

## **From Cultural to Creative Industries: Theory, Industry, and Policy Implications**

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The paper will present a rationale for distinguishing between notions of cultural and creative industries which have implications for theory, industry and policy analysis. I do this from the standpoint of a researcher and analyst and also from a position of a corporate involvement in a substantial project to grow and diversify a regional economy through the development of its creative industries.

This is a 'creative industries precinct' in inner suburban Brisbane involving my university, QUT, the Queensland state government through its Department of State Development, and a variety of industry players, and retail and property developers.

There is theoretical purchase in distinguishing the two terms, in part to put further flesh on the bones of claims about the nature of the knowledge-based economy and its relation to culture and creativity. Shifts in the nature of the industries usually described by the terms also need to be captured effectively, as are different policy regimes that come into play as regulation of and support for cultural and creative industries.

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'Creative industries' is a quite recent category in academic, policy and industry discourse. It can claim to capture significant 'new economy' enterprise dynamics that such terms as 'the arts,' 'media' and 'cultural industries' do not. An early recognition of the distinct contribution of the creative industries came in the Creative Industries Task Force Mapping Document (CITF (1998) 2001) in the UK. This document defined creative industries as 'activities which have their origin in individual creativity, skill and talent and which have the potential for wealth and job creation through generation and exploitation of intellectual property.' It mapped into the creative industries sector the following activities: Advertising, Architecture, Arts and Antique Markets, Crafts, Design, Designer Fashion, Film, Interactive Leisure Software, Music, Television and Radio, Performing Arts, Publishing and Software. This eclectic list includes the resolutely analogue (arts, crafts, antiques, architecture), established commercial business sectors (TV, radio, film) as well as all-digital new economy sectors (software, interactive leisure software).

Critics point to a rather arbitrary exclusivity in the list, whereby, for example, the heritage sector is omitted despite its economic, creative and cultural characteristics being at least if not more robust than some of the sectors included.

Nevertheless, the Task Force approach valuably stresses commercial or commercialisable achievements or potential, and also stresses the overall strategic importance of the notion of the creative industries to Britain's export profile and international branding. The Task Force's work is claimed to have had a galvanising effect on Britain's cultural profile, and has been the template overlaid on a good deal of subsequent policy development work in the UK.

In March 2001 the then Secretary of State, Chris Smith, put out an update from the Task Force (CITF 2001). A few years on, the significance of the creative industries to the knowledge economy and national wealth has been widely appreciated. Regions and cities, as well as venture capital, are providing, he reported, more focused support measures. There is better career structuring, some reforms of education and training programs, and ownership of intellectual property issues by practitioners. Smith said of policy settings in the UK: 'The creative industries have moved from the fringes to the mainstream.'

But its exclusivity and its lack of differentiation of the cultural and creative industries leaves some questions unanswered. They are not only theoretical questions but go to issues of how to measure the size, nature and prospects of the 'industries' we claim to be analysing or championing, and how to develop policies and programs to most appropriately develop, facilitate or intervene in them.

There is almost exasperation in Simon Roodhouse's survey of what he calls the 'tortuous and contorted definitional history' of the arts, cultural and creative industries (2001: 505) and he calls for a more inclusive definition than those like the Task Force's from the perspective of one wanting a stable framework for data classification and collection (517).

I am not going to go over ground covered by other analysts on the ideational history of the movements from the arts to cultural to creative industries (but see Hartley and Cunningham 2001), but I will probably add to those tortuous contortions while focusing on some strategic aspects of the present moment, where creative industries as a concept and policy instrument is being effectively invented. This is in relation not just to the perhaps too narrow history of articulation to arts and cultural industries. It's also about its articulation to enterprise development more generally, the knowledge-based economy and society, and the service industries.

