REPORT

Format case study selection

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May 2019

This project has received funding from the European Union's Horizon 2020 research and innovation programme.

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Document identifier
D1.3 Format case study selection

Submission date
31 May 2019

Work package
WP 1 "Setting the Scene"

Lead beneficiary
University of Amsterdam

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CONTENT

Introduction

This contribution to the CICERONE project builds on *D1.1 State of the Art* and *D1.2 Overview of CCI Research Gaps*. It provides a roadmap for the actual empirical research in WP2 by unpacking the key analytical building blocks and by subsequently outlining a detailed methodology for the Global Production Network (GPN) approach and the case studies that are based upon it. The GPN framework (see D1.1) is a very useful heuristic tool to investigate contemporary dispersed production systems. Such dispersed production system also applies to Cultural and Creative Industries (CCIs), which often rely on very long chains of activities with intricate geographies reflecting the contemporary economy of sign and space. The application of the GPN perspective to CCIs is deemed, therefore, to introduce a number of theoretical and empirical innovations as indicated in D1.1 with important implications in terms of socio- economic development. A crucial challenge facing GPNs research in CCIs, however, concerns the scant quantitative data available. That is, while there is a wide range of statistical analysis on single CCIs, there is no data collection, as the GPN framework requires, that looks at the flows of activities connecting various stages of a production process. D1.2 has identified the data collection gaps and proposed strategies to overcome these by doing empirical research. Below, we set out how to embark on this empirical research.

In the first section, we deal with the cultural production system and how the production cycle can be carved up in five distinct stages that fit in with the GPN approach. We then dissect the GPN approach more in detail by focusing on its crucial components (section 2). In this section, we disentangle the role of governance and look at embeddedness – the notion that all economic activities take place within concrete socio-cultural and institutional contexts.

The main objects of our project, the CCIs, are characterised by a relatively high level of heterogeneity. Researching CCIs, therefore, implies taking this heterogeneity into account. In order to transform the GPN from a heuristic framework into an analytical tool, one needs to consider and operationalize its key dimensions. Therefore, in section 3, we identify the key dimensions of variety both between and within CCIs, so that we will be able to position the cases. After that, we present a methodological framework for conducting a series of sectoral cases studies that allow for cross-sector and cross-location comparisons at the EU level (section 4). In section 5, we formulate the overarching research questions that each of the selected case will need to address.

1. The Cultural Industries Production System

The concept of the Cultural Industries Production System (CIPS) was developed as a means of providing an analytically robust definition of the cultural industries (Pratt, 1997). Previous definitions and analysis were

firmly rooted in analyses of consumption or artistic creativity; a foundation for the analysis of cultural production, in the cultural industries qua *industry*, was lacking. The logic adopted was consistent with classical taxonomies of the economy: definition of industry by its product, tracing back from its production to initiation. Separate activities can be identified, usually identified with a particular process. It is important to note that such taxonomies do not correspond with normative neo-classical economic logics. Developed in the mid-20th century, neo-classical economics' economic lens is the firm and the market; inter- and intra-firm organisation is deemed irrelevant. Moreover, the notion of industry is not considered to be an analytically relevant variable.

But also, the taxonomic logic of empirical industrial analysis is only partially consistent with an analysis of occupation. In neo-classical analysis 'labour' is a factor of production, and skill/expertise will differentiate costs; recent developments have turned a focus on 'human capital', which have stressed skill acquisition (Towse, 2006). Normative occupational analyses have focused on the particularity of skills and individuals. Artistic and cultural analyses have taken the number of artists, or later 'creatives', as an indication of the creative assets of an economy (Bakhshi *et al.*, 2012). Although coming from a different set of assumptions, welfare economic approaches to culture analysis focus on the balance of supply and demand of artists.

Lacking in both approaches is the notion of organisation or, more generally, institutions. There are many forms of institutional analysis, but a particular influential one on thinking about cultural production is the 'Filière School' (Groenewegen and Beije, 1989; Raikes *et al.*, 2000). Simply put, this school stresses the 'production chain' – the steps of the production process – as applied to an industry (defined by its final product). Moreover, there are similarities and integrations between different industries that may be considered to constitute 'sectors' of the economy: that is, they are functionally related. These notions are central to institutional analyses in that they indicate mechanisms of governance (Hall and Taylor, 1996). In a 'pure' market/neo-classical approach, price is the only mechanism.

Implicitly, the 'filière logic' underpins conventional industrial strategy and provides potential analysis of targeted interventions in an economy, sector and industry. The cultural industries were not considered an industry until the 1970s; simply an occupation (artists). Whilst in some analyses of those (many) cultural industries that tended to monopolies (newspapers, TV, films), regulation was rooted in a logic of censorship rather than economics.

Analysing the cultural industries as industries (which collectively constitute a sector) highlighted the diversity and variety (as opposed to the unitary category 'the culture industry'), as well as complex relationships between markets, state and society (should culture be regulated by state or market?).

The next step was looking within particular cultural industries, complementing institutional analyses were those of networks and intermediation. Theses analytical developments sought to understand the empirical transformation of industries under the regime of post-Fordism (Lash and Urry, 1993). A final and critical step was to examine the production processes taking an idea to product. Here, the notion of the cultural production system was developed, recognising a dense network of relationships that constitute a(n) (socially and spatially) embedded system. Critically, the notion of flow as introduced at this stage; the ideal type of production, distribution and exchange, as well as the feedback flows, as adopted from Marxist analyses.

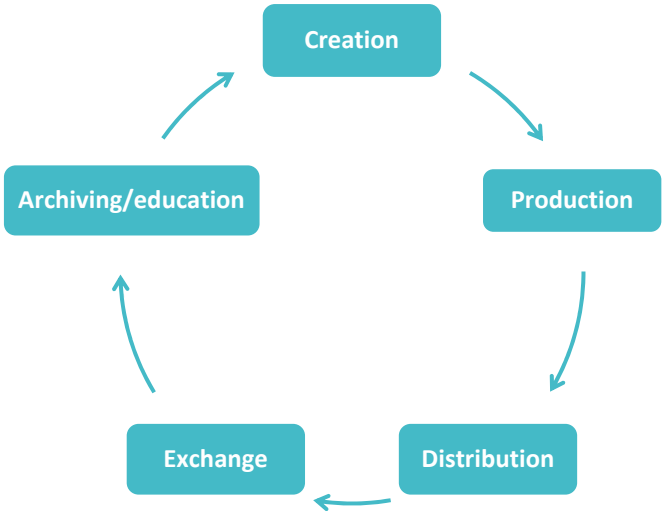
A number of iterations of the model have taken place: first, adding in the prior 'Conception', and 'Prototyping' phases; and, second (anticipating the circular economy), the final 'Archiving' and/or 'Reflection' stage. A parallel model was developed from a cultural studies perspective – the circuit of culture – having the phases 'Production', 'Consumption', 'Regulation', 'Representation', and 'Identity' (Du Gay, 1997). However, despite its similarities, this is a process of symbolic production.

