

Another point of view on the development of video game industry in UK and France

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Abstract

Comparing the market share and the development scale of France's video game industry to the UK, France are showing the weak side in both. From the angle of the industrial development history, we can say that the British Government began to develop the game industry earlier than France, that accounted for the initiative. However, this paper attempts to reflect the difficulties of the development of video games industry from the production and consumption in information and communication technologies (ICT) industry in UK and France. On the other hand, with different angles such as the concept of the cultural industry and the consumption of

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high-tech products in France, we can have more resources to approach the question.

Index Terms – cultural industry, video game industry, digital industry.



I. Introduction

The UK began their development of the video game industry in 1980s, when many small game development studios were established, while the British government promoted the development of related creative industries in 1990s. The development of relevant industries in France is later than in the UK, and their situation is worse, we can say that Britain led the initiative, standing at the forefront of related industrial development. However, this paper tries to give another perspective to think the less developed industries in France, and with an angle of the production and consumption of high-tech products to find the factors that block the development of video game industry, such as the different understanding of cultural industry by the government and the consumption conscious of high-tech products in the French society. In this paper, firstly, we describe the developing situation of the video game industry in the world, and then explore the British and French history of the development of related industries and the early attitude of the government. Finally, we consider the difference on the consumption attitude for the ICT products in these two countries, using the data analysis on IT industry and examining the concept of cultural industries, thereby providing a different perspective to think about this topic.



II. The development of video game industry in the world

Gamers Gate is a company who engages in development of video game and provides online game download service for PC and Mac users. Company director Theodore Berg Quist noted that the company's turnover in 2010 has increased by 100% compared with the past three years (1), although there were many difficulties in their business, such as the problems of customer to download and install the game and the challenges on the second-hand game selling market. The video game industry of United States in 2009 brought them for 19,66 billion USD (13,6 billion euros), almost twice the annual income of the film in the same year. The income in Japan was 540 billion yens (4,16 billion euros) (2). Video game industry's overall growth in the world is very large, as IDATE (3) study showed that gross sales in 2004 was 24 billion euros, while in 2008, this figure reached 41 billion euros. Just only in four years, it increased of nearly 20 billion euros (4).

In fact, since 1990, people had found the cultural and economic value of video game industry, therefore, video game and website industry have been also included in the cultural industry (5). At the same time, the R&D (Research and Development) of video game combines the achievement of telecommunication technology and interactive device. The technology leads



《Another point of view on the development of video game industry in UK and France》

the future of video game directly. For example, the remote communication device installed in the console makes it to become an electronic hardware with the function of network communication and online games playing, like the new model Xbox360 with a camera and an object scanner, people can play games by moving their own body, which represents the interactive concept of “Experienced Economy”. As a result, with the combination of modern technology and new economic model, video game industry has a positive impetus and occupies an important position in the field of cultural industry as well.

The R&D of video game integrates many multi-specialties and peripheral industries. Technically, it involves programming and interactive technology research between human and machine. On the other hand, it also relates to design, story compiling, book publishing, advertising and other peripheral industries, forming a diversified industrial chain.

And video game’s market can be divided into five areas: TV games, game devices, PC games, video game machines in amusement places and online or mobile games. There’re no more than 3 brand leaders in game’s production and sale in the market: Play station of Sony, GameCube of Nintendo and Xbox of Microsoft. Although the market is dominated by these three major brands, the competition among them is very intensive.



They need to launch new games and new functions constantly or even reduce their price to keep competitive. The patent strategy has also been taken to protect the profits, that is to say, each manufacturer has to develop their own unique technology to make sure that their products are not compatible with the others, but only with the specific products under its own brands.

However, because of the intensive competition, developers have to consider how to get more benefits by using the new technology. So the consequence of the continuous development is that the isolated game system is connected to the network and telecommunication technology, and then online and mobile games come out. Now, people upgrade games to a new economic product with the function of network, interaction and experience by modern technology in order to break the closed situation of human-to-machine. From this, we can realize that how the digitalization and ICT provide support and innovation in technology and creative thinking for cultural industry (6). In the following paragraph, we are going to make a general description on the related industries of UK and France, using the data to understand their specific situation.