In the US, there is virtually no purchase for the term – the recent experience of a QUT team in proposing a creative industries document reader and reference work for a US-based publisher confirmed this. Nevertheless, we would be well advised to treat the first book actually titled 'creative industries' - Richard Caves' *Creative Industries: Contracts between Arts and Commerce* (2000), which magisterially canvasses the economic and contractual dynamics that link the established arts and media while giving us handy watchwords by which to grasp these dynamics – as a harbinger of things to come in that market. However, Caves is concerned to constitute commonalities across the arts-media

spectrum and does not take the definition of creative industries beyond these commonalities. Why invent a term if it adds practically nothing to the provenance of the existing conceptual language?

From a business economics perspective, recent canvassing such as that of John Howkins' *The Creative Economy: How People make Money from Ideas* (2001) has given us a very broad but bracing definition: the sum total of four sectors – the copyright, patent, trademark and design industries – together constitute the creative industries and the creative economy (Howkins 2001: xiii). What looks like a similar list to that of the UK Task Force is actually a very significant expansion of it, as it includes all patent-based R&D in all science-engineering-technology based sectors.

(Along with this omnibus definition, Howkins adds the rather dubious criticism that most countries would embrace such a definition linking all industries with creative inputs together, whereas countries like Britain and Australia only define it as arts and cultural industries and exclude the patent industries, thus perpetuating the arts-science divide that has bedevilled the West.)

Is Caves too narrow and Howkins too broad?

As things go in Australia, there are several attempts at definitional development, with differing degrees of clarificatory usefulness:

- ? 'Knowledge Nation'  
([http://www.alp.org.au/download.html?filename=federal/reports/kn\\_report\\_02070\\_1.pdf](http://www.alp.org.au/download.html?filename=federal/reports/kn_report_02070_1.pdf)) is the Labour Party's compendium of policy options for stimulating a knowledge-based economy and society leading into the federal election on 10 November 2001. The Knowledge Nation Task Force was chaired by the party savant Barry Jones. For Knowledge Nation, the creative industries are coterminous with the arts. The result of this conflation is that recommendations for advancing the creative industries are residual at best, being lumped in with some afterthought recompense for the university's humanities and social sciences rather than upfront in the document as the sector that will deliver the content essential for next generation ICT sector growth (ICT is seen as one of five key knowledge-based growth hotspots of the Australian economy into the future). While KN can claim against its political rivals that 'There was not one mention of the creative industries – the arts – in the Howard government's innovation statement' (KN 2001: 53), the patent limitations of complete equivalence of the arts and the creative industries has at this time escaped Australian Labour.
- ? QUT's advancing of the 'commercialisable applications of creativity' (<http://www.creativeindustries.qut.com/research/cirac>), which stresses wealth and job creation and diversification of the Queensland economy in alignment with the state government's rationale for funding the fore-mentioned Creative Industries Precinct. This approach places strategic but not exclusive stress on those applications of creativity that have a realistic enterprise growth potential, without confining that to digital content alone. Aboriginal arts and crafts, analogue

fashion outputs (which, when I last looked, were what we used to call clothes), are proven wealth creators.

- ? the federal government has since mid-2001 entered the field with its proposed study of ‘Digital content and Australia’s creative industries – a survey and case study on clustering and clustering strategies for industry development’ (see <http://www.dca.gov.au/mediarel.html>).

This approach is driven by the pragmatics of delivering useful policy tools for effective and appropriate intervention, and thus is normative and strategic rather than descriptive and comprehensive. It has arguably learned from the problems that may have been posed by the CITF and calls for more ‘inclusive’ definitions of the creative industries. The shapers of these initial federal forays into creative industries have moved rather rapidly to focus the research away from the more predictable definition of including whatever is in their portfolio (in its first iteration in June 2001 the non-commercial sat alongside the commercial on equal terms, whereas in the latest iteration (see attachment 1) almost all industry sectors are commercial).