The emergence of measures of the creative industries yielded a number of classification systems all of which provided an iteration of a 'core and periphery' model: defining 'core' creative arts, and then lesser, more peripheral (or creatively less intense) (Throsby, 2001). This echoed the regulatory discourse that prioritised state support for the arts, and provided an allocation model for funding. However, it did not treat the cultural industries as 'industries'. Despite its unprincipled selection of industries, the DCMS Creative Industries approach was a step in the right direction (Department for Culture Media & Sport, 1998; DCMS, 2003).

The next step was to establish a principled selection of which industries to include. The UNESCO Framework for Cultural Statistics established that (UNESCO Institute for Statistics and Statistics, 2009). It had two dimensions: the 'breadth' which was the range of 'cultural expressions' (or industries) which covered 'Heritage', 'Arts', 'Media' and 'Functional Creations'. This was a clear signal of the convergences of public and private funding and activities in the field of culture. However, analytically, the critical innovation here was the inclusion of a 'depth' dimension, that is the cycle of cultural production that each 'cultural expression' (or industry) moves through.

These cycles are defined as five ideal-typical steps: 'Creation/Ideation', 'Production', 'Distribution', 'Exchange' and 'Archiving'. As noted above, it is critical that it is represented as a cycle, not a linear chain; moreover, one that it is imbedded in society and space. Hence, it is often characterised as a cultural ecosystem.

Figure 1. Cultural Industries Production System (source: Pratt, 2000)



As a model, it helps guide analysis, and does not substitute for it. The actual form of cultural production is constantly changing and convergence of product forms and production processes takes place, each of which conferring its particular strategic advantages. Where these advantages fall and who thus benefits from these, are the realm of governance: and governance can structure, or be a response to, the system. A key

characteristic of the 'system' in practice is the iterative and heuristic feedback process: this results in the 'blurring of the edges' between the ideal typical steps.

The five ideal-typical steps of the cycle of cultural production are to interpreted as follows:

Creation: As for the first step of the cycle, this is the part where a new idea, process or approach is devised. The notion of creation used is a social one: namely, that what is 'new' is relationally situated and conditional. So, it involves a 'creative process', a method ('design' being an example), but also reference to history and to previous creation (the stage before). Sometimes, this is referred to as 'ideation': having ideas.

Production: Having an idea, or creating a 'new' thing, remains provisional, potential and conditional until it can be 'stabilised' or made/produced. This is what is often termed the 'prototype stage'; usually, this is also developed into the multiple or mass production phase. The costs of the products and the potential access to it are affected by technology and labour costs, as well as producer decisions and regulatory standards. Also related, but we separate them out here to 'Exchange', are marketing and advertising.

Distribution/Circulation: Having products, even if they are new and unusual, are unformed and inaccessible unless these can be moved/migrated to markets/audiences. Physical distribution is clearly a key issue here in terms of access and reach, as well as the development of digital approaches that potentially overcome some of these barriers. Generally, the distribution system, or distribution platform, is expensive to develop and susceptible to monopoly control.

Exchange: This is the stage of engagement of the product of service with the audience or customer. It is a critical moment of information exchange, and one where e/valuation takes place: from market transaction, to participation and critique. Values are made and stabilised at this stage. Hence, the marketing, advertising and expectation setting is the link with distribution. In the experience economy, and particularly the cultural economy, the 'negotiation' of value is a key element of the transaction/exchange and institutions have been developed to normalise and 'de-risk' this stage. The engagement of the audience/consumer is also directly shaped by advertising and marketing: linking back to the previous stages, this process can literally determine which products are made available for production and distribution.

Archiving: As cultural value is relational, history and cultural diversity will always be in dialogue with the present. Moreover, the process of reflection and learning, or rejection, is part of the critical appreciation of culture. Culture archiving both creates normative structures to enable cultural production systems, as well as the disruptive elements to facilitate new approaches. This stage would also include education (of audiences/consumers, creative practitioners), institutions such as universities and media systems, as well as repositories such as libraries, museums and galleries are required to achieve this. This is where 'heritage' is identified and then later mobilised via the production system; more generally, it is the resource from which new ideas are developed, which leads us back to 'Creation'.

The conceptual origins of the cultural industries production system (CIPS) are both shared commodity chain analyses, and value chain analyses (Pratt, 2008). Whilst we have identified the ideal-typical formations, commodity chain analysis has evolved, via value-chain approaches, a variety of empirical regularities in institutional forms (market, modular, relational, captive and hierarchical). Whereas Global Value Chain (GVC)

analysis has developed an approach that is generalised to all sectors of the economy, the analysis of the cultural industries has been focused on one sector and its industries (a field that has been under explored from a GVC perspective). The CIPS approach creates a means to pivot GVC analyses to the specificities of the cultural economy.

Initial analyses have shown how the spatial location of particular phases of the CIPS echo the 'spatial division' of labour found in other industries (Pratt, 1997). The particular consequences are experiences in terms of employment and opportunity, as well as value added activities. Moreover, exploratory analyses have shown that particularity of institutional forms structure the trans-local operation and value acquisition in the sector (Pratt and Gornostaeva, 2009). Examples of 'cultural commodity chain' analysis from the film and music industries have illustrated how local film subsidy, or local production, may be effective in attracting location shooting, but not at generating economic activity (Pratt, 2007a) or in retaining income (Pratt, 2007b).

2. Features of the network

2.1 Governance/organization of production networks

The governance dimension implies that interactions between firms along a production network exhibits some reflection of organisation rather than being simply random. Value chains are governed when indications concerning product, process, distribution and others are set and have consequences up or down the value chain. Governance is about power, which in the network is asymmetric, and about value (Appelbaum & Gereffi, 1994; Greco, 2016; Smith *et al*., 2002). In the network, implying upstream and downstream activities, there are key actors who take responsibility – therefore have the power- for the inter-firm division of labour. As already indicated, the value chain describes the set of different economic activities required to bring a product or service from his design and conceptualisation to the final consumer, through intermediate production phases which add value to each step. Each product has different technologies and market conditions that give rise to different governance configuration. Governance, therefore, refers to the way in which such key actors (namely lead firms) organise and control inter-organisational links (e.g. the relationships among writers, publishers, distribution companies, readers/libraries) and to the way in which they capture value along the chain. Value can be created, accrued/enhanced and captured/appropriated.

