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The Digital Age and Crisis: The Challenges Facing Culture

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An analysis of culture in the light of the crisis points to three lessons.

First, the crisis has highlighted the strong attachment of the French to cultural venues and goods. Despite significant geographical disparities in terms of spending and facilities, the country's cultural venues are important for developing dynamic regions, and cultural practices make a positive contribution to people's well-being. The failure to take this type of effects into account explains why the economy of culture is underestimated.

Second, although cultural actors, both public and private, have benefited from significant public support in the face of Covid-19, the pandemic has nevertheless impacted certain cultural sectors and organizations, such as associations, small businesses and the establishments which particularly rely on personal attendance.

Finally, the crisis has accelerated a paradigm shift: the cultural sector has gradually moved from a logic of scarcity, typical of the 1950s when France's Ministry of Culture was founded, to a logic of abundance. The development of digital technology in recent years has fuelled a drop in production and distribution costs, leading to increase competition over the output of works, services and content. This digitisation has gone hand-in-hand with a weakening of the level of protection for rights holders and less transparency concerning the data used by service providers.

As a result, the acceleration of digitisation together and pandemic challenges are calling for cultural policy reshaping. To this end, we recommend the following three guidelines.

First, it is necessary to implement a "culture in the regions" plan. The recovery plan must rebalance cultural public funding throughout the country, while supporting cultural associations and the most fragile companies as they exit from the state loan guarantee programme (PGE).

Second, there is an urgent need to adopt and deploy a genuine digital strategy for culture. In particular, we recommend accelerating the modernisation of cultural sectors as part of the recovery plan, improving digital training for cultural players, creating a mediation authority to ensure that contracts comply with French law, and setting up a commission to promote best practices in terms of the transparency of data activity, collection and exploitation.

Third, we call for strengthening the public service role of culture. To do this, we suggest the following: centring the culture pass on learning by doing and on the offers proposed by cultural establishments; increasing the funding and scope of action of the Arte channel, in order to make it the "go-to" cultural platform on a European scale; redirecting public subsidies towards a better balance between the creation and dissemination of cultural works and content over time; and guaranteeing the autonomy of the public audiovisual sector by maintaining a dedicated permanent resource. These various measures would make possible to put France's culture economy on a firm basis and strengthen its influence.

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The health crisis has shown that the cultural sector is the object of particularly strong collective attention and emotions. The support for bookshops, the frustration caused by the cancellation of festivals and the occupation of theatres have highlighted the attachment of French people to cultural venues, which are a source of regional and local resilience and individual's well-being, as this Note shows using original data. The crisis has also revealed the economic fragility of certain cultural sectors, particularly those whose business model is based on physical attendance. The malaise expressed by the artistic community is arising due not only to the limitations, cancellations and postponements of activities but also to the accelerating digitisation of services and cultural consumption. Faced with these developments, the crisis has revived the debate on public support for culture in France. This debate is all the more complex as the French cultural economy is made up of many sectors whose characteristics and needs often differ significantly. It is impossible for this Note to go into detail on all of these sectors. This is why it deals with cross-cutting issues and aims to participate constructively in the debate on the economic situation of culture in France, at a time of great uncertainty for professionals. We draw up a series of observations and put forward several recommendations for reviving an ambitious cultural policy, that is capable of uniting everyone involved in culture around the digital age, without abandoning the objective of cultural democratisation throughout the country.

The specificities of the cultural "sector"

An atypical market

Culture is not a standard market. Classical economists associated it with the realm of unproductive labour and viewed spending on the arts as a low-efficiency investment. The atypical character of cultural markets is explained by the properties of cultural goods and services: unique goods dependent on a personal experienced, prototypes, whose value and price differ from the sum of their components and their production costs.[1]

The economy of culture has two sides: companies oriented towards the production of dedicated goods and services, and a set of organizations supported by the public authorities. The analysis of Broadway shows economy by Baumol and Bowen in the mid-1960s had a lasting impact on the cultural world.[2] These two researchers argued that, since the work of the artist on stage is a "consumed" good, productivity gains would be marginal: because the actor or musician cannot be replaced by machines, the sector must increase its prices at the risk of reserving consumption for the richest or reducing quality in order to lower production costs. The analytical path opened up by these authors has made possible to deepen the standard conception of culture. Indeed, the different fine arts and cultural industries maintain variable relationships to technology: some are based on a singular combination of raw materials, like painting or sculpture, while others are linked to the development of information technology, starting with video games. The variances in employment regimes and business models can be understood from this differentiated relationship to technology. The table hereafter presents an overview by distinguishing between non-reproducible goods, cultural industries, creative industries and leisure industries. Culture is thus made up of a mosaic of sectors, with various types of solidarity. The historical domains of culture, such as a country's cultural heritage, are dependent on tourism, with the attractiveness of different areas manifested through filming permits, for example, while historical sites and buildings are regularly honoured by various fashion, luxury or contemporary art events and performances.[3]

This approach makes it possible to consider the evolution of the French cultural economy in a new light. The arrival of the Internet has been presented as a crisis factor of the music and the press industries, but it can just as easily be described as a key to their renewal, through new inter- and intra-sectoral solidarities, or the development of business models based on subscription or online advertising.

The economic weight of culture

If we stick to the definition adopted by the Ministry of Culture, the direct weight of culture, i.e. the added value of all the cultural branches, was 49.2 billion euros in 2019, i.e. 2.3% of the economy as a whole. This share has remained stable since 2013 but is down compared to the year 2000. The different cultural sectors nevertheless make varying contributions. Audiovisual represents (24%) more than live performances, video games, recorded music, architectural heritage, cinemas, radio, artistic and cultural education combined (19% cumulatively, see Figure 1). Despite this diversity, culture is a highly concentrated sector: 0.1% of cultural enterprises produce half of the cultural turnover (*cf*. INSEE/DEPS).

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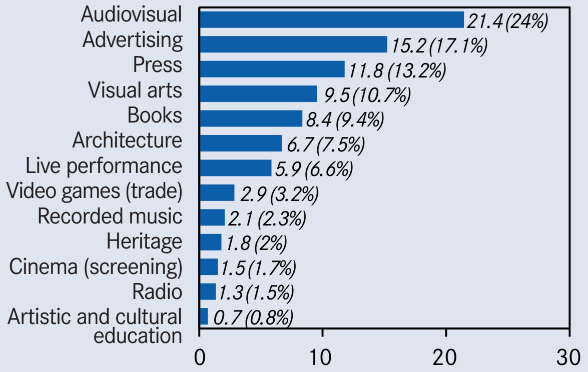
[1] Karpik L. (2007): *L'économie des singularités*, Gallimard.

[2] Baumol W.J. and W. Bowen (1966): *Performing Arts. The Economic Dilemma: A Study of Problems Common to Theater, Opera, Music and Dance*, New York, The Twentieth Century Fund.