It is both a far leaner exercise than the CITF (its three stages of inquiry are set to last no more than the best part of a year) and a more focused one – in some ways. It slices just the top off the creative industries by adopting a root and branch metaphor and concentrating only on the digital green shoots rather than the root industries which may remain substantially analogue. It thus focuses on the highest growth, most convergent, most commercialisable parts of the creative industries that are also most in need of contemporary forms of state intervention/facilitation. In making the study more focused, the relevant department and agency (DCITA/NOIE) have also gone beyond the ‘usual suspect’ sectors to include creative inputs into the service industries more generally:

The cluster study will help both the Government and the industry to further develop their strategies for digital content and applications development. It will include the cultural industries, but also goes beyond them to identify linkages to key users like education, health and government service delivery, key inputs like training, and key supporting infrastructures like business services and copyright management systems. (Alston 2001; see attachment 1)

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Have we got any further down the ‘tortuous and contorted’ path?

As I said to start with, there is theoretical purchase in clarifying possible distinctions between cultural and creative industries, and I will attempt to do so now.

A substantial literature is available on arts as an industry sector, and on arts and media as *cultural* industries. It has placed the economic as well as social benefits of creativity on the policy agenda (e.g. Garnham 1990; 2000; O’Connor 1999; Caves 2000; Landry 2000; Throsby 2001; Mercer 1998; OECD 1998; Cutler and Company 1996; DoCA 1994). This theme has been developed in the cultural policies of nation states. Typically it has entailed the application of neoclassical economics to the arts. Externalities, multipliers,

and merit and public goods arguments are to the fore (e.g. Throsby 2001). Also, the *cultural* industries arguments of the 1970s and 1980s involved a ‘re-badging’ of large, usually commercial industries such as TV and film, as ‘cultural.’ This placed them within the purview of a state’s cultural policy regime, to justify continued regulation and subvention as direct industry development arguments became harder to maintain.

Essentially, then, my argument is that cultural industries notions and arguments have been developed for nation states and around the cultures of nation states. The term has developed into the application of neoclassical economics to the arts paralleled by a ‘re-badging’ of large, usually commercial industries such as TV, music and film, as ‘cultural’.

Of course, it was not always so. There are probably four prongs to the history of the term cultural industries as a ‘rhetorical set’:

- The 1930s negative version
- The 1970s and 1980s reconceptualisation of established commercial industries as cultural
- Applied arts practices (for eg., urban regeneration)
- The application of neoclassical economics to the arts

There was the original condemnatory critique by the Frankfurt School. Then, in the 1970s-80s, it was decoupled from this mode of distanced dialectical critique and critically turned on its head by those in Britain looking to reconceptualise the established commercial industries as cultural, and to facilitate urban regeneration through applied arts practices and clustering strategies. Both took place in an environment of Labourist and socialist retooling under Thatcher. The former took industry in the direction of culture; the latter took culture in the direction of industry.

Both required cultural Marxists to address what Nicholas Garnham (1987: 24-25) called the dangers of the ‘idealist’ tradition in cultural analysis and its blind spot, commercialism:

Most people’s cultural needs and aspirations are being, for better or worse, supplied by the market as goods and services. If one turns one’s back on an analysis of that dominant cultural process, one cannot understand either the culture of our time or the challenges and opportunities which that dominant culture offers to public policy makers

After that came the scholarly ‘settling-down’ period, and the application of neoclassical economic models to the subsidised arts as techniques of updating the rationale for such subsidization. This was and is applied internationally to this day.

Essentially, the phenomena called cultural industries have tended to be a concatenation of the arts and the established commercial or large-scale public sector media; a concatenation that didn’t hold. Since the 1980s, small business models of networked, usually commercial, interdependency have arisen which have the scale and commitment to creativity of the typical arts company but the ethos of commercial practice – wealth

creation and meeting their markets. Second, new models of creative applications in technology mean a wider set of opportunities for creatives while threatening the settled business models of the big commercial firms.

The concept of the cultural industries has shrunk somewhat (see O'Regan 2001); the third and fourth meaning of the term have tended to become its contemporary default setting. That is, it has come to stand for the (subsidised) arts with the contemporary clothing of "audience development", "community involvement" and professionalisation. While it has strong currency in academia, it is, at least in Australia, rarely used by or around industries like broadcasting or new media, and you are more likely to find economic development portfolios carrying forward creative industries agendas as arts portfolios.