Value creation is a process through which an additional economic surplus is generated through the transformation of raw material and inputs into a new product of the provision of a service. It implies any action leading for instance to the introduction of new products, new processes, new functions, to the development of new ideas, etc.

Value is usually enhanced/accrued by improving workers' skills or introducing new technologies (processes of upgrading). Value enhancement implies that actors add tangible or/and intangible inputs to an existing product or service to make it more valuable.

Value appropriation/capture usually refers to two related processes: inter-organisational value appropriation (i.e., how value is distributed among the firms within a network) and intra-organisational value appropriation (i.e., once value is appropriated by a firm, how it is being distributed among the firm's internal stakeholders).

Value appropriation at inter-organisational level might occur on the basis a few aspects. The most common ones in economic literature are: i) market-based bargaining power; ii) relation-based power; iii) isolating mechanisms; and iv) opportunity-based action. That is:

i) An actor gains market-based bargaining power by managing to establish unilateral dependence, as it this actor less dependent on others because of its resources, capacities, knowledge, information asymmetries, etc. It is therefore non-substitutable, so that switching costs or replacement costs increase (e.g. if a firm owns specific/ unique technologies, capital, knowledge and/or skills that no one else owns, it has more bargaining power than those others - and the same holds for an intermediary who is able to control the market).

ii) Relation-based power derives from one's ability to extract a greater portion of the value associated with an existing relation. While bargaining power derives from the ownership of scarce resources, relation-based power is conveyed on the basis of reputation, status, prestige or legacy (e.g. if a publisher is working with a very famous writer, it acquires a higher relation-based power among publishers).

iii & iv) Value can be appropriated also as result of opportunistic actions and so-called isolating mechanism that are employed to inhibit the expropriation of value by others and to hinder possible upgrading processes through patenting, trade secrets, intellectual property rights, etc. (e.g. if a clothing brand patented a fabric which is manufactured by a producer, the latter has less value appropriation power as it cannot exploit that knowledge for market purposes).

Intra-organisational value appropriation implies the uneven distribution of revenues among firms' different actors: owners, workers, stakeholders. The most common forms of exploitation of creative labour reflect precisely this dimension.

Value capture is, thus, influenced by a series of aspects that are both internal and external to the network. The intensity of competition in the different nodes/phases of the network is another key aspect affecting value appropriation.

To define the governance dimension, it is therefore important to identify:

1) Who are the actors, comprised of the intermediaries, of the network;

2) What is being exchanged among them (e.g. material assets, financial assets, human resource assets, technological assets, information, knowledge) - it is important to consider both the static aspects (e.g. which actor owns an asset and where it is located) and the dynamic aspects (e.g. ideas, information and/or knowledge flows among actors);

3) How the relationships among actors are organised and managed.

The scope is to go beyond the positionality in a network and assess power: who holds the capacity to exercise power and the ways in which it is exercised within a network of relations. Power and the modality through which it is exercised should be conceived as dynamic: companies can modify their situation through upgrading

processes. In an increasingly high number of industries value accruing has shifted from tangible to intangible activities in the value chain.

2.1 Spatial features

The spatial features of GPNs are clearly connected to the work of the network and its embeddedness, and due to the unbundling of value chains, production may now, more than before, show very different spatial patterns as actors are located at different places. However, space and spatial aspects have been severely undertheorized and understudied within the GPN approach in general (Coe and Yeung, 2015: 67-68) and especially so regarding GPNs in the CCI (see Kloosterman *et al*., 2019, European Commission, 2017, EY, 2015). Nevertheless, the more recent concept of the GPN as presented by Coe and Yeung (2015) does include reflections on the spatial features ("GPN 2.0") as discussed below. Within a relational approach, such as the GPN approach, there are obviously long rows of factors that have important spatial components, but here we focus on the spatial *features*. Coe and Young (2015) directly relate to "territoriality", including also the role of region and value capture. A first comment, however, is that "global" in Coe and Yeung's conception of global production networks is a:

> "*metaphoric device to bring together all of the (…) scales – local, regional, national, macro-regional and international – in our conceptualization of the spatial organization and geographical reach of these networks. Very few production networks are truly global in their organizational integration of constituent value activities, with the exception perhaps of final distribution (for example, retailing) and consumption*." (Coe and Yeung 2015: 70)

Focus on the spatial aspects is, accordingly, not on the global level. Rather, Coe and Yeung argue that the "where"-question of value activity (value creation, enhancement and capture) is 'extremely important' for understanding GPNs' role for economic development, thereby thus pointing to the level where the actors of the networks are actually situated. To paraphrase Coe and Yeung's, a GPN analysis "deals with how actors in various global production networks are anchored in different places and regions" (2015: 68). Accordingly, the spatial features are directly related to how the actors are embedded in a place.

However, that actors are locally anchored does not mean that they do not operate on various levels of scale. Coe and Yeung discuss territoriality of the GPNs along two 'dimensions" – one vertical dimension (from the global to the local) and one horizontal dimension. Regarding the vertical dimension, they argue that the:

> …"*spatial scope of actors, from the global to the local, is highly specific to the organizational configuration of each global production network. Some corporate functions are globally organized and implemented (for example, strategic planning and product mandates in headquarters), whereas other value activities can be reproduced in several supra-national regions (for example, manufacturing, sales, and servicing). Value activities in global production networks can also be highly local because crucial inputs and/or knowhow are grounded in particular localities. This localization of global production networks is particularly prevalent in the initial phase of producing goods and/or services*." (2015: 68)

At what level of scale are the various stages of the chain of production best understood? The various stages are territorially organised differently and:

> "*The idea of a global production network, then, should be understood territorially as a spatial ensemble of different local and regionally centred value activities. While the final goods and services are global in their consumption, their production is far less integrated globally than the literature has suggested. Instead, the globality of these networks should be reconceptualized along the global-local continuum as a dynamic scalar configuration of value activities across diverse localities, urban and regional economies, nation states, and macro-regional formations*." (Coe and Yeung 2015: 71)

Thus, for the CICERONE-project, it is important to understand at what spatial scale along the global-local continuum the actors in the various stages of a network operate, and to discover what this scale means for their value-adding activities.

