Summary Report on the mapping activities (WP4)

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1. Executive Summary and Methodology

CCAlps is a European project that promotes the Creative and Cultural Industry, one of the most dynamic and strategic sectors for the European economic growth. It is financed by the Alpine Space Program of the European Union and its aim is to develop the competitiveness and the attractiveness of the Alpine Space Area, by strengthening the relations between urban and peripheral areas. Lombardy Region is the lead partner of the project that involves a network of nine institutions from six European partner countries: Italy, France, Germany, Austria, Slovenia and Switzerland. It's overall aim is to create a transnational network among HUBs that exist in the partner region in order to support creative enterprises, SMEs and research institutions to commonly realize successful innovation projects.

As one of the preliminary activities the partner's defined the idea of "Hubs", the selection criterias and guidelines in order to engage them in the course of the project's life-time. Once the regional hub structures were identified and the potential hub coordinator's were actively involved on a regional level this phase was completed, and the core activities could be implemented. In particular, three macro–phases can be distinguished in the implementation process: mapping, hubs implementation and feeding, results and recommendations. After the project HUBs placed in the partnering regions could develop services, events and pilot projects for the continuous connection of CCI's, public actors, SME's and universities. The HUB could be placed in existing spaces (e.g. an office in public structure) or in new dedicated buildings with a specific design or be managed as a virtual network. In peripheral areas HUBs may be organised in a less concentrated way (could be identified with an innovative creative company which is located in a rural area) but have the chance to further benefit from the virtual platform and from networking with urban Hub's. All Hubs will be connected with the meta-hub network linking also the actors geographically far away from the center (SME's, small town, mountain communities, etc.). Hubs could be temporary and/or incorporated in established Hubs.

As one of the main results it can be summarized that Hub's in the field of Cultural and Creative Industries are seen as important catalysts for change throughout the regions, as their value is regarded significant in:

- Creating a new eco-system
- Creating economic value – creativity as a source of business value
- Cross-Sectoral Business Linkages

And by taking in account their potentials in:

- Flexible forms for cooperation
- Cross-disciplinary interest
- Creating new markets
- Strengthening linkages between industries

2. Definition of Hub's

The "Hub" is a space-based and online community to access innovation, knowledge, market opportunities, inspiration and experience that brings together people who want to make a change, and are willing to take the risk – a space that will help make the change easier and less lonely.

Hub's can be characterized by their **thematical focus on Cultural and Creative Industries** (Design&Media, Movie, etc.), **their territorial focus** (urban or rural areas), their **organizational structure** (flexible in size and structure), their **aims** (the value that it delivers to the rest of the members), their **services and activities** (events, trips, coaching/consulting, etc.), their **Members/Partners** (start-ups, micro-enterprises, economic or cultural institutions, SME's, etc.) and their **funding** (mix of private and public support; project-oriented financing).

There are also some **different levels of hubs,** as following:

The **Hub Level** with a hub coordinator who will help identifying the regional hub's (outside in the territory or within the cities), coordinating the network and supporting their activities.

The **Sub-Hub-Level** are the various "hubs" in the region, which will be identified, listed, demonstrated and communicated.

The **Micro-Hub-Level** are the members (companies, start-ups, relevant institutions...) of each "hub" which will be listed and communicated.

3. Transnational Map of Creative Industries

4.1 Overview of Creative Industries per region

Based on the regional reports the following short descriptions shall outline the main information generated by the mapping activities.

4.1.1 Baden-Württemberg

Overall in Germany creative industries are mostly represented by small enterprises. Big companies represents just the 0,3% but alone they are responsible for the 63% of the overall industry turnover. Cultural and Creative Industries in Germany have become an important sector with strong cross-sectorial potential offering services to many other branches.

In Baden-Württemberg several branches of the Creative Industries are represented, for an overall of 29.000 companies with 210.000 employees and an overall turnover of more than 20 million Euros.
Baden-Württemberg is particularly strong in three branches: "software/games", "architecture, design and visual arts" and "writing, publishing and print media".

The industry connected to **Publishing, Newspaper and Books** is on the first place with an overall turnover of 6,4 billion Euro and 29.200 people employed. This is followed by the Software and Games industry which alone generate 5,8 billion Euro of turnover and employed 68.600 people. This latter field can be for sure considered one of the most innovative and promising for the future of the creative industry in Baden-Württemberg. Design, Architecture and Arts occupy the third place in the region (3,7 billion Euro; 36.900 employees), narrowly followed by advertising (3,4 billion Euro, 18.400 employees).

In the field of 3D Animation, Baden-Württemberg can boast some excellence as well in the research and education as in the industry. The highlight is the Filmakademie Baden-Württemberg10 (Film Academy), founded in 1991 and today already one of the most renowned international film schools.
The Games industry in Baden-Württemberg can also be considered a promising sector. Some major players have their seat in the region; particularly the city of Karlsruhe is becoming an important games location.

4.1.2 Ljubljana

Ljubljana urban region (LUR) there is the biggest concentration of human resources, knowledge, and entrepreneurship, as well as opportunities, whether in capital or in the creative environment.

Large urban areas and capital city regions dominate the CCI (Power, Nielsen, 2010). Since Ljubljana is the capital and the biggest city in Slovenia, it is no surprise that creative industries are concentrated here.

The occupational analysis of CI in Slovenia (Murovec, Kavaš, 2010) confirmed the concentration of CCI around in the capital. The comparison between the shares of creative occupations in all occupations in Ljubljana, LUR and Slovenia (see Table 1) indicated a preference on the part of creative people to settle in Ljubljana. The share of individuals with a creative occupation living in Ljubljana was twice as large as the share of individuals with a creative occupation on a national level. Moreover, the share of individuals with a creative occupation living in Ljubljana (with regard to individuals with all kinds of occupations living in Ljubljana) was significantly larger than the share of individuals with a creative occupation working in Ljubljana (with regard to individuals with all kinds of occupations working in Ljubljana). Therefore, it can be concluded that creative people tend to concentrate in Ljubljana. However, there was no single creative vocation that stuck out in Ljubljana, in relative comparison to other creative vocations.

Share of creative occupations

	Slovenia	Osrednje-slovenska (residence)	Osrednje-slovenska (work)	Ljubljana (residence)	Ljubljana (work)
% of creative occupations in total occupations	1.5	2.4	2.3	3.3	2.6

Murovec, Kavaš, 2010

Also the industrial analysis of CI in Slovenia (Murovec, Kavaš, 2010; Murovec et al., 2012) confirmed the concentration of CI in LUR - as much as 42 percent of all CI companies in Slovenia are located here. In Table 2 below, the comparison of the number of creative companies by different Slovenian regions is presented. Since in general, there is a tendency for all companies (also from other industries) to concentrate around the capital, the number of CI companies is also compared with the number of high tech, mid-high tech and all industries by regions. The comparison clearly demonstrates, that CI are more concentrated in LUR than other industries.

Since Ljubljana is the capital of Slovenia, most national cultural institutions are located here as well. The estimation is that around 60% of all Slovenian cultural events, infrastructure and also people, working in culture, are concentrated in Ljubljana. All the major faculties are located in Ljubljana as well, and the major firms from other business sectors concentrate here as well.

In the Table below, the estimated size of CI in LUR (compared to Ljubljana and Slovenia) in terms of number of employees and firms is presented.

Number of full-time accounted employees as well as self-employed entrepreneurs and number of firms

NUMBER OF FULL-TIME ACCOUNTED EMPLOYEES AS WELL AS SELF-EMPLOYED ENTREPRENEURS			
	Ljubljana	LUR	Slovenia
Creative industries	18,050	20,818	39,193
All industries	146,018	193,448	564,478
Share of CI in all	*0.12%*	*0.11%*	*0.07%*

NUMBER OF FIRMS OF THE TOTAL SECTOR			
	Ljubljana	LUR	Slovenia
Creative industries	4,356	5,967	15,073
All industries	23,755	38,209	112,026
Share of CI in all	*0.18%*	*0.16%*	*0.13%*

Murovec, Kavaš, 2010

From the quantitative data presented in the tables and text above, it is evident that CI play an important role in the LUR's economy.

Throughout the world, CI are the topic which has in the last decades, moved from marginal debates about culture rights into the centre of the discussions regarding competitiveness. CI are considered as increasingly important to economic well-being, proponents suggesting that »human creativity is the ultimate economic resource«, (Florida, 2002) and that »the industries of the twenty-first century will depend increasingly on the generation of knowledge through creativity and innovation« (Landry, Bianchini, 1995).

The increase in popularity and interest in CI is no surprise, taking into account the fact that CI represent more than 3 percent of total EU GDP and 3 percent of employment. They are one of the most dynamic sectors in Europe with a large growth potential (COM, 2010). CI are drivers of innovation with positive spill-over effects on the rest of the economy and on society as a whole. Furthermore, CI are essential drivers of cultural diversity and environmental sustainability, and a lever for social and territorial cohesion (UNCTAD, 2010).

Slovenia is, however, lagging behind with regard to the awareness of the CI importance. Nevertheless, the numbers speak for themselves, and the size of the CI sector itself is an indicator of its economic relevance.

CI employ 11% of all employed in the private sector in LUR and account for 16% of all firms in LUR. For Slovenia, these shares are a bit lower, but still very significant. The further economic relevance of CI in Slovenia is that the profitability of CI as well as the value-added, created in the CI, are far above the average of the economy.

While CI are by all means an important industry per se, their spill-over effects on other industries are probably of even greater economic value but more difficult to capture in numbers. The CI could play a crucial role in the process of restructuring of other business sectors in Slovenia. CI, which provide intermediary goods or services for companies in other industries contribute to the rise in added value of their products (for example with creation of trademarks) and to the rise in demand for their products. Subsequently, CI foster growth of other companies as well. Furthermore, CI also have indirect effects on other industries as they can foster innovation.

Besides that, CI also have wider effects on the economy in terms of improving the quality of life, preserving cultural identity and achieving a wide range of other important social, cultural or sustainability goals.

The problem in Slovenia is however, that the cooperation of other business sectors with CI is very low. Besides the general lack of cooperation culture in Slovenia there are also other reasons behind this. Most companies in Slovenia do not operate in the end-consumer markets and no not invest into their own trademarks. Subsequently, their competition is often based on price. Adding to this, they do not perceive the cooperation with CI (for example cooperation with designers) as an investment but as a cost, since they do not recognise the true value of such cooperation. They try to minimise each such cost, and subsequently, they can also not receive a desirable result. This leads into a vicious circle and only further establishes their inappropriate attitude towards CI.

It has to be pointed out, however, that not all of the reasons for low cooperation are on the demand side. The quality of creatives is very heterogeneous. The analysis of the design sector (Murovec et al., 2012) confirmed that this fact presents an important problem. Low quality service providers lower not only the price but also the reputation of the whole field.

4.1.3 Lombardia

In Lombardy there are more than 800,000 enterprises: more than half of them belong to the services sector and the main part of them are placed in Milan; neighboring provinces are highly industrialized, the other areas have a relevant agricultural activity, although in terms of added value manufacturing produces 30% (the Italian average is 25%) and services almost 69%. Particularly strong among manufacturing are the sector of electronic and optical products, computer and electrical equipment (25% added value) and that one of metallurgy and metal products (21%)[1].

As the EU Green Paper on CCIs illustrates, Creative Industries sector in Europe employs 5 million people and contributes to 2.6% of the EU27 GDP.