There are undoubted continuities between cultural and creative industries, but I would posit that the trend differences can be summed up as creative industries is trying to chart an historical shift from subsidised 'public arts' and broadcast era media, towards new and broader applications of creativity.

This sector is taking advantage of (but is not confined to) the 'new economy' and its associated characteristics. Here, technological and organisational innovation enables new relationships with customers and the public that are not reliant on 'mass' models of centralised production (media) and real time public consumption (the arts). Interactivity, convergence, customisation, collaboration and networks are key. Creative industries are less national, and more global and local/regional, than is typical among public broadcasting systems, flagship arts companies and so on. Their characteristic organisational mode is the micro-firm to small to medium-sized enterprise (SMEs) relating to large established distribution/circulation organisations. And while many creative enterprises remain identifiably within the arts and media, it is the case that creative inputs are increasingly important throughout the services sector. In the same way that enterprises *in general* have had to become information intensive, so they are becoming more 'creativity intensive.'

Rather, then, than the grafting-on of a neo-classical economic grid – with its arguments about the quantification of economic impacts which are largely regarded as a dubious exercise by the practitioner and a good many politicians – onto the sector, creative industries can lay claim to being significant elements of the new economy in and of themselves.

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I want now to turn to a few conceptual issues:

- ? what are the creative industries sectors and their adjacencies (service industries/knowledge economy)?
- ? what is the nature of the policy architecture (culture/industry)?
- ? how are the creative industries disposed (regionalism)?

## Service industries and knowledge economy models

Convergence is a watchword of contemporary understandings of media, communications and creative industries. A somewhat different way into the issue of convergence and creative industries, however, is to consider the degree to which a wide range of industries, including the audiovisual and cultural industries, are being drawn into a generic services industries framework, and how that is complemented to conflicted by their articulation to knowledge economy models.

Cultural and creative enterprise would typically regard itself as further up the food chain from the service industries, given the characteristics of authorial signature, innovation, and risk involved in its production. Caves' (2000) list of the nature of creative industries reinforce this sense of 'not just another business'.

Nobody knows/demand is uncertain  
 Art for arts sake/Creative workers care about their product  
 Motley crew/some products require diverse skills  
 Infinite variety/differentiated products  
 A list/B list/vertically differentiated skills  
 Time flies/time is of the essence  
 Ars longa/durable products and durable rents

However, trends that clothe the contemporary arts in the language of audience development, access and community involvement, and professionalisation are conformable to the language of a service industries model.

Broader economic and policy trends - such as the growing impacts of international services trade protocols and agreements and the growing importance of knowledge-based inputs into advanced economies – are the larger frames that these pressures are working within. A future-oriented sense of place of the creative industries might begin with the idea of its growing convergence with the service industries model.

Like prototypical service industries – telecommunications, health, education, financial services – the creative industries involve higher value-added inputs at the digital content and other applications upstream end of the value chain. This is where the claims for their place in the knowledge-based economy come in, where issues of copyright and IP ownership and exploitation are key.

A converged service industries model implies that

- ? content creation will become more important than it is in the current content industries (distribution, not production, is where most profit-making currently occurs), and
- ? the creative industries will be characterised increasingly by their being inputs into other (service, but also manufacturing and even primary) industries.

Like the prototypical service industries, the downstream or retail part of the value chain is where most turnover but least value adding might occur. This model will continue to sit uncomfortably with the current arts and culture value chain of culturally valuable art works and activity with variable and variably-defined market value distributed and exhibited in analogue formats with digital as ancillary modes of circulation. It is important that the 'not just another business' justification for the special nature of the cultural industries doesn't turn into just not a business at all.

It's not all one-way modelling, of course. We can also think of the service industries coming further toward the cultural industries: Lash and Urry argue that manufacturing and service industries are increasingly taking on characteristics of the cultural industries (1994: 123)

### **Cultural/Industry Policy**

The domain of what counted as cultural policy, as Tom O'Regan argues it, expanded during the 1980s and 1990s and now it is beginning to shrink. In part, he argues, this is a function of having arguments about the importance of culture and creativity taken seriously by more than the traditional arts portfolios.