Regarding the horizontal dimension, Coe and Yeung relate this to "territorial embeddedness" (see further below). Even if the headquarter function of a certain firm has a global spatial scope (its value activities operate at the global level) it will need to be located somewhere. From that 'point in space', its "horizontal interface" will connect it to the locality itself with spill-over effects and diffusion of value activity. Coe and Yeung argue that "[t]his is where territoriality matters most, because, […] different localities can be gradually articulated into global production networks, and possibilities for value capture enhanced" (2015: 72).

Apart from the local scale, they also discuss the regional scale and the interface a region may have with other regions. These regions, however, do not necessarily have to be directly bordering each other but could be located in various countries or continents. Nevertheless, the value activities in one region might be forcefully competing with those of another and this competition can be formative for the value activities in both regions. In this sense, competition forms the bases of the horizontal interface, even if they are not located next to each other.

For the CICERONE-project, it is important to understand how the various spatial scales (local, regional, national, macro-regional) involved at the various stages in a GPN are articulating with, horizontally viewed, corresponding localities and regions around Europe and beyond.

Finally, what is divided here into two dimensions (vertical and horizontal) should, according to Coe and Yeung, actually be viewed together in order to solve the "analytical dilemma of production networks operating on a global scale and, yet, producing very local and regional impacts" (2015: 73). They argue:

> "*By explicitly incorporating the interfaces of these vertical-horizontal dimensions into our conception of territoriality in GPN 2.0, we can develop a better understanding of how and why development can occur in particular localities and regions at the same time as national development strategies may fail to 'resonate better', […] with the competitive dynamics of global production networks.*" (Coe and Yeung 2015: 74)

Nevertheless, even if both the vertical and horizontal dimensions are important to understand the territoriality of GPNs, the various territorial aspects are not equally important regarding the role of GPNs for economic development. Coe and Yeung argue that the sub-national 'regional' level, rather than the national or any other level, is the most relevant level in understanding economic development (2015: 167-168), and that "[a]nalytically, we suggest that the kinds of firms located within a particular territory, the roles they perform within wider global production networks, and the possibilities those roles afford for value capture are of prime importance" (2015: 169).

Regarding the question what such "region" could be, Coe and Yeung do not primarily refer to administrative regions, but stress that it could be:

> "*city states, city regions, states/provinces or parts thereof – but we are generally referring to a sub-national space with some kind of coherence to its economic relationships and, importantly, some kind of territorial governance apparatus*." (2015: 168)

Local firms may either directly "plug in" the GPN or via other local firms that already have such direct connection (Coe and Yeung 2015: 180). For the CICERONE-project it is of critical interest how this "strategic coupling" happens in such regions in relation to different stages of a GPN. More generally, Coe and Yeung argue that there are three main "modes" of this strategic coupling (indigenous, functional, structural), each of which affecting the possibilities for value capture (2015: 185). The indigenous mode is the one that is most likely to capture the most value, and the strategic one the least. Coe and Yeung also state that, typically, a region only rarely possesses more than one mode, but that it is possible, in fact, for regions to progress from one mode to another (2015: 188). Thus, it would seem central, in a European perspective and for the CICERONE-project, to identify what regions show what mode of strategic coupling, and to discuss how the region might progress to the "indigenous mode", which implies better opportunities to capture value. Potentially, the four main indicators (capital flows; organisational ecology; knowledge/technology; employment), as discussed by Coe and Yeung (2015: 182) in the context of how a GPN, in developmental terms, impacts on a region, may give important leads when identifying these regions.

However, the focus on regions should not mean that the role of states and supranational institutions such as EU is downplayed. How these states and supranational institutions impact on the region's possibilities is also of crucial interest as regions themselves have extensive vertical and horizontal relations, and are embedded within larger governance structures.

Before moving on to discuss embeddedness more in detail, it could be useful to develop more extensively the spatial features of global production networks that are not explicated by Coe and Yeung (2015), but that might still be important for understanding the networks, strategic coupling and opportunities for regional economic development. Coe and Yeung's (2015) approach is an actor-centred approach, but when discussing territoriality and spatial aspects this approach does not go into the details of the spatial form of the networks, or of the spatial pattern of actors within the different stages in the chain. Are actors dispersed within the region or concentrated in cities? Are networks "long" and transgressing several borders of various kind (social, cultural, linguistic etc.)? If so, in or between what stages? What micro-locational choices have been made? And what are the character of the places involved (large city, small town, rural)? Highlighting these and other spatial features of global production networks, in combination with the scaled two-dimensional territoriality that now dominate the spatial understanding of the GPN concept, would give further underpinnings for constructing supportive policy.

2.2 Embeddedness

Another beneficial feature of GPN analysis, which differentiates it from earlier Global Commodity Chain and Global Value Chain frameworks, is the consideration of embeddedness. The concept originates from economic sociology (Polyani, 1944) and was later much influenced by Granovetter's writing of economics as being "in

networks of interpersonal relations" (1985: 504) - (for reviews on embeddedness see e.g. Hess, 2004; Dequech, 2003). This entails an understanding that all activities involved in value creation and value capture are situated, shaped and deeply embedded in the social, economic and political environments of the places they are located in. From a GPN perspective, Coe and Yeung (2015) have developed an understanding of embeddedness as consisting of three forms – societal, network and territorial embeddedness. Below follows a brief exploration of how Coe and Yeung's three forms of embeddedness can be operationalised in our CCI analysis.

Societal embeddedness

Societal embeddedness refers to the role that socio-cultural, institutional and historical origins matter in the actions taken by economic actors in different places (Coe & Yeung 2015). Coe & Yeung exemplify this by describing the cultural, social and economic values a firm or a person brings with him or her when investing overseas, expecting certain kinds of labour conditions and management. For CCIs the societal embeddedness also can include how the societal and historical values of a place determines what is considered *aesthetically* valuable, such as the long held distinction between "high" and "low" art in Europe. "High" art was, and to some extent still is, held as more valuable and important, even though its market competitiveness is lower and its existence many timed dependent on governmental initiatives (Throsby, 2008).