[3] Ernst&Young Report (2021): *Panorama européen des industries culturelles et créatives*.

1. Turnover and weight of sectors in the culture economy, 2019
(in billions of euros and as a percentage)



Note: Audiovisual mainly includes production for generalist channels, production of film and television programmes, cinema film production, video game publishing, and post-cinema film and video publishing.

Sources: DEPS, SNEP, CNC, MCC.

But a quantification in terms of turnover does not give the full picture of the culture economy. In some sectors (e.g. video, music, information), consumers are turning to online services at very low or no cost. As a result, the total contributions of these sectors to GDP may fall, even as consumers gain access to a variety of goods and services in digital form.[4] The size of the French cultural economy and the direction of change are therefore poorly estimated by existing measures of GDP. Given such phenomena as free consultations in libraries, online information, access to a constantly enriched heritage at no extra cost, the success of subscription-sharing offers for the same service between several people (for VoD offers from 2 to 6 euros), there is a need to go beyond traditional accounting methods to analyse cultural economies, especially since it plays an important role in personal well-being, a dimension not taken into account in the usual measures of its contribution to national wealth.

Finding 1. Developments in the culture sector are leading to an underestimation of its economic importance.

Culture and well-being at the local level

In France, cultural sectors benefit from significant support from the public authorities, in the form of orders, subsidies, earmarked taxes, tax exemptions and regulations. Alongside the State's action, the municipalities and inter-municipal bodies are the most important level in terms of public cultural expenditure. They spend an average of 114 euros per inhabitant, or 6% of their budget. INSEE's SRCV (Statistics on Resources and Living Conditions) surveys of several thousand individuals indicate that most people go out at least once a year to a museum, heritage site, theatre or other live performance venue (56.2%). Among those who do not, only 6% say that this is because facilities are too far away geographically, while 17% cite insufficient financial resources and 37% a lack of interest.[5]

While there is no "cultural desert" in France, there are major geographical disparities in terms of public spending. When we're combining municipal spending and subsidies to cultural associations,[6] spending in Paris reaches 300

Summary typology of the cultural sector

	Sectors with unique assets	Traditional industries	Cultural industries Media	Software Indust.	Other creative industries	Leisure industries
Areas	– Heritage – Live performance – Architecture – Fine arts	– Book publishing – Recorded music – Cinema	– Television – Press – Radio	– Video game – Weblog – Vlog – Podcast	– Fashion – Design – Gastronomy – Advertising	– Amusement parks – Cultural tourism
Support(s)	– Work	– Copy/file	– Copy/file	– File	– Work, series	– Service
Model(s)	– Ordering/Ticketing	– Distribution	– Distribution in two-sided markets	– Subscription	– Licence	– Ticketing
Dominant employment	– Contractor/Part-timer	– Employee/Part-timer	– Employee/Part-timer	– Self-employed/Employed	– Employee/Freelancer	– Employee/Seasonal worker

Source: Authors.

4 Brynjolfsson E., F. Eggers and A. Gannamaneni (2018): "Using Massive Online Choice Experiments to Measure Changes in Well-Being", *NBER Working Paper Series*, no 24514, April.

5 See Beuve J., M. Péron and C. Poux (2022): "Culture, bien-être et territoires", *Focus du CAE*, no 79, February. It should be noted that 40% of respondents declaring that they do not have any cultural practices do not provide an analysable answer ("Other" reason).

6 The 263,400 cultural associations active in 2013 –which are based on a mixture of voluntary work (3.5 million volunteers) and paid employment (200,000 paid jobs)– play an essential role in providing access to culture throughout the country.

euros per inhabitant, compared to only 80 euros for isolated cities (urban units made up of a single municipality, most often small or medium-sized towns). This unequal ratio is reflected in the number of theatres and performance venues per inhabitant, with five times as many such facilities per inhabitant in Paris (5.6 per 100,000 inhabitants) as in the isolated towns (1.1).[7] It is also in the Paris region of Île-de-France that we find the majority of cultural schools, training, production and distribution companies, as well as the highest proportion of artistic jobs.[8] It is home to many national operators, which partly justifies the concentration of the Ministry's expenditure in the area. As a result, public policy tends to reinforce the concentration of cultural activities in the wider Paris area.

It is important to pay particular attention to these differences in spending as they have implications for the local economies, the attractiveness of an area and the well-being of the people there. Support for culture is likely to generate positive externalities, as a cultural event such as a festival has a positive impact on tourist numbers and the local economy as a whole.[9] Cultural spending also has an impact on indicators of well-being. Using French data, Beuve *et al*. (2022) combine a territorial and individual approach to study the links between cultural spending, people's habits and well-being. The results, summarised in Box 1, show that a municipality's spending on culture has a positive impact on cultural practices and well-being, whether the latter is approximated at the local level by electoral abstention rates or at the individual level by large-scale surveys.

Finding 2. Even though a municipality's spending on culture has a positive impact on the well-being of its inhabitants, major geographical disparities persist in terms of cultural spending and facilities.

1. Culture, well-being and France's regions and towns

By combining a static and dynamic approach that is both regional and individual, and by mobilising several databases and indicators on French municipalities and French citizens, Beuve *et al*. (2022) propose an original study of the links between local cultural spending, cultural practices and people's well-being.[a]

Municipal cultural expenditure and electoral abstention

An econometric analysis shows a significant and robust link between cultural spending per capita and abstention in elections, which can be taken as a measure of well-being and political regional integration. For two municipalities that are comparable in size and composition (share of workers, unemployment rate, average level of education, etc.) and with similar levels of abstention in the 2014 municipal elections, the municipality that allocated 100 euros more to cultural operating expenses had on average a 0.9% lower abstention rate in the 2020 municipal elections.

Cultural practices and individual well-being

The analysis at the individual level concludes that there is a strong relationship between people's cultural practices and their satisfaction. Declaring having at least one cultural activity is associated with a declared satisfaction equivalent to a 1% increase in the household's disposable income (+ 420 euros per year). This relationship rises to a 1.65% increase for respondents with regular cultural practices (+ 693 euros per year). Furthermore, living in a municipality that spends more on culture also increases the probability that an inhabitant will have cultural practices, thus indirectly favouring local citizens' well-being.

[a] Beuve J., M. Péron and C. Poux (2022): "Culture, bien-être et territoires", *Focus du CAE*, no 079-2022, February.

The culture sector in the light of the pandemic

A differentiated impact depending on the sector

These observations are particularly relevant in the context of the Covid-19 pandemic. Indeed, taken as a whole, culture has been the se ctor hardest hit by the pandemic, alongside aeronautics and tourism, with a 16% drop in turnover in 2020.[10] However, not all cultural sectors have experienced the same difficulties: we have distinguished three categories. First, the ones which have been heavily impacted (cinemas, live performance); second, those that have been more moderately affected (radio, architecture, visual arts, audiovisual, film production, press); and finally, those that have experienced stability or an increase (recorded music, book publishing and video games, see Figure 2).[11]

[7] See Beuve *et al*. (2022), *op. cit*.