Cultural policy is by definition nation-state specific and so is being squeezed by globally-dispersed creative industries and by international trade rules that seek by definition to limit national exceptionalism. Content convergence means that cultural policy has a shrinking sector-specific envelope to work as a bigger mix of new content policies come to the fore, and a set of formidable challenges in collaboration, and the design and delivery of policy and programs

The arts, cultural and creative industry sectors will need to get used to thinking of themselves and acting as part of a broader coalescence of interests encompassing the content-rich service industries such as education and learning, publishing, design, communications devices, and e-commerce. These sectors, says consultant and adviser Malcolm Long, are 'notoriously non-collaborative with each other, living within their separate smokestacks' (2001: 75).

Culture was divorced from industry policy arguably more so than in other countries because in the 1980s economic orthodoxy focused on microeconomic reform, tariff reduction or abandonment, globalisation and liberalisation – in this context, there was no place for old-style industry policy based on tariff protection, subsidisation of declining manufacturing sectors, and the new international trade frameworks beginning to impact national policy making. (It is not at all surprising in the Australian context of competitive federalism that state governments have been quicker off the mark than federal governments in new economy industry policy, because the neo-liberal economic hegemony was strongest at federal level.

This has resulted in two decades of arid argument grappling with the bifurcation of culture (which is 'institution' based) and entertainment (which is 'industry' based). In



policy terms, the problems of film and the case for financial support are siphoned to the 'mendicant' arts/culture part of government and the 'serious' economic policies are directed to ICT and infrastructure. This has had a corrosive effect on attempts to renovate national industry policy.

The challenges are not just on the side of cultural policy to remodel/reinvent itself. Industry policy needs to be able to conceive intervention strategies that grasp the nature of intangibles, the weightless economy, of 'living on thin air' – what Barry Jones in *Knowledge Nation* calls the 'dematerialisation' the economy. Even new economy initiatives have tended to be ICT infrastructure obsessed.

One of the ways forward is to centre new policy around a small business development agenda which has potentially as much to do with a portfolio like industry, IT or the information economy as it has with culture and the arts. Just as the Canadians did some 'forum shifting' after they lost the split run magazine case in the WTO, working with the Network for Cultural Diversity, and the US did after the Uruguay Round when it tried to set the agenda through the MAI, so the cultural lobby might have to do some forum shifting, from cultural policy to the new economy.

The policy mix might see a range of forms of facilitation of creative content enterprises' access to and comfort with industry support schemes. These can take the form of venture capital support, other forms of equity investment, enforcement of competition regulation, and structural regulation. These can sit alongside, but are other than straight subsidy or content regulation. Incubation, business skills development, investment incentives, digital rights management, advances against profit, etc. R and D tax concessions, accelerated write-offs, concessions, tax holidays, addressing GST impacts on small business, wider utilisation of industry development schemes such as the START scheme. They might include test beds, clustering strategies and support to develop them. (For an interesting list of such support measures, see Senator Alston's comments launching the Digital Content and Applications Review (Alston 2001).

A key issue for reframed industry policies focused on the creative content sector is to what extent can such industry support be challenged under agreements undertaken within multilateral trade frameworks such as WTO and other like agreements?

Remember that it is the designation of audiovisual and related services as cultural that stalled US attempts in the Uruguay Round of the GATT to liberalise trade in this area. Limiting the provenance of cultural policy is precisely what the US wants and is continuing to pursue in the renewed GATS currently. However, this 'setting limits to culture' is, as we have seen, already occurring for reasons additional to US policy moves. Interestingly, the latest US 'communication' to the WTO on GATS audiovisual in December last year represents a softening on subsidy as a policy instrument but a determination to place digital content in business services not audiovisual.

This, if it was to be taken up by sufficient WTO member countries, would mean that content regulation for established audiovisual was more secure but that it would be more

difficult, even if workable mechanisms could be devised to effect content regulation in new media, to extend content regulation to new media. The threat, at least in terms of my argument today, would be that industry development measures might also be countermanded.

These shifts in the international trade forum landscape are at least interesting pointers to new opportunities and threats.

### **Regionalism, or ‘Paris or the provinces’**

The EU has done much to reshape the spatial logics and priorities of subvention and development in Europe, providing a supranational framework for interventions that often outflanked nation-state capitals and metropolises in the interests of regional locales. This dynamic has not been reproduced elsewhere in the world, despite its manifold value, as nowhere else has a supranational polity been established with such ramified provenance and effect.

There is an argument to be made that the creative industries, as they have been delineated here – and the particular ways that they may be developed – may not obey the iron laws of agglomeration – of the necessary alignment of ‘hard’ as well as ‘soft’ infrastructure – characteristic of national flagship arts and well-established cultural industries.

Indeed, the creative industries moment may reintroduce some of the animating principles of 1970s cultural industries arguments – that of urban renewal and regional/ provincial strategy.

Cluster theory, based on adaptations and revisions of Michael Porter’s classic studies, tend to be a dominant grid for understanding the creative industries and here there is real prospect of opening up the ‘Paris or the provinces’ logics of Australian cultural institutions. (The contrast between the husbanding of scarce resources based upon notions of aesthetic excellence and national flagship status in the Nugent enquiry stands in sharp contrast to the small business development strategies and cluster strategies of creative industries policy logics.)

Take as an example a just-published compendium which I would argue represents a high water mark of cultural industries and policy studies in Australia – *Culture in Australia: Policies, Publics and Programs*, edited by Tony Bennett and David Carter (2001).

An analytical and authoritative survey of most of the main institutions of culture in Australia, it is particularly strong on class, on national flagship cultural institutions, and on assessing the record of established cultural industries.

But there is a key lacuna in *Culture in Australia* – regionalism, the spatial geography of Australia’s cultural institutions. There is a chapter on regionalism in the book – Robin Trotter’s case studies of regional Queensland’s cultural tourism initiatives – but generally the book’s account of the institutions of culture tend, spatially, to float. We may want to

sign up to Graham Turner's call in the book to hold firm to the project of national cultural formation inaugurated in the 1960s and 1970s but the industries which such policy rhetorics and aspirations spawned have undoubtedly obeyed the iron laws of infrastructural agglomeration – Paris or the provinces. Investing in large national flagship institutions and national flagship funding agencies – what we might call Big Culture - generally speaking means further consolidation of cultural industries in one or two spatial hotspots in the country - Sydney and Melbourne. National cultural policies have, by and large, contributed to further centralisation of cultural resource and cultural cachet, rather than contributed to their redistribution spatially. This is easily as significant as the challenges of class-based dispositions of cultural capital. And the institutions which deliver some of the core popular cultural product and service most strongly supported by Turner have been the worst centralisers: film and television.

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**Attachment 1:*****A taxonomy of industries producing digital content (DCITA/NOIE)***

Feature film production – including animation; use of digital video cameras, digital editing (George Lucas now shoots his films digitally without using film).

Film post-production – special effects, image creation.

Commercial, community and national broadcasting services – use of digital production for series, documentaries, telefilms etc; radio production.

Pay television services – use of digital production for telefilms, documentaries etc

On-line broadcasting – Internet broadcasting by established broadcasting services and dedicated online broadcasters

New Media Communications – ninemsn, ABC Online

Book publishing – text and graphics for the Internet, DVD, CD etc

Newspaper and magazine publishing – text and graphics distributed on the Internet, DVD, CD etc

Game publishing – for established gaming platforms (Nintendo) and the internet

Online services – more a generic category - ninemsn (website content)

Information services / directories – E-libraries and online collections i.e. - nla.gov.au; museums and galleries

E-commerce – companies whose presence and business is conducted primarily online lastminute.com, travel.com and Melbourne.com.au other e-commerce services

Advertising – banner advertising, direct marketing using the internet

Audio/Music publishing

Architectural and other design activities (use of CAD)

Health and education

Visual arts – painting, photography, sculpture

Performing arts