Network embeddedness

Understanding network embeddedness is to analyse the linkages between different actors in a GPN as to understand the functional and social connectivity and stability of these relationships, which acts as "bridges" between 'nodes' in the GPN. These actors are both inter-firm, intra-firm and extra-firm (such as government representatives, higher education centres and NGOs). Given the multifarious nature of the industries within the CCI, the organisational structure and stability of networks within CCI will presumably differ greatly. As Lorenzen (2018) points out, most CCI have products with a short life-cycle and a constant need for producing new content. This leads to new forms of temporary networks in the shape of short-term projects of collaborating freelancers, where new configurations of projects are frequent. The embeddedness of networks can potentially transcend the specific project, with social relationships and spatial proximity becoming important factors in the formation of new groups of collaborators. Gaining access to CCI production networks can therefore also be complex, as they are intrinsically social and typically comprise mechanisms of inclusion and exclusion. Being complex social constructions, they are also path-dependently reproducing particular patterns. The presence of intermediaries, such as literary agents in publishing, have, as a result, become crucial 'nodes' in networks for gaining both access to networks and bargaining power towards lead firms (Hill & Power, 2005). It is worth noting that there are industries in the CCI with longer life cycles, which are part of smaller and potentially more stable networks (Lorenzen, 2018). The relationships between members of networks are determinant for the formation of new networks, reconfigurations and the stability of existing ones and are a key aspect for the CICERONE-project to investigate.

Territorial embeddedness

Analysing the territorial embeddedness of CCI production networks is to seek an understanding of how its anchored in places. To this extent, it is similar to Zukin and Di Maggio's political embeddedness (1990). All value creating and capturing activity is located in a place and is shaped (and constrained) through the regulatory and institutional context that presides there. Exploring such contexts involves investigating (labour)

laws, IPR, subsidies, tax incentives and other institutional frameworks that affect the structure and activities of the CCIs in their locales.

The institutional context can also be determinant for where CCIs chose to locate and embed, as have been repeatedly shown in writings on e.g. the film industry. National and regional policies, and subsidies and incentives have become an integral part of how the film industry in Europe organize their production. More than 30 percent of films are nowadays made as co-productions between different countries as a means to disperse risks, receive benefits and raise funds (Morawetz *et al*., 2007; Morawetz, 2009; Lorenzen, 2018). Run-off industries from Hollywood typically locate in places that have profitable incentives and tax breaks (Mossig, 2008; Coe, 2015). The presence of the CCI can, in turn, lead to a reshaping of the place itself, as its presence potentially brings positive spillover effects, such as job opportunities in new agglomerations (Coe, 2015). Anticipating these rewards, the CCIs are increasingly seen as tools of local economic development, and policies affecting CCIs exists on all scales. Understanding how these types of incentives shape and are being shaped by the CCI in question, is crucial (Coe, 2015). Analysing the territorial embeddedness of the CCI therefore needs to be multi-scalar, as regulatory frameworks shaping the CCI can be found at both macro-regional, national and local scales.

Although the three-part concept of embeddedness, as understood by Coe and Yeung (2015), presents a good point of departure for investigating the embeddedness of CCIs, it can be beneficial to the CICERONE project to keep in mind that the concept can be placed at the intersection of different fields of studies. The understanding of how CCIs are embedded in their societal and spatial settings could be further developed by involving perspectives from other fields, such as economic sociology and organisational studies. One example of such an additional perspective is policy research, where the transfer and mobility of policies also is considered a social practice. Successful policies tend to be adopted and copied by governments at different scales. During the transfer, the policy will be adjusted and mutates due to divergent political landscapes, social environments and understanding of concepts. When analysing CCI and their production networks, taking inputs from related fields into account can thus widen our understanding of, for example, territorial embeddedness. The emphasis and point of departure should be grounded in Coe and Yeung's (2015) definition of embeddedness, but not necessarily be limited to it.

3. Dimensions of variation in Cultural Industries Production Systems

Our project focuses on CCIs, that is, those industries producing or distributing cultural goods and services. As already stated by Allen Scott in his pioneering study *The Cultural Economy of Cities* (2000: 8), "the cultural economy is represented by an extremely wide variety of manufacturing and service activities". This wide variety, even within particular categories of CCIs, has often been noted in more comprehensive studies of these activities (e.g. Pratt, 1997; Power, 2003; European Commission, 2017). In this project, we have adopted an industry-approach and will investigate a series of case studies for selected CCIs. To be able to position these case studies properly within the larger field of CCIs, we need to explore the *key dimensions of variation* between (inter-sectoral) and within (intra-sectoral) the selected industries, which are relevant from our GPN perspective.

The subsectoral classification in CCI is, in principle, based on the similarity of the products on final markets of consumer goods and services (e.g. music or architectural design). The industries thus comprise (significant parts of) bundles of value chains or global production networks that are devoted to particular categories of products like, for a matter of consistency, music or architectural design. Below, we first explore the key dimensions of variation of these categories of products, as they are closely related to the spatio-organisational format of the production networks. That is, to put it bluntly, the GPN of haute couture – highly expensive, one-off, complex man-made, tangible products requiring highly skilled craft workers - will likely display rather different patterns of value creation, value capture as well as labour conditions than that of, say, book publishing in which products are relatively cheap, often produced in large series, and increasingly digital.

To make it even more complex, we also encounter significant differences within industries. Within the subsector of fashion design, for instance, we find a brand marketer (Zara) and a fashion maison (Versace). As the first is characterised by producing clothing that competes on prices, it concentrates on cost-cutting strategies (including outsourcing and off-shoring). Versace puts much more emphasis on originality and quality of its products, and much of its production takes place in nearby factories (Reimer, 2009; d'Ovidio, 2015). These differences play out in each of the different stages of the global production networks.

In the remainder of this section, we first briefly identify key product characteristics that we expect to be closely related to business models and, therefore, to the organisation of the production in networks. We then look at more general dimensions of the Cultural Industries Production Systems. As the above example of Zara and Versace indicated, we expect that characteristics of the product and those of the GPN are strongly interrelated. To what extent that is indeed the case and how these relationships are formed will be explored in the case studies. This will also contribute to our insights how these GPNs are shaped and how they function in terms of labour conditions, their impact on local and regional economies, and their role in fostering local identities. For now, it suffices to identify the key dimensions of variation in Cultural Industries Production Systems.