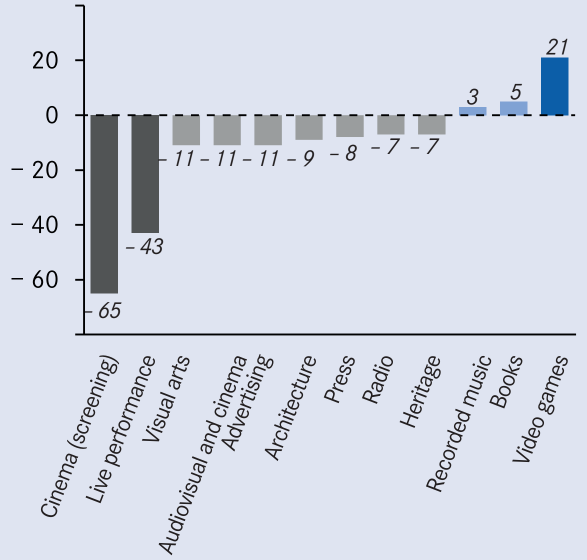
[8] See Menger P-M. (1993): "L'hégémonie parisienne. Économie et politique de la gravitation artistique", *Annales. Histoire, Sciences Sociales*, vol. 48, no 6 and Karam A. and S. de la Provôté (2019): "Mission d'information sur les nouveaux territoires de la culture", *Rapport d'information du Sénat*, no 210, Session 2019-2020.

[9] See Négrier E. and M. Vidal (2009): "L''impact économique de la culture : réel défi et fausses pistes", *Economia della Cultura*, no 4, pp. 487-498.

[10] This refers to the commercial cultural sector. See Bourlès L. and Y. Nicolas (2021): "Impact de la crise sanitaire sur l'évolution des chiffres d'affaires enregistrés dans le champ de la culture", *Note de Conjoncture DEPS/ministère de la Culture*, no 2021#1, January.

[11] Inequalities also exist between sectors. In the publishing sector, there are differences according to the size of the shops and the profile of the publishers, with a smaller rebound for large bookshops than for small and medium-sized ones, while small publishers in the regions have been very much affected by the cancellation of literary events.

2. Changes in turnover in 2020 (in %)



Reading: These figures relate to turnover, not value added, and only deal with the market sector (17% of cultural production is non-market).
Source: DEPS.

These differenciations are linked to cyclical and structural factors. The complete or partial closure of cultural venues and road shows (due to access protocols) have stopped, then slowed the activity event-based: live shows, festivals, exhibitions, literary meetings, etc., with no or few compensating alternatives for consumers (virtual visits to exhibitions, filming of shows, etc.).

Support schemes: Effective, but not very visible

With cash injections that offset the losses, support measures have made it possible to safeguard jobs and minimise the cessation of activity for most cultural organizations. The success of these measures has been due in part to their composite nature: the earmarking of part of the recovery plan for culture, the release of additional credits to deal with the duration of the crisis, indirect aid via France's "intermittence" system for technicians and artists (almost 950 million euros for the "lost year", then extensions), eligibility for aid or non-earmarked loans (partial unemployment, the PGE State-guaranteed loan). The CMOs (collective management organizations) were able to convert funds linked to cultural activities into financial aid for rights holders who were particularly affected by the pandemic. Emergency funds were also set up to support authors and performers not eligible for government measures.

In addition, some sectors or market segments benefited from measures that are not part of the programme for recovery from the pandemic but of cultural policy generally. For example, the Culture Pass (300 euros per young person at age 18) has had a positive effect on book purchases, particularly manga books (sales rose by 124% between January and August 2021 compared to the same period in 2020). French authors have not always benefited from this not negligible market support.

As the Court of Auditors have pointed out in several notes,[12] the multiplicity of support measures has partly concealed the contrasting effects on different categories of organizations and sectors. Although the level of support put in place thanks to the joint effort of State and local authorities has been unparalleled in Europe,[13] the aggregate, serial and multi-level nature of the support explains why it has been underestimated in the public debate. The concentration of certain aid on large national operators, particularly in the heritage sector, may have accentuated this feeling, while small companies and creative collectives were going through the crisis with great difficulty. In a study using original bank data to analyse the financial situation of companies between November 2019 and November 2021, Fize *et al*. (2022) show that SMEs in the cultural sector were hit harder than SMEs in the rest of the economy. The number of SMEs experiencing great difficulty has doubled, while this figure has remained stable in the rest of the economy (see Figure 3), even though take-up of the PGEs (state-guaranteed loans) by cultural SMEs is almost identical to that of the rest of the economy, at around 31% (and much lower than that observed among SMEs in the accommodation and catering sector: 49%).[14]

Finding 3. The crisis has hit sectors unevenly. Cultural organizations, both public and private, were protected during the pandemic thanks to public support. However, the category of very small companies in difficulty has increased significantly.

Digitization of culture

Digital: A substitution effect

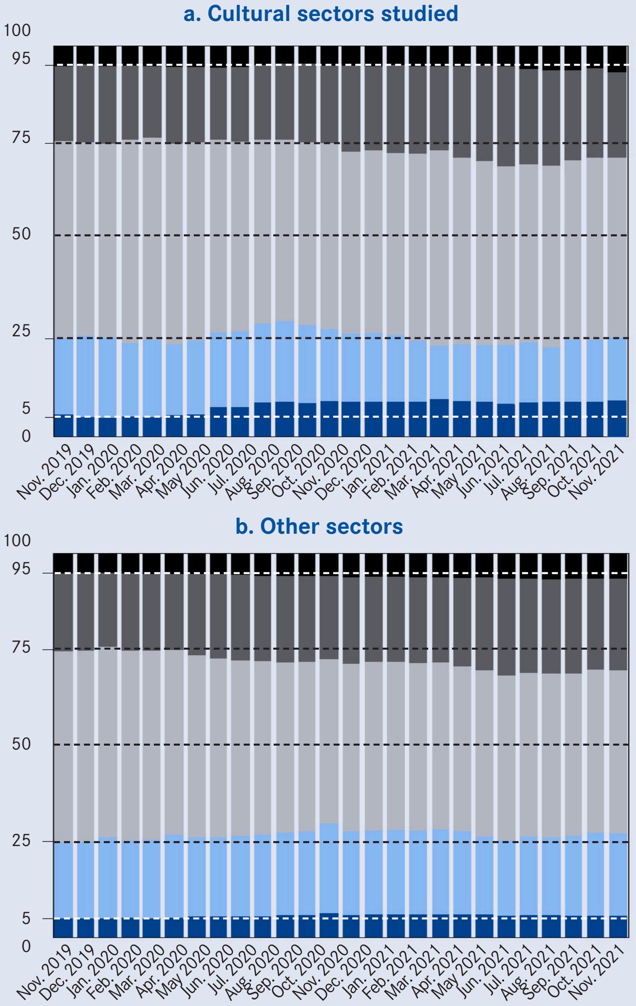
Generally speaking, one of the main consequences of the pandemic is the acceleration of the cultural economies digitalization movement that began at the turn of the 2000s, when the development of the Internet, software and computers