III. The status of video game industry in UK and France



《Another point of view on the development of video game industry in UK and France》

In France, 38.8 million units of video game were sold in 2009. Compare with 2008, it fell by 11.4%, software developed by foreign countries dropped 10.2%, while that by French company declined by 25.2%. Software developed by foreign countries was 92.9% in the total sale volume, but only 7.1% software was from France.

In the same year, the output value created by game software industry in France was 1434, 8 million euros, decreased by 13% compared with 2008. The total sale volume of French video game software was 69.8 million euros, which reduced to 44.9% of previous year. But the amount of game that designed by foreign countries selling in France also fell by 10.4% to 1364.9 million euros. The total sales amount of software created by foreign companies for the year was 95.1%, while that by French companies only accounted for 4.9% (7).

However, the average volume of video game in UK is 60 billions USD every year (8). Though its global market share is only 8%, the percentage of UK companies as a participant in game developing was accounted for 15%. From the year 1997 to 2003, the UK game market increased by 100%. During 6 years, in 2003, the market share of video game hardware and software industry (PC hardware was not included.) had surpassed the one in Germany and France (9).



Compare with 2008, in France, not only the sales volume, but also the amount of selling game reduced more than 10% in 2009. Foreign game software was accounted for more than 90% of the whole French national market, which played an important role and the market share of French software was less than 10%. This shows the situation that we need to consider: why is the market share of French game software so low? Is that a problem in technology? Does the game design not match the market? Is the support not enough from the government? These are the questions that the related French governmental department needs to solve.

IV. Positive impulse from the UK government

The healthy development of the industry relies on the government's attention and policy support. In UK, the government has a positive attitude to the development of video game industry. They have paid much attention to organize related trade associations and built up sound institutions.

Early in the 1980s, the Britain began to develop the video game industry. Some video game ateliers have been established and developed until now, such as the Rare Ltd, it sold 90 million copies of software game from 1985 to 2003.



《Another point of view on the development of video game industry in UK and France》

Although there are no specific policies to promote the development of video game industry in UK, it has 2 ministries with the responsibility of the related business. One is the DCMS (Department for Culture, Media and Sport), and the other is DTI (Department of Trade and Industry). The former is mainly responsible for the supervision and co-ordinate planning, while the latter focuses on support and development such as financial support. For example, DTI helped to organize TIGA (The Independent Games developers' Association) in 2001. In 2002, DTI was the financial sponsor of a research project "Analysis of the competitiveness of the UK video game". And it also provided funding to game creation company to participate in the largest E3 (Electronic Entertainment Expo) in U.S.A.

DCMS has the responsibility for the review and supervision of the company and their products. Due to the social problem from the violence and the pornography in game, DCMS assisted the related publishers in conducting a video game rating system to adjust players from different ages, like the film classification. In 2003, PEGI (Pan European Game Information) formulated by ISFE (Interactive Software Federation of Europe), included that video game rating system as a classification system to use into the development of relevant industries in Europe and improved its institutions of the game industry.



In the regions, RDAC (Regional Development Agency) was built in 1997 for the purpose of enhancing the development of digital industry. For example, it helped the Association of Scottish Game to set up the exposition in E3 to promote the British games through the year, as well as it improved the world operation of the TIGA, which aimed at accelerating the development of Yorkshire and Humberside game industry. In 1989, ELSPA (Entertainment and Leisure Software Publishers' Association) was founded to coordinate the management, marketing and development of domestic producers. These examples show that the UK game industry has an earlier history, so that they are far ahead in this field. Meanwhile the government plays an active part in its development and makes policy to coordinate all related companies, in order to establish a sound developed system for in the future (10). These examples indicate that the UK video game industry has not only the earlier development history to let them hold the initiative in the field, while the active participation of the government and making policy to set up a road for the future development of the industry.

V. The measures of early industrial development by the French government



«Another point of view on the development of video game industry in UK and France»

Comparing with the UK, the video game industrial development in France is late. We can say that the French government's enthusiasm for this industry was reflected in the response the questions of Association des Producteurs d'Oeuvres Multimedia (APOM) (now "Syndicat National du Jeu Video") by Prime minister Jean-Pierre Raffarin in april 2003. This positive response, as mentioned above, was a reaction that the UK video game gross sales surpassed France and Germany in 2003. In the opening of Futuroscope which is a theme park of video games and new media technology in april 2003, Raffarin gave a positive response to the various development issues summed up by the association, and clearly expressed an intention to support by government the development of French video game industry at the international level (11). And in December, a study report was written by a governmental department to put forward concrete solutions more clearly on these issues (12).

Association made a total of number of issues and recommendations, and Raffarin gave them all specific response. For example, APOM hopes that ANVAR (13) can provide financial assistance to small game production company to develop their own software for improving the efficiency of the production. Raffarin said on this issue, ANVAR has provided a 5-year



financial support for 50 game development projects, amounting to 4,24 billion euros.

For the sales distribution problems, APOM hopes that "Le Réseau pour l'Innovation dans l'Audiovisuel et le Multimédia" (RIAM) (14) can provide more assistance. Raffarin answered that in 2002 RIAM supported 9 development projects for total of 2,4 billion euros, including 1.9 billion euros from the Ministry of Industrial Development (15). However, we think that a more important and effective measures are the government loans providing for the pre-production.

The investment of pre-production for the small game development company is a problem. In the past, French company's initial investment in product development generally took 10 million euros for a project, but in 2003 up to 50-100 million euros. There is a myriad of difficulties for small companies applying for bank loans, and such a huge investment will also face greater risks in the global market, the relevant departments of French government took note of that high initial investment costs which will affect the industrial development. In this regard, the government set up a 4 million euros loan fund to assist the company's initial investment, it can cover maximum 40% of the upfront capital investment (16).



«Another point of view on the development of video game industry in UK and France»

All these proposals and responses were summarized and written to a study report by Fabrice Fries, executive of The Court of Audit, in January 2004, and the report was submitted to the Prime minister and the minister of Finances for preparing to actively implement the measures. The Ministry of Foreign Affairs also organized a conference "Imagina 2004 - European video game development" in february of the same year in Monaco, for studying the blueprint of the development of related industries. The conference contributed to Paris regional universities and private studios to establish a **network for promoting an exchange and mutual relationship (17).**

Then in 2005, the Ministry of Foreign Affairs began to operate an organization "France Game" (18) to internationalize French video game industry. their maintask is to provide international investors and practitioners a communication and coordination with French company. They also play an active participation in international exhibitions such as E3. In 2005 Los Angeles's E3 show, Ministry of Foreign Affairs associated the domestic game studio to participate actively with a theme "France. The Rising Playground" in such international exchange platform to allow more countries to understand the French video game development.



On the top, we introduce the implementation of the measures by the government of UK and France with a way of historical description on the development of related industries, while it also demonstrates the government's attitude. From the description that UK is a earlier European country to emphasize on the video game industry, and its goal is for the international area. As a result, compare with other European countries, the UK has an advantage in an early market and France is in a relatively backward situation those are easy to understand.

However, in this view of history as a methodology, it can not fully explain the features of the game industry, because the video game as a high-tech product will have more different factors of development with the other commodities, for example, the level of technological development, social attitude for the high-tech products, etc. Hence, we will attempt to provide the following analyses with some figures concerned with the development of ICT industry for providing a diverse perspective on video game industry studying.



VI. Situation of the digital industry in the world

	2005	2006	2007	2008
DigiWorld markets (billion EUR)	2 307	2 455	2 614	2 739
yoy growth	-	6.4%	6.5%	4.8%
World GDP (billion EUR)	34 185	36 850	39 500	42 310
yoy growth	-	7.8%	7.2%	7.1%
DigiWorld as a % of GDP	6.7%	6.7%	6.6%	6.5%

Source: IDATE

Fig. 1 DigiWorld contributions to global GDP

From the Fig.1 above, we can see that the development of digital industry in the whole world revealed a trend of steady rise. In the years between 2005 and 2008, its growth was 432 billion euros, an increase by 18.7%, the increasing of percentage can also remained 6% in 2006 and 2007, even in the financial crisis in 2008 rise it by 4.8%. Compared to GDP, the percentage of digital industry in GDP stayed steady at 6.5% above around 2005 to 2008, including the time of financial crisis.

In the national rankings the top three market share of IT (information and technology) products in 2008 were the United States, Japan and China. And the United Kingdom with 140.3 billion euros was ranked fourth in the world, first in Europe. With 133.3 billion euros stayed Germany in fifth place. The ranking of world market share in 2009 did not change. The United States accounted for 29%, Japan 10.4%, China 6.5%, UK 5.8% and



5.5% in Germany. Finally, the leader of the world in this area is the United States (19), whereas France was not on the list.

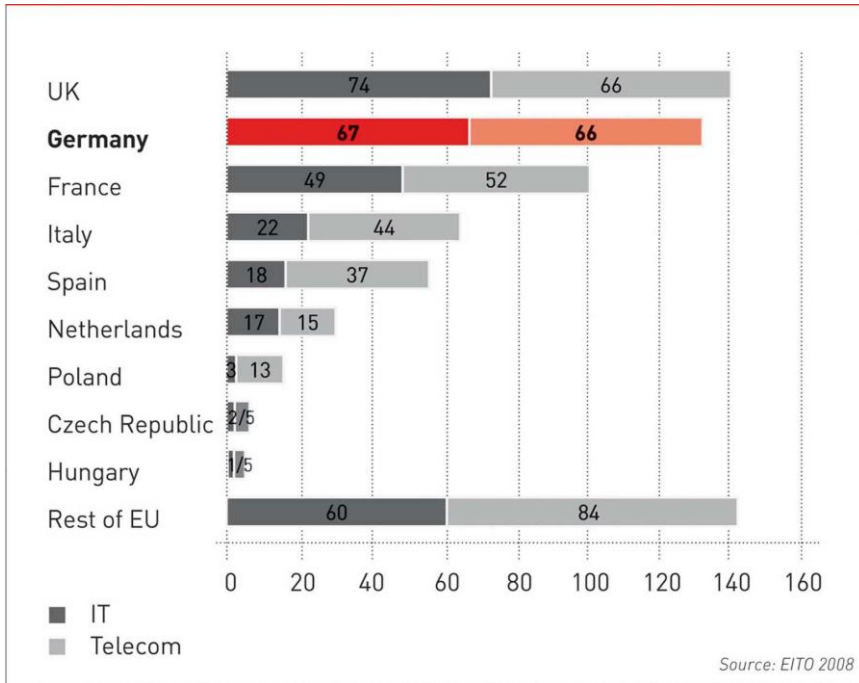


Fig. 2 EU-25 ICT Industry Market Volumes 2008 (in billion euros)

Now, let us analyze the IT situation in three European countries: Britain, Germany and France. The graph indicates the market share of IT products in Europe in 2008. If we take a look from the data, there is not a great deal of difference between IT and telecommunication industry in UK and Germany. But in France, the gap between these two areas in Europe has exceeded over 10 billion euros, particularly the large balance in IT between France and UK is nearly 25 billions. It is clear by studying this graph that



«Another point of view on the development of video game industry in UK and France»

the digestion of IT products and services in France is obviously much smaller than the other two countries.

The Fig.3 shows that the consumption of ICT product in France. If we regard 100 units as the cardinality in 2000, the consumption of IT in France was 85 units in 1990 and rose to 120 units in 2008. The increase was about 29% during 18 years. However, the IT related production and its consumption in domestic market had a great difference. If we suppose that 100 units as before, 18 years later, IT products in France climbed dramatically from 30 units in 1990 to 270 in the year of 2008, which increased by 88%. Another example, from 2008 to 2009, the production rate ups to 5.66% from 268.14 to 284.24 units, while its total consumption went up slightly from 118.97 to 119.72 units with a rate of only 0.62%. (20)



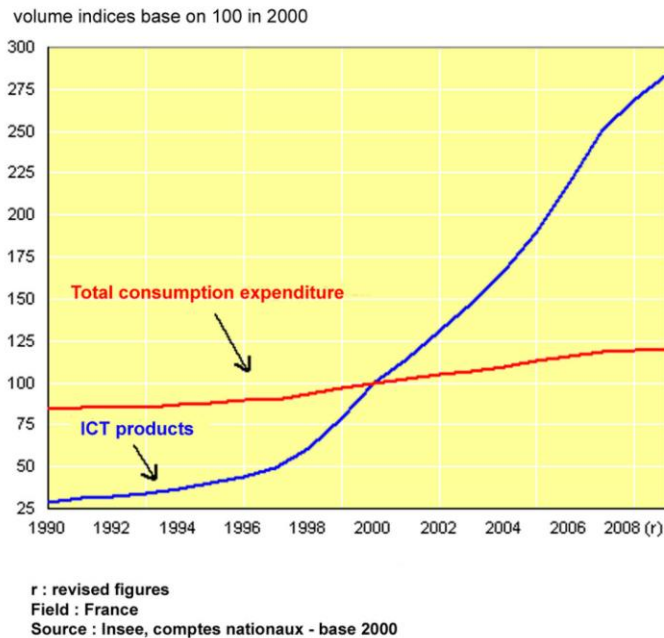


Fig. 3 Consumption of ICT product

The analysis above interprets some status of the development in digital industry: first of all, the increasing market share of digital industry in the whole world indicates that people's demand for IT products is rising. Despite the dreadful state of economy, people are still willing to spend money on IT product, which has become the necessity for the development of people and business; second, data shows that United States and Japan are leaders in technological development, therefore their related industries grow quickly. And China, because of its huge market, is just a little behind these two developed countries. However, Europe has no great advantage in



《Another point of view on the development of video game industry in UK and France》

technology and its market volume, this becomes a “birth defects” of the development in this industry.

If some large countries in Europe are amplified, we can easily find out that the development of digital related areas in France is much more slowly than the other European countries. In this case we can preliminary estimate that there're several possibilities of its development as below: First of all, the nation lacks the enthusiasm of new technology. In terms of awareness, demand and practical application of IT do not synchronize with its development; secondly, the government has considered incomprehensively the industrial development such as the cooperation in education and the promotion of relevant technologies; thirdly, because of the poor economic situation, companies and individuals reduce their investment in high-tech products. In this highly information-oriented age nowadays, digital and ICT industry and its consumption influence directly the development between the cultural industry and IT industry. Therefore it impels the operational updates and extensional competitive in domestic cultural industry.



	Turnover in 2003 (billion USD)
Television	260
Print media	220
Edition (book)	90
Cinema (sale for TV not included)	80
Radio	45
CD	38
Video game (consoles included)	32
Website	2

Fig. 4 Evaluation of the global market in cultural industries (21)

Sources : Bureau of Census, Screen Digest, Banque mondiale, Idate, Ifpi.

	Turnover in 2003 (billion Euro)
Telecommunication	1 182
Computer	1 328
Consumer electronics	280

Fig. 5 Evaluation of the global market in digital industries

Source : Idate.

However, what's the connection between the impetus in digital industry and the development in cultural industry? From the Fig.4, the marketing evaluation in 2003, the gross output value of cultural industry was 767 billion USD. But in digital industry (Fig.5), only the telecommunication accounted for 1182 billion euros, there were overall 2790 billion euros income from information industry, the output value was



《Another point of view on the development of video game industry in UK and France》

three times more than the cultural industries. Therefore, we know that the power of transmission in telecommunications and the application of computer technology can be integrated in the area of cultural industry for an interactive development. The growth of some new industry types based on electronic technology such as video games industry can bring along the development of peripheral industries and form a strong multi-industry chain.

After the analysis above, we believe that the ICT industry has two things which concern the video game industry, or even other categories of cultural industries: one is the consumer psychology and consumption patterns, and second is the thinking about the development of combination of cultural industry and information technology. The power of France on ICT industry and video game industry is not as good as the UK, one of the reasons, it can be said that it is the different orientation on cultural development in this two countries and the other is the result from the differences on the custom of cultural consumption.

On one hand, from the concept of cultural industry development, the British government, in a particular emphasis, makes London becoming a creative and fashionable capital. Their creative industries concept has a special attention on the individual's creativity and talent to create wealth



and employment opportunities (22). On the other hand, France has been using the term cultural industries (L'industries culturelles), its internal side shows us a French cultural concept is very different from the UK one.

In 2006, a research report of Paris was using the term "cultural industry", this definition was coming from a report of CESE in 2003 (23). We think that the "cultural industry" refers to a static feature of culture, it means to industrialise the cultural value which is already existed, like the industrialization and commercialization of "cultural heritage", to produce an economic benefits, it is a passive concept compare with the creative industry. We can understand the concept "creative" is more active and positive, it emphasizes on creation, rather stress on the existing value, but closes to an enterprise to construct from zero. The French government noticed this issue in a study report in the year of 2010, they studied the concept of "creative industry" from UK, they compared the connotation between these two concepts (24).

On the other hand, the high-tech products as a fashionable consumption concept, the domestic consumption of ICT products in France was not very active, it was already mentioned above. But we believe that this situation reflects a different cultural orientation from tradition and modern between mainland Europe and the island country UK, and at the



《Another point of view on the development of video game industry in UK and France》

same time, this consumption attitude on high-tech products can be the factor causing the differences on the development of the new media industry in these two countries.

VII. Conclusion

The different understanding of the cultural connotations will influence the direction of the cultural industries policy, we can say that the British chooses an unlimited and active direction for their cultural industries development in the early time, compared with other European countries, its success is evident. However, France has been proud of its traditional culture, but also began to reflect on its own future on the cultural economic development. The consumer attitudes sometime reflect the possibility of accepting new things for a society, meanwhile continental culture and island country culture like UK's empiricism have a congenital difference. So when facing of a new era, new technology, it will present a different thinking and a different result. These two aspects may really reflect some local features on the development of new media industry, and those of them may not be changed through a mandatory policy in a short time.

The continuous growing of video game on internet will become a new consumption pattern in the future. Even in the virtual world of video game,



people can also deal with their normal business in everyday life, daily chores are combined with the video game. Therefore, as a creative industry, its development and potential market are enormous, because these may become a lifestyle, a necessity in our future life. But, to develop this industry, we need a solid foundation and long-term policies based in the digital and ICT industries. On one side, in the case of disadvantages of technology and market, Europe can just only to develop the software as its main direction. On the other side, the United States and Japan monopolize the production and sale in console. At the present stage, we can believe that there is a clear division of the video game industry in the world: the U.S.A. and Japan control the production of console and software; Europe plays a part in the development of software and China is a role of producing parts and accessories.

In this situation, the future of video game and its new consumption and lifestyle patterns will be dominated by the countries which manufacture console and software. However, who controls the video game's future means that it has not only a head start of a mode of new consumption, new entertainment and new life patterns, but also can reflect its leading role in cultural diffusion for the future. Even so, entering into this untapped market, we need more creative ideas to imagine how the video game and network can have more connections with our everyday life.



«Another point of view on the development of video game industry in UK and France»

Note

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1 8	http://www.france-game.org
1 9	<i>The Information and Communications Technology Industry in Germany</i> , by Germany Trade and Invest (Berlin), p.3, 2009.
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«Another point of view on the development of video game industry in UK and France»

	classer tel ou tel secteur d'activité comme "industrie culturelle" dépend des sources consultées. " (CESE, <i>Les industries culturelles en Europe</i> , décembre 2003)
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