3.1 Product and content characteristics

The first dimension that we should consider is whether we are dealing with goods or services. Goods are objects where the location of production does not need to coincide with that of the buyer or final consumer. Goods are typically sold to consumers elsewhere and this holds even more for digital goods than tangible goods, as the former can be easily transferred across long distances through the internet as for instance with digital formats of music. Services, on the other hand, constitute an activity or labour and not an object and they typically have to be produced in the presence of consumers often close physical proximity. A performance is a cultural service where producers and consumers have to get together physically, whereas a recording of that same performance in whichever tangible or intangible form is a good. The creation phase in that case is, evidently, the same but the production phase is quite different.

The activities under the heading of the selected CCIs have been lumped together on the basis of the similarity of their products like music or architectural design. Still, these industries are very much aggregates and they group together rather numerous heterogeneous activities. For each of the selected CCIs, we have to make a brief scan of the composition of the bundle of products in terms of tangible/digital goods and services to gauge the bandwidth of variation. Especially now with digitisation, boundaries are becoming more blurred

between different types of products and even between different sectors of CCIs (European Commission, 2017). This scan should also shed light on these dynamics.

A second dimension concerns the intrinsic complexity of the products. The staging of a large-scale opera performance is quite different from that of a folk music concert in a small venue or the architectural design of a new kitchen compared to that of an iconic office tower or stadium. The GPNs generating these cultural products will also be very different. These differences are relevant for goods as well as services and can be observed between but especially within CCI.

A third dimension is related to the positioning of the products in the final markets. Are we dealing with products aimed at niches or mainstream, competing on price or uniqueness (quality, cultural expression), with small or large series? These strategic choices made by firms or key actors in the CCIs are linked to the spatio-organisational format of the GPN as clearly shown by the contrasting cases of Zara and Versace.

The fourth dimension of products which impacts on the format of the GPNs in CCIs is the ability of the products to travel borders. Products of CCIs distinguish themselves by definition through their symbolic or aesthetic value. Some of these products – e.g. poetry or radio programmes ("Export of radiobroadcasting and content is limited", European Commission, 2017: 71) – tend to be confined to linguistic or even regional, subcultural or ethnic markets. This dimension is especially relevant for those cultural products for which linguistic expression is important.

The fifth dimension refers to the regulatory regime of the context. This comprises subsidies (e.g. French film industry), rules (e.g. minimal content of national language music on the radio; legally stipulated role of architects in design and construction process) and Intellectual Property Rights (not just the formal rules and regulations but also the enforcement). With processes of digitisation, ever more products can be streamed and downloaded (even architectural designs of buildings) almost anywhere thereby undermining national regulatory regimes. Still, creation and production of cultural goods and services have to touch down somewhere and are subject to regulatory regimes.

The sixth dimension concerns technological development. The development of technology represents a crucial element for variation in CCIs and their PNs. The digitisation of many cultural products, the technological improvements in production, the communication technologies and so on are all elements that introduce deep transformation in the industries. Moreover, a firm can gain power or upgrade its position within the network by introducing new technology.

3.2 Key dimensions of variation in Cultural Industries Production Systems

To be able to position the case studies of WP2, we also have to look at the broader context of the production system. Above, we have already identified different forms of embeddedness and dimensions of governance which are related to how GPNs are shaped and function.

A first dimension is the geographical scope of the network. Production networks can be more or less extended from a geographical point of view. Extended networks tend to characterise industries with low barriers to

entry, limited workers' competences, extreme mobile capital and greater competition, especially in the production phase. Less extended networks (shorter, more concentrated) are usually more capital intensive and require more sophisticated skills.

A second dimension of variation of a GPN is the configuration of the network. Are we dealing with a systems house (Scott, 2000) benefiting from scale advantages in creation, production, distribution/circulation or exchange and dominating the whole network? Or are we dealing with a much more dispersed production system with many interlinked small firms? Can we observe a more buyer-driven or more supply-driven GPN? What kind of relationships (arm's length or part of recurrent trust-based social networks) characterise which stage?

A second dimension concerns the accumulation, namely the type of rent and value (creation, enhancement, appropriation). According to Neil Coe (2015: 488), there are three types of rent relevant for GPNs in CCIs: - technological rents, human resource rents, and brand rents. Value (Appelbaum & Gereffi 1994) can be created, accrued/enhanced and captured/appropriated. As discussed above, value is created through a process which generate an additional economic surplus. Value enhancement is obtained by improving workers' skills or introducing new technologies (process of upgrading). Value appropriation/capture usually refers to both inter-organisational and intra-organisational value appropriation. We have summarised the different components in Figure 1.[1]

Figure 1. Analytical grid for Cultural and Creative Industry Global Production Networks

Product phases					
	Creation	**Production**	**Distribution/circulation**	**Exchange**	**Archiving**
Regulatory environment					
Product characteristics					
Labour relations					
Finance					
Type of rent					
Locational characteristics					
Scale (dis)advantages					
Market characteristics					
Competitive strategy					
Power configurations					

What we have, then, is rather large numbers of variables which are only partly quantifiable. We are interested in how and why GPN in CCIS function: therefore, the unit of analysis is the network and this means not only

[1] We would like thank Suzan van Kempen for her suggestions regarding the construction of this analytical grid.

looking at the nodes but also, and more importantly, at the relations among nodes We also want to cover contextual conditions as they are highly relevant in addressing the how and why questions. In addition, the boundaries between the phenomenon and context are not very clear. These are all arguments for in-depth case studies (Yin, 2003). The above grid will enable us to position our cases in the wider context of the CCIs.

4. Format case studies selection

4.1 Methodology

This research adopts a mixed methods approach of investigation. This means using both quantitative and qualitative tools, primary and secondary data. Quantitative data will be used to have a factual overview of European GPNs in CCIs. Qualitative research includes the choice of a case study approach which is extensively used to produce novel knowledge in the field and constitute the base for further research. *Case study selection privileges the transnational reach of GPNs in CCIs in Europe*. Such a selection brings new knowledge on the contribution of the EU CCIs to economic development, sustainability, social cohesion and (local) identity. Therefore, three main dimensions will be considered:

1) the explicative power of case studies, so that the analysis will produce a 'substantive' representativeness of the EU CCIs rather than their statistical one; in other words, case studies will provide an understanding of dynamics, mechanisms, relationships, etc. useful for grasping such industries;

2) the feasibility of the empirical research, so that each team will be able to perform an in-depth case study analysis;

3) the territorial distribution of the network: the interest lies in GPNs of CCIs that cross the borders of single European countries so that the majority (if not all) of the nodes constituting the networks are located within European borders.