[12] Cour des comptes (2021a): *Le soutien du ministère de la Culture au spectacle vivant pendant la crise de la Covid-19*, Audit Flash, September. Cour des comptes (2021b): *Les mesures spécifiques de soutien au cinéma prises lors de la crise sanitaire*, Audit Flash, September. Cour des comptes (2021c): *Le soutien spécifique de l'État au patrimoine pendant la crise sanitaire. Exercice 2020: 1st half year 2021*, Audit Flash, September.

[13] For an international comparison, see the UNESCO Report: Naylor R., J. Todd, M. Moretto and R. Traverso (2021): *Les industries culturelles et créatives face à la pandémie de Covid-19*, UNESCO Report, 62 p. Salvador E., T. Navarrete and A. Srakar (2022): *Cultural Industries and the Covid-19 Pandemic. A European Focus*, Routledge.

[14] See Fize E., T. Le Calvé and C. Poux (2022): "La crise a-t-elle laissé la culture en jachère ? Analyse à partir de donn ées bancaires", *Focus du CAE*, no 080-2022, February.

3. Distribution of very small enterprises according to their financial situation
(comparison of cultural sectors *vs*. other sectors) (in %)

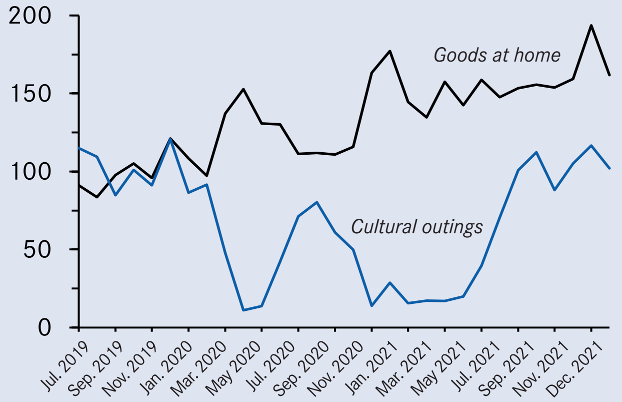


Champ : 67 079 TPE dont 635 des secteurs culturels.

Reading: : In April 2020, the level of household credit card spending on cultural products at home (subscriptions, streaming, video-on-demand, dematerialised video games, etc.) was 151% of what it was on average between July 2019 and February 2020, while the level of card spending on cultural outings (cinema, shows, concerts, galleries, tourist attractions, etc.) was only 11% of what it was on average between July 2019 and February 2020.

Source: Fize E. , T. Le Calvé and C. Poux (2022): "La crise a-t-elle laissé la culture en jachère ? Analyse à partir de données bancaires", *Focus du CAE*, no 080-2022, February.

4. Credit card expenditure
(base index 100: July 2019-February 2020)



Scope: 234,700 households.

Reading: In April 2020, the level of household credit card spending on cultural products at home (subscriptions, streaming, video-on-demand, dematerialised video games, etc.) was 151% of what it was on average between July 2019 and February 2020, while the level of card spending on cultural outings (cinema, shows, concerts, galleries, tourist attractions, etc.) was only 11% of what it was on average between July 2019 and February 2020.

Source: Fize, E., Le Calvé, T. and C. Poux (2022): "La crise a-t-elle laissé la culture en jachère ? Analyse à partir de données bancaires", *Focus du CAE*, no 80-2022, February.

gave rise to a cultural content production and distribution expansion process. In 2020, the audience for streaming platforms increased by 37% and the time spent each day on the Internet rose by 15%.[15] In 2021, 83% of Internet users, i.e. 43 million French[16] people, made use of dematerialised cultural goods. However, as shown in Figure 4, lockdowns have fuelled the substitution of predominantly physical consumption by remote and digitalized consumption.

Digital: A paradigm shift for the cultural sectors

This development corresponds to a paradigm shift for culture, going from a logic of scarcity in the 1960s to a logic of abundance and competition for visibility in the 2010s. Digital technologies have reduced the production and distribution costs of works and services,[17] and the different sectors have consequently begun to digitise their production and distribution tools. The increase in equipment and connections has encouraged the circulation and exchange of accessible content, and this increased production of information by consumers has in turn led to lowering promotional costs. The use of data on consumer preferences and behaviour is making it possible to adjust production and individualise distribution. In doing so, digital technologies have fuelled a dynamic of increasing returns for producers and distributors of cultural goods and services, i.e. reduced production costs and better access for users to content diversity. In the early 2000s, distributors in the US offered nearly 100,000 different books, 15,000 albums and 1,500 films. Amazon alone had 10 to 30 times more items in each of these categories by the mid-2000s.[18] Network effects, a particularly decisive phenomena in both cultural field and digital sector, has been amplified by the increase in storage capacity and the ease with which cultural goods and services can be distributed as digital files. A server makes it possible to store millions of references and to distribute them by downloading procedures whose

[15] Médiamétrie (2020): *L'année internet 2020*, 17 February.

[16] Hadopi (2021): *Baromètre de la consommation de biens culturels dématérialisés*, 17 November.

[17] Bourreau M. and M. Gensollen (2006): "L'impact d'Internet et des technologies de l'information et de la communication sur l'industrie de la musique enregistrée", *Revue d'Économie Industrielle*, no 116, pp. 31-70.

[18] Brynjolfsson E., Y. Hu and M.D. Smith (2006): "From Niches to Riches: Anatomy of the Long Tail", *Sloan Management Review*, vol. 47, no 4, pp. 67-71.

performance has been constantly improving. This dynamic explains why contents that are not widely disseminated can be profitable, and how the marginal storage and distribution costs of large-scale dissemination today are low or close to zero.[19] This networked dissemination alleviates the time and space constraints that weighed on traditional consumption basins, making it possible to internationalize local productions (so-called "niche markets") in the same way as international productions (so-called "mainstream") are being delocalized.

However, by lowering production costs, digitisation has accentuated the trend towards expanding supply and intensifying competition for visibility.[20] For example, in the movie industry, the increase if production had already gone hand in hand with a shortening of their life cycle in movie theatres, despite an exceptional network in France (more than 2,000 movie theatres and 6 100 screens in 2021);[21] digital technology is accelerating this trend. An imbalance between creation and distribution has also long been an issue for the performing arts.[22] Digital technology can help preserving the legacy of works, extending the distribution scale and broadening access to culture (see Box 2), but the question of visibility remains crucial.

Finding 4. Digital technology has lowered production and distribution costs, increasing and heightening competition for visibility of goods and services.

2. What digital model for the performing arts?

The period of the pandemic has been an opportunity for cultural institutions (museums, theatres, large concert halls) to develop their online catalogues. Several avenues are to be explored, particularly for the performing arts:

- The digitisation of broadcasting and the development of recordings represent a variable cost (from a few thousand to 300,000 euros), on which the quality of the final product depends. There is a support fund administered by the CNC with 30 million euros, as well as funding programmes run by television channels (including Arte); this fund's resources need to be developed;
- Although there is no specific short-term economic model for digital formats for the performing arts, so-called "general public" productions are generally successful in terms of online audiences: the major institutions (Covent Garden, the Met, the Paris Philharmonic, Opéra de Paris, etc.) have launched efforts in this direction. Systematically switching to platforms that exploit this content free of charge is not a solution for the future;
- This content represents a resource that is still too little used in the context of artistic cultural education, both in and out of school.

The competitive and regulatory challenges of the "platformisation" of culture

As a result of these developments, technology operators have positioned themselves at the heart of the value chain, at the intersection of different market segments and categories. First, these companies are capturing a growing share of the value based on information on cultural production and consumption (meta-data and meta-information), to the detriment of the traditional producers of cultural goods and services (studios, labels, press, television channels, etc.) and rights holders; they are benefitting from a comparative advantage in terms of infrastructure and intermediation.

Second, the major digital platforms, which are positioned from the outset on the cultural markets, have benefited the most from network effects (direct and indirect): books and video games for Amazon and Twitch, cinema and audiovisual for Netflix, music for Apple, advertising, information and music for Google and YouTube, information and advertising for Facebook, etc. At the same time, production and distribution tools have contributed to decompartmentalising creative activity, at the borders of the professional and amateur worlds, to the point of confusing emerging creative categories with the name of distribution services and companies: bloggers, streamers, youtubers, Instagrammers, etc. Various intermediaries, ranging from content aggregators to online

[19] Bourreau M., S. Maillard and F. Moreau (2015): "Une analyse économique du phénomène de la longue traîne dans les industries culturelles", *Revue Française d'Économie*, vol. XXX, no 2, pp. 216-179.

[20] For an account of these developments within the cultural sector, see Patino B. (2022): Te*mpête dans le bocal. La nouvelle civilisation du poisson rouge*, Grasset.

[21] This duration decreased by three weeks between 2000 and 2013 in France. In 2019, the level of 90% of theatrical admissions was reached, on average, in five weeks, *cf. Centre national et de l'image animée: Durée de vie des films inédits en salles* www.cnc.fr/cinema/etudes-et-rapports/duree-de-vie-des-films-inedits-en-salles_226082

[22] Between 2006 and 2014, the four national theatres (Comédie française, Odéon, Théâtre national de Strasbourg, Théâtre de la colline) presented 68 shows per year, with an average of 22 performances per show. The revenues were then insufficient to cover the costs of putting on and running the shows. The guidelines for the national theatres also tend to give priority to the objectives of creation over distribution. For the national and regional drama centres, "long" series of 10 compulsory performances for creations and 5.5 performances on average for all programming have been introduced, along with small touring shows for geographically or culturally remote audiences. But the results are still insufficient, cf. Loiseau A.P. Ciercoles and V. Cosse (coord.) (2014): *Évaluation de la politique en faveur du spectacle vivant : diagnostic*, Ministère de la Culture/DGCA. Available at www.vie-publique.fr/sites/default/files/rapport/pdf/154000335.pdf

service architects, have also appeared. From this point of view, the cultural promise arising with the Internet at the end of the 1990s, of democratizing production and diversifying supply, has been partly fulfilled.

These developments are raising the question of market concentration and domination by a few platforms.[23] Nevertheless, platforms are heterogenous. Three categories can be distinguished. The first one concerns the large digital companies (Amazon, Netflix, iTunes, Google, Spotify, etc.) that have claimed platform status since the end of the 2000s, even though they were founded earlier. The second group includes service offerings developed in the mid-2010s. These platforms, small in size and benefitting from public seed funding, claim to be independent and put forward alternative and complementary proposals to the dominant market players in various fields: books (Librest, Place des libraires), live performances (Artishoc, Soticket), cinema (Cinétek, La Toile), documentaries (Tenk), video games (1D Touch).[24] The third concerns traditional companies in cultural fields, which have been positioning themselves as platforms since the end of the 2010s to respond to competition from the large technological companies (Disney+ and Canal+ Series launched in 2019, Salto and HBO Max created in 2020). This plateformization trend concerns all sectors: online bookstores, concert ticketing, recorded music, video game streaming, video on demand, rights holders' services, radio aggregators, audiovisual publishers' platforms, etc. In 2021, Hadopi counted 424 legal services that offered online cultural contents in France: digital books (171), video on demand (110), catch-up television (63), music (57), podcasts (38), video games (35), images (18) and virtual reality (6).[25] This platformization process of the cultural economy (and its ongoing validation by European and French law)[26] represents four challenges, relating to the conditions of competition, the legal approval of platforms, the evolution of contracts and data transparency.

Competition

Although platforms have helped lower entry barriers, a few American companies capture the bulk of the market. This domination poses several risks of distortion of competition: free access constraints, unfair acquisitions, rent-seeking, etc. In addition, traditional operators have to deal with a restrictive national framework on their activity (tax charges, legal requirements, charters, etc.), which foreign platforms partly escape. The latter also practice tax optimization despite the progress made in the area of regulation. Guaranteeing conditions for fair competition therefore requires harmonization of the regulatory framework.

Legal authorisation of platforms

Platforms have different statuses and types of activity. The success of the concept is due precisely to the fact that it doesn't settle the thorny question of status organization: "host", active or passive,[27] integrated or independent, no specifying the nature of the service, the business model (advertising, subscription, sale) or the volume of activity.[28] The revamping of the regulatory framework has made it possible since 2021 to specify the status and responsibility of platforms as "content-sharing service providers"[29] and to distinguish between acts of representation and acts of content exploitation. Service providers now have to monitor this representation and exploitation, ensuring that rights are respected and that rights holders receive proportionate compensations. Regulators can fix the level of activity that defines the nature of the provider. In practice, the culture economy is dominated by a dozen of globally known companies.

Contracts

The major platforms have made strategic changes, either on their own volition and/or as a result of the extension of regulations. They now frequently combine the roles of host, broadcaster and producer. Netflix and Amazon are stepping up investment in the audiovisual field on the basis of legal and regulatory constraints. This development, while positive in terms of output, raises questions about the type of contracts and the preservation of copyright. Indeed, one of the negative spillovers from the legal recognition of content-sharing service providers is that the structure of contracts is changing, influenced by North American copyright practices. As cultural content and talent are with platforms international and global assets, the dominant companies try to secure them through acquisitions or production contracts that go beyond current practices and national regulatory framework in each country. In return, they are demanding exclusive operating rights, longer durations and supplementary rights (on broadcasting, possible extensions, adaptations, etc.).

[23] On this subject, see Bourreau M. and A. Perrot (2020): "Digital Platforms: Regulate Before it's Too Late", *Notes du CAE*, no 60, October.

[24] Thuillas O. and L. Wiart (2019): "Plateformes alternatives et coopérations d'acteurs : quels modèles d'accès aux contenus culturels", *TIC & Société*, vol. 13, no 1-2, pp. 13-41.

[25] See Hadopi (2021): *Baromètre de l'offre légale en 2021*, 22 December.

[26] The European Parliament's Audiovisual Media Services Directive (AVMS Directive 2018/1808), translated by the Order of 21 December 2020, renews the framework governing audiovisual media. It transposes into French law a series of expectations relating to the respect of copyright, the transparency of operations activity and the financing of French productions.

[27] This is the term used in the long-standing EU Directive of 2002.

[28] Gillepsie T. (2010): "The Politics of Platforms", *New Media and Society*, vol. 12, no. 3, pp. 347-364.

[29] *Cf. Loi relative à la régulation et à la protection de l'accès aux œuvres culturelles à l'ère numérique* [Law on the regulation and protection of access to cultural works in the digital era], *Journal Officiel*, 26 October 2021.

The dominant companies are thus using their positions to impose conditions on producers and songwriters, which are tending to become the norm for their competitors and subcontractors. Producers and authors are encouraged to sign contracts providing lesser rights protection, shorter remuneration life cycle, with fewer possibilities of contract renegotiation.

Data transparency

The dominant providers of content distribution are generating and capturing value through the information produced and exchanged over their platforms. Content producers and rights holders have no visibility on critical issues such as how audiences are counted, how remuneration scales are set, how tools for classifying and organizing catalogues are developed, how editorial decisions are made or how consumption is monitored. Many rights holders would like greater transparency at these different stages, more specifically in regard to the arbitration and administration of operating accounts, recommendation systems and payment systems.

Finding 5. The importation into France of Anglo-American copyright principles in content service providers' acquisition and production procedures has lowered the level of protection for producers and rights holders. In addition, there is a serious lack of transparency about data accounting procedures, payment scales and recommendation systems of service providers.

Rethinking cultural policy in the era of the pandemic and the digital age

The pandemic and this platerformization movement call for a major overhaul of cultural policy.[30] To do this, we make three recommendations: a plan for Regional cultural development, a genuine digital strategy for culture, and strengthening culture's public service role.

A plan for regional cultural development

Although culture is the subject of a democratisation policy, strong inequalities persist between different regions and within the population. The key elements of a reshaped cultural policy include: maintaining funding at the municipality level, ensuring a more equal distribution of expenditure per inhabitant on a nationwide scale, and strengthening the network of cultural facilities. This objective covers issues that are directly political: the best-equipped municipalities benefit from a lower abstention rate, and culture seems to play a role in social stability and confidence. It is therefore necessary to ensure a rebalancing of public support for culture, which is too strongly centred on Paris and its surroudings. By the same token, if the health crisis continues, public support for culture must be maintained throughout the country, particularly in the sectors most dependent on going-outs (notably movie theatres and live performance venues), small businesses and cultural associations, which represent an effective hyphen between cultural establishments and the population.[31]

Recommendation 1. Rebalance public support for culture across the country, help the most fragile companies wind up their PGE State-guaranteed loans and a continuous subsidies allocations for cultural associations.

Developing a real digital strategy for culture

The investment credits planned by the State for culture must be used to revive and modernise the sector. The national strategy for accelerating the cultural and creative industries (ICC) announced at the end of September 2021 by the Minister of Culture and the culture section of the France 2030 investment plan represent a budget of, respectively, 400 million euros (financed by the government's fourth programme for future investments) and 600 million euros. The 2030 plan specifies that the goal is "placing France once again at the forefront of content production" in a competition that has become global, where culture has become a matter of influence and sovereignty. Through this one-billion-euro investment in culture (over five years), the public authorities will play a role in supporting and encouraging cultural innovation, with a particular focus on digital technology.

In recent years, some cultural circles have indicated mistrust of digital technology. A prerequisite for this productive effort is therefore developing skills through a sustained training effort and improving the equipment of the cultural administrations and the institutions under their supervision. While culture might not always appear to be an attractive sector for students and young talents specialized in new technologies, the call for projects needs to support high-level training and the enrichment of digital skills in top schools and culturel institutions.

[30] As proof of the importance and topicality of these issues, Terranova has also just published a report on the subject of cultural industries, see Busson A., Y. Evrard and T. Paris (2022): *Quelles politiques pour les industries culturelles à l'ère du numérique*, Terranova Report, January.

[31] In September 2021, the Ministry of Culture identified 460 million euros of support operations already distributed around the country, see Ministère de la Culture (2021): *Le plan de relance dans les territoires*, September.

Recommendation 2. Devote part of the France 2030 investments to initial and ongoing training in digital technology, in order to place the relationship between cultural creation and digital technology at the heart of cultural actors' strategies and ensure the modernization of the cultural administrations' hardware and software.

Developing a genuine public digital policy requires the creation within the Ministry of Culture of a transversal service that coordinates the actions of the cultural industries with public operators. Developing this service must be a priority, with an inter-departmental service adapted to the specificities of digital technology (both transversal and contributive). This service could welcome "general interest entrepreneurs"[32] associated with the Ministry of Culture and the Ministry of Public Transformation and the Civil Service. With a view to country-wide coordination and the active mobilisation of local authorities, this system should be generalised within the regional directorates of cultural affairs (DRAC), by providing them with a digital liaison.

More generally, there is an urgent need for a clear and strategic vision of digital[33] cultural policy. First, all the institutions under the authority of the Ministry of Culture should unify their infrastructures in order to allow data interoperability and to provide cultural actors with internationally competitive services. Second, it is necessary to rely on the services and technical teams who are leaders in the digital processing of texts and images. The services of the BNF, the National Archives and the INA in particular have recognized expertise in this field. In order to continue to develop this expertise and to share it with other institutions, the digital service of the Ministry of Culture must pool these services and coordinate joint projects. Third, these different services should select and support projects within the framework of the "Innovative digital services" programme (set up in 2016), hosting and training the selected project leaders within a single incubator.

Recommendation 3. Deploy a genuine digital strategy for culture along three lines: data interoperability, the pooling of innovative cultural services, and a single incubator bringing together supported cultural projects.

As mentioned above, digitisation is exposing the cultural sector to competitive and regulatory challenges. It is not immune to the domination of North-American platforms. In order to preserve copyright protection and ensure the remuneration of creators, the independence of intermediaries and the long-term visibility of contents, an official body needs to be set up to ensure that practices comply with French law. The cinema ombudsman could serve as a model for this independent authority, either directly, by extending the ombudsman's prerogatives, or indirectly, via a new entity attached to the Audiovisual Communication Regulation Authority (ARCOM). Furthermore, one of the challenges posed by the dominant platforms is data opacity. In view of this, it is imperative to encourage the publication of data and to consolidate the expertise and investigation capacity of public administrative authorities and institutions (DEPS, CNC, CNM, CNL, ARCOM, PeREN). This lack of transparency on the platforms' data could thus be dealt with by establishing a public agency for surveys on cultural production, distribution and consumption, based on the systematisation of partnerships between the research departments of the various regulatory and administrative institutions. At the same time, a commission dedicated to promoting transparency on platform usage data could be created and placed under the supervision of the CNIL or ARCOM. Its task would be to define collective principles for data disclosure, aimed at users and professionals. Its membership could be composed in equal proportions of representatives of regulatory bodies, content distribution service providers, and rights holders (CMOs, private management representatives and professional unions).

Recommendation 4. Create a mediation authority to ensure that contracts comply with French law and set up a commission to promote good practice in data transparency.

Consolidating culture's public service role

The culture pass, a tool for cultural policy throughout the territory

Digitization has not reduced inequalities of access in terms of geography, gender and social categories. It has even accentuated the effects of age, with the under-25s spending more and more time on mobile screens, while professionals in the performing arts and the movie industry are reporting the ageing of their audiences. How can the decline in certain tendencies be halted and inequalities in access to culture reduced? Cultural socialization takes place mainly via three matrices: family and friends, education and associations. A programme for the future needs to take these levers into account, including by consolidating the place of culture in school time (dedicated time within and outside the school curriculum, outings, artists interventions, etc.). The culture pass is a tool that is increasingly well structured and identified

[32] The General Interest Entrepreneurs (IEG) programme selects specialists in technology, design and digital law to test and experiment on projects with government employees. For 10 months, they contribute their expertise. Within any type of administration (central or local government, operators or agencies), public officials are likely to host "IEGs" in their services, see https://eig.etalab.gouv.fr/

[33] See TMNLab Report, *État des lieux du numérique 2021*, available at http://www.tmnlab.com/etudes/État-des-lieux-du-numerique-2021

within the population, with eligibility now lowered to age 15. We propose setting aside at least 30% of the allocated to learning and practicing artistic and cultural disciplina. Early practising is indeed determinant of intense, sustainable and multi-faceted consumption. 30% of the pass could also be devoted to regional and local cultural offers (occasional or more established attendance –*via* a subscription– at a cultural establishment, book purchases). These two measures would contribute to boosting cultural practices throughout the country, by mobilizing an educational network, while supporting the local economy. The rest of the sum would be allocated to purchases in compliance with the rules already established (no Amazon, no Netflix, no Amazon Prime and no Disney, but possible access to French and European platforms).

Recommendation 5. Focus the Culture Pass on learning by doing and on local.

A European cultural platform

While platforms have become a dominant form of organization in the cultural field, the size of the domestic market and Europe's linguistic diversity have prevented national and European operators from competing with American and British companies. The public service has nevertheless adapted to the increased competition over funding and content visibility, in areas as innovative as podcasting (Radio France) and video on demand (Arte.Tv). Content must continue to be accessible via a platform centralizing the publicly supported offer, avoiding these contents of being commercially exploited by private platforms in a quasi-monopoly position. This objective concerns both the cultural industries and artistic fields that are not yet fully digitized. Indeed, during lockdowns, digital technology has occasionally made it possible to reach a public that has been internationalised and freed from the constraints of the audience gauge, giving greater visibility to shows that have been made permanently accessible (see Box 2). The "*Culture chez nous*" platform, launched by the Ministry of Culture in 2020, offers a space for centralizing recordings of shows supported by public funds, an offer that is still relatively restricted and poorly edited. This type of initiative represents a limited but strategic market, on which Netflix and YouTube have already positioned themselves. In order to develop it, the exploitation rights must include a clause allowing producers of live performances to benefit from rights on these shows (the exploitation rights being for the benefit of the recording's producer). Furthermore, the possibility of collaborating with Arte and establishing a European network for the distribution of productions by national institutions and venues should be explored.

Indeed, the Arte channel has recognised know-how in this area (the aggregation and editorialization of content). The channel has already deployed a European platform, with a complete range of contents. It could be entrusted with the task of developing recordings, aggregating content, bringing together all categories of programmes and encouraging their development. In order to change its scale and enter the international competition for content, this platform would require more substantial funding from the State: tripling the programmes on the Arte platform would require an investment of 35 million euros per year over three years. The French presidency of the European Union could be an opportunity to allocate additional funds to this platform with a cultural and European vocation. In addition, the question of free access arises. Various subscription models could be envisaged.

Recommendation 6. Increase Arte's funding and scope of action to make it the cultural platform of reference on a European scale.

Guaranteeing the autonomy of public service broadcasting

Public service broadcasting is an integral part of a range of tools for disseminating culture to the greatest number of people. Its autonomy must be guaranteed. This issue has three dimensions: the scope of public broadcasting at national and local level (France Télévisions, Arte France, Radio France, France Médias Monde, Institut national de l'audiovisuel and TV5 Monde); its financing (which is essentially based on the Contribution à l'audiovisuel public, the CAP, formerly known as the licence fee); and the method for collecting the CAP, based on the housing tax (*taxe d'habitation*), which will disappear in 2023. Discussions on a new collection method are underway.

Public broadcasting, for reasons of independence and economic structure (it has fixed costs, with high programming costs), requires long-term funding. The amount of the CAP tax is relatively low: 138 euros for metropolitan France and 88 euros for the overseas départements, i.e. a projection for 2022 of 3.7 billion euros. The comparable fee in Germany is 220 euros, for a total of 8 billion euros of public revenue, which goes to the ARD and ZDF groups (ARD: 5.7 billion euros, of which 1.7 billion euros are allocated to the national channel and 3.9 billion to the regional channels; ZDF: 2 billion euros). As for what the CAP covers, this is out of step with changes in the way television is viewed in France, due to the migration of cultural practices to digital. While television involves media other than television screens, such as tablets, computers and telephones, the licence fee is paid only by owners of television sets. It is with this perspective in mind that Germany, Finland, Sweden, Denmark and the United Kingdom have modernized their public broadcasting contribution systems. France's General Inspectorate of Finance (IGF) and the General Inspectorate of Cultural Affairs (IGAC) have been entrusted with a mission on the financing of public broadcasting, including a rethink of the method of contribution, which is also necessary due to the abolition of the taxe d'habitation. This mission will draw on

European benchmarking and should deliver its conclusions in May. Although several scenarios are possible, it seems essential to us to guarantee the independence of public broadcasting through a permanent resource that is adapted to the reality of current audiovisual usage.

> **Recommendation 7.** Guarantee the autonomy of public broadcasting by maintaining a permanent resource allocated to it.

Rethinking policies to support creation

Since the Ministry of Culture was created at the end of the 1950s, public subsidies have been directed towards giving new talent access to production and constantly renewing creation. However, these support systems were inherited from the scarcity paradigm and do not address the issue of difficulty in accessing works. Digital technology has lowered entry costs and barriers, and its tools are contributing to the renewal of creation. In this new configuration, the existing support systems are not always playing their role as market correctors. On the contrary, they contribute to the increase in output and to the intensification of competition for visibility. Consequently, support systems that are historically focused on the renewal of creation need to be readjusted to ensure a better balance between creation and dissemination. To do this, it will be necessary to reorient support systems towards the objectives of ensuring continuity of works and content.

> **Recommendation 8.** Redirect public subsidies towards a better balance between creation and the dissemination of works and content over time.

Culture represents a major economic issue due to its weight in national wealth, its role in the attractiveness of the country's regions and its positive impact on people's well-being. Current developments, linked to the pandemic and digitisation, constitute an opportunity –which must be seized– to rethink cultural policy and to implement a genuine digital strategy, at the service of all French citizens.

To extend your reading (in French)


conseil d'analyse économique

Focus

N° 079-2022
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Culture, bien-être et territoires

Jean Beuve, Madeleine Péron et César Poux(*)

L'objet de ce *Focus* est de mettre en évidence un lien statistique entre les politiques culturelles à l'échelon le plus local d'une part et la vie des territoires et le bien-être individuel d'autre part. Il dresse le constat d'une offre culturelle inégale sur le territoire et tente d'en identifier les implications. Nos analyses mettent en évidence les effets des pratiques culturelles sur le bien-être, à une double échelle. À l'échelle des communes et intercommunalités, nous montrons que l'environnement culturel local est lié à la participation à la vie politique mesurée via l'abstention. L'étude se concentre ensuite sur l'échelle individuelle, en mobilisant des données d'enquête en panel nous permettant de croiser des métriques de bien-être, de pratiques culturelles et d'accès à l'offre culturelle locale. Dans les deux cas, nous exploitons à la fois la dimension spatiale et la dimension temporelle des données.

Introduction

La question de la valeur sociale des biens et équipements culturels (et des pratiques associées) est cruciale pour justifier et évaluer l'intervention massive de l'État dans le secteur culturel. Si l'étanchéité des industries culturelles au progrès technique (Baumol et Bowen, 1968) ou les défaillances de marché sont souvent citées comme arguments économiques à l'intervention publique (Peacock, 1991), l'idée que la culture est désirable en elle-même constitue un moteur important des politiques publiques et de leur popularité. Des arguments normatifs ou paternalistes peuvent exister de manière légitime dans le champ politique mais il n'appartient pas aux économistes de déclarer telle ou telle pratique comme bonne et désirable. À ce titre, la discipline s'est plus souvent penchée sur la mesure de la valeur non monétaire des biens et pratiques culturelles.

Ce Focus est publié sous la responsabilité de ses auteurs et n'engage que ceux-ci.

(*) Respectivement : Paris 1-Panthéon-Sorbonne et CAE ; CAE ; CAE.

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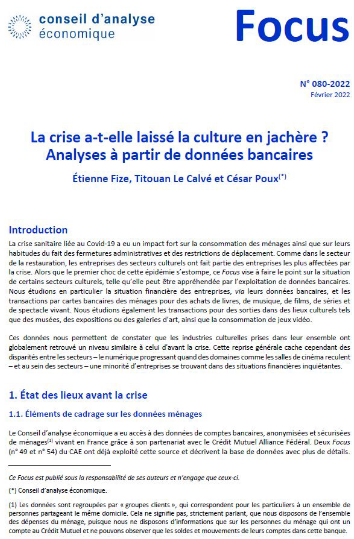
https://www.cae-eco.fr/culture-bien-etre-et-territoires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Focus

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La crise a-t-elle laissé la culture en jachère ?
Analyses à partir de données bancaires

Étienne Fize, Titouan Le Calvé et César Poux(*)

Introduction

La crise sanitaire liée au Covid-19 a eu un impact fort sur la consommation des ménages ainsi que sur leurs habitudes du fait des fermetures administratives et des restrictions de déplacement. Comme dans le secteur de la restauration, les entreprises des secteurs culturels ont fait partie des entreprises les plus affectées par la crise. Alors que le premier choc de cette épidémie s'estompe, ce *Focus* vise à faire le point sur la situation de certains secteurs culturels, telle qu'elle peut être appréhendée par l'exploitation de données bancaires. Nous étudions en particulier la situation financière des entreprises, *via* leurs données bancaires, et les transactions par cartes bancaires des ménages pour des achats de livres, de musique, de films, de séries et de spectacle vivant. Nous étudions également les transactions pour des sorties dans des lieux culturels tels que des musées, des expositions ou des galeries d'art, ainsi que la consommation de jeux vidéo.

Ces données nous permettent de constater que les industries culturelles prises dans leur ensemble ont globalement retrouvé un niveau similaire à celui d'avant la crise. Cette reprise générale cache cependant des disparités entre les secteurs – le numérique progressant quand des domaines comme les salles de cinéma reculent – et au sein des secteurs – une minorité d'entreprises se trouvant dans des situations financières inquiétantes.

1. État des lieux avant la crise

1.1. Éléments de cadrage sur les données ménages

Le Conseil d'analyse économique a eu accès à des données de comptes bancaires, anonymisées et sécurisées de ménages(1) vivant en France grâce à son partenariat avec le Crédit Mutuel Alliance Fédéral. Deux *Focus* (n° 49 et n° 54) du CAE ont déjà exploité cette source et décrivent la base de données avec plus de détails.

Ce Focus est publié sous la responsabilité de ses auteurs et n'engage que ceux-ci.

(*) Conseil d'analyse économique.

(1) Les données sont regroupées par « groupes clients », qui correspondent pour les particuliers à un ensemble de personnes partageant le même domicile. Cela ne signifie pas, strictement parlant, que nous disposons de l'ensemble des dépenses du ménage, puisque nous ne disposons d'informations que sur les personnes du ménage qui ont un compte au Crédit Mutuel et ne pouvons observer que les soldes et mouvements de leurs comptes dans cette banque.

https://www.cae-eco.fr/la-crise-a-t-elle-laisse-la-culture-en-jachere-analyses-a-partir-de-donnees-bancaires

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