

International Research Panel on Culture and Creative Industries 2017

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FRENCH CULTURAL INDUSTRIES AND
POSSIBLE FUTURE PERSPECTIVES FOR
CULTURAL POLICIES IN FRANCE

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- A strong tradition for a political commitment in the arts and culture in France
- ... But disruption in cultural industries
- A renewed agenda for cultural policies

**A STRONG TRADITION FOR A POLITICAL
COMMITMENT IN THE ARTS AND CULTURE IN
FRANCE**

Practitioners insist on the wide scope and the spillover effects of culture

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	Turnover (Billion €)		% of French gross domestic product (%)	
	1995	2015	1995	2015
Total cultural activities	25.0	43.1	2.28	2.21
	Total (units)		% of total employment	
Employment	423,930	597,000	1.91	2.31

Source: Insee and
Deps

Audiovisual services, performing arts, newspapers, advertising services, heritage, architecture, publishing industry, music industry, visual arts, cinema, art schools

- Causes of decrease
 - collapse of the music market
 - decrease in value
 - changes in the book and press markets,
 - economic crisis,
 - "capture" a share of the value added by digital platforms (Apple, Google, Amazon, Facebook)
- Practitioners insist on the wide scope and the spillover effects of culture

Report Durieux and Kancel France, 2013:

Impact of culture: 104 billion€ (6% of GDP)

DISRUPTION IN CULTURAL INDUSTRIES

Disruption of economic models due to digitization

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Supply side

- Infinite supply
- Co-creation. Contribution of the crowd to the production of creative goods
- New entrants in the value chain (especially GAFAM), capture of value, new conditions of competition
- Disintermediation, “uberization”
- Personal data as sources of value

Demand side

- Fragmentation of audiences and consumer’s nomadism
- Substitution of downloading for streaming (end of ownership?)
- Scarcity on the demand (and attention) side
- Long tail effects : new interest for niche product

Turnover of recorded music, France (M€)

	2010	2011	2012	2013	2014	2015	2016	2016/ 2010 (%)
<i>Physical sales</i>	727	413	364	367	325	274	267	-63%
<i>Digitized sales</i>	90	111	125	126	133	152	183	+103%
<i>Total</i>	817	523	489	493	459	426	450	-44,9%

QUESTIONS FOR CULTURAL POLICIES

Towards new foundations of French cultural policies

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- Traditional pillars
 - Cultural exception
 - ✦ Audiovisual services
 - Support
 - ✦ Subsidies
 - ✦ Tax incentives
 - ✦ Tax on telcoms for cinema and AV services
 - Protection
 - ✦ « media chronology »
 - ✦ Net book prices
 - Democratization

- New foundations

- Demand

- ✦ Pass culture
- ✦ Education
- ✦ Internet and access
- ✦ Involvement in cities policies (suburbs)

- Financing culture

- ✦ New frontiers between public and private sector on the one side and between for-profit and non-profit organization on the other side
 - Ex. Fondation Vuitton
 - Crowdfunding
 - Lottery

An agenda for the Ministry of culture

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- Development of libraries
- Subsidies to music industry
- New regulation of audiovisual services (scope, governance and strategy of public channels, chronology of the media, tax policy)
- Policies towards GAFAs
 - ✦ The European level is the right one for this question
- Copyright protection in Europe

- And...
 - ✦ Renewed governance of the Ministry
 - ✦ Link between domestic and foreign cultural policy

Thanks for your attention

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