The research makes also use of existing literature on CCIs but assumes a novel viewpoint. *The observation unit is in fact the network: this implies to look at the single nodes and their relationships.*

The empirical research on GPNs in CCIs is composed by several interconnected research dimensions: an industry description, an analysis for the identification of the case-studies and the case-studies themselves.

4.2 Preliminary industry analysis for case study selection

The preliminary description of the European CCIs in terms of GPNs aims to identify the case-studies to be addressed with the qualitative in-depth analysis. Such a description focuses essentially on the organisation of GPNs.

In order to select our case studies a number of steps are needed. The first involves the identification of the phases of the production network for each industry. With reference to the CCIs, these are (see section 1): creation, production, distribution/circulation, exchange, archive. To provide an example, the input-output chain of the fashion industry and festivals could be presented as follows:

	Fashion	**Festival**
Creation	Design	Conception/ideas
Production	Textile, clothing	Organisation, fundraising, stage building, making costumes
Distribution/circulation	Fashion shows, distribution, shops	Marketing. Advertising
Exchange	Retail, showroom	Festival, event
Archiving	Archive	Live recording

Then, the second step involves a brief literature review on the extant literature in order to identify the main typologies of governance structures characterising the industry. For instance, when we oversimplify the fashion industry, one could imagine having only two typologies, one of which exemplified by a brand marketer (Zara) and the other by a fashion *maison* (Versace):

1) Zara: not too much effort on conception (they basically copy what others do); production is made in both owned firms and by subcontractors located where labour cost is low (the quality is not so important, nor the "made in..."); marketing made essentially through stores;

2) Versace: a lot of effort on the conception phase; production made in near-by factories, where also the quality of production is important; a lot of effort on marketing.

In this specific example, with two distinct typologies, the implication would be that the CICERONE consortium would need two case studies to give an account of the PNs of the design industry in Europe. However beyond the standard network configurations, it should also account for possible national variations and specificities.

4.3 European production networks in CCIs: an overview

Literature analysis and quantitative (secondary) data will be used to explore and describe the features of each industry, its quantitative consistence and its European production network, its role in the European economy, the territorial distribution of its companies and the typical business models.

The literature review, for each of the industry being studied, comprises:

1) Configuration of the PN (input-output structure) in industry X;
2) Prevailing governance typology in industry X (e.g. power relationships, barriers to entry, value adding mechanisms, labour processes/skills …) + possible governance typologies considering single interfirm relationships;

3) Key socio-institutional dimensions affecting network configuration/dynamics (e.g. fiscal incentives, property rights, labour legislation, path dependent cultural aspects) at various levels (European, national, regional);
4) (possible) Changes over time (e.g. digitalisation, technologies, ---) + possible firms upgrading processes (value capture strategies);
5) (possible) National variations and specificities (e.g. the French film industry is very much supported by national funds).

The statistical mapping of PN of CCIs in Europe comprises:

1) Statistical data at the EU level (by Nuts 1, 2, 3 if possible) on number of firms, employment, VA, ... relative to the *different network phases* (e.g. creation, production, distribution, etc.) composing the PNs of the 8 selected CCIs;
2) Cartographic mapping of those data to answer the question of: *where is what*? European regions turn off and on following the industries or some of their specific phases. In this regard it is likely that the most added value activities –i.e. conception, distribution– concentrate in cities and central regions, while the production phases are likely to agglomerate in the marginal ones).

5. The fieldwork: the case studies

The empirical research for each selected case study will revolve around four main tasks (see section 5.1). In addition, a specific analysis of the socio-economic implications of networks' activities and dynamics on (local) development is to be carried out (see section 5.2). Section 5.3, then, presents a brief stylised summary of tasks, questions and outcomes.

5.1 The network configuration

Task 1: The analysis of the specific input-output structure

This task involves the identification and analysis of the input-output structure, which involves goods and services, as well as a range of supporting activities with reference to the creative production systems (see D1.1 and section 1 of this report). The input-output structure is typically represented as a set of value chain boxes connected by arrows that show the flows of tangible and intangible goods and services. This is a critical task in order to map the added value at different stages in the chain, and to gather particularly interesting information (e.g., type of companies involved -SMEs, large ones, private or public companies-, type of jobs, wages, workforce typology, etc.).

Task 2: The analysis of spatial organisation of the networks

This task implies to consider the geographical reach of the network. The territorial localisation of each node of the case-study needs to be identified and analysed. This is important because the 'where question' helps the

understanding how value creation, enhancement and appropriation through PNs matter for economic development. This analysis concerns the geographical localisation of the activities involved in the networks by paying attention to the multiple geographical scales involved (e.g. global, European, national, regional, etc.). The aim is to assess in what ways GPNs are anchored in different places and regions and yet operate at multiple scales.

Task 3: The analysis of power relations within GPNs: the governance dimension

Governance refers to authority and power relationships along the network. It helps identifying the distribution of material and immaterial resources (e.g. financial, material and human resources) within them (see D1.1 and section 2.1 of this report). In practice, governance analysis requires the identification of the lead firm(s) in the industry; its/their location; how it/they interact(s) with suppliers, clients, intermediaries, etc.; its/their source of influence and power, paying attention also to possible upgrading processes along the network.

This task address the following questions:

a) Where and how is value created? Where and how is it enhanced/accrued? Where and how is it captured/appropriated?

b) What are the working conditions in the various segments of the network? How much agency do workers have within and acrossnodes?

c) How, where and by whom knowledge is produced, transferred and used?

d) Are there any conflicts within the network or related to it?

e) Have firms in the network pursued upgrading strategies? What have they consisted of (e.g. introducing new technologies, hired more skilled workers, etc.)?

Task 4: The analysis of the institutional conditions which influence the network: the territorial and societal embeddedness

This task analyses networks' territorial embeddedness. It involves the analysis of the comprehensive set of institutional conditions and policies that influence the organisation of GPNs and their participation in the global economy - laws, subsidies, tax incentives and other institutional frameworks that shape the structure and activities of the CCIs at different levels. It also involves considering a firms' reliance on particular resources such as labour costs, infrastructures, access to finance, etc. as well as to highly territorially embedded cultures i.e. concerning consumption. Societal embeddedness refers to the importance of values, attitudes, cultural elements that shape the production of good and services, their aesthetics, meanings, value.

5.2 The contribution to development

How does a production network contribute to the development of European regions? To address this questions, an analysis is required that considers the variety of ways in which a regional economy 'couples' with a production network (e.g. functional, structural, indigenous) (see also D1.1).

