on a specific aspect of the creative economy can be contrasted with more transversal approaches. Admittedly, the boundary between sectoral approaches and transversal approaches is sometimes tenuous. It is more a case of ideal-type models than clearly defined classifications. Let us summarize by saying that the transversal approaches are within the sectoral approaches while deploying them at another level and according to a more integrated configuration. Transversal approaches can be divided into two groups. The first places the arts and artists at the centre of a continuum linking culture to development of the market and society. The second type considers the creative process a subject for policy, seeking to uncover the prerequisite conditions, of creativity and innovation, as well as their social, spatial and economic consequences. In all cases, the approaches bring the relevance of traditional models into direct play in the study of the economic impacts of cultural actions.

The concept of creative industry involves, according to David Throsby (2001), the revision of a modern dichotomous division between artistic and commercial nodes of culture. Currently, this model of creative industries tends to dominate in guidance and policy documents, including those most recently endorsed by the DCMS (The Word Foundation, 2007).

²¹ National Endowment for Science, Technology and the Arts (NESTA), 2008; Higgs, Cunningham and Pagan, 2007; Higgs, Cunningham and Bakhshi, 2008.

²² See the new framework for UNESCO statistics (2007) which is meant to be more flexible precisely in order to take this reality into account.

Preferring to begin with products (goods and services), Throsby proposes a description of creative industries with a concentric circles model (cf. Throsby, 2008). Cultural activities and structures issuing from the arts themselves lie at the centre, in accordance with the traditional perimeter defined by cultural policies and institutional surveys. A second circle contains what is commonly designated in the francophone world as the concept of cultural industries, meaning, industries that produce and distribute content of a cultural nature: broadcasting, cinema, the media, publishing, etc. For Throsby, these industries are the ones in which “creative ideas are used and reproduced” as a major component of the production process. Lastly, a final circle encompasses industries that produce goods or services situated outside the cultural domain proper and which appeal to creative ideas without artistic creation serving as the dominant logic. Throsby gives the example of “paracultural” activities such as advertising, tourism, design and fashion (Throsby, 2001: 5).

In conjunction with the DCMS, The Work Foundation, a British research and consulting firm, recently proposed the addition of a fourth circle, “the rest of the economy,” in which the classic goods and services industries benefit from and exploit outputs generated by creative activities and industries (The Work Foundation, 2007). In a value-added process through the influx of creativity, the search for and creation of art “feeds” the cultural/creative industries which then, in turn, stimulate and support creative innovation within the “rest of the economy.” The creative industries are thus presented as one of the components of the knowledge economy. A second important modification is made to the original model, in which the core is no longer exclusive only to the domains of “High Art,” but is open to all learned and popular “pure” forms of cultural expression: “ranging from traditional high conceptualized art to video games and software” (The Work Foundation, 2007: 19).

Independently of the functional variants that it supports (the concept of culture remaining divided), this model of concentric circles is defensible economically by a generic acceptance which clearly distinguishes inputs and outputs of the “value chain” of the creative industries. At one end, artistic creativity (permanently striving toward “pure” creation), opposed at the other end to economic creativity (industrial innovation), oriented toward an existing or potential market. Consequently, this model simultaneously makes it possible to attribute a specific value to artistic activities that is separate from their economic dimension and to take into account the sectoral economic weight represented by the traditional fields of arts and literature. It also highlights the economic value that these activities produce to the benefit of the cultural industries, on the one hand, and to the benefit of industries related to culture situated outside the domain of culture proper, on the other.

Here we find the classic economic model of cultural policies in liberal capitalist societies, along with the argument-strengths of the neo-classical approach in favour of artistic policy (public interest, positive external effect of the arts benefitting tourism and cultural industries, a multiplier effect of cultural expenditures), the identification of a new economic function in the relation of dependency that links the entire creative economy to artistic activities.

These links between culture, creativity and innovation, on the one hand, and economic, social and cultural development, on the other, are at the centre of the model developed by the National Endowment for Science, Technology and the Arts in the United Kingdom (NESTA, 2006: 55). However, contrary to the concentric circles model, the interrelations between the sectors or fields of activity are not envisioned in accordance with the “creative,” aesthetic or semiotic aspects of the final products, but rather, with the targeted markets: the different circles become permeable and permit a certain flexibility in their continuity (which, according

to O'Connor [2007: 51], is undoubtedly more in conformity with reality). Three publications by the European Commission (KEA 2006, 2009; Hollanders and van Cruysen, 2009) repeat the general idea.

Enlargement of the framework of economic analysis of the arts and culture well beyond the cultural sector and the economic spillover of these activities can also be traced to Richard Florida's theory of the "rise of the creative class" (Florida, 2002, 2005a, 2005b). It is possible to see in this theory a spatialized conception of the concentric model of the creative economy in that artistic creativity and industrial innovation are shown to be linked in an open continuum. Far from seeming to be the reflection of strong urban growth, the arts and culture constitute, according to Florida, a specific basis for the production of externalities which induce, in diverse ways, economic growth and the development of territories.

The key to economic growth via innovation resides in the meeting of a triple combination within a single geographic location, i.e., dynamic industrial and technological innovation, "talent", and social tolerance. The "Creativity Index," a composite statistical index, has been proposed to take this into account (Florida and Tinagli, 2004). Despite a harsh reception in academia,²³ in the past several years, Florida's approach has inspired a multitude of statistical indices designed to evaluate elements such as the positive externalities of the cultural/creative sector in local and national economies.

Other indices combine a series of economic, as well as social and cultural indicators. A set of subjective notions (the cultural quality of the living environment, a city's openness to creativity, the attractiveness of an urban and "bohemian" lifestyle, etc.) are included within the framework of analysis. More broadly, certain authors (Gollmitzer and Murray, 2008) subsequently discussed the creative ecosystem, which, in particular, integrated the notions of culture and sustainable development. Nevertheless, it is important to point out that both sectoral approaches and more transversal approaches have not really established the social and qualitative impacts of their indicators.

Measuring creativity: Issues and challenges

Several observations result from this literature review. Firstly, there is the idea that creativity increasingly encompasses more sectors and occupations. Thus, the trend is clearly toward an enlargement of the notion, which does not preclude the raising of major questions. As Gaétan Tremblay has, in fact, posited (2008), while art and culture are at the centre of the ideological construction of the new model of the creative economy, this is certainly not due to the economic weight of the activities traditionally associated with the cultural sector:

²³ The scientific basis of the process has been questioned, in particular the value of the statistical method on which it depends. The use of data that is biased and dated because too closely associated with the inflation of the Internet bubble and taken from a group of "creativity" and "diversity" indicators that are approximate, to say the least, has been questioned. Causality errors have been found: fallacious deductions and statistical classifications of little significance as well as confusion between cause and effect, and between correlation and causality. Lastly, insufficient development of the structural concepts; that of the "creative class," as well as that of "city" and "region," due to a mixing of the different territorial levels, has been noted.

[T]he successive publications of data from the British Mapping Document as well as those from UNCTAD reveal that cultural industries only constitute, in terms of value, a relatively small part of the new sector called the creative industries. In the first case, it is software and information technology services that constitute the driving force of the sector. In the second, design acts as a driver [...]. In fact, activities not traditionally identified with the cultural industries account for more than 65% of the total revenues of the creative industries. (Tremblay, 2008: 76, *unofficial translation*).

Beyond the economic factors, strictly speaking, the notion of culture itself runs the risk of being diluted by the concept of creativity. Numerous authors have recently insisted on this point, even proposing a return to labelling industries as “cultural” rather than “creative.”²⁴

Secondly, research demonstrates that the economic aspect predominates among the indicators. While several researchers and organizations have begun to develop more “social” and “qualitative” aspects (see Poirier, 2005), lacunae remain in the literature concerning these questions. The second part of this report addresses this aspect more specifically, using indicators developed by certain countries.

Thirdly, the research inspires reflection on the construction of indicators themselves, as well as their data collection. The frames of reference of the creative economy seem relevant for the definition of indicators to attain a more correct “measurement” of the contribution of cultural/creative industries to the general economy and society as a whole. The inter-sectoral and diffuse nature of the creative economy, nevertheless, points toward the difficulty in establishing appropriate indicators.

In general, it would be beneficial on both sides of the Atlantic to highlight the inherent limits of the national industrial classification systems in order to adequately take the “new” economy into account (Higgs and Cunningham, 2008b; Markusen *et al.*, 2008). Having recourse to the standard systems of classification seems insufficient for a complete economic analysis of the macro-sector of the creative industries, independently of the definitions ascribed to it. In essence, the creative economy is meant to be multi-sectoral and the data (in terms of employment, GDP, etc.) spans the entire economy, or at the least is dispersed across several sectors. Moreover, in certain cases, there is a lack of agreement between the sectors identified within the frames of reference and those taken into account for the economic evaluation founded on official statistical nomenclature (Santagata, 2009: 54). If limited to quantitative data, the lack of official statistical information on the digital economy particularly concerning the “digitalization” of the economy seems detrimental to an understanding of the creative economy, (KEA, 2009). Information obtained for this purpose through surveying businesses and other organizations is costly and difficult to compare from one country to another. Moreover, such data only cover a restricted number of indicators relevant to the measurement of the economic scope of the sector when more qualitative dimensions of the concept of the creative economy are taken into account.

²⁴ See some of the contributions included in Volume 15, Number 4 (2009) of the *International Journal of Cultural Policy*, specifically titled, *After the Creative Industries*.

Another difficulty lies in the fact that governments use different methods in the collection and analysis of statistics, which makes international comparisons difficult (Van der Pol, 2008).²⁵ The particularly high number of indicators proposed by certain statistical frameworks (see, for example, the case of Hong Kong in Part 2) complicates their application for comparative purposes, if not making them impractical due to the unavailability of data or the costs associated with data collection (KEA, 2009). In addition, as highlighted above, “(t)he reality is also that there are many countries, policy documents and literature that use the term creative industries without clearly defining it and without transparency in the use of data to measure and compare them” (EURICUR, 2007: 3). Lastly, the classifications often seem to serve rhetoric more than conceptual analysis; at the least, the insufficiency of methodological and statistical tools on the national and international levels is a problem that has been highlighted numerous times. Furthermore, certain people have called for the development and definition of international indicators and standards.

On another level, the difficulty in determining a specific set of measurable indicators results from the fact that their construction responds to a variety of intentions and objectives, taking place either before or after the launching of policies. Brown and Corbett (1997: iii), cited in a report from the IFACCA (2005: 19) concerning cultural statistics, see at least five policy “usages” of indicators (here, social indicators): description and understanding (development of comprehension), “monitoring” (of the evolution of a sector), the definition of quantifiable objectives (needing to be completed within a previously defined temporal horizon), accountability and verification (efficacy and efficiency of programs and policies).

Beyond the reasons for which the indicators are used, their definition varies in accordance with the manner in which they are envisioned. In this regard, prior work on the definition of cultural impact indicators is telling. In effect, an overview of this literature reveals the multitude of distinctions in use, whether concerning the overall dichotomy between quantitative and qualitative indicators or the economic and social impacts of culture. In addition, some indicators are more appropriate on one territorial scale than another. This is undoubtedly why the development of qualitative indicators was partly associated with the local level and the urban setting. More typically, qualitative methodologies (interviews, etc.) can also be employed within a well-defined territory. Analyses on a national level would involve research of an unprecedented scale. However, this does not prevent national entities from developing such indicators and integrating them within their existing frameworks.

²⁵ Also see the case of Australia which, despite having developed a classification in line with the creative economy, is rather hesitant about using the system for different reasons. See Pattinson Consulting (2003).

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