European Cluster Observatory data at 2009 show that Lombardy has 175,580 workers in CCIs (on a national total amount of 690,258 workers and an European value of 6,442,410). The region is ranked third in Europe (after Île de France and Inner London) and first in Italy. Lombardy's employment in Print

1 Data from da bancaditalia.it

Media (57,091 units, third in Europe with an European share of 2.7%) and in Advertising (14,949 units, fourth with 2.6 %) are particularly relevant. The region is also first in Europe for Design employment with 11,839 workers (7.3%) and fourth for Artistic and literary creation (with 8,451 workers and a share of 3%).[2]

Using data from Unioncamere and Fondazione Symbola, it's possible to look better at Lombardy in the national context. In the region are registered 84,106 companies , the 19% of Italian CCIs. Among them, the business areas with the highest share of employment are the Music sector (32.6%), Advertising (27%), Publishing (27%) and Videogames and software (23.9%). As it's clear from the table below, talking in terms of added value stress this picture[3].

	added value (million €)			employment (thousand €)		
	Lombardy	Italy	*Share (IT context)*	Lombardy	Italy	*Share (IT context)*
Creative Industry	7,651.00	35,716.50	*21.42%*	135.50	743.40	*18.23%*
Architecture	2,610.90	12,395.30	*21.06%*	38.50	222.40	*17.31%*
Advertising	1,260.10	3,920.10	*32.14%*	21.60	79.50	*27.17%*
Design and style	1,731.80	8,913.40	*19.43%*	34.30	193.70	*17.71%*
Craft	2,048.10	10,487.70	*19.53%*	41.20	247.80	*16.63%*
Cultural Industry	9,995.00	35,273.30	*28.34%*	135.00	543.00	*24.86%*
Movie, video, radio	1,778.60	7,838.40	*22.69%*	13.80	73.00	*18.90%*
Videogames and software	3,413.10	12,408.30	*27.51%*	53.50	223.20	*23.97%*
Music	155.90	412.10	*37.83%*	1.60	4.90	*32.65%*
Publishing	4,647.30	14,614.50	*31.80%*	66.10	241.90	*27.33%*
Core arts field	1,025.60	4,816.00	*21.30%*	17.90	103.50	*17.29%*
Museums, libraries, archives and historical sites and monumentes management	183.10	1,061.10	*17.26%*	3.20	21.10	*15.17%*
Performing and visual arts	842.50	3,754.90	*22.44%*	14.70	82.40	*17.84%*
TOTAL	18,671.60	75,805.80	*24.63%*	288.30	1,390.00	*20.74%*

Source: Unioncamere and Fondazione Symbola, 2012

2 European Cluster Observatory, 2011, "Priority Sector Report: Creative and Cultural Industries"

3 Data come from Unioncamere and Fondazione Symbola, 2012, "l'Italia che verrà. Industria culturale, made in Italy e territori. Rapporto 2012". There are many different ways to identify cultural and creative industries. Each of these reports uses different criteria so numbers can vary.

4.1.4 Salzburg

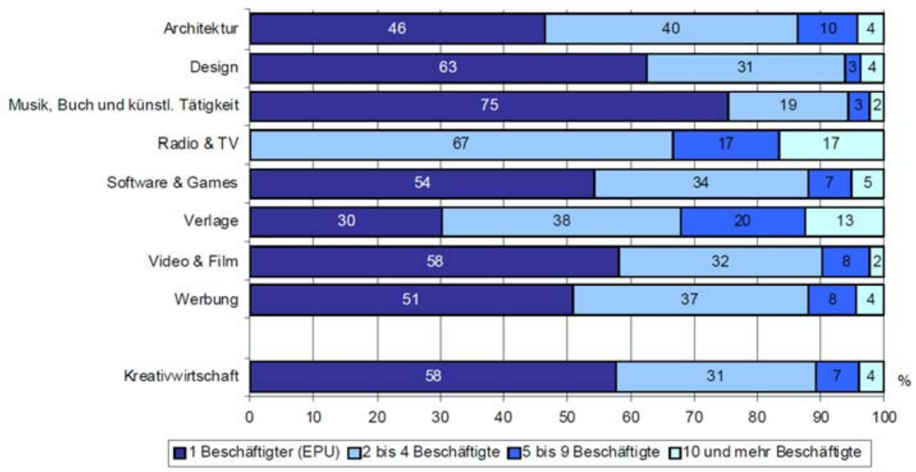
The federal state of Salzburg is one of Europe's most dynamic economic regions. Rooted in small and medium enterprises, its economic structure has proven to be a crisis-resistant stability factor. Two-thirds of businesses are involved in trade, tourism and business services. Thanks to its location, Salzburg is also home to a number of national and multinational corporate headquarters.

In 2009, more than 8% of the Salzburg-based enterprises can be attributed to the creative industries. The nearly 2 400 companies in the creative industries located in Salzburg employed almost 7 900 persons. The companies in the creative industries are on average smaller than those of other fields - more than 60% are single-person companies. Though quantitative data available specifically for the creative industries in Salzburg is not very detailed, there is more precise information about the creative industries in Austria (creativ wirtschaft austria 2010) and there are some specific figures about the situation in Salzburg.

Referring to Austrian Scheme creative industries in Salzburg may be subdivided into nine areas, architecture, design, music, books & arts, radio & TV, software & games, publishing companies, video & film, advertising, libraries and museums as well as botanical and zoological gardens. The economic significance of the creative industries is ever growing – and with it, the awareness of its significance. Creative enterprises constitute an important field of growth in a modern, knowledge-based society.

With view to the employment rates in the cultural and creative sectors, Vienna and Salzburg, however, are among the leading locations in Europe. The development of the number of employees in the cultural and creative sectors in Austria is better than in any other European country.

Regional structure of Creative Industries in Salzburg, in size



Source: KMU-Forschung Austria 2012

In 2009 the Salzburg creative industry achieved sales of approximately € 833 million and a gross value of approximately € 357 million.

Regional structure of Creative Industries in Salzburg (2009)

	2009	Anteil an den Salzburger Unternehmen der Gesamtwirtschaft[2] in %
Unternehmen	2.395	8,4
Beschäftigte	7.861	3,0
unselbstständig Beschäftigte	5.512	2,3
Umsatzerlöse in € Mio	833	1,6
Bruttowertschöpfung zu Faktorkosten in € Mio	357	2,6

Source: KMU-Forschung Austria 2012

A comparison of the creative industries with other sectors of the economy shows the importance of this sector for the economy of Salzburg. In 2009 there were more companies in Salzburg in the creative industries (about 2.400) than, for example, the hospitality or construction sector (2.500). A comparison with the Austrian creative industry shows that in 2009 7% of home-grown creative companies are based in Salzburg. The proportion of employees working in Salzburg, was also at 7%. This corresponds roughly to the proportion of the Salzburg Economy to those of Austria.

In 2009 Music, book and artistic activities and advertising were within the Salzburg Creative industries, the largest sector followed by the field of software and games. In terms of the number of companies dominates the field of music, written and artistic activities with a share of one third the most. Most areas of the creative economy, are one person companies with approx. 75% of the field of music, books and artistic activities.

The publishing of computer games and other software, programming and IT consulting services are mapped in the sector of software and games. This sector (which is very much characterized by software companies) has a focus on the primary products and capital goods industries and in various knowledge-intensive services (telecommunications, banking & insurance, software & computers). Therefore it is hard to estimate actual figures for the game industry in Salzburg.

Regional structure of Creative Industries in branches (2009)

	Unternehmen	Beschäftigte	Umsatzerlöse in € Mio	Bruttowert-schöpfung zu Faktorkosten in € Mio
Architektur	390	1.040	100	60
Design	80	G	G	G
Musik, Buch und künstlerische Tätigkeit	670	2.370	240	110
Radio & TV	10	G	G	G
Software & Games	450	1.370	110	70
Verlage	60	580	90	40
Video & Film	90	200	20	10
Werbung	660	1.990	230	70

Source: KMU-Forschung Austria 2012

Though there is no in-depth analysis available on a regional level, there is data on the national level, which gives insight about the market conditions in Austria. The economic significance of the creative industries is ever growing – and with it, the awareness of this significance. An increasing number of studies deal with this topic, and political decision makers have come to understand its relevance. Creative enterprises constitute an important field of growth in a modern, knowledge-based society. In Austria, the increase in the number of employees in the creative industries between 2001 and 2006 was higher than that in the overall economy.

According to recent studies, the statement "Austria is a country of tourism" may well be amended by "Austria is a country of creative industries" – at least when overall revenues are considered. The creative industries clearly emerge as the winners from the comparison of tourism and creative industries. In 2008, the 36,000 creative enterprises recorded a turnover of EUR 18.5 billion, i.e. 2.6 percent of the overall economic turnover. The turnover in the area of the tourist accommodation and food service industries amounts to a share of 2.0 percent.

"Enterprises that belong to the creative industries are comparatively smaller; their number of cooperations with business partners, however, is above average."

4.1.5 Lyon

Lyon metropolitan area :

- 3 Millions inhabitants (a half of Rhone-alpes Region)
- 1st for the number of business set-ups (after Paris) (Attractiveness Survey 2011 Ernst & Young)
- 9th favorite European city among entrepreneurs (ECER Ranking 2010)

- 9th most innovative city in the world (2thinknow Innovation Cities Global 256 Index 2010)
- €4 billion per year invested in Research & Development (R&D) in the Rhône-Alpes region; spending comparable to that of Finland and Denmark.
- 2.8 million business trips were made to Lyon in 2009 (Lyon Tourism Office)

Economic assets in industry, BTP(BUILDING AND CIVIL ENGINEERING WORKS), tertiary sector. Lyon is home to renowned international companies and major decision centers.

Favorable economic environment : 5 poles Leading competitive clusters: Lyonbiôpole, Axelera, Lyon Urban Truck & Bus, Imaginove, Techtera...; clusters 10; numerous zones of activity; fairs and international trade shows; centers of innovation and search(research).

International events: Biovision, Pollutec, Sirha

Overview of creative industries:

- Specific hub Citytechs field dedicated to create and renovate cities : Embellishment (lighting cluster and festival,..), urban design, urban planification, Energy, architects : 3265 enterprises 37 831 salaries
- Specific Hub textile Museum :
  Silk heritage city, Strong textile industrial know how, Cluster Techtera dedicated to new technical textile, IFTH school
- Specific hub scenario and art of writing: The city for video game makers

Lyon region:

- 2nd French concentration after Paris and Ile de France
- 650 companies
- 23 research laboratories
- 45 R&D projects certified in 2 years
- More than 30% of all French developers
- 4 of the world's leading publishers
- 15 graduate schools in multimedia
- 10% of European sales in the sector

Electronic Arts, Nobilis, Widescreen Games, Prelight, Phoenix Interactive, Etranges Libellules, Eden Games (Atari), Jet Multimedia, Arkesis e-learning, Wiziway, Embedia, SBT (Serious Brain Training) and more

4.1.6 Nice

In the regional business location there is Europe's first science park, Sophia Antipolis and a young and international population with highly-skilled and talented workforce.

The regional business location consists of over 100,900 establishments with net sales of € 51.25 billion and 437,700 workforce. Over 117,000 jobs created during the past 10 years.

The French Riviera Chamber of Commerce and the French Riviera Film Commission worked on the creation of an audiovisual and image industries hub. The creation of this hub is the result of a strategical need of the SME's working in this field.

419 CCI's are working in the Image and audiovisual hub with a permanent workforce of 1400 employees. This figure does not include casual workers. These companies generated net sales for a total amount of 231 millions € in 2012.

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Image and Audiovisual Hub Ecosystem

These CCI's are working in an Eco System including a hub and different sub hubs.

The main activities of the hub are :

CONTENT PROVIDERS: composed by companies, SME's and stakeholders who are creating films, advertisings, videos,.. such as producers of short film, film producers, TV producers, documentary producers. 184 companies are located on the French Riviera
TECHNICAL PROFESIONALS / IMAGE PROCESSING COMPANIES And TECHNICAL DESIGNERS MANUFACTURERs: composed by companies and stakeholders supporting and providing technical products related to audiovisual and image industries such as companies specialized on pre- production and post-production (cutting, mixing, reproduction,…), sound system, audiovisual technical,…. And companies specialized in manufacturing some materials to create image, diffusion or conservation of images. Those companies are coming from industrial sectors and are working cooperatively with technical

professionals such as TCS PACA (techniques communications system), monitoring company, Doremi Technologies : 50 CCI's are part of this branche.

BROADCASTERS / PROVIDERS / DISTRIBUTORS: companies specialized in distribution of products or services, to the final consumers. Members: cinemas, TV and Radio channels, websites,.... : 44 CCI's are located on the French Riviera in this branche.

This core hub is linked with 3 sub hubs such as :

COMMUNICATION AGENCIES: Global and numeric agencies. Numbers of companies implicate in this sub hub: 78 SME's

ICT SME'S: 31 SME's consider that their main activities are ICT related but that they are partly working within the Image and audiovisual Hub.

Photographs are also partly related to this hub with 32 SME'S

Tourism Industry : a hub that benefit from image and audiovisual activity

This EcoSystem also includes other hubs of our economy that are impacted by the image and audiovisual hub activity.

Of course, schools and research centers are teaching students in this field at different levels and for different diplomas at Université Sophia Antipolis, Lycée Carnot, ESRA and INRIA.

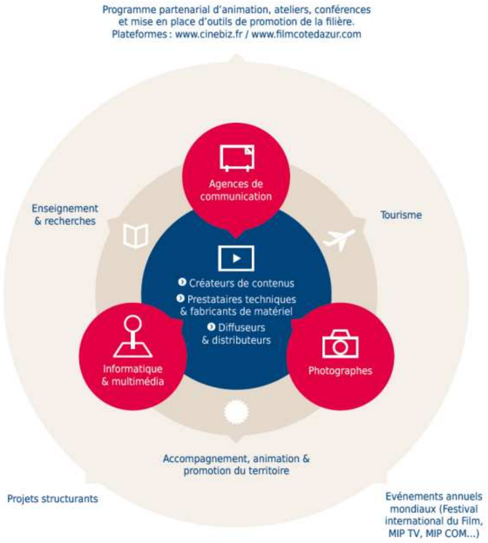
The RECEPTION AND TOURISM hub is also involved in the image and audiovisual hub as The French Riviera is a shooting land. 1621 days of shooting were located on the French Riviera in 2012. Hotels benefit from this market with 23 391 nights spent in French Riviera hotels by shooting teams in 2012. Moreover, 62% of tourists visiting France declare having been influenced by films to choose their touristic trip destination. Films, Tv programs are seen as advertising for French Riviera with a long tale impact on our touristic attractivity.

All around this private EcoSystem are public sector providing important projects.

Public stakeholders or innovation support centers provide services to the HUB suc as Co working spaces, Financial supports: Region PACA , and the Prides PRIMI, Physical places (clusters, offices, ..). On of the most important project in the area is Cannes "Technopole de l'image": the technopole will be a building devoted to develop new economic potentials to federate and sparks activities in the field of image and audiovisual. « creative valley » is also a new initiative from Sophia Antipolis, Cannes, Grasse in order to foster creative activities in the area.

There are also international events related to audiovisual and image industries every year on the French Riviera such as Cannes Film Festival in May, MIP TV (a worldwide event who bring together all the production TV Worldwide companies in April) , the MIP COM (a worldwide tv and content event in October). Those business events are some important appointments for professionals .It is also opportunities to validate local hub competence on the international market.

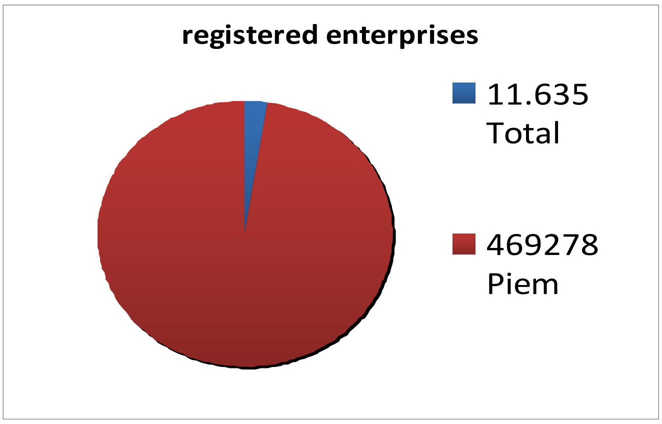
This scheme symbolizes the Ecosystem in which the “image and audiovisual hub” is working.



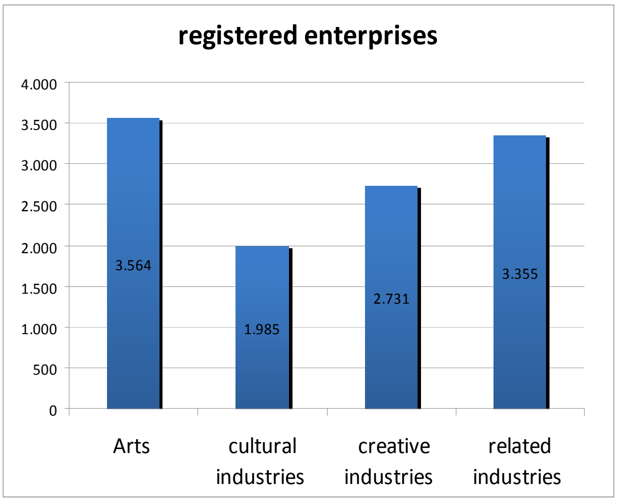
4.1.7 Piemonte

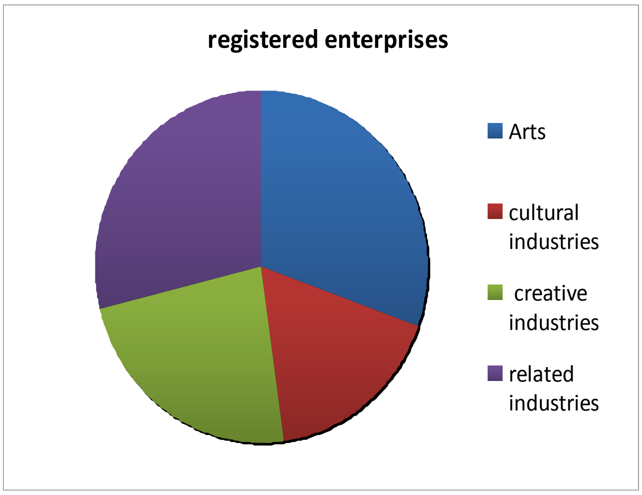
Historically this territory has had a strong financial and manufacturing structure, and still now it produces 8.1% of Italy’s national wealth, due to its 469.000 companies (7,7% of the national quota). Piemonte Region is internationally famous for being the cradle of the Italian car industry - Torino being the home town of Fiat, and it has been considered for long time the Italian capital city of industry.

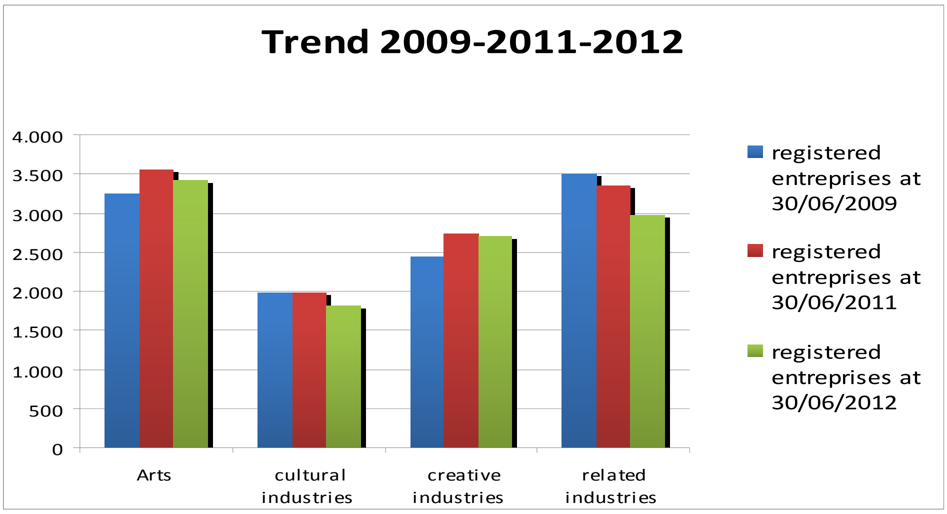
CCIs are shaped into four categories: arts, cultural industries, creative industries, related industries. Total CCIs registered in Piemonte are 11.635, out of 469.278 registered enterprises (2,5%).



Among them: arts are 3.564, cultural industries 1.985, creative industries 2.731, related industries 3.355

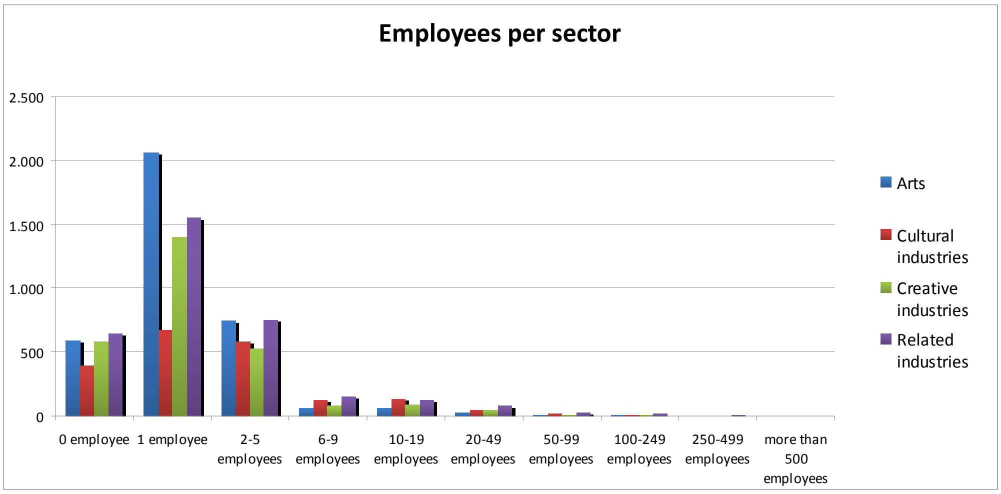






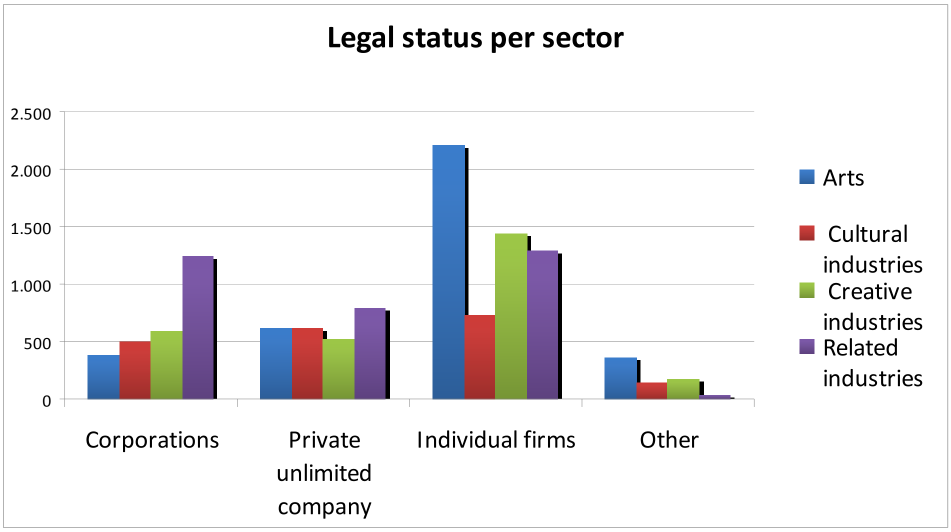
Dimension: 90% is between 0 and 5 employees (but regional average is 92%); 19% are „single person" (no staff); 20 firms have more than 250 employees.

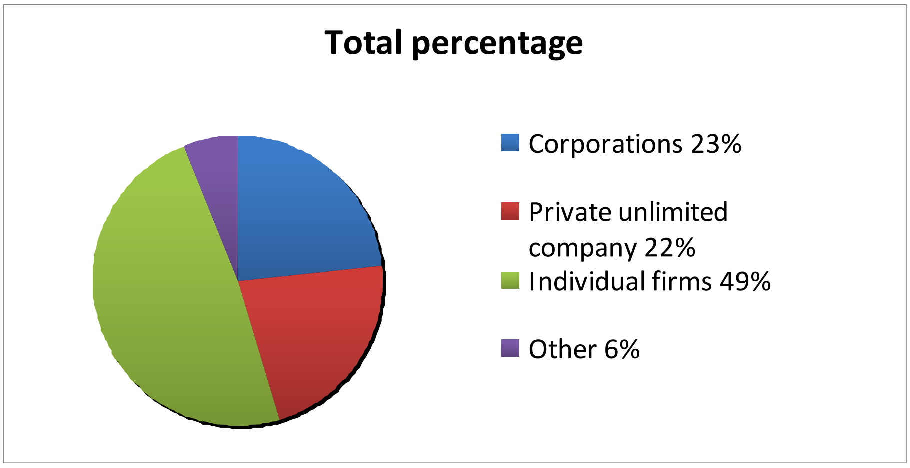
Total employees: 63.000



Regarding their legal status, 2.717 are corporations (23%), 2.544 private unlimited companies (22%), 5.622 individual firms (49%), 712 other (6%). This reflects a bigger dimension that the overall situation of registered enterprises, with 14% of corporations, 26% of private unlimited companies, 58% of individual firms and 2% of other.

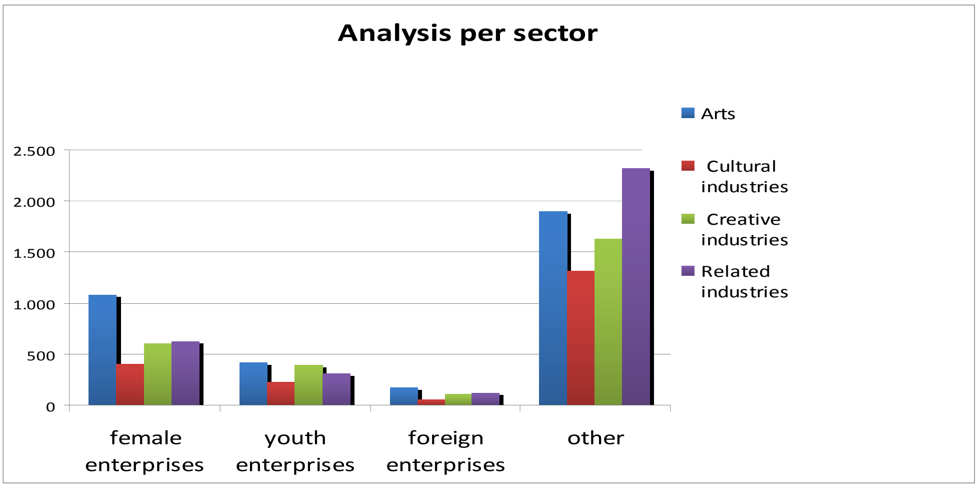
This is mainly due to the great number of corporations into the related industries (more than 1.200), and the corresponding lower number in the residual categories of "Other" (38).

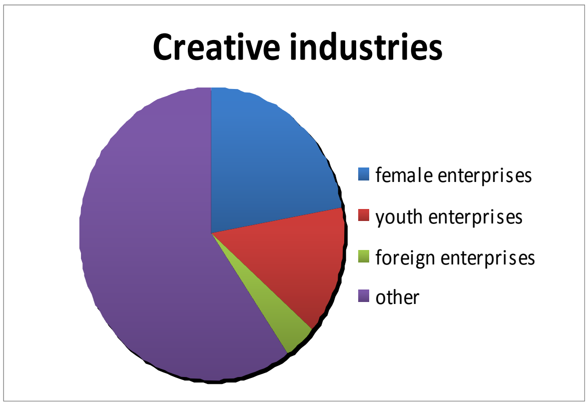


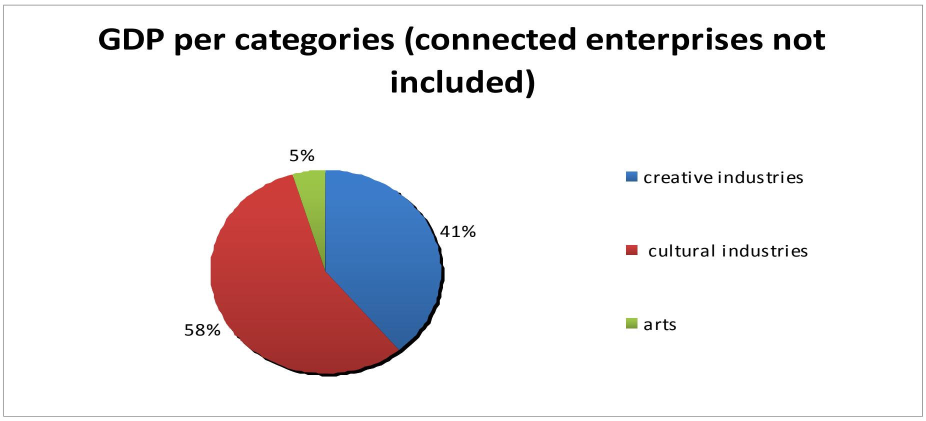


By compering the participation of women, youth and foreigners, even in this case CCIs reflect the overall situation of registered enterprises (except that for foreign enterprises):

Some more differences in the analysis per sector: female enterprises have a strong importance in Arts, but less in the other sectors, youth enterprises are not well represented in cultural enterprises, and foreign enterprises is underestimated in three of the four sectors.







Territorial distribution: Turin and its surrounding hosts more than the 65% of total regional CCIs.

Regional qualitative analysis

The qualitative survey on the CCI in Piemonte was made through the web platform www.itsastart.it/questionnaire-cci-piedmont.
273 firms responded (out of 3.000 invited) with the following dimensional characteristics:

- Number of workers (employees, partners, etc.) equal to 3768, an average of almost 14 per firm, but 55% of the sample is a CCI with less than 5 workers, and 4% have more than 40 workers
- Number of employees amounted to 2070 (55% of total workers), 16% of the sample has no employees
- 17% of participating companies in 2011 had a turnover of less than 50.000 euro
- 24% is between 50 and 150 thousand euro
- 31% is between 151 and 500 thousand euro
- 18% is between 501 and 2 million euro

- 10% are over 2 million euro

At a time of widespread economic crisis, and general decline in sales, the CCIs declared a forecast for 2012 sales equal to or better than the 2011 for 2/3 of the participants, and a forecast for 2013 revenue positive for almost the 80% of participants.

On average, the surveyed companies invest 20% of their turnover in R&D, and almost half have also invested in the search for new markets. 35% of the participating companies providing goods or services to operators of Cultural Heritage: the main Libraries and Museums.

About markets, just over 34% of companies have a business relationship or partnership with foreign companies, a figure that rises to 52%, however, among companies with more than 2 million euro turnover. The countries in which there is a greater presence are France, Germany and the United States. Almost a third of the companies working with foreign draws more than 25% of sales, and a fifth draws more than 50%

In terms of cross-sectoral collaboration, 43% of participating companies collaborates with other CCIs, but only 29% worked with manufacturers not cultural and creative. In this case, for 90% the assessment is positive, negative judgments are missing altogether (complicated experience not to be repeated, negative experience).

Please note that national average for all the enterprises is 4% regarding international relationship/partnership, and 12,1% regarding national collaborations. This means that CCIs are more use to cooperate than any other economical sector.

Most of the participating companies (67%) is not associated or aggregated with other companies, and only 3% of them participate in specific associations of cultural and creative enterprises, although one of the main requirements for the development of enterprises are recognized as development of the network of relationships and to make greater networking. In addition, the factors contributing to the success of CCI in Piemonte are innovation, professional skills and competitiveness of the tax system.

With regard to the support of public or private sector (regional or local authorities, banks, venture capital, incubators), 22% of participants gives a positive opinion to the support provided by the public sector to CCIs, while 33% gives a positive opinion to the support provided by private entities. 30% of companies have had experiences of support from the public, with positive evaluation in 66% of cases, while 17% had experienced support from individuals, and the valuation is good for 78%.

4.1.8 Switzerland

The economy produces a cantonal income of about 14 billion Swiss francs. In Ticino are active 21’553 companies (98% are SMEs and 80% micro), for a total of 181’042 persons employed. The economy of the Canton of Ticino is strongly characterized by tertiary sector activities, particularly by activities in financial, pharmaceutical, biomedical sectors as well as tourism and creative industries in emerging clusters as mechatronic, advanced services (R&D, ICT products/services) and green technologies.

Marketing and technical competences can be founded in movie production, communication industry and also in media and digital creation companies. Many relationships exist in the Ticino audiovisual systems especially related to new media sectors such as, digital design and integrated communication, enterprises dedicated to social marketing, games (in particular pervasive and mixed games).

4.2 Transnational List of Hub's with Hub's Structure per region (Hubs, Sub-Hubs, Micro-Hubs)

Region	Hub's name	Short description	Hub-Level
Baden-Württemberg			
	3D Visual Animation and Simulation	3D Animation is the Process of giving the illusion of movement to drawings, models, or inanimate objects.	
	Virtual and Immersive Environment	Virtual environments are computer-simulated environments, immersive digital environment is an artificial, interactive, computer-created scene or "world" within which a user can immerse themselves	
	Game	Games genres encompass social game, simulation, video game, role play, strategy game etc.	
Ljubljana			
	DESIGN HUB	Coordinator RCEC acts as a connecting point within CI (clustering) as well as between CI and other industrial branches (business chains)	HUB
	CREATIVE DISTRICT ŠIŠKA	District, located in the western part of the inner city in which many creatives are located.	SUB-HUB
	Kino Šiška	Cultural institution focused on urban culture, concerts etc.	SUB-HUB
	Service Design Group Slovenia	It is an open space offered to creatives and specialists from other fields in order to support the field of service design.	
	CO-WORKING SLOVENIA	Initiative organizing	MICRO-

		coworking within the Kino Šiška.	HUB
	KCŠ (Kreativna cona Šiška)	KCŠ is a group of freelancers and associations in which 8-15 people are included.	
	Španski borci	A cultural institution mainly focused on projects related to contemporary dance.	SUB-HUB
	DUKZ	It is an association and a network of different creatives who promote creative cooperatives and their establishment.	
	CREATIVE STATION	Creative station is an open space offered to creatives in order to establish a creative community.	SUB-HUB
	Prva postaja	A particular creative station, a coworking space which facilitates a cooperative network establishment.	MICRO-HUB
	TP-LJ Start-up Centre	It is an organizational unit of Technology Park Ljubljana, offering comprehensive business support services for the successful development and growth of start-up companies from business idea to global expansion (growth).	SUB-HUB
	MOBILITY HUB	Technologies in smart mobility in connection with creative industries sector.	SUB-HUB
	Rimska street	A concentration fo creative entrepreneurs in the southern part of the downtown of Ljubljana.	SUB-HUB
	RTO	It is manifested as a web page, which is a result of cooperation between the professors of the Academy	

		of fine arts and design and Pekinpah association with students and ex-students ofdesign.	
	Multipraktik	It is a multi-disciplinary platform.	MICRO-HUB
	Factory Rog	It is not a classic occupation of space, but a temporary alteration of its purposes for creative industries.	SUB-HUB
	Rog - Lab	3D Lab for prototyping for different groups of users.	SUB-HUB
	MAO	It is a museum and architectural and design center.	
	Design & Wood Industry	Establishment of a value chain, which includes micro and small businesses in the furniture industry, creative industries, economic research and a support institution - RCEC - as a coordinator and integrator.	HUB
Lombardia			
	Incubatore d'impresa Bergamo	Activities are business services, new technologies, green economy and tourism.	
	Incubatore di Imprese Valcamonica - Impresa Territorio	Activities are the promotion of new enterprises in the fields of art, culture, tourism and craft.	
	TALENT GARDEN	Tag is a coworking space for startups, freelancers and small companies working in the fields of web and communication.	
	PARCO SCIENTIFICO TECNOLOGICO ComoNExT	It aims to increase the wealth of their communities, promoting a culture of innovation and competitiveness of local companies.	

	MAKE A CUBE[3]	It applies a "stage-gate" roadmap for incubation	
	Incubatore Tecnologico Bottega di Leonardo S.c. a r.l	Plays mainly an activity of incubator, through targeted interventions favoring the productive activities	
	La fabbrica del vapore - FDV LAB	It wants to be the meeting point between those capable and talented young people, given the opportunity to learn, experiment and produce.	
	Viafarini DOCVA – Documentation Center for Visual Arts	It is an exhibition space open for experimentation, offers documentation services on visual arts, and runs a residency program for artists and curators.	
	STARTUP BUSINESS	Virtual Network for Start-ups and Investors	
	StartMi Up	It wants to help the startup culture grow and flourish in Milan and Italy.	
	Cowo	Coworking Project by Cowo is a project willing to increase and expand Coworking through a program identified by a shared vision and logo.	
	Digital Magics	The company's mission is to create our country's most prolific industrial incubator for online initiatives.	
	Jobox la Cordata	It is the incubator for young companies and provides different answers to the questions of youth entrepreneurship.	
	Designhub (Hub del Design - confluirà nella Triennale)	The portal aims to bring the previous	HUB

		experimental experience on a plan that allows auto-generation of the continuity and momentum, innovative design by designers and contractors.	
	Acceleratore d'Impresa del Politecnico di Milano	The ICT Incubator Business Accelerator is the heart of the Milan Polytechnic and hosts: Companies specifically aimed at information technology and communications, operating primarily in computer and telecommunications.	
	Fondazione Distretto Green & High-Tech Monza Brianza	Basic idea of the 'aggregated' together companies that speak the same language, so they have a certain approximation in skills and business so as to favor the spread of excellence and success factors from one to the other.	
	Cà dei Bossi (starting within dec 2013)	Model of "Networked Incubator" to facilitate the flow of knowledge and talent between the same companies or wannabes in the area of Monza and Brianza.	
	Brianza Hub Networking Space	Supply of co-working fully serviced spaces	
	SERVITEC Srl - Società di gestione del Point - Polo per l'Innovazione Tecnologica della Provincia di Bergamo	Support to companies in start-up.	
	POINT di Dalmine - gestito da Bergamo Sviluppo	Dissemination of innovation in the area, linking Universities / Research and SMEs, partnerships for product development and / or innovative processes.	

	Incubatore dell'Alimentazione e del Gusto - collegato a PTP	Alimenta Incubator at PTP is devoted to newly founded enterprises in the agro-biotech field.	
	Centro Servizi alle Imprese Lod-innova (Centro Polivalente per l'innovazione e lo sviluppo della PMI)	Development of SMEs in general, with reference also to the field of ceramic Lodi and design	
	PROMOIMPRESA - Innovation Point	The special agency provides services to local businesses like training / institutional activieties, promotional activities and business services.	
	BIC La Fucina s.c.r.l.	It gives promotion and sustains the development of Lombard entrepreneurship, in particular the metropolitan Milan area.	
	Laboratorio Innovazione Breda (LIB) - Milano Metropoli collegato con BIC La Fucina	Design and creative businesses, culture, third sector	
	BIC Euroimpresa Legnano s.c.r.l.	Its aim is to stimulate the local development of the productive and administrative systems.	
	Innovhub - Stazioni Sperimentali per l'Industria	Special Agency for Innovation	
	Hub Milano	It is part of an international network where entepreneurs, creative peolple and members of liberal professions can joint resources, structures ,find needs and support for a collaboration about the activity that they want develop.	HUB
	Dpixel	Advisor to Digital Investments Sca Sicar - Seed Compartment, focused on helping talented entrepreneurs build remarkable companies, often	

		providing a company's first outside capital.	
	SIAMO SOCI	Search engine that allows investors to find companies which include the business.	
	Sportello donna	The incubator of "counter lady" offers activities' support, counseling and follow-up to the creation of enterprises through the search for subsidized loans.	
	Hub multimediale Vigevano - We Art Technology	Initiatives for training, mobility, promotion and networking of actors and productions related to the combination of art, multimedia and innovation.	HUB
	POLITEC SOCIETA' COOPERATIVA POLO DELL'INNOVAZIONE DELLA VALTELLINA	Estabilishment of a network of virtuous connections with the aim to share knowledge and skills in order to promote the diffusione of innovation and technology and to booster the growth of Valtellina and its surroundings.	
	Consorzio AST VIGEVANO	It is an agency with mixed public-private non-profit organization that operates in the economic, environmental and cultural development for the implementation of the policies promoted by the constituencies of the territory.	
	Reindustria Agenzia Cremona Sviluppo	Analyzing, planning, management of resources and projects in order to overcome industrial decline.	
	Consorzio Crema Ricerche -	It picks spin-offs,	HUB

	HUB "Officina"	start-ups and new generation companies, whose business ideas are estimated high potential, but not yet ready to cope with the high costs of the market. For this reason the research undermined Crema enjoy special treatment and facilitated.	
	Parco Tecnologico Padano Lodi (PTP) - collegato a incubatore alimentare e del gusto	The Cluster PTP is the engine of the Lodi Cluster which hosts many organisations involved in the ag-biotech sector, it also hosts an enterprise Incubator and a Business.	
	Centro Cot - Centro Tessile Cotoniero e Abbigliamento S.p.A.	Services to companies in the textile sector and cotton and fashion.	
Salzburg			
	Design & Media Hub	It is the largest cross-industry network of designers in Austria and encourage cross-company cooperation and support companies in developing their design strategies. Regional Hub-Coordinator: Network Design & Media / ITG Salzburg	HUB
	"Science City Salzburg" (ICT Hub)	Research, Start-up help.	SUB-HUB
	Technology-Park, Coworking-Space, Business-Creation Center, Research Institutions, GIS-Center	Members of Sub-Hub Science City Salzburg	MICRO-HUB
	"Designforum Salzburg"	Showing the potential and business activities of local designers	SUB-HUB
	Creative companies, Exhibition and Event-Location, Educational Institution, Cultural institutions (Fotohof)	Members of Design-forum Salzburg	MICRO-HUB
	"Interactive Media Hub"	Research, consulting	SUB-

			HUB
	University of Applied Sciences, Creative companies, Sony DADC, RealNetworks	Members of Interactive Media Hub	MICRO-HUB
	"Design & Wood Hub"	Consulting	SUB-HUB
	University of Applied Sciences, “creative” design oriented Wood-Companies, design research center (deresa), Wood-Cluster	Members of Design & Wood Hub	MICRO-HUB
	"Social-Media Hub"	Social Media	SUB-HUB
	Members: Viermalvier / Karim Bannour, Aviseo / Martin Zelewitz, Creative Companies	Members of Social Media Hub	MICRO-HUB
	"Design-Hub"	Design services and consulting	SUB-HUB
	Porsche Design Studio, DesignStorz, Creative Companies, design oriented enterprises	Members of Design-Hub	MICRO-HUB
	"Multimedia Hub"	Advertising	SUB-HUB
	Advertising agency Algo, printing companies	Members of Multimedia-Hub	MICRO-HUB
Lyon			
	Hub CCI art of writing	It promotes methods in art of writing in order to improve the quality of writing of creative companies in Story arts, fashion and Urban design.	HUB
	Image / story arts	It promotes methods in art of writing in order to improve the quality of writing of creative companies in Story arts, fashion and Urban design.	SUB-HUB
	Beautification work and Urban design	It promotes methods in art of writing in order to improve the quality of writing and create a promotion policy.	SUB-HUB
	Fashion design art of writing	The Hub promote methods in art of writing in order to improve the quality of writing and create a promotion policy.	SUB-HUB
Nice			

	IMAGE, AUDIOVISUAL AND CINEMA HUB	Regional Hub-Coordinator: French Riviera film commis-sion	HUB
	"CONTENT PROVIDERS / PROCUCERS"	Composed by com-panies, SME's and stakeholders who are creating films, adver-tisings, videos,	SUB-HUB
	Producers of short film, features film producers, tv producers, documentary producers	Members of "Content providers, producers" (180)	MICRO-HUBS
	"TECHNICAL PROFESIONALS / IMAGE PROCESSING COMPA-NIES"	Composed by com-panies and stake-holders who are sup-porting and providing some technical prod-ucts related to audio-visual and image in-dustries.	SUB-HUB
	Companies specialized on pre-production and post-production (cutting, mixing, reproduction), sound system, audiovisual technical	Members of "Tech-nical professionals associa-tions" / Im-age processing com-panies" (30)	MICRO-HUB
	"BROADCASTERS / PROVID-ERS / DISTRIBUTORS"	Companies special-ized in distribution of products or services, to the final consum-ers.	SUB-HUB
	Cinemas, TV and Radio chan-nels, websites,.... Numbers of companies and/or stakeholders	Members of "Broad-casters / Providers / Distributors" (50)	MICRO-HUB
	"TECHNICAL DESIGNERS / MANUFACTURERS"	Contains all the com-panies specialized in manufacturing some materials to create image, diffusion or conservation of im-ages. Those compa-nies are coming from industrial sectors and are working coopera-tively with some technical profession-als.	SUB-HUB
	TCS PACA (techniques com-munications system), monitor-ing company, Doremi Technol-ogies,....	Members of "Tech-nical Designers / Manufactures" (10)	MICRO-HUB

	"TECHNICAL AND PROFESSIONAL ASSOCIATIONS"	Location: Alpes Maritimes department	SUB-HUB
	Heliotrope, le BACCA, actors training, Collectif cinema Côte d'Azur, Phoenix, Nikaia video, producers' union, ...	Members of "Technical and professional associations" (10)	MICRO-HUB
	"RECEPTION AND TOURISM"	The French Riviera is a shooting land, hotels and restaurants are currently working with shooting teams.	SUB-HUB (Parallel)
	Hotels, hotels union trade, restaurants	Members of "reception and tourism"	MICRO-HUB (Parallel)
	"PUBLIC INSTITUTIONS"	Location: Alpes Maritimes department	SUB-HUB (Parallel)
	Chamber of commerce and industry, Alpes Maritimes towns, department services, tourism offices, Conseil regional PACA, Conseil Général des Alpes Maritimes	Members of "public institutions"	MICRO-HUB (Parallel)
	"SCHOOLS, UNIVERSITIES AND RESEARCH CENTERS"		SUB-HUB (Parallel)
	Université Nice Sophia Antipolis, research center INRIA specialized in numeric research, audiovisual schools ESRA, BTS AUDIOVISUEL Cannes	Members of "Schools, universities and research centers" (15)	MICRO-HUB (Parallel)
	"COMMUNICATION AGENCIES"		SUB-HUB (Parallel)
	Global and numeric agencies	Members of "Communication Agencies" (350)	MICRO-HUB (Parallel)
	"TOWNS MEMBERS OF THE FILM COMMISSION"	Location: Riviera	SUB-HUB (Parallel)
	14 members (Antibes, Nice, Cannes, Grasse, Menton, Cagnes sur Mer; la Colle sur loup; saint Martin du Vésubie; Saint Etienne de Tinée; Vence; Villeneuve Loubet; Villefranche-sur-Mer; Beausoleil; Roquebrune)	Members of "towns members of the film commission"	MICRO-HUB (Parallel)
Piemonte			
	OGR	A physical place where people from various professions, background and cul-	HUB

		ture are being united and work together to support innovation and new contents in cultural and creative industries.	
Switzerland			
	Audiovisual Creation Hub	It looks at how media platforms and channels are used to meet the future generation of audiovisual production and developing innovative entrepreneurial projects. Regional coordinator: SUPSI – Laboratory of Visual Culture	HUB
	Movie & film productions		SUB-HUB
	Directors, writers, designer, film makers	Members of Movie & film productions	MICRO-HUB
	Laboratories		SUB-HUB
	Training services, Atelier, research labs	Members of Laboratories	MICRO-HUB
	Multimedia Communication and Design Strategies		SUB-HUB
	Web advertising, New Media, Social media	Members of Multimedia Communication and Design Strategies	MICRO-HUB
	Broadcasting & Digital Media		SUB-HUB
	Telecommunication provider, TV, Radio	Members of Broadcasting & Digital Media	MICRO-HUB
	Gaming		SUB-HUB
	Developers, artists, interaction designers…	Members of Gaming	MICRO-HUB
	Support Network		SUB-HUB
	Location agencies, Associations	Members of Support Network	MICRO-HUB
	Performance & Live Events		SUB-HUB
	Performers, composers, locative media designers, tourism organization	Members of Performance & Live Events	MICRO-HUB
	Promotion		SUB-HUB
	Festival, Foundations,Structures	Members of Promo-	MICRO-

	forEntrepreneurship	tion	HUB

4. Regulations, Policies, Funding for Creative Industries of each region

5.1 Baden-Württemberg

Some funding programs for Creative Industries are already available in Baden-Württemberg, which can be classified in three different type of support: Support to innovation (Innovation Voucher and Young Innovators), Business start-up (national programs like Exist-Gründerstipendium (BMBF) or High-Tech Gründerfonds HTGF) and Support to project (financial support).

Especially young professionals and companies have some resistances in the use of support instruments because of the complicated procedure to apply for such programs and the high burocracy. Often people do not have enough trust in the selection procedure or they report a lack of transparency.

5.2 Ljubljana

From the perspective of the region, the creatives should be attracted and retained in the region. CI have several positive spill-over effects on the rest of economy and on society as a whole. In order to fully benefit from CI the cooperation of the creatives with other business sectors and also with the public sector should be enhanced as much as possible.

To be able to take more actions for support, CI do however first need to be placed into relevant strategic documents. Compared to other Slovenian regions, Ljubljana and LUR are a step ahead with regard to that. CI will be given an important role in the Regional development programme 2014-2020, which is still in the process of preparation, and have already been recognised as an important factor in the Strategy of cultural development in the Municipality of Ljubljana 2012-2015. Therefore, in the future, significant efforts must be taken in order to implement those strategies. This is not only important for the region, but also for the establishment of RCEC, since it can otherwise very quickly loose the trust and interest of the creatives.

5.3 Lombardia

At regional level, to rationalize the existing regulatory framework DG Education Training and Culture realized a survey and analysis of the current regulations in the field of culture and produced a draft for a reorganization law. Lombardy Region, starting from 2011, has also organized an "inter-sectorial table" on performing arts, to identify best policies to face the crisis, and promoted focused initiatives in the field of cinema and audiovisual.

In order to promote CCIs, to follow the guidelines of the European Community, from the beginning of 2012 Lombardy Region started a new line of action, with the purpose of "promote, develop and support cultural and creative business" . This new line of action strongly integrates Regional Directorates and third parties, and creatings synergies and avoiding overlaps in interventions.

Schematically, the aims of the new line of activity are:

- ❑ To listen and give voice to the creative = through workshops and surveys
- ❑ Networking and governance towards a "regional cluster for CCI"
  - ✓ International networking = through DCN and European projects
  - ✓ Networking in "Regione"= lobbing for CCI within Lombardy Region
  - ✓ Networking in Lombardy= know, map and connect the initiatives for CCI in Lombardy promoted by other public and private stakeholders
- ❑ Give better access to finance = redefining the rules of rotation funds for the start-up of CCI
- ❑ Set up new calls for ideas and proposals = especially tailored for these sectors

So, the foreseen (and in-progress) activities intend to understand and systematize the actions that many public and private entities have already started, with the aim to develop new opportunities for access to credit and funding(including specific calls for this type of business).The activities also aim to support cultural and creative business start-up.

To achieve these objectives, the following main actions have been undertaken:

1. *Project CCAlps (Creative Companies in Alpine Space)*

Lombardy Region is the leading partner of the European project CCALPS (funded under the Community Program "Alpine Space"), which will be developed between 2012 and 2014. The total cost of the project is about € 2.9 million and Lombardy Region's budget is about € 680,000.

2. *A program to develop cultural and creative businesses in partnership with Cariplo Foundation.*

It consists in two main actions:

A) a call for proposal with the aim of stimulating the start-up of entrepreneurial projects that offer innovative/creative products or services for the use and dissemination of culture. The call includes a support since the first steps of the business project (even from pre-start-upphase);

B) a call for proposal to enforce human capital, promote the growth of technical and management skills of employers and workers of CCIs in Lombardy. Tha call also aims at stimulatingyoung talents in order to develop creative ideas through European mobility. The budget dedicate to the implementation of this program is about million Euros.

5.4 Salzburg

Salzburg's new economic programme regards creative services in general as important drivers for innovation and economic change. Aiming on a stronger linkage between service providers from the creative industries and other business fields, specific support measures are in the stage of implementation and development, such as a creative voucher model, co-working spaces, specific business support measures, an incubator programme, a design forum and related conferences, talks and exhibitions.

National level - Austrian government program – Evolve

In Austria, Impulse is a nation-wide operating promotion programme for the creative industry with multiple lines of funding available. Departure offers Viennese companies and company founders of the creative industries four funding programmes tailor-made to the various requirements of the applicants on both content and on an economic point of view. Starting in 2013, a new creative voucher model will start in Austria based on the experiences made in the pilot region of Salzburg. Small and medium enterprises will have the chance to receive a € 5,000 voucher for the implementation of innovation projects with partners from creative industries. By strengthening the cross-sectorial cooperation, creative services (such as from gaming) will be integrated in the innovation process of SMEs.

The national level policies are mainly shaped by the Austrian Government. As a cross-sectoral branch made up by mainly micro-enterprises, the creative industries are marked by a high degree of heterogeneity and highly differing needs. For that reason, the Ministry of Economy, Family and Youth decided in 2008 to create "Evolve" (bmwfj 2012), a scheme to promote innovation in and by means of the creative sector.

The goal of "Evolve" is to make the most of the high potential for innovation in the increasingly vital creative sector in order to secure and even improve Austria's already excellent innovation performance. Evolve unites under a common roof the services made available at federal level to companies for the purpose of bolstering the creative economic sector and consolidates them into a comprehensive package.

Evolve's mission is to support creative entrepreneurs on the basis of a package of measures tailor-made to their individual needs – in all branches, in all of Austria, and at all stages of development. In addition, Evolve's offerings are available not only to creative but also traditional companies that have recognized the value of creative goods and services and wish to further develop themselves in this direction – whether alone or with partners in the branch. Besides the direct promotion of companies or projects in the creative sector, "Evolve" aims to raise the level of awareness for the concerns of the creative industries. "Evolve" takes measures to strengthen the public acceptance and awareness of creative goods and services and to raise the visibility of the creative industries on both the national and international level. Impulse, a funding program, and Creativ Wirtschaft Austria, a platform and stakeholder for the creative industries, are part of the Evolve program.

Impulse – Creative Industries Funding

Impulse (impulse/aws 2012), offered by the Austria Economic Service (aws), is the first national promotion program for the creative industries in Austria. Impulse is part of "evolve," the innovation promotion program for the creative industry initiated by the Federal Ministry of Economy, Family and Youth. Impulse was tailor-made within the framework of evolve to meet the needs of the creative industries, and it supports innovations whose creation of value predominantly, or completely, is the result of products or services from the creative industries.

There are three lines of funding available, depending upon the maturity and type of project:

- impulse XS helps projects in the development phase to assess their viability in terms of content and commercial usability .
- impulse XL supports projects in stages of development, implementation and first market replication whose economic viability and market orientation can already be plausibly and concretely demonstrated.
- impulse LEAD sponsors pilot projects that go beyond just single companies and have a “best-practice character”. Through their diffusing and disseminating effect, they contribute to increasing the view of the creative industries as value creators and thus to improving the international position of Austria as a creative location.

Federal Ministry of Economy, Family and Youth (BMWFJ)

The BMWFJ creates the best possible framework for enterprises and represents at international levels the interests of Austria as a business location. One of the main objectives is to accelerate structural change by actively supporting research, technology and innovation. A key economic policy objective is to reinforce Austria's position as an attractive business location. By enhancing the creative industrie’s competitive and innovative capacity via the support program called “evolve”) the ministry acknowledges the increasing significance of the creative industries.

Creativ Wirtschaft Austria

Creativ Wirtschaft Austria (CWA) holds as its remit the interests of the Austrian creative industries, both at a national, European and international level. CWA is an integral part of the Austrian chamber of commerce. It is committed to developing the creative industries in Austria and creating linkages with other sectors.

Activities:

- Skills Development - CWA supports the economic success of creative people, regardless of membership in the Chamber of Commerce, through tangible services and networking of companies and intermediaries.
- Representation of Interests - CWA acts as an advocate for the interests of the creative industries and is active in creating a supportive environment.
- Information and Awareness - CWA sees itself as a knowledge hub, commissioning studies into and increasing the visibility of the achievements of the creative sector.

Since 2008, CWA, together with the Impulse/Austria business service, has been the sponsor and promoter of Evolve. Evolve is an initiative of the Federal Ministry for Economy, Family and Youth (BMWFJ) to promote innovation in the creative economy. Evolve helps to develop creative ideas right at the start of the creative process and to guide them on to a commercially successful track. The aim is to exploit the high innovation potential of the increasingly important creative industries, not only to secure but also to expand the outstanding innovation development performance of Austria relative to Europe.

Regional level

As the regional innovation agency of the region, ITG Salzburg GmbH has the mandate from the regional government (Land Salzburg) to develop and implement measures of the regional innovation programme in the field of creative industries and is coordinating the cross-regional Network Design & Media with Upper Austria. In Salzburg, the "Business Creation Centre Salzburg" (BCCS) supports innovative business ideas for academic start-ups (spin-offs), and supports as such, start-up projects within the field of gaming by providing infrastructure, consulting services and monetary support. Also, WE-Workshops and C Hoch3 Coaching-Workshops for entrepreneurs are organised and a special innovation service is provided by ITG Salzburg. In Austria, national support instruments in coaching and training on entrepreneurship, including networking, are being implemented on a regional level, which work to meet regional needs.

Regional Government - Land Salzburg

“Salzburg. Standort Zukunft. Wirtschaftsprogramm Salzburg 2020“ (=Economic programme)

The regional government – Land Salzburg - is shaping the regional innovation and technology related policies and has recently developed a new economic framework program for future policy measures until 2020. By engaging all relevant stakeholders the Land Salzburg developed a new vision for Salzburg including new strategies and measures in the field of Creative Industries and Information and Communication Technologies (ICT).

In its economic programme the regional government and partners sketched and analyzed the current situation, stating new strategies and measures for the future of the Land Salzburg. Among themtical fields like Building, Wood Products and – Technologies and Life Sciences emphasizes is given to the importance of creative industries, ICT as well as digital interactive media and games industry .

As in most regions in Austria (except Vienna) there are no specific monetary funding instruments for the creative industries in Salzburg.

New funding/ financing instruments

Crowdsourcing is a new buzz-word in the creative industries industry, especially after well-known game studios raised millions of dollars for their games via the crowdsourcing platform Kickstarter[4]. For a successful fundraising you need a convincing presentation, good marketing and it makes it much easier if you are already well-known for your games. Startups usually lack most or all of this.

Embedded in national and regional policy initiatives to promote the creative industries (CI), certain measures such as funding programs and networks have been developed in order to support the games industry as part of the CIs.

As diverse as the creative branch is, the problems it is confronted with are just as diverse: in addition to problems of financing, issues like lack of networking, weaknesses in translating ideas into economic activities, insufficient legal and business knowledge, or management deficits play a big role.

5.5 Lyon

Funding measures

National Level
Policies to support heritage
Policies to develop training on writing scenarios

Regional Level : 3 actors to support Creatives companies

- Rhône Alpes Region :
    - Poles of competitiveness : programs to develop companies
    - Founding for trainings
    - Rhône Alpes Cinéma: Regional fund for co-financing and distribution of films

Imaginove Cluster: is a moving image sector competitiveness cluster (video games, audio-visual, cinema, animation and multimedia) which unites companies in the Rhône-Alpes region around a common objective: to develop synergies between these sectors by encouraging anticipation and stimulating innovation.
Cité du Design: Place of higher education, research and experimentation, conferences and exhibitions
Centre européen cinématographique Rhône-Alpes: regional structure to help cinema sector

- Metropolitan Pôle
  Alternate years, 2 world-famous international biennial festivals:

[4] http://www.kickstarter.com/

The Dance Biennial, with performances by the world's most renowned dance companies and thousands of amateur dancers for a colourful procession through the streets of Lyon
The Contemporary Art Biennial, showcasing the avant-garde of the international art world

- Greater Lyon :
  Support the development of Creatives companies: training, events, new services
  Non-monetary fundings :
  - Cultural events:
    - Expositions
    - Special days : cinema days; Cartoon days
    - Special festivals: lighting festival; nuits sonores;
  - Business Incubation Center :
    - "Pôle Pixel": new activities of the image, sound and creative industries
    - "Les subsitances ": International laboratory of artistic creation
    - "Villages des créateurs" : BIC to federate stakeholders and to promote the emergence of fashion brands
  - Educational Institutions
    - Ecole d'Architecture, ESMOd, Drawing School Emile Cohl...

Funding (Convention Greater Lyon and Rhône-Alpes Region) :

Cleantech :	4.600.000 € (services and event)
Digital Incubator :	580.000 € (investment and animation)
Image cluster Incubator :	520.000 € (investment and animation)
Image Projects Open Call :	2.100.000 €
Cross media event :	480.000 €
Cartoon movie event :	2.400.000 €
Fashion incubator "village des créateurs" :	2.040.000 € (6 years)
Creative time cross sector :	1.200.000 €

5.6 Nice

Regulation and policies at national level

At the national level, France has a national cluster policy which is especially supporting R&D project of clusters.

Regulation and policies at regional level

At the regional level, some PRIDES are representing the regional quality of label for innovation clusters in Provence Alpes Côte d'Azur region. Some Innovation PRIDES specialized in the audiovisual field are POLE ICI (a network of companies working on numeric creativity) and Pole PRMI (a network of companies working on innovation and image production on Provence Alpes Côte d'Azur region).

Financial support:

At national level, there are 3 possible systems to provide financial support to audiovisual production.

•The National Cinema Center: who debit a part of earned incomes from movies and injected on new audiovisual projects.

•SOFICA: tax relief measures to support audiovisual production

•Tax Rebate for International Production (TRIP): to support audiovisual and production foreign companies whose project are completely or partly shoot in France.

At the regional level, there are two organizations who can provide some financial support in audiovisual production: the Conseil Régional Provence Alpes Côte d'Azur and the Conseil Général Alpes Maritimes (they both provide financial supports on tv project, cinema projects, and éco-shooting).

Non-monetary funding:

The Provence Alpes Cote d'Azur is also providing some business centers focusing on SME's: Incubateur PACA Est; Pole PRIMI/ Belle de mai in Marseille; les Satellites a co working place in Nice; a business pole in Sophia Antipolis.

5.7 Piemonte

Italian regions have a significant level of autonomy, in particular following the constitutional reform of 2001, that reserved them specific responsibilities in some key sectors, among which research and innovation. Piedmont Region had been the first Italian Region to adopt, in 2006, a specific framework law for research and innovation, the regional law (R.L.) 4/2006, called "A Regional System for Research and Innovation".

After the crisis of some large and important companies in Italy and in Piedmont, it was clear to policy makers, that in a more complex and international environment the traditional R&D and Innovation model, even if declined in support to cultural and creative industries, was no longer able to guarantee the competitiveness of an area. It was also clear that public intervention is nowadays necessary to promote cooperation among different innovation and production actors, to support them to work together and provide the right balance of financial tools, incentives and scientific infrastructures.

The regional law aims at promoting and supporting the overall Regional Research System including the research activities carried out within the universities, enterprises, and research centres both private and public.

The most relevant and innovative aspects of the regional law n. 4/2006 are based *inter alias* on the following:

- For the first time the regional research system is recognised as active and responsible actor within the European Research Area with the aim to achieve the EU goals while using and benefiting from the territorial potentialities of the region
- The adoption of a unique, local and flexible planning framework with a clear definition of aims, strategic working areas, available funds and evaluation criteria for projects
- The focus on cooperation among the different actors involved in the field of research and innovation
- Setting up of a fund for research and innovation
- Special attention to monitoring and evaluation activities and results in order to be able to review and better finalise current and future research and innovation programmes

Piemonte Region set up along these lines a range of tools to stimulate SMEs to invest in collaborative research and innovation activities, and in creativity. At the same time, regional public authorities started to implement measures aimed at increasing innovation demand from Piemontese firms, rising the awareness about the central role of innovation in competing and assuring competitiveness in the global market.

The most important operational programme, in this framework, is the "Operational Programme of the ERDF". The strategic choice made under the ERDF POR 2007-13 aims to develop the adaptive capacity of the regional system to sudden changes induced by the interdependence of economic systems, thus enhancing the ability to innovate and reducing the gap with European areas with higher standards of living. The Programme is intended to give its principal contributions and added value through:

- acting as a lever to encourage domestic resources to address the key development challenges
- fostering cooperation among firms and among firms and the research sector
- investing in the key research and innovation sources in the regional economy and encouraging their greater use by enterprises
- promoting a more pro-active approach to research and innovation among all businesses
- increasing the level of new firm formation and the involvement of researchers and highly qualified personnel in the business sector
- improving the conditions for indigenous economic growth in the most deprived urban areas.

The second main operational programme in Regional R&D, Innovation and Information policies is the regional "Triennial Research Plan" (2007-2010 and subsequently 2011-2014), settled by regional law n. 4/2006, that defines concrete actions to be implemented for attaining the target objectives, identifies priority sectors and strategic domains to support, sets up evaluation standards and allocates financial resources to the different actions. The Research Plan is aiming to boost Piedmont economy toward a more research and innovation based economy, with high-growth, high-potential innovative business.

Funding measure

Piemonte Region, in the framework of its *Regional Research System,* has launched several call for proposal from 2008 until 2012. These calls has been funded above all through ERDF, via the "*Operational Programme of the ERDF 2007-2013*" and the *"Triennial Research Plan 2007-2010",* but even through regional own funds.

As the main goal of the two instruments is the support to SMEs, these are the main beneficiaries of the supporting grant, but the most innovative call regards micro enterprises, including professionals, workers persons registered for VAT and individual firms, which constitutes the biggest part of cultural and creative industries. And universities and research centres are not excluded.

Referring to the dimension of the investments, Piemonte Region has allocated a total amount of 39,5 million Euro, with an average contribution up to 60% of total costs (normally staff, external expertise, equipment).

Hereafter a reporting table:

Calls	Beneficiaries	Objective	Budget €
Digital Creativity in innovative projects designed by young	micro enterprises, including professionals, workers persons registered for VAT and individual firms, either individually or in consortium	Encourage the introduction of innovation through the development of initiatives related to the field of digital creativity. Digital Creativity is the creation and use of digital tools in creative contexts, such as animation and computer games, entertainment software, graphic design and marketing, architecture, visual arts and design, music composition and production, movie , television and video, writing, publishing and media.	2.000.000
Innovation voucher	micro enterprises, including professionals, workers persons registered for VAT and individual firms, either individ-	Promote the competitiveness of the territorial economic system supporting the development, implementation and distribution of innovative and creative ideas through the provision of innovation voucher for the acquisi-	7.000.000

	ually or in consortium, SMEs	tion of services for the research and innovation.	
Digital cinema	SMEs	Facilitate SMEs engaged in cinema to support innovative investments related facilities, systems and equipment for digital cinema projection.	1.500.000
Digital television	SMEs	Support the transition to digital by local broadcasters in order to strengthen the system of local information and the development of new content and services on digital networks.	4.000.000
Innovative ICT services	SMEs	Support and enhance the provision of IT services by small and medium-sized enterprises, aimed efficiency in production methods and organization of business functions. The aim, in particular, is to facilitate the development of products and / or IT services for innovative companies, based on the use Internet, which meet the real needs of business users and which will enhance their efficiency and productivity.	15.000.000
Human and Social Sciences	Universities, Artistic and Music High Education Institutes, Research centres	Promote the transition to a model based on the widespread knowledge and innovation, with particular regard to the expansion of scientific knowledge and techniques related to the subject areas identified in the Call.	10.000.000
Total			39.500.00

5.8 Switzerland

The federal government's regional policy is designed to make mountainous, peripheral and border regions favorable to the entrepreneurs and more attractive centers of business. It has strengthened its support to the transfer of innovative technologies and knowledge and to specific Creative and Cultural Industries, both with formal policies and participative strategies. Diverse governmental sub-projects model organizations and bodies working on both regional and national levels (AGIRE Foundation, Biopolo Ticino, KTI/CTI Swiss Commission for Technology and Innovation) supported by the intersection of the subjects and cantons. There are several efforts in promoting events and local initiatives.

5. Perceived needs of each region in the field of creative industries

6.1 Baden-Württemberg

Creative companies are experiencing increasing difficulties in the acquisition of clients, this is made more difficult by the high competition on the market. In that sense companies should be able to clearly communicate the characteristics that make them different, almost unique on the market. Already established companies have difficulties in the acquisition of talented workforce and for this reason they should try to cooperate with younger companies.

A obstacle for the future growth of creative companies could be the skill shortage. It can be caused by the salary restrictions and type of contracts which are offered in the creative industry and make the jobs not attractive. Also clients' requests have become more and more complex.

Financing still represents a problem for many creative companies, banks are not always ready to give money to creative companies because of the less stable business models. In that sense, some steps in Baden-Württemberg have already be made with the offer of specific venture capital funds for creative industries and the offer of consultancy on financial instruments and start-ups building from some banks and institutions of the region.

Creative companies see possible solutions to these challenges in the stronger national and international networking and cooperation.

6.2 Ljubljana

All around the world CI moved from marginal debates about culture rights into the centre of the discussions regarding competitiveness. CI are considered as increasingly important to economic well-being. Slovenia is, however, lagging behind with regard to the awareness of the CI importance. Nevertheless, the numbers speak for themselves, and the size of the CI sector itself is an indicator of its economic relevance.

The cooperation of other business sectors with CI is very low. Most companies in Slovenia do not operate in the end-consumer markets and no not invest into their own trademarks. Their competition is often based on price - adding to this, they do not perceive the cooperation with CI (for example cooperation with designers) as an investment but as a cost. Furthermore the quality of creatives is very heterogeneous, a analysis of the design sector confirmed that this fact presents an important problem. This compromise the reputation of the whole field.

The needs of creatives in the region are different: established creatives dedect that the region (Regional creative economy centre – RCEC) can mostly offer added value to them by promoting creative industries (locally, nationally and specially internationally)l. The younger, unestablished creatives have a much wider spectrum of needs like awareness raising about the CI and their potential, improvement of communication between the creatives and policymakers, inclusion of the CI into relevant strategies on municipal, regional and state level, promotion of the capabilities/results of the local creatives and the benefits of inclusion of creatives into business processes to companies in other sectors, enhancement of the skills of creatives (eg marketing) and improvement of networking of the local creatives among themselves and with other local/national stakeholders and internationally.

6.3 Lombardia

A survey conducted during the event "It's a Start", organized in Monza in June 2012, shows that most of the participating companies (37%) believe that the most important factor to sustain CCIs is the development of networks of relationships, followed by the access to credit (24%) and by the marketing capacity (17%).

Workshops conducted during CCAlps WP4 with hubs and companies lead to map threats and opportunities and, as a result, needs and requests of the cultural enterpirses.

Hubs see as opportunity the creation of stable, interdisciplinary networks, opened to the space, between creative industries and relevant stakeholders, while the public sector shows interest in this sector, also recognizing the importance of the start-up phase. Even the current economic crisis can become an opportunity because it stimulates entrepreneurship (e.g. when young unemployed and precarious workers look for new economic strategies) and technology today offers new solutions enabling creative ideas. In Lombardy Expo2015 will be a driver for growth.

Within this scenario there are some threats to avoid, such as the credit crunch to or the lack of institutional support for the internalization of SME's. Also the the lack of management skills in the cultural sector, especially among small companies, is a problem to face.. Other risks to avoid could be the lack of coordination between projects, a too poor response to the need for administrative simplification and the difficulty for small business to access to call for tenders because of their lack of competence in managing to large funds and projects.

Universities and institution consider as a necessary action the mapping of CCIs, in order to know their geographical distribution, their specialization, their needs and the ways to compete, the type of services offered and demanded and the identification of best practices. They solicit cultural and creative entrepreneurs to develop new ideas feasible and replicable, looking for those with the best potential for transformation in business ideas and request venture capitalists and the public sector to develop methods for defining a specific business model for CCIs start-up. The private actors of the hubs focus on funds and support services: they ask to business and financial institutions calls for proposal tailored to the needs of CCIs. In fact, CCIs have not, in general, enough time (but also specific skills) to deal with the burden of complicated administrative procedures. They have low financial needs but also a very little capacity to give guarantees. It's needed also a specific attention to the pre-startup phase. Private actors also ask, especially to public institution, easy access to services that can facilitate birth and development of CCIs, such artistic trends search services, voucher to use physical spaces, training services, digital platforms, assistance to increase financial reliability and to strengthen their capacity to operate independently, support to face the business competition and for internationalization.

Some of these ideas are shared by companies that participated in the three workshops dedicated to them. For example, partnerships and internationalization are considered fundamental to foster contamination and new ideas. New technologies in multimedia and e-commerce are perceived as key-ways to achieve new markets, thanks to the development of ideas in infotainment and in teen markets and thanks to the capacity of anticipating new needs from CCIs sector, new areas of creative supply and demand are created. The network between actors allows the system to connect multi-disciplinary ideas and funding.

On the other hand the lenders' request of "strong assurances" for the return of investments and the lack of managerial skills and abilities of young people entering the labor are serious obstacles. For young people other problems are that often creativity is not recognized as professional work, especially if practiced by emerging people. Actually young people are penalized in the selection process of the projects, because the criterion of reputation is more important than creative innovation. Institutions still present too much bureaucracy and a lack of vision in the medium/long term, so communication often overload. At the same time, according to the point of view of the companies, there is a lack of expertise and coordination aren't enough: several institutions often activate similar initiatives (e.g. subsidized loans) and let uncovered critical aspects (support to the pre-startup).

To enforce sectoral policies CCIs ask institutions a stronger connection and partnerships with universities, equipped spaces and hubs, experts to facilitate the meetings between traditional businesses and creative people and between different kind of creative people, web-notifications about calls for proposal and support access to finance, actions to increase visibility of CCIs industry.

6.4 Salzburg

Salzburg's ambition is to promote innovation in and by means of the creative sector (e.g. gaming). Therefore the biggest current need seems to be to raise awareness for the importance of creative services and to support cross-sectorial cooperation with traditional business fields and organise networking activities. In addition existing framework conditions (e.g. incubators) need to meet the needs of highly skilled and talented professionals from the games industry. Salzburg's challenge will be to raise awareness in traditional business fields (like health, tourism, trade and crafts) for the potential of applying creative services and to stimulate demand. Furthermore existing support measures (like incubators or funding instruments) need to meet the necessities of start-ups and young entrepreneurs in the field of creative industries. However, the high level of skilled regional workforce (coming from the University of Applied Sciences) provide favourable conditions to cope with the above mentioned challenges.

Salzburg's creative industries is emerging with a number of small sized enterprises and a few large international players. New Master programs at the University of Applied Sciences and awareness raising measures demonstrate Salzburg's ambition to make use of its high potential.

In Salzburg, the regional potential of cross-sectorial partnerships (e.g. in the fields of tourism, health and education) needs to be unlocked by further awareness raising and networking measures. Based upon the activities, experiences and possibilities need to be shared and creative companies, researchers and SME's from various branches shall be further connected.

In Salzburg, educational institutions have developed specific degree programmes meeting the needs of the creative industries and it is to be expected that in the upcoming years highly qualified talents and entrepreneurs will emerge and highly qualified researchers and research centres will continue to work on many innovation projects together with businesses.

SWOT Matrix

Salzburg currently has in development/implementation several support services (e.g. forum for design and media, co-working space, creative industry think-tank…) for the creative industries. For the time-being they focus on its strengths in design, digital and interactive media, but lack an overarching strategy, a holistic approach at regional level that meaningfully links all the measures and makes them visible to a large audience – with one final goal: to rejuvenate the regional economy based on traditional industries, increasing its performance by using the transformative power of service innovation and creative industries. This SWOT analysis of the Salzburg region should provide an overview of the status quo.

Strengths	Weaknesses
• Salzburg is a region with high economic and innovative power, with excellent research infrastructure, especially in Information and Communication Technologies. • Strong Educational and Research institutions: Universities in the region offer special degree programmes relevant to	• Lack of collaboration between creative companies and other industries. • No national policies e.g. to cut "non-wage labor costs" & taxes. • No specific monetary and non-monetary support instruments for projects on a regional level.

game development. • Transregional conferences receiving growing interest. • Highly skilled human resources in Creative Industries, especially in design, digital interactive media/gaming. • Strong service orientation and knowledge-based economy. • Education targeted on design, digital interactive media and games. • R&D projects in related fields • Large design companies, Media companies such as Red Bull Mediahouse and distributors such as Sony DADC and Real-Networks.	• Various small hubs but no regional co-ordination.. • No overarching strategy. • Few riskfinancing measures/Venture Capital support: Many companies struggle to have sufficient capital backing for their business. • Young Start-Ups and highly skilled professionals move to other regions.
Opportunities	Threats
• Matches the economic profile/ programme of the region -> to put creative industries – design, digital interactive media and gaming higher on the political agenda. • High potential for creative and technological innovation – the market is expanding • New business models. • Create favourable framework conditions for an eco-system for service innovation and the creative industries. • Bridging the traditional sectors with the creative ones. • Stronger visibility of regional ICT capacities. • Cross-sectoral focus: Able to strengthen regional economy connecting with other fields:	• Raise awareness for the importance of creative services, digital interactive media for other sectors -> work against distrust towards the industry. • Talents move to other regions. To position the region of Salzburg, in the long term, as a creative district open to co-operation and as a creative hub attracting talents in the creative industries.

o Trade o Health/Medicine o Education/Training o Tourism o Culture & Arts • Coworking Spaces and other platforms for creative people (design.forum) will be established in the region.	

6.5 Lyon

SWOT Fashion

STRENGHTS

- European capital for technical textiles
- Strong know how
- 650 creative companies
- 15.500 salaries (25% national)
- R&D
- Incubators Passage Tthiaffait
- A network of Textile culture Heritage museum

WEAKNESSES

- A lack of cross sectorial and cross industrial and creative job training
- Individual creativity, none for mass market

OPPORTUNITIES

- Research and famous institution in Lyon : IFTH, Techtera Cluster
- Fashion University (Université de la mode Lyon II)
- Strategic vision of Lyon Textile Museum
- New Connectivity with others fashion hubs in Alpine space area : Milan and Turin (RTE-T)

THREATS

- Externalization of design and production out of Alpine space and European countries

SWOT urban design

STRENGHTS

- Economic asserts in building and urban planning
- Lyon, Citytechs networking originality
- Cultural events
- Regional Clusters, public and private R&D

WEAKNESSES

1. Diversity of needs from various economic sectors
2. Lack of understanding between creative sectors and industrial sectors

OPPORTUNITