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A synoptic view of production networks in the cultural and creative sector

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1 November 2023



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An synoptic view of production networks in the cultural and creative sector

Project name	Creative Industries Cultural Economy Production Network
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Work package	<p>The CICERONE project consists of seven work packages (WPs). This report is the third in a series of six reports that is part of WP3. This WP is called “<i>Policy, regulatory and governance matrix of the CCS</i>” and aims at exploring the policy and regulatory environment for CCS. It assesses to what extent these are appropriate for addressing the challenges of new and emergent organisational and governance forms of the creative economy.</p> <p>This report is preceded by a review (D3.1) of tariff barriers and trade costs affecting the creative industries across European border, and a report on incentives (D3.2). This report on regulation (D3.3) will be followed by a review of organisational structures (D3.4) in the CCS. The fifth report (D3.5) in this series provides a synoptic mapping of production networks, while the sixth and final report (D3.6) constitutes a background report of EU global production networks. As a series, the WP3-reports provide a backdrop for the project’s local-level analyses of individual creative production chains.</p> <p>All papers of the CICERONE project are publicly disclosed on the project’s website www.cicerone-project.eu and in its dedicated Zenodo community on https://zenodo.org/communities/cicerone-h2020.</p>

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1. Introduction

The aim of this paper (D3.5) is to provide a synoptic overview of the production network models that we found in the case studies, which were conducted as part of WP2 (see also the deliverables D2.1-8). The aim is to look for some common patterns or a typology of production systems. The majority of this paper is taken up with reviewing and summarising the findings on production networks that were uncovered. Accordingly, the paper is divided into sub-sections based on the industry case studies covered in those groups of reports.

The initial assumption that has pervaded the cultural and creative sector (CCS) is the notion that a singular system prevails, and there may not be significant value in delving deeper into its intricacies. The foundational principle of CICEONE, however, posits that we are poised to witness a spectrum of production systems, akin yet distinct from generic global production network (GPN) models. This anticipation hinges on the belief that through this examination, we can glean insights into the orchestration of power dynamics, their loci, and the mechanisms governing them. It is precisely for this reason that we broaden our analysis in a concluding section, encompassing a holistic view across all case studies, transcending specific industries, in search of emergent patterns.

Beyond its academic importance, such analysis holds paramount significance for policy formulation within the CCS domain. As we contend, much of the CCS policy landscape is founded upon a potentially flawed causal model of organization and action (see D3.1-4). A refined model would, in logical progression, lead to more efficacious and streamlined policy-making processes. This theme is further explored in this paper, commencing with a concise overview of the methodology employed in generating the data underpinning the analysis presented herein.



2. Mapping the networks

Of course, the configuration of production networks is one of those topics that is invisible to standard data collection on the CCS, such as that dominated by the reports based on census materials, as reported by Eurostat; or even the additional insights into production and services reported by the European Audio-Visual Observatory. These two sources do provide us with vital information, but sadly it is partial. Partial in the coverage of industries/domains, and partial in relation to the functions. The CICERONE survey sought to repair some of these problems for the pilot study, but its main focus was on what is not covered in such surveys, namely the linkage across production ecosystems (and across spaces). As the CICERONE project proposes, CCS production occurs in ecosystems, divided by functional relations, and spread across spaces. The concentration of elements of this production system can be of particular import to a locality; but that significance depends not so much on scale but power and control of the added value of the product or service. Moreover, that functions and domains maybe embedded in their own ecosystems of co-dependence (which may or may not be co-locational). Simply, it is the nature and quality of production relations that is important, and this is what we studied.

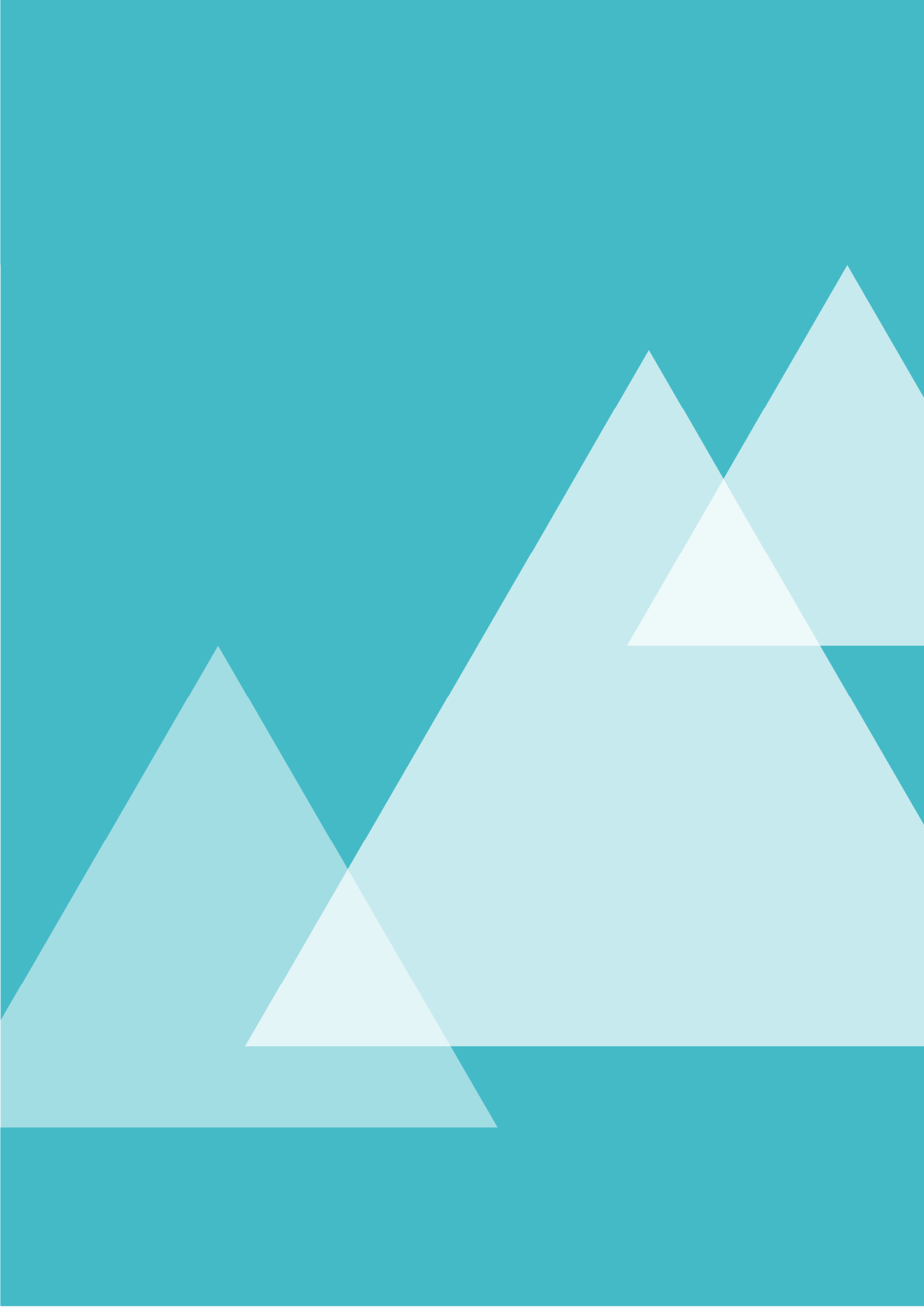
Critically, our unit of analysis was not the individual firm, as in normative approaches, rather it was the production network surrounding or enabling the movement of a product or service from creation through production, dissemination, exchange and archiving, and back to creating the conditions for further production. As is seen in the WP2 methodology, we 'followed the networks' and mapped as full production systems as we could for a selection of industries. It is important that we were looking for diversity, so we aimed at looking a more extreme cases for variety where they reflected an important aspect of the CCS. Size and age is a case in point, we were interested in the lifecycle and ecosystem of production from birth to maturity so saw value in exploring these different elements to see if it generated different process and organisations. We were also interested in the variety of business models, or simply which focus of maximisation or value were selected by creatives and enterprises (economic, social and culture).

As can be seen in the annex to this paper we developed a coding guide such that we could re-analyse the interview and survey material generated in WP2 such that we could extract in particular the organisational information underpinning each case. We developed a common format for reporting this that sought to articulate the phases of production, and these locations of power and control from a governance perspective (table 1, see next page).

Table 1. The typology matrix

PRODUCTION NETWORK PHASES	Local/regional	National	Intra-EU	Global	GOVERNANCE
Creation					
Production					
Distribution					
Exchange					
Archiving					
Network level					Lead actor/multiple actors/horizontal

In what follows, each of the cases is reviewed and a synopsis developed of what we can learn across each group of industries presented in each WP2 report (D2.1-8)



3. Analysing the networks

3.1 Architecture

3.1.1 Studio RAP

Table 2. Topology matrix for the Studio RAP case studio

PRODUCTION NETWORK PHASES	Local/regional	National	Intra-EU	Global	GOVERNANCE
Creation	Creators				
Production	Lead actors	Lead actors			
Distribution	Lead actors				
Exchange	Lead actors				
Archiving		Lead actors			
Network level					Horizontal/dispersed: two lead partners

With regards to the distribution of power, we have found a nested structure, very much like Russian Matryoshka dolls, with the municipality in conjunction with representatives of the Theater and two construction firms on top. Below this public private partnership, there is an architectural practice responsible for the design of the outer structures of the building, and an architectural firm responsible for the interior of the theatre. Nested under this layer, we come across Studio RAP which is the main actor in designing the façade of the theatre hall. The actors involved have been using their different resources (mostly in the form of different kinds of complementary proprietary knowledge) and as a result, there did not appear to be one dominant actor. Within the framework of the assignment, power has been very much dispersed which is the result of the distribution of resources of the actors involved (financial capital and sophisticated forms of human capital) as well as of habitus – the deeply ingrained habits, skills, and dispositions of the actors involved – which also determines the relationships in the production network.

The spatial footprint of the network has been first and foremost local. Except for the engineering consultancy (a transnational firm with an office in Amsterdam) and the consultancy specialising in theatre interiors (also located in Amsterdam), they were all based in Rotterdam. The only phase which clearly has a wider spatial setting is that of archiving. The websites, journals, magazines and newspapers which have presented this project, are mostly aimed at a national audience. The economic benefits have, accordingly, also landed first and foremost in Rotterdam. The theatre and its interior are evidently place-making elements contributing to the local identity. This was one of the

explicit aims of the municipality who wanted to boost the quality of place in this relatively deprived part of Rotterdam. This aim was, however, also shared and internalised by many of the actors who wanted to participate in the realisation of something special and beautiful.

3.1.2 MEF Architects

Table 3. Typology matrix for the MEF Architects case

PRODUCTION NETWORK PHASES	Local/regional	National	Intra-EU	Global	GOVERNANCE
Creation	Creator		Creator		
Production		Strategic partner and specialized suppliers			
Distribution	Strategic partner and specialized suppliers				
Exchange			Customer		
Archiving			Creator		
Network level					Horizontal

The founder and owner of MEF Architect, Maria, is based in Vinkeveen, a village located in the province of Utrecht. She is self-employed and works from her self-designed home. She has a long history of working in the architectural sector, first helping her father with his business in Italy, and later taking over his business. When she moved to the Netherlands, she first started to get familiar in the field through journalistic writing. After a few years, she felt she was established enough to start her own company named MEF Architect. Her Italian roots are not only her trademark, but also a liability in some ways. With a fully Dutch-speaking competition, she finds herself often in a disadvantaged starting position. However, she has managed to make a name for herself and is a well-established architect for luxurious renovation projects and villa construction projects.

3.1.3 The case of Guallart Architects and Picharchitects

The focus in this case is on how a project from a large, consolidated architectural practice conforms to a production network and on what type of policy implications might be identified. It can be characterised as a design- and innovation-centred project since strong-idea strategies prevail. Both architecture studios are consolidated enterprises named after the founders and lead architects: Guallart Architects (GA) on the one hand and Picharchitects (PA) on the other. Both studios are at the forefront of innovation in sustainability.

The creation phase has a global scale, since actors may be based in Europe, America, Africa or elsewhere but the project takes place in Asia, where the customer is based. The customer, in this case

a public administration, is the initiator of the architecture project, the commissioner and decision maker thus holding the power of the creation phase and therefore the path of the subsequent stages. The production phase is carried on by a national building company that has the expertise to navigate local regulations and assemble a network of providers and holds the power over the architecture firm. Their role starts once the creation phase is over and the building design is delivered and approved. The sites of exchange that award prizes, commissions or media coverage to architects and architecture firms are the most powerful actor of the exchange phase. Their activity has a global dimension and expands on more than one project. The curation, selection and archiving are performed by local institutions like the Design Museum of Barcelona or the Architects' Association of Catalonia. These archiving actors have freedom to decide how, where and for how long they will interpret and store designs.

Table 4. Typology matrix for the case of Guallart Architects and Picharchitects

PRODUCTION NETWORK PHASES	Local/regional	National	Intra-EU	Global	GOVERNANCE
Creation				Customer	
Production		Specialised supplier			
Distribution		Distributor			
Exchange			Strategic partners (private actor)		
Archiving	Strategic partners (civil society)				
Network level					Hierarchically organised

3.1.4 Synoptic insights

The three case studies of the architectural domain illustrates both similarities and differences in organisational form, power and impact on spaces. Focusing on a specific project makes it possible to evaluate who asks for it (i.e. the demand that initiates the cycle in the different procurement routes), how it is financially supported, who is in charge of the design, and who is responsible for the construction, while focusing on the networks of architectural practices provides a broader view. Although analysing the dynamics in all production phases is crucial to understanding the functioning of the GPN, our main interest was to analyse the design stage of the process, as that is there where the highest creative value is added.

However, we can see that the mode of operation of the architects that we studied differs by not only size, but the business model, and focus on the creative quality. The international GA/PA tend to a

platform like operation who use their extensive networks to work internationally, and embed local contractual and supplier linkages, but retain overall creative control, in effect the brand of the company. Clearly this is a demonstration of economic and contractual centralisation of control. This can be contrasted with the two comparators, which operate in a more dispersed form of network. MEF the sole operator who uses the embedded and longitudinal relationships to not only maintain creative quality control, but also to offer more bespoke client operated services. This is something we can see at a larger scale in the example of RAP who work very closely with client and community and are focused on local supplier and user engagement with the client.

There are clearly insights here about scale of operation, but these are have to be balanced by issues of quality control in execution throughout the production cycle, and the maintenance of the quality of the overall product. As this product, a building has a variety of users individual clients skew the emphasis on which particular stakeholders have prominence. On one hand, the case of RAP is notable for the way that public sector clients can leverage local benefits in terms of embedded local production and networks, which can support local ecosystems. On the other hand, GA/PA are able to exercise their central control over the production system to seek to implement sustainability objectives, even across national and regulatory boundaries.

3.2 Archiving and heritage

3.2.1 The case of Museum Collegium Maius

The schematic presentation of the typology of the production network at the Jagiellonian University Museum shows that power is concentrated. Most activities are conducted locally, but the distribution and exchange phases are internationally oriented. The impact of the Jagiellonian University Museum on the activities of other academic museums in Poland and in the European Union is significant.

Table 5. Typology matrix for the Museum Collegium Maius case

PRODUCTION NETWORK PHASES	Local/regional	National	Intra-EU	Global	GOVERNANCE
Creation	Creators				
Production	Creators/ strategic partners				
Distribution	Creators/ strategic partners	Creators/ strategic partners			
Exchange		Creators/ strategic partners	Creators/ strategic partners		
Archiving	Creators				
Network level					Lead actors

In terms of its structure, item management and social embeddedness, the Collegium Maius is a hybrid between a traditional museum and a university collection. It is the only museum in Poland that operates simultaneously as a museum and as a university unit. Therefore, it is difficult to delineate GPN phases clearly. The creation phase includes the activities of a typical museum. The main tasks of the museum are to protect cultural goods (associated with university heritage in this case), to conduct research, to conserve and to restore, and to share tangible and intangible natural and cultural heritage with the public. There are thus several distinct activities, each of which can be analysed separately.

3.2.2 Wiener Heurigenkultur

The typology of the Wiener Heurigenkultur reveals a scheme that could possibly also be applied to other cases of intangible cultural heritage practices. Most of the activities are located on a local level, some extend to a national level and only the distribution phase reaches an intra-EU level. The production phase involves not only the creator and suppliers but also strategic parts at all levels (private & public sector and civil society). Creation and exchange take place at the same place as intangible cultural heritage is usually practiced at the place of its origin.

Table 6. Typology matrix for the Wiener Heurigenkultur case

PRODUCTION NETWORK PHASES	Local/regional	National	Intra-EU	Global	GOVERNANCE
Creation	Creators, Strategic partners (civil society)				
Production	Creators, Suppliers, Strategic partners (all)	Suppliers			
Distribution	Creators, Distributors	Creators/ Distributors	Creators/ Distributors		
Exchange	Consumers				
Archiving	Creators, Strategic partners (public sector, civil society)	Strategic partners (public sector)			
Network level					Multiple lead actors

The lead actors are the creators but also the civil society as the Heurigenkultur is a practice that must be acknowledged and reproduced by a community in order to exist. Still, it is the Heurigen owners who offer their place, products and service and ensure the material continuation of the Wiener Heurigenkultur. The spatial level mostly remains on a local and national level because Heurigenkultur is a local tradition and most stakeholders involved are either on a local or national level. Only the distribution phase can reach an intra-EU level, e.g. when products such as wine get shipped to Germany. Most activities are conducted locally, and only the distribution phase has an international orientation. The archiving phase is also ambivalent. Archiving can be abstract, as discussed above. An archive can also be accessible from any point in the world, as is the case of the *Wiener Volksliedwerk*. Still, locating the archiving phase on a national level is more rational. For example, *Heurigenkultur* is listed by the UNESCO national commission as a part of the intangible cultural heritage of Austria. Furthermore, power is dispersed rather than concentrated.

3.2.3 Archive of Austrian popular music

The typology reveals that most activities are done by the creators on a local level. The staff of the archive carries out their work in Vienna and distributes it from there all over the world as it is an online archive. Only in the production and exchange phase, there are some other actors involved: Production includes strategic partners from the public sector who ensure funding and suppliers for the acquisition of data and other archiving material. In the exchange phase it is the consumers (rather referred to as users) that can use the archive from all spatial levels because the website can be accessed from all over the world. The archiving is done on a local/regional level again, namely the digital and physical archive based at the SRA in Vienna.

Table 7. Typology matrix for the archive of Austrian popular music case

PRODUCTION NETWORK PHASES	Local/regional	National	Intra-EU	Global	GOVERNANCE
Creation	Creators				
Production	Creators/ suppliers	Strategic partners (public sector)/ suppliers			
Distribution	Creators				
Exchange	Consumers/ creators	Consumers	Consumers	Consumers	
Archiving	Creators				
Network level					Single lead actor

Concerning the network level, its governance is defined by a lead actor, which in this case is the creators. Although the archive is based in Vienna and its staff works there, the network level is rather national, because the archive collects data from musicians all over Austria and many stakeholders, especially from the production and exchange phase, can be found on a national rather than only local/regional level. As the table above shows, most of the activities were performed by the SRA organisation: creation, parts of the production, all of the distribution and the archiving. Only in the production phase there are suppliers and strategic partners involved. The public sector as a subsidiser also plays a relevant role in the production phase as the archive relies on subsidies. The consumers and creators prevail in the exchange phase at a global level because SRA is not only a physical but also an online archive and can be accessed from all over the world. Since the archive only collects Austrian popular music, production only occurs within national boundaries. The main target audience is also national. The distribution and exploitation phase can unfold on the global level and affect it a result of digitisation and because the archive is available online.

3.2.4 Synoptic insights

The three case studies of archiving activities in the heritage sector are perhaps inevitably characterised by the scale and scope of their collections, in this case we have intangible heritage which has tangible expressions (music and wine culture), moreover, this are linked to a maintenance of a notion of identity, symbolic value and meanings.

These functions accord with the organisational and curatorial objectives and a high degree of central control; and are funded by the public sector, which is linked to particular institutions and spatial footprints which often lead to funding disputes as the archiving activities flow over these boundaries. We can note that the ecosystems of archives often spread not only widely but across the formal and informal sector; this has implications for dependency on these external relations (especially in ties of austerity).

Even though each of the examples are their own particular 'locality' (at different scales and meaning) they are also embedded in a far wider circuit of international knowledge and expertise. This is often the 'hidden' aspect of archiving, but the case studies reveal that it is often a key to the quality control and creative brand maintenance. It makes sense, functionally, why each of the archives exerts versions of local control, but not in a hierarchical manner, more towards a collaborative network, for example by drawing in a wider range of distribution networks (see particularly in the Heurigenkultur example), or external expertise.

3.3 Artistic crafts

3.3.1 Prisma

The yachting system, of which the Prisma case is part, can be described as a platform that brings together multiple *filières*, specialised in the realisation of the different components and structures of the craft. Within these *filières*, a multiplicity of actors cooperates, most of whom are craftspeople (carpenters, upholsterers, marble producers and cutters, plumbers, producers or assemblers of technological appliances, window fitters, and electricians, among others). Thus, the high artisanal intensity that characterises the final product is one of the reasons that guided the selection of this case. A second reason is the consistency of the investigated project with the production network governance model. This model is based on the close collaboration of the brand (usually the lead actor) with a web of artisanal suppliers, who sell their ability and products to it. These artisans are assumed to be the main contributors to the value creation of the final product, but not necessarily those who are able to capture the majority of this value. Based on these premises, the study of the selected production network is the occasion for unveiling the power dynamics that characterise the artisanal work in a larger *filière* (to some extent semi-industrial).

Table 8. Typology matrix for the Prisma case

PRODUCTION NETWORK PHASES	Local/regional	National	Intra-EU	Global	GOVERNANCE
Creation	Creators, customers, lead actors				
Production	Specialised suppliers	Specialised suppliers			
Distribution			Distributors, customers		
Exchange			Strategic partners (private)		
Archiving	Strategic partners (public)				
Network level					Horizontal

3.3.2 Konsthantverkarna

Konsthantverkarna is a membership organisation which functions as a type of platform, with a shop and a gallery space, as well as a meeting point for the networks between craftspeople. The governance model of the case exhibited a horizontal power distribution throughout the chain, where craftspeople influence and control the entirety of the production network, except for the distribution phase. Here,

a number of gatekeepers select which crafts to exhibit, buy, reward grants to, or commission. To be facilitated into these nodes, craftspeople need to produce highly skilled and artistic works that would help them build an artistic reputation and thus gain access through more gatekeepers.

Table 9. Typology matrix for the Konsthantverkarna case

PRODUCTION NETWORK PHASES	Local/regional	National	Intra-EU	Global	GOVERNANCE
Creation	Creators				
Production	Creators				
Distribution	Consumers	Strategic partners (private)	Consumers		
Exchange		Strategic partners (private)			
Archiving		Strategic partners (public)			
Network level					Horizontal

3.3.3 Swedish glassmaking

The Swedish glass manufacturer, a factory using traditional methods of blowing and casting glass, represents a smaller case study in this report, where the firm takes the main responsibility for the project from creation to distribution. The project unpacked in this case is the production of glassware, which is designed either by external designers or in-house – mainly the designs of the owner. The factory is a family-run company in the process of a generational shift, which offered an extra dimension into how production networks are reconfigured through the generations. The glass factory’s production network is an example of a vertically integrated craft activity, where there is a clear lead firm that influences the structure of the network. Surrounding this network are a number of supportive actors who facilitate the distribution of goods towards clients both nationally and internationally. The glass factory and the cluster within which it is embedded have transformed during the 20th century, from an area of mass production to an area of artistically driven artisanal craftsmanship that has built a tourism economy. This economy is facilitated by supportive actors, such as Export Sweden and the municipality driven tourism organisation that facilitates tourists experiencing the creation of artisanal craft products and then purchasing them. The focus of the production that remains in the area has become more artistically driven throughout the previous century, and today no mass manufacturing exists in the area. Being able to produce artistically driven crafted objects is made possible through tourists who want to experience and consume authentic, traditional crafted goods.

Table 10. Typology matrix for the case on Swedish glassmaking

PRODUCTION NETWORK PHASES	Local/regional	National	Intra-EU	Global	GOVERNANCE
Creation	Creators	Creators			
Production	Lead actor				
Distribution	Consumers	Consumers	Consumers	Consumers	
Exchange	Strategic partners (private)	Strategic partners (private)		Strategic partners (private)	
Archiving	Strategic partners (private and public)				
Network level					Hierarchical

3.3.4 Synoptic insights

The three case studies of the crafts sector illustrate how craft expertise and quality control of concentrated with the creators, and this sustains the value/s of the products. However the organisational challenge is how to engage markets and audiences with essentially niche and one off productions. Hence the role of distribution and exchange is a key element in any business model. In orientation that is focused on the market, and the Yacht industry is a case in point the client is central, and the process is built around that point. However, due to the nature of craft, what is being paid for is the quality and exception and this means handing over control to the craft makers. At the other end of the spectrum we see the collective systems of the Konsthantverkarna and Swedish Glassmaking network that provide an articulation with the consumers through an umbrella organisation.

In all three cases we see the existence of strongly embedded ecosystems of supply and expertise on one hand, and reputation management and marketing on the other. Again, although the language may ‘grate’, this is making and maintain the brand, and building and maintain audiences. Despite the very local nature of production and creation, in all cases the markets extend nationally and internationally. This is a contrast with many micro-businesses in other sectors who are locally based. It raises the question of the disproportionate challenges of navigating export and marketing of such small enterprises; it is precisely the role that platforms and collective marketing agencies can potentially fulfil. We can also note the clear dependency of the supply of craft skills and craft labour, for which a supply pipeline is neither guaranteed nor planned for outside of these networks. Obviously, there is both a strategic threat and opportunity here for local agencies in terms of training and craft heritage maintenance, but generally such concerns are ‘left to the network’ or the market; both of which are fragile. It is notable that the Swedish system of work stipends and grants played a critical role in sustaining local craft systems. Again, strategic investment in creating pathways to market are a potential opportunity.

3.4 Audio-visual

3.4.1 KLAS flim production

The KLAS Film production company (owned by Rossitsa Valkanova) initiates, coordinates, and manages each project, securing and managing the resources associated with it. The producer exercises financial and creative control over the process and product. The creative control goes through the contract signed with the director. The production company has strategic functions through the selection of the idea, the teams, and the selection of the partners; in other words, it makes decisions about the inter-company division of labour.

Table 11. Typology matrix for the case on KLAS film production

PRODUCTION NETWORK PHASES	Local/regional	National	Intra-EU	Global	GOVERNANCE
Creation	Creators	Creators			
Production	Lead actor				
Distribution	Consumers	Consumers	Consumers	Consumers	
Exchange	Strategic partners (private)	Strategic partners (private)		Strategic partners (private)	
Archiving	Strategic partners (private and public)				
Network level					Hierarchical

We see the network as vertical because of the key role of the lead company, KLAS Film. An important specificity of this network is the presence of many actors: partners, suppliers, special clients, mediators, stakeholders, and gatekeepers. Their activity creates natural dispersion of power (administrative–institutional, creative, managerial, or distributional) at each phase. Key partners, suppliers, and customers are national, but when the project is a co-production, the majority of them are in Europe. The highest spatial scale at which the network is involved is global, through distribution, screening in cinemas and streaming platforms, and in archives.

3.4.2 Eurovision song contest

The structure of the global production network phases is not linear in time. It is simultaneous and overlapping in the course of activities in the different phases, both at the national and the European levels. The highest spatial scale at which the network is involved is global, through the distribution, the broadcast phase, and the online archives. We observed here the creation of a complex product that is not only a live television event but also an intersectional event that includes a) a performing

arts product, a live musical performance of a song (concert); b) a music industry product, a recorded song and video; and c) a television format and live broadcast that brings it all together.

Table 12. Typology matrix for the Eurovision song contest case

PRODUCTION NETWORK PHASES	Local/ regional	National	Intra-EU	Global	GOVERNANCE
Creation		Lead actor, strategic partner (public and private), specialized supplier, creators	Lead actors, strategic partners (public), creators		
Production		Creator, strategic partner (private), specialized supplier	Lead actor, creators, strategic partners (public), specialized supplier		
Distribution		Distributor, specialized supplier	Lead actor, distributor, strategic partners (public and private)	Distributor, strategic partner (private)	
Exchange		Creator, strategic partner (public and private)	Lead actor, creators, strategic partners (public)	Strategic partners (public)	
Archiving		Strategic partner (public)	Lead actor, strategic partners (public)	Lead actor	
Network level					Horizontal

The host country of the event is mandated by the EBU and has direct responsibility for the organisation and execution of the stage concert, the live broadcast, and the logistics of the visiting teams. All co-funders, companies, and partners have some form of power, and they add value to the GPN. However, each also receives value in the form of branding, access to a global television audience, and participation on the event's social platforms.

EBU is the owner and creator of the television format and the concept of the Eurovision rules. The organisation manages the network of participants and activities—not always directly managing the process but rather monitoring, controlling, and evaluating it. The executive supervisor has the task of controlling the activities in the Eurovision GPN. It has the individual authority to implement the event itself through a committee that acts on behalf of all participating broadcasters of the Eurovision Song Contest. The main job of the committee is to oversee and guide the organisation and evolution of the contest as a whole" (Eurosong contest fandom).

3.4.3 Euro radio music exchange

The lead firm of EBU-MUS network is the EBU–Euroradio, which is the creator of the platform archive and of its rules of operation, and which maintains the technical exchange between the member countries by controlling the process. All Member States are strategic partners with the lead institution and are equal and united by the common mission of public service media. The global production network approach applied to EBU–MUS, has clearly defined phases which may, however, overlap for some activities or run in parallel rather than linearly. The setup phase takes place at the national level but the selection criteria very often at the pan-European level. The production of the specific product is at the national level but can take place in real time, as a live event recording, be part of a past production (e.g. in the national archive), or be a specially created new recording by radio orchestrators. The special function of any national phonographic library should be emphasised here; its role in the production phase can be compared to post-production in cinema. EBU–MUS has the functions of an archive, but its format is a digital platform. Therefore, we can see its appearance twice in the chain: 1) as an intermediary between the production and distribution phases and a platform on which concerts (recordings) are embedded and downloaded in real time; and 2) as an archive in which musical recordings are preserved for a short period of time. The distribution and broadcasting of the recordings takes place on a national level, for a national audience, but given that each partner distributes on its national airwaves the music of another partner, this process adds pan-European and global dimensions.

Table 13. Typology matrix Euro radio music exchange case

PRODUCTION NETWORK PHASES	Local/ regional	National	Intra-EU	Global	GOVERNANCE
Creation		Lead actor, strategic partner (public), creators	Lead actor		
Production		Strategic partner (public), creators	Lead actor	Strategic partner (public)	
Distribution		Strategic partner (public)	Lead actor	Strategic partner (public)	
Exchange		Lead actor, strategic partner (public), consumers	Lead actor, strategic partner (public), consumers	Lead actor, strategic partners (public), consumers	
Archiving		Strategic partner (public)	Lead actor		
Network level					Dispersed

3.4.4 Viennese gaming

At the network level, the prevailing spatial scales with reference to lead actors are the local and regional, where the creators are the lead actors, and the global, where the lead actors are the distributors. As the scheme above shows, the creation phase can be located on a local but also a global level, as there are co-creation activities with actors from all around the world; this global character also applies to the production phase. Games are usually distributed and exchanged all around the world. Only the archiving phase remains on a local level: creators and distributors do not grant access to their products because of copyright issues and mostly store them locally. The network level shows the prevalence of multiple horizontal actors.

Table 14. Typology matrix of the Viennese gaming case

PRODUCTION NETWORK PHASES	Local/ regional	National	Intra-EU	Global	GOVERNANCE
Creation	Creators			Creators	
Production	Creators, supplies	Suppliers	Suppliers	Suppliers, strategic partners (private), customers	
Distribution	Distributors	Distributors	Distributors	Distributors	
Exchange	Consumers	Consumers	Consumers	Consumers	
Archiving	Creators, distributors				
Network level					Dispersed

Instead of one archetypical typology of the Viennese games sector, there is a plurality of different constellations of production phases, actors, and activities, depending on the size and specialisation of the actors, and the kind of games produced in this field. This example shows the typology of a game that was produced by a SME gaming company based in Vienna and distributed all over the world. In the creation phase, it is the creators that prevail, and they are to be found at the local or regional level. There are some co-creation activities with other international actors in the creation phase.

As soon as we enter the next phase, production, there are more suppliers involved, as, for example, informatics experts, graphic designers, animation specialists, and musicians. They can be found in and around Vienna but also at all other levels, particularly in the global level as the strategic partners in the private sector, and they share the matrix space with customers. In the distribution phase, distributors are at every level, as it is consumers in the next phase who share their position with customers at the global level. On the one hand, there are powerful actors on a global level, such as large publishers, online platforms, and console companies that distribute the game all over the world. On the other hand, there are more local events like fairs, festivals, and exhibitions that address a more

local audience. The archive phase is occupied by creators and distributors, the two categories of actors who engage in the archiving of the games.

3.4.5 Synoptic lessons

The four case studies from the audio-visual sector provide a rich and complex insight. The first point is to note that this is the best populated secondary data set for all of the industries; we have in many ways an ideal case of statistical coverage, with an overlap of both Eurostat employment data, and the local Bulgarian, and the European Audio-visual Observatory on the flow of goods and services. Nevertheless, we can point out the considerable added value of the CICEONE analysis which added insight into organisation and power to this contextual data picture.

We can see considerable variation and some similarities in the audio-visual examples. Clearly the importance of distribution and exchange phases that – based on the mass market business model – they have to be international, and interface with the dominated platform world of media (games and music are each dominated by 2-3 players globally). However, production is something that is very networked. In part, this is to utilise the broad ecosystems of intermediate suppliers that comprise the expertise in every (unique) film or music project. This flexible specialisation model depends on a vibrant and functional local ecosystem (local may be trans-European). Despite the presence of ‘lead actors’ shaping parts of the production system, this can be deceptive, there is always the challenge of ‘exterior’ lead actors who control distribution and markets, and indeed the future shaping of markets.

The system is also uniquely ‘distorted’ by national and regional subsidies from public bodies who either provide direct financial incentives, or / and support a local ecosystem of suppliers. Film making is a very clear example of this, a thoroughly European industry but with distinct locally embedded characteristics (based on funding). National funding models for film necessarily shape the localisation picture; however, the value-added aspect of the production system, and much of the product parameters are set internationally based on market control by platforms and monopolies. Although the Viennese games industry is a small example of its kind, we can see that it too is subject to entry into and compliance with this international system. It does raise issues about the balance of public action in relation to competitive funding, and/or infrastructure, versus strategic, market shaping support, and distribution and exchange platforms.

The Eurovision Song Contest provides an interesting contrasting vision to this commercial market mentality, with a publicly constructed market and audience, and the articulation of a semi-public infrastructure. However, it also reveals the tensions in creating shared resources across a platform, that each stakeholder has their (competing) conditions of entry. We can note the commercial aspect of advertising funding being a determinant of audience wealth, which tends to a reinforcement of inequalities rather than their mitigation. The Euro music exchange is perhaps better seen grouped with those examples from 2.2 on archiving and heritage, with which it shares similar characteristics.

However, it is a reminder of the value and role of archives and libraries in the business model of the audio-visual sector; rather than being a somewhat neglected field, libraries of intellectual property are a key component of media conglomerates valuation. The example of the Euromusic exchange raises the question of the valuation of public goods and archives and how they may be transitioned to a mixed or commercial media sphere. Finally, as with other examples of the transitions economies (Poland, Bulgaria), there are huge challenges in providing a level funding structure, and regulatory field, in competition with a rapidly commercialising audio-visual sector in Europe, questions of business sustainability potentially threaten the (at present) attractive local production ecosystems.

3.5 Fashion design

3.5.1 Yellow (high-end)

The production network of Yellow Co is structured around the leadership of the fashion brand, whose power is exercised over all the phases of the production cycle. Yellow Co has in fact the capacity to organise all the activities of the network according to its need and strategies. If creativity is internalised within the company, production is mostly outsourced, and highly controlled and managed by Yellow Co.

The brand also exercises its power in the distribution and exchange phases: Yellow Co owns brand shops and in the case of distribution through multi-brand shops, the brand activates a very strict control towards multi-brand shops owners, thanks to contracts and other legal tools. In the exchange phase, the influence of the brand is also strong. Yellow Co controls directly the whole catwalk organisation, and uses different tools (both financial and symbolic) to affect the action of fashion journalists and fashion bloggers.

Table 15. Typology matrix of the Yellow Co case

PRODUCTION NETWORK PHASES	Local/ regional	National	Intra-EU	Global	GOVERNANCE
Creation	Creators				
Production	Specialised suppliers	Specialised suppliers			
Distribution		Customer		Distributors, consumers	
Exchange	Creators			Strategic partners (private)	
Archiving	Creators				
Network level					Lead actors

Therefore, we can describe the production network of Yellow Co as led by a single actor (the brand). Regarding the spatial footprint of the network, it is both very localised (territorially embedded), and much globalised. In fact, the creativity and the production phase are deeply rooted, respectively, in Milan and in some Italian regions; the brand however, reaches all over the world with its products, its name, its importance.

3.5.2 Magenta (sustainable fashion)

The relationships between actors are characterised by trust-building processes, a determinant factor in their connection with suppliers, producers and consumers, aiding resilience before a crisis.

Nevertheless, the brand retains power in selecting providers and other actors involved. Coming from a traditional fashion design company, the brand has pushed for the certification of some providers in sustainability and fair trade, which did not always achieve the expected results. Some providers were dismissed when they did not want or achieve these certifications. This outcome can be read as a double process. On the one hand, the brand has power over the rest of the actors, pushing them to become more sustainable and change their forms of production to continue producing with them, a necessary process when only a few providers and producers were available. On the other hand, the failure in transforming the network and moving towards new providers and restructuring was a limitation of the power of the company, as its owner stated:

“In contrast to large companies such as Yellow Co in the high-end sector, Magenta Co has a limited capacity to push providers and producers since its production volume is limited. Often producers also work for other customers, giving Magenta Co less relevance. For instance, the Chinese producer interviewed for this case study worked for several customers in sustainable fashion, and Magenta Co was not the most relevant. Moreover, the inclusion of environmental, fair trade and good quality jobs criteria generates limitations in terms of quality demands and costs. The firm is currently committed (and certified) to ensuring fair trade from their suppliers and only establishing relationships with those guaranteeing fair labour conditions. They use certifications all along the chain (i.e. GOTS, GRS, ETI, FLA). These efforts provide value to the brand through sustainability, fair production and discursive practices.”

Design is also relevant in orienting the whole company strategy and the relationships between actors. As previously stated, designers in the company have a strong role in setting the language and discourse of subsequent phases such as distribution and exchange. In this regard, marketing is linked to the head of designers’ images for the collection and the brand. At the same time, designers must negotiate with producers on possibilities and development.

PRODUCTION NETWORK PHASES	Local/ regional	National	Intra-EU	Global	GOVERNANCE
Creation	Creators				
Production				Specialised supplier	
Distribution				Distributors	
Exchange		Strategic partners (private and civil society)		Customers, consumers	
Archiving	Creators				
Network level	Creators	Strategic partners (private and civil society)			

3.5.3 Cyan (emergent designer)

This typology matrix of a Cyan Co.’s very first collection case illustrates how power, phases and spatial footprint combine for the archetypical representation of a viable production network. Since failure is a possibility along the production network, given the weakness of the creator, the initiator of the collection, and their need to accumulate cultural, social, and economic capital for its development, power at the network level can be depicted as horizontal.

Table 16. Typology matrix of the Cyan Co case

PRODUCTION NETWORK PHASES	Local/ regional	National	Intra-EU	Global	GOVERNANCE
Creation	Creators				
Production	Specialised supplier	Strategic partners (private, civil society)			
Distribution					
Exchange				Consumer	
Archiving					
Network level					Horizontal

The design of the collection comprises the creation phase and is developed by the designer locally, usually with the aid of other emerging designers. Apart of the creativity required to design the collection, the economic and labour investment from the emerging designer vest them the power at this phase. The production phase is also local, with providers and producers located nearby to facilitate direct communication and quality control by the emerging designers. However, due to the limited scale of the first collection, Cyan Co is a weak actor that is not a priority for suppliers like wholesalers and workshops. Therefore, producers are the powerful actor at this phase.

While the distribution is online and therefore global, intermediaries could be located at national level as well. These are agents and gatekeepers of specialized circuits that bring recognition to the emerging designer first collection. As it has been expressed elsewhere, the exchange is intertwined with the distribution, with sites of exchange like catwalks, showrooms, magazines or awards as most powerful actors. The archive phase has a local spatial footprint and is carried out by the emerging designer in a personal registry of patterns, designs and samples. This archive could be the basis for the next creation phase, in which a reinterpretation of the designs starts the next production cycle. Even if in terms of value the emerging designer benefits from capturing most of the symbolic value produced by the first collection, agencies, intermediaries and producers share the power of the production network, thus the horizontal characterization of power.

3.5.4 Synoptic lessons

The three cases of fashion design provide contrasts and similarities; here we can see the echo of the Architecture cases where organisational form and global scope create very powerful lead firms for some segments of the market, aimed at high value clients. However, other forms do exist, and in a sense these are equally representative of the 'bread and butter' basic provision of the design element of the industry. As we saw in Craft as well, the importance of quality control and simple excellence is a counter to the 'normative' quality control (basic compliance) of mass production. Quality in craft and cultural production is sustained via an ecosystem. It is true that large companies can provide a stable market to nurture such ecosystems, but they can also act as 'free riders'. In the latter case it is local and regional advantage that is at stake, as is heritage and a training and skill infrastructure.

In Magenta and Cyan cases horizontal networking is the strategy to both exploit the economies of flexible specialisation (and the cultural assets), but balanced by the need for the creator to maintain quality and artistic control (which is the unique selling point in a competitive market). We saw with Cyan the importance of legacy ecosystems such as archives that can be so important to enabling small producers to develop (but as we saw, these are vulnerable). Finally, again to echo a point made in the Architectural section that system wide changes need power. In that section we say how the larger global player was able to push form environmental benefits; whereas we can see here that Magenta and its networks has to absorb the extra challenges of developing environmental innovations. Again, this systemic and foresight, and market shaping element is so critical, but out with the control of local or small-scale actors.

3.6 Festivals

3.6.1 Lowlands

An analysis of the power distribution shows that the MOJO management is likely to be the lead actor since they are responsible for conceptualisation of the festival, planning and coordination of various activities, promotion and distribution of tickets through their own channels, and coordination of the assembly of necessary actors at the right time in each of the production phases. Accordingly, in the creation, distribution and exchange phases, power is highly concentrated around the MOJO management. In the production phase, however, power is more dispersed since the MOJO management is highly dependent on various strategic and specialist suppliers. These actors have specific knowledge and skills, which gives them a more powerful position than generic suppliers.

Table 17. Typology matrix for the Lowlands case

PRODUCTION NETWORK PHASES	Local/ regional	National	Intra-EU	Global	GOVERNANCE
Creation	X				
Production		X			
Distribution				X	
Exchange	X				
Archiving		x			
Network level					Hierarchical

An important strategic partner is the local government of Biddinghuizen, which decides on the provision of the necessary permit. In addition, MOJO also seeks to attract various internationally renowned A-list artists, for which they have to negotiate considerably. Finally, in the archiving phase, the media and newspaper seem to occupy the most power. Nevertheless, throughout the process, the power is generally concentrated in the hands of MOJO.

3.6.2 Nederlands Dans Theater

The production network of *Tell your mom you love your skin* is global in its creation, distribution and production phases, during which NDT is the lead actor. However, as mentioned above, in the creation and the production phases, the choreographer and his team have a lot of freedom to create. In addition, there are no neat boundaries between creation and production nor between production and distribution. The exchange phase, with its evaluation processes, was mostly national at the time of this research because *Tell your mom you love your skin* had only been performed in the Netherlands. In this phase, different actors are involved without any clear lead. Archiving is a core responsibility of

NDT to preserve its performances. The trailers on YouTube are globally accessible and play an important role in international online communities focused on modern dance.

Table 18. Typology matrix for the Lowlands case

PRODUCTION NETWORK PHASES	Local/ regional	National	Intra-EU	Global	GOVERNANCE
Creation				X	
Production				X	
Distribution				X	
Exchange		X			
Archiving				X	
Network level					Hierarchical

3.6.3 Amalyashi Festival

The performers (storytellers, actors, musicians) come from many different countries and often carry a story of their migration or refuge to the Netherlands. That story often appears in their performance. The Amalyashi Festival had hosted one edition at the time of this report. The goal of the organisers was to make it a annual event. Whether this is realised is up to the money flows of sponsors and subsidies.

Table 19. Typology matrix of the Amalyashi Festival case

PRODUCTION NETWORK PHASES	Local/ regional	National	Intra-EU	Global	GOVERNANCE
Creation				X	
Production				X	
Distribution				X	
Exchange		X			
Archiving				X	
Network level					Hierarchical

3.6.4 Varna Summer Festival

In terms of the adopted typology, the Varna Summer International Theatre Festival unfolds in its different phases with a variable concentration of responsibilities and activities. The main organizer of

the initiative undergoes a significant transformation. Initially established as an association of theatre directors, the organisational structure of the festival has transformed into a foundation concentrated in a narrower circle of professionals. The interests of professional associations are no longer as important, as the demands of specific competencies for the realization of an event that reflects the achievements and trends in theatre. Strategic partnerships are established by the leader organisation with foreign cultural institutes in Bulgaria as well as with festivals in the region of South East Europe. The creation phase unfolds on the basis of concentrated, systematically planned and targeted activities at national and international level (mostly from EU countries).

3.6.5 Synoptic lessons

These four case studies offer contrasting insights into the live production of festivals. As we have noted, in part due to their temporary nature, and their varied manifestations such activities common escape analysis as part of the CCS; however, we can note the increased importance of such festivals as economic events, and as ways of opening up the market to new talent. The problem is, analytically, that so much of the 'platform creation' of the festival is unrecorded, hence these case studies offer a vital and new insight.

Clearly, an event has to have an overall curator and organiser, and hence, implicitly there are hierarchically controlled activities; as we see elsewhere in the CCS, notably in audio-visual, the flexible specialisation model and large supportive ecosystem plays a big role in enabling these events to take place; clearly just setting something like this up once is not economically or culturally feasible. So, this shapes the high risk, but need for long term sustainability, space that festivals exist in. Of course, it highlights why COVID hit the sector so badly, not simply the lack of a live event, but the breaking of sustainability of ecosystem that have been curated over years.

The Lowlands festival illustrates a mature and sustainable event; it is thus because of the organisation and mobilisation of the infrastructure, as noted via a company called MOJO. The ability to maintain and develop the necessary contacts and contracts for such an event underpins its success; and, we cannot how public authorities have been able to work with and share responsibilities for sorting out infrastructure challenges, but also to support innovation in environmental responsibility. The Nederlands Dan Theatre is not a festival, but it is a project based organisation which in effect hosts an external group of experts to use its infrastructure on a temporary basis. What we can see here is with a stable business model and structure how excellence in cultural expression, and innovation, can be supported. This stresses the importance of public sector core funding, and a patient business model focused on excellence as much as return on investment.

The Varna summer festival is a classic platform event, which brings cultural excellence and innovation to a place from outside. The guests and activity are all networked and external, however the local population benefits. What is particularly interesting is that given that the local production

manifestation must take place, and all of the theatre technology and skill utilised, that these related and allied skills have become a part of the festival, creating a learning and skill development: it is almost like making a temporary cluster. Of course, the challenge is to sustain such a cluster or ecosystem between festivals. Finally, the Amalyashi Festival is a classic cultural exchange platform, but in its first iteration. It illustrates how developing and building long term sustainability is the challenge in mounting such an event.

3.7 Visual arts

3.7.1 Patty Morgan

Except for Breaking Boundaries, Patty Morgan’s activities occur nationally. Logistically, the webshop collaborates with artists living in the Netherlands. Their clientele consists of Dutch companies and individual buyers. In addition, in a winner-take-all sector, the owners of Patty Morgan try to decentralise power in favour of emerging artists, being democratic while providing artists with more control over the dissemination of their work. As such, artists are responsible for maintaining their pages on the webshop, setting the price for artworks and transporting them to the consumer. However, as a gatekeeper, Patty Morgan remains in control of the artists they represent on the webshop, dispersing power.

Table 20. Typology matrix for the Patty Morgan case

PRODUCTION NETWORK PHASES	Local/ regional	National	Intra-EU	Global	GOVERNANCE
Creation		Lead actor, creators			
Production		Creators			
Distribution		Lead actor			
Exchange		Lead actor, consumers	Lead actor		
Archiving		Lead actor			
Network level					Dispersed

3.7.2 Sibumski and UNU Rotterdam

PRODUCTION NETWORK PHASES	Local/ regional	National	Intra-EU	Global	GOVERNANCE
Creation	Creator, customer				
Production	Specialised supplier				
Distribution	Customer, strategic partners				
Exchange	Customers				
Archiving	Customers				
Network level					Dispersed

The production process of the UNU bag has a clear local footprint. Each phase takes place in Rotterdam. As for the concentration of power, it is more dispersed. In the creation phase, Subumski and UNU Rotterdam decide on the bags' designs. Then, production is outsourced to specialised supplier Talentfabriek 010. In the distribution phase, UNU Rotterdam seeks to disseminate their bags online and in shops. In the exchange phase, UNU Rotterdam depends on shops (specialised suppliers) to sell the bags. Finally, archiving activities are taken care of by UNU Rotterdam.

3.7.3 Venice Biennale

The production network of the Venice Biennale is dominated by the lead actor – La Biennale Foundation that defines the rules of participation for all international actors for producing, exhibiting and distributing their works. Decisions about national participation are taken by each of the over 100 participating countries, hence the network governance is also dispersed. Creation takes place nationally, but taking into consideration the locality (the specifics of the exhibition spaces/pavilions in Venice). Production phase is strongly embedded in Venice, as required by the statute (employing local suppliers and services, renting spaces etc.). In the case of the Bulgarian participation in the 58th biennale, the artists' work in two other European countries, hence both creation and production phases have Intra-EU level. Exchange happens exclusively in Venice during the exhibition. Archiving is kept by *La Biennale* archive, as well as by the national commissioner, artists, curators

Table 21. Typology matrix for the Venice Biennale

PRODUCTION NETWORK PHASES	Local/ regional	National	Intra-EU	Global	GOVERNANCE
Creation	Specialised suppliers (private)	Strategic partners (public), creators	Creators, lead actor		
Production	Strategic partners (public and private), creators	Strategic partner (public and private), creator	Creator		
Distribution	Lead actor, strategic partners (public), specialized supplier	Strategic partner (public), creators	Specialised suppliers	Lea actor	
Exchange	Lead actor, creators, strategic partner (public), consumers				
Archiving	Lead actor	Strategic partners (public)			
Network level					

3.7.4 Synoptic lessons

The three case studies in visual arts covered range of scales, and actors. The focus on Patty Morgan illustrated the case of a strategic intervention in a production system; in an attempt to transform the relationship between artists and their audiences via intermediating the agent relationship and changing the business model. However, we can see how such a model, driven by issue of artistic quality control and ownership is theoretically possible in the digital world, but the one of material products frustrates it. The fact that Patty Morgan was limited to national exchange (due to export controls) limited the business model.

Sibumski was another example of the emergent artist, as we will see in music, and we saw in fashion. Clearly the creative ecosystem relies upon innovation and new firm and product entries, but as we have seen, and was illustrated in the Crafts sector as well, the barriers to entry can be very high. Barriers are not necessarily about getting access to a market or platform, but the ability to sustain the effort (the sunk investment) until an audience can be grown, or market found. This is the challenge for independents; the advantage of going with a platform or a large company is that the 'market making' is part of a wider process; the creative can focus more on their craft. However, as noted with Patty Morgan, a strong sense of independent evaluation of creative value drives many artists who may be prepared to accept lower income or sustain losses for some time before reaching success. In all cases the role of local ecosystems of skills and training are underlined as important in delivery of visual arts (however much we might assume that it's simple the artist). In particular, Patty Morgan pointed to the issue of creatives' sustainability and reliance on the Dutch support for artists. Again, stressing how such policies can be a critical element of ecosystem viability.

The case study of the Venice Biennale in some senses could be considered better grouped with the festival cases (2.6a), and in the sense of hierarchical organisation and local infrastructure and service provision it fits well. However, the inflection that earns it a place in this section is the focus on the national participation model (Bulgaria). In this case it demonstrates that simply having sympathetic gatekeepers is not always enough to overcome barriers to entry. Here it was pointed out how local funding and preparation we often short term or not timely enough to support and sustain the artistic activity; this is more about an alignment of national support mechanisms.

3.8 Music

3.8.1 Marcin Wasilewski Trio

In the case of the music sector, the typology matrix has to take into account the three sub-sectors into which the music sector is usually divided: the recording sub-sector, the concert sub-sector and the music publishing sub-sector. Within each sub-sector there are, on the one hand, the same actors and, on the other hand, actors specific to each sub-sector.

In the recording sub-sector, there is a recording studio and a label (recording company). We can consider these entities to operate on an Intra-EU level, as the band originates from Poland, the recording studio is located in France and the label in Germany. In the concert sub-sector, there are entities such as concert agencies or festival organisers whose role is to produce a live music event with artists and audiences. Concerts are organised in Poland, in Europe and beyond, so in this case the level is global.

Power in the network is quite concentrated. The leading actors are both MW Trio and the band's manager, as well as the recording label, ECM, which - due to its reputation and very strong market position in the jazz music genre worldwide - has a decisive voice, especially in matters related to recorded music. Although the label is not involved in concert activities or the band's participation in jazz festivals, its reputation is an important factor influencing the strength of the band itself and its manager.

Table 22. Typology matrix for the case of the Marcin Wasilewski Trio

PRODUCTION NETWORK PHASES	Local/ regional	National	Intra-EU	Global	GOVERNANCE
Creation	Creators	Creators			
Production			Lead actor		
Distribution				Strategic partners (private)	
Exchange		Strategic partners (private)		Distributor	
Archiving		Strategic partners (civil society)			
Network level					Hierarchical

3.8.2 Independent debut artist

In the case of the independent debut artist, we found a network model where influence was horizontal and where the artist and the studio owner had the power to choose strategic partners. Simultaneously, the actors they engaged with also had the power to either engage or not engage with the project. This means that the governance of the network is horizontal: different actors have the power to influence and engage, or not engage, with the network. Through reputation and knowledge of one another, the actors had built trust and were able to form a network for the project.

This distribution would not necessarily be typical of other early career artists. We found that the studio owner, who could finance and produce the recorded product, was instrumental in the development of the network, and with a well-established reputation, he was able to guide the configuration of the network. This actor could, in a sense, be considered a lead actor. Due to the other actors' close collaboration and ability to choose their clients, as well as the shared future profits with the artist, we still consider this network to be horizontally governed.

The production network was defined by a spatial presence in Stockholm. The majority of activity in the phase, from creation to archiving, took place in Stockholm, where these relationships of trust could be developed. The distribution component of the network has other dimensions. If COVID-19 had not disrupted the live sector, the artist would have performed her music nationally. The music that was released on Spotify was primarily streamed in Sweden and the Nordics, but the project was also already streamed in countries further away, such as the Philippines.

Table 23. Typology matrix for the case on the independent debut artists

PRODUCTION NETWORK PHASES	Local/ regional	National	Intra-EU	Global	GOVERNANCE
Creation	Creators				
Production	Creators				
Distribution	Strategic partners (private)			Distributor	
Exchange		Strategic partners (private)			
Archiving		Strategic partners (public)			
Network level					Hierarchical

3.8.3 Synoptic lessons

The two cases covered here offer different dimensions of the music experience. In the background, as we noted with the audio-visual examples, there is the final connection to market via one of the majors or platforms. What we note in these two cases are alternative strategies. With the emerging artist, clearly, they are suffering from the long-term barrier to entry discussed in the previous section; again, we note the desire for artistic control being uppermost. Interestingly in this case, entry into a production ecosystem generated its own benefits, even without a 'label'. This points to the existence of different levels of, and control of, access to networking resources in this case the music industry, but we can also see in many small scale craft-based activities, a sort of community of practice. Once again, we need to remind ourselves that these are informal activities, that exist on the penumbra of commercial systems. The point is the space of possibility of public sector intervention and support to sustain such resources.

The MW Trio chose yet another strategy, this time working with a 'non-major' label, ECM. Such labels – as with other 'brands' in the craft sector – are guarantors of cultural value and signify a market for notable niche products. As we have seen before, the two business models of intellectual property sales/rents; or income from live performance offer competing and complementary approaches that can be traded off against one another. Even though we did not cover it here, a similar bifurcation can be seen in the use of Spotify/Apple Music versus peer-to-peer services such as Paetron. The lesson is that there are a multitude of models, and various different points on which to maximise the social, cultural or economic returns, and the evaluation (and policy response to) creative endeavours needs to be seen in this light.

3.9 Publishing

3.9.1 Wislawa Szymborska

Production in the Wislawa Szymborska case takes place primarily at the national level. Publishing houses produce books for the domestic market, using national specialists (editors, graphic designers etc.). Only the printing stage was subject to the process of globalization, as the paper was imported (mainly from China). The pandemic demonstrated this global spread, disrupting supply chains and making it difficult and costly to import from Asia. Distribution is of national character, as books written in native languages have almost no market outside the country, often as much as 50% of the price of the book.

The greatest moment of globalization in the chain is exchange. At this phase the licenses for Szymborska's works are made available to foreign publishers and other creative sectors, ensuring global recognition for the Nobel Prize winner. As a result, the archives of her texts in various languages are also global, which is possible especially thanks to the development of online archives. As a consequence of the above, given that most of this activity is rights-based and hence requires consent of rightsholders, power within the network is very concentrated. Currently, the main decision-maker is the Wislawa Szymborska Foundation. It is responsible for the selection of publishers, consent for translations and granting licenses for the use of author's works. Without the consent of the Foundation, no activity related to the legacy of the Nobel Prize winner will commence.

Table 24. Typology matrix for the Wislawa Szymborska case

PRODUCTION NETWORK PHASES	Local/ regional	National	Intra-EU	Global	GOVERNANCE
Creation	Lead actors, specialized suppliers				
Production		Specialised suppliers		Specialised suppliers	
Distribution		Distributors		Distributors	
Exchange		Consumers		Strategic partners (private), specialized suppliers	
Archiving	Specialised suppliers			Specialised suppliers	
Network level					Hierarchical

3.9.2 STEM Publishing

In the STEM Publishing case, each phase of the production cycle is dominated by particular actors, operating at different territorial scales. The Creation phase concerns the assembling of written

research content, in which the Journal (and Scholarly Society) is focal point: findings are written up in line with the house style and formatting requirements, submitted and quality checked through editorial and peer review. The journal itself is located in London, embedded in a national disciplinary community from which its name derives; however, it is a global brand, attracting authors, editors, reviewers and readers at that level. The Production phase, concerning the coordination of these processes, plus typesetting, layout and eventual online publication, is clearly dominated by the transnational publisher (Global STM). The latter bring together the submitting author with in-house and third-party publishing services, the offices of which are strategically located in specific localities, based on proximity to an educated workforce for reasons of efficiency, quality control and (in the case of the typesetter) cost. Distribution concerns the circulation and tracking of articles to third party sites globally which, given the online nature of the journal, occurs predominantly through the attribution of standard identifiers, metadata and logging in citation indexing services. This too is initiated and underpinned by the publisher. Exchange (i.e. transactions that lead to readership and usage of research content) takes place in a number of ways, with libraries spread across the globe as primary consumers, negotiating subscriptions usually through national consortia. However, the drive towards Open Access is led by funders, commonly embedded in national contexts, but who may work in regional consortia (such as at EU scale). Finally, archiving is again distributed across multiple services, including (localised) university repositories, and (internationally) the publisher’s data servers and pre-print servers run by non-profits.

Table 25. Typology matrix for the STEM Publishing case

PRODUCTION NETWORK PHASES	Local/ regional	National	Intra-EU	Global	GOVERNANCE
Creation	Creators, strategic partners (public& civil society)			Specialised suppliers	
Production	Specialised suppliers			Lead actor 1, specialised suppliers	
Distribution				Lead actor 1, distributors, specialized suppliers	
Exchange	Lead actor 2, strategic partners (civil society), consumers				
Archiving	Specialised suppliers				
Network level					

3.9.3 Synoptic lessons

The two publishing cases are at different ends of the value spectrum: high art and science, and artist centred Polish language national production of printed books, and a globally distributed mainly online production and consumption. However, cultural signification, knowledge and meaning is a core

concern. In the case of Szyborska this is prized and personified in the case of the poet, and her personal values which are not that market friendly. Moreover, we again see how local rules associated with the prize money from the Nobel award affect different countries in various ways. Szyborska has mainly continued and extended a pattern of production and dissemination, with added IP management. It has been difficult without extra investment, or will, to break out of a national system.

The scientific publishing case is on the surface a classic case of globalisation and domination by a lead firm, the production disseminated globally, and publication is digital. The sites where STEM production 'hits the ground' are twofold: the library and the author. University libraries have become reliable money spinners for 'periodicals', a complete set of an ever-expanded list of journals creates a reliable income for publishers. It is perhaps the fragmented 'market' that universities represent that disables them from negotiating a more favourable business model; however, it is complex as the journals are also the source material for research and teaching: parts of the university ecosystem. Which brings us to the creation, academics are responsible for authoring and editing journals usually for no payment, and indeed often on a pay to publish model; but then again academics are dependent on a 'publish or perish' model of career advancement. Perhaps the contrast of the sovereign author in the Polish model, and the academic who is a cog in a bigger machine could not be more extreme. Finally, we need to mention the issue of quality assurance, that associated with editorial bodies and scientific societies; whatever the business model of academic journals, at some level they rely upon a justification and quality control that is secured through this value fixing mechanism.



4. Learning across networks

This paper has collected together the organisational mapping of CCS production networks based upon our case studies as reported in WP2. We have summarised and selected our analysis through and exploration of the spatial distribution of the various functions of cultural production. Our objective has been to examine the organisation and control of the CCS and how that affects not only the distribution of functions, but how it helps us to understand the final location of the value-added activities. Our case study explorations did not seek to attend to the gross flows of goods, services or people across the networks we found. In a perfectly documented world, a pattern of flows might be constructed, however the complexity of economic value, and strategic values (even if it were available) would be confusing. Commonly this sort of analysis might be used as a proxy for the exercise of power and control. Instead, we sought insight from the firms/actors that we interviewed into the particular organisational patterns, and used their self-reporting to understand where decision making took place in a production network.

Immediately, we can reference the stereotypical exemplar of a trans-national corporation which is hierarchically controlled and organised; and the GPN 'lead firm' variant of this (spread across various companies) as an international or global production network. The key element here is the organisational concentration of control which can exercise control over a network. The contrasting organisational form is that of a single firm, or a locally-based horizontally linked network; the control of which is dispersed. The popular stereotype of CCS production is of the lone operator or firm; we have shown through our case studies that this stereotype is not correct. First, that the production is exercised through a network of actors. Second, that their relations – between functions – is variable, not determined by functional relation, but by organisation and control: which either may tend to vertical/hierarchy or horizontal exercise of power and control. Third, that the organisational and spatial location of control of a network is where the economic value added is aggregated.

Our case studies display what is at first a variety of organisational and control patterns, as we explain in the Annex to D3.6,¹ our analysis articulating the inter-relationship between function and space, and control, creates a degree of order. We can identify a group of case studies that are closer to the ideal typical TNC/Lead firm hierarchically and internationally controlled. Perhaps the most extreme example is found in the scientific publishing industry; this is a lead example of the possibilities of

¹ See Pratt, A. (2023) *Synoptic overview of the landscape of governance challenges in the cultural and creative sector* (CICERONE deliverable D3.6) <https://zenodo.org/doi/10.5281/zenodo.8358453>.

controlling distribution; which we also find in the second group, audio-visual industries of film and music (Klas Film, Eurovision), as well as the international performers (MWT). However, it is not simply the possibilities of control and monopoly value added profits that can be achieved through distribution systems. We can see interesting parallel examples of cultural and editorial control that are manifest in both architecture (GA/PA) and craft yacht making (Prisma), and the high-end designer fashion (Yellow). A fourth sub-group are the site-specific curation of live events and festivals when they assemble international expertise and deliver it locally (Lowlands, NDT, Amalyashi, Varan and Venice). So, to summarise, these are all CCS industries that are organised to exert strong central control, either to extract monetary values, or to regulate cultural values.

At the other end of the organisational spectrum, we find activities that are closer to the normative stereotype of the CCS, except they are networks that are local and horizontally organised. We can observe two variants here, the first is characteristically based around a focal artist, or artistic vision: they collaborate locally to sustain a production ecosystem based on cultural value or technique (Szymborska, Debut artist, Sibumski, and Patty Morgan). These actors may have international linkages, but the focus is the local. Second, heritage and cultural institutions that are embedded in local cultural expressions (Music Collegium, Weiner Heurigenkultur).

In between these forms we can find two other combinations of spatial/functional and organisational configurations. First, those that resemble the local cultural producers but who are focused on a global market; the examples are the two fashion networks Magenta and Cyan. Second, we have local producers who have hierarchically controlled networks; who, return much cultural and economic value to the locality, due to their embeddedness drawing on local expertise and audiences, again, there is an indication of curatorial control that favours the hierarchical form; but in these cases it is directed at a local field (RAP, MEF; SRA, Konstanverkarna, Swedish Glass, Euromusic exchange and Viennese Games).

Clearly, whilst we selected case studies to represent the range of CCS we have not been able to include a fully representative sample; our objective here is to iterate a schema of ideal types of production network, in particular stressing issue of control and location. Our analysis not only challenges the simplistic reductive assumed relation between location and value (economic, employment or cultural), but also stresses that value and function are distributed across space (but not equally). The analysis alerts us to how control is exercised in the different network configurations: more generally between hierarchical and horizontal control, and more locally embedded, or globally dispersed. There is not a simple correlate between particular industries and organisational form; we find that issues of cultural control complete with those of financial control, at both the local and global levels: in this sense the locational 'fix' (and the embedding that it implies) represents a pragmatic balance between these competing organisational objectives.

In the previous section we explored the organisational formation of CCS production networks across our case studies. The first point is that it confirmed our hypothesis that there is more than one

organisational form of the CCS. In fact, we identified a number of different types of network based on scale and the functions of the production network. In this second iteration of this exercise we have sought to simplify the process. Namely, to compress the production cycle and to highlight where power is articulated from. In this sense we are seeking a determination overall for a vertical organised network, or one that is horizontally organised. This is clearly a gross oversimplification, however we can have reference to the classifications above to identify which functions are more in the vertical or horizontal vector of power.

However, our objective here is to create an overall framework that generally distinguishes between the two dimensions scale (local/trans-local), and organisation (horizontal/vertical) in which they can be expressed as a 2 x 2 matrix. In this case the normative 'global network' is characterised by the global – vertical cell, and the characteristic 'local' actor by the Local Horizontal cell.

A common pattern is that horizontal linkages in the network occur in the creation, production and archiving functions, but distribution and exchange are vertically controlled. We can see a common pattern where these later functions are non-local. The other dimension that we have simplified on is scale, our reference is the local (and we extend this to a region of city region), and the trans-local by which we mean the national and beyond. Again, as to which functions are carried out at the local or trans local scale are critical in terms of control and power.

Table 26 presents the summary allocation of these cases to the 2 x 2 matrix. As can be noted, all cells have network types allocated, and as designated by the case study codes (2.1a-2.8b) there is a degree of correspondence to 'industry' variations. The craft and smaller scale network operators tend toward the local – vertical. On the other hand, those activities that have a string curatorial/ production process tend to the Global-vertical. Finally, the local-horizontal is populated by those that have a close connection with local culture.

Table 26. Classification of cases by network type (simplified)

Global-vertical	Global-horizontal	Local-vertical	Local-horizontal
GA/PA	Magenta	RAP	Museum Collegium
Prisma	Cyan	MEF	Wiener Heurigenkultur
KLAS Film		SRA	Patty Morgan
Eurovision		Konsthantverkarna	Sibumski
Yellow		Swedish glassmaking	Debuting artist
Lowlands		Euromusic exchange	Szyborska
NDT		Viennese gaming	
Amalyashi			

Varna			
Venice			
MWT			
STEM			

This classification is should not be taken as absolute, as all of the functions in each case are in some way distributed between local and global; and there is some fuzziness in the definition of trans-local; however, we have used the filter of power and control in terms of decision making that was revealed in the interviews, as well as the particular significance of distance and trans-local to actors in production systems.

The reason for this reduction is to make a manageable classification of cases for the Observatory pilot exercise, which we wanted to represent in accordance with an emergent production network typology (WP6).



5. Conclusions

The aim of this paper has been to provide a high-level synoptic overview of the various configurations of production networks that have been mapped based upon our case studies in WP2. We have translated the findings from these case studies so that they can be represented in a common format of a table: function by scale. This has been carried out to highlight the scope and organisation of production networks, and to identify where power is articulated from.

We noted that in contrast to normative assumptions the CCS had more than one organisational type, and these types were of various complexity that had particular power geometries. We hope that these models help both on one hand, in speaking back to general arguments about GPN which have not generally examined the CCS and their particular formations; and on the other hand, to inform policy makers of the particular varieties of CCS production network models. Intervention to challenge the existing power and distributional outcomes will clearly be more effective based upon a revised concept and understanding of the operation of CCS production networks.

The following paper refers back to the policy discussion summarised in D3.3 and identifies the challenges and opportunity spaces for policy action conceived of as part of production network understanding of the CCS.

Annex 1

How to fill in the typology matrix of production networks?

The typology matrix is a crucial component in constructing an overarching narrative which will enable us to transcend the idiosyncrasies of the cases. It will, moreover, form the basis for our policy recommendations as these are phase and location specific and as these also have to take into account how the governance of the network is organised. We have to strive for a high level of uniformity to enable comparisons and this means that we have to fill in the typology matrix in a similar way. Below, we present a guide to achieve that goal.

In many cases, we cannot compress the information on the two key dimensions spatial footprint and governance for the whole production network right from the start. Instead, we have to break down the network into the phases and then assess where the actors of these phases are located and who is in charge. This will generate a refined stepwise analysis of the production network. The next step, then, is to summarise the findings for the whole network. Production networks may be local from the creation phase to archiving or they may be global from start to finish. It may also be the case that the whole creation and production phase are local/regional but that the distribution and exchange phases are national or even global. Identifying such a spatial footprint would already convey important information for policy makers.

Similarly, assessing how the governance of the network is organised, takes place in a stepwise approach. We look for each phase which actor initiates, organises, monitors and controls the activities. It may be the case that one actor is in charge of the whole network, it may also be the case that two actors are in charge of different phases, and there is also the option of a more horizontal governance configuration without clear lead actors. How policies impact on a production network is contingent on its governance configuration. Throwing money at a specific cultural and creative industry which is controlled by a Transnational Corporation located outside the EU would be a rather different kind of proposal than if the lead actor would be located close to the other actors in the same country or even same city.

Two Options:

1. Filling the typology matrix just with X to indicate where the phase takes place
2. Use the actor categories and fill these in the boxes – including indicating where the lead actor(s) in which phase and where they are located. In this case, we will be able to present rich information in one go.

Table 27. The typology matrix

PRODUCTION NETWORK PHASES	Local/ regional	National	Intra-EU	Global	GOVERNANCE
Creation					
Production					
Distribution					
Exchange					
Archiving					
Network level					One vs. multiple lead actors

Table 28. Key actor types in the production networks

Creators	Actors who do the initial creation (individual - e.g. writer, musician - or collective – e.g. fashion brand, film crew)
Specialised suppliers	Suppliers who provide specialised/dedicated services or products and which are hard to replace in the short term
Strategic partners – private sector	Providers of strategic resources (capital, labour, knowledge, certification): e.g. banks, educational institutions, professional associations, tastemakers, critics
Strategic partners – civil society	Actors who are neither state nor market but who provide essential goods or services or resources (funding, labour, information, certification)
Strategic partners – public sector	Public sector actors at the level of the EU, the national or the regional or local government providing strategic resources (e.g. funding, certification)
Distributor	Actors (individual or collective) who are in charge of delivering the good or service to the customer or consumer
Consumers	B2C: business to consumers: final market of large number of buyers
Customer	B2B: Business to business: final market with typically just one buyer (e.g. real-estate firm commissioning a design for a building)
Lead actor	An actor who initiates, organises, monitors and controls the activities of the network

Phases

We depart from the five phases of the GPN approach. In many cases, though, the phases overlap, borders are blurred etc. This can easily be dealt with by merging the cells of these phases if they overlap or with dotted lines if they are distinct but blurred.

The spatial scales

We distinguish four local scales: local/regional, national, intra-EU and global. These scales, in principle, correspond with different sets of policy makers and, in many cases, also with different sets of policies (from local policies to provide workspaces, to national subsidy programmes, to EU regulations regarding competition, and to EU trade policies). The anchor point for *the local/regional* is where the initial creation takes place: in other words where the aesthetic component of the good or service is created. This spatial level coincides with an individual city, a larger metropolitan area, or a more rural, subnational area. The start of the value chain may be located elsewhere – as in the case of architectural design where the customer may be located on the other side of the globe – but our focus here is on the first moves of the concrete actors of a specific cultural and creative sector. We, then, assess for each phase where the other key actors in the production network are located. The location of an activity is where the actors are from: flying in a choreographer from Norway and a light engineer from Israel to create a modern dance piece in The Hague still is a form of global import.

Governance

We distinguish three options: two top-down governance configurations: a) lead actor and b) multiple lead actors (not more than 2 or 3), and a third bottom-up horizontal configuration.