Secondly, this analysis also aims to assess the concrete returns of such a relationship in terms of wages, formation of new economic activities, new jobs, taxation, revenues, technological improvement, new cultural and aesthetic canons, and so on, which all contribute to the socio-economic development of European regions.

5.3 A brief stylized summary of tasks, questions and outcomes

Table 2. Preliminary industry analysis for case study selection (to be carried out for each industry)

Tasks	Research questions	Main sources	Outcomes
Identification of the key phases of the production network for industry X	What is the final product/service of the industry? What phases are necessary to bring it from conception to the end market? What are the underlying economic activities of each phase? How do the previously identified activities fall into the scheme used for CCIs (creation, production, distribution/circulation, exchange, archiving)?	Literature review, general knowledge, grey literature, media (newspapers, magazines, etc.) possible interviews with key actors/privileged informants in the field	Input-output structure: a drawing and a description
Identification of inter-organisational relationships / governance	How is the network organised? How is each phase featured? Who are the key actors and why? Can you say anything about value production, accruing and appropriation? In your opinion how, by whom and at which stage value is produced/accrued/appropriated? Are there any intermediaries?	Literature review, general knowledge, grey literature, media (newspapers, magazines, etc.), possible interviews to key actors / privileged informants in the field	Identification of main governance typologies

	what are their roles? What is exchanged in the network? At which stage/phase? (material or immaterial goods, knowledge, technology, skills) Are there differences (e.g. territorial variations, differences between mainstream and independent production, differences among contents, or products)		
Towards the identification of case studies	Can you describe (very generally) one case study? Are there any case studies that might be interested to study? Why?	Literature review, general knowledge, grey literature, media (newspapers, magazines, etc), possible interviews to key actors / privileged informants in the field	(preliminary) selection of case studies

Table 3. European production networks in CCIs: an overview (to be carried out for each sector)

Tasks	Research questions	Main sources	Outcomes
Identification of the key phases of the production network	Starting from the previously identified input-output structure, what can you add? Are there any missing activities? Are there any other phases?	Results of the preliminary description, extensive literature review, possible interviews to key actors / privileged informants	Updated (if necessary) input-output structure and review of the literature about it
Prevailing governance typology and other possible governance typologies	Following the literature, what is the prevailing governance typology? Starting from the previously identified governance typologies, what can you add? How do power relationships, barriers to entry, value adding mechanisms, labour processes/skills intervene in the definition of typologies of governance?	Results of the preliminary description, extensive literature review	Precise description of the governance typologies and literature review

Key socio-institutional dimensions affecting network configuration/dynamics	How does regulation (fiscal incentives, property rights, labour legislation) at various territorial levels (European, national, regional) affect the network configuration? How do socio-cultural elements (path dependency, cultural or historical elements) in European countries affect the network configuration? How does technology affect the network configuration?	Extensive literature review, possible interview with key actor or privileged informants	Theoretical discussion and literature review on the role of (territorial and societal) embeddedness in the network configuration in the European CCIs
Changes over time	Have there been any variations or changes over time in the network configuration? Has there been any major innovation (both in terms of technology and in terms of cultural elements) in the network? How did the network modify accordingly? Has there been any firms that took advantages from that (firms' upgrading processes)	Extensive literature review, possible interview with key actor or privileged informants	Discussion (theoretically founded) and literature review about variation over time in the network configuration
National variations and specificities	Can you identify any relevant territorial variation in networks/cultural industries? Are there European countries showing particular differences in the network configuration? Why?	Extensive literature review, possible interview with key actor or privileged informants	Discussion (theoretically founded) and literature review about variation over space in the network configuration
Valuing the contribution of the PN of industry X on the European economy	What is the contribution of the PN to the European economy?	Quantitative data (e.g. Eurostat) at the EU level (by Nuts 1, 2,3) on number of firms, employment, VA, relative to the different stages composing the PN of industry X	Quantitative analysis of PNs in industry X
Cartographic mapping of the PNs of industry X	Where are the different phases of the PNs located in Europe?	Quantitative data (e.g. Eurostat) at the EU	An "Atlas" of the GPNs of CCIs in Europe

in Europe	Where are the most value-added activities? And the less value-added ones?	level (by Nuts 1, 2,3) on number of firms, employment, VA, relative to the different stages composing the PN of industry X	

Table 4. Fieldwork: the case studies (to be carried out for each selected case-study)

Tasks	Research questions	Main sources	Outcomes
Analysis of the specific input-output structure	Which firms/companies are involved in each phase? What kind of (tangible/intangible) goods or services are created and exchanged in each phase? How/where do goods and services flow among phase?	Qualitative and in-depth analysis	A detailed description of the input-output structure
Analysis of spatial organisation of the networks	Where is each node located?	Qualitative and in-depth analysis	The geographical reach of the network: cartography and description
Analysis of the governance of the network	Where and how is value created? Where and how is it enhanced/accrued? Where and how is it captured/appropriated? What are the working conditions in the various segments of the network? How much agency do workers have within and across nodes? How, where and by whom knowledge is produced, transferred and used? Are there any conflicts within the network or related to it? Have firms in the network pursued upgrading strategies? What have they consisted of (e.g.	Qualitative and in-depth analysis	A detailed investigation of the power-relations of the network addressing both at intra-firm and inter-firm levels

	introducing new technologies, hired more skilled workers, etc.)?		
Analysis of the institutional conditions	What institutional conditions influence the overall organisation of the network? What specific policies influence the overall organisation of the network? What institutional conditions influence the nodes and their relation within the network? What specific policies influence the nodes and their relation within the network? Do firms in the network rely on particular local resources, such as labour costs, infrastructures, access to finance? Do they rely on highly territorially embedded cultures, consumption, styles or other cultural elements? Are there any local values, attitudes, or other cultural dimensions that shape the local production and/or the network?	Qualitative and in-depth analysis; literature review, secondary analysis of published empirical research, policies publication	A detailed examination of the territorial and societal embeddedness of the network and its nodes
How does a production network contribute to the development of European regions?	How does the regional economy couple with the production network? Is it a functional, structural or indigenous relation? How do the firms in the network contribute to the local economy and society (in terms of wages, local taxation, push to the formation of new economic activities, new jobs, technological/cultural/aesthetic spill-over)	Qualitative and in-depth analysis; literature review, secondary analysis of published empirical research, policies publication	A detailed and critical examination of the factual contribution to the socio-economic development of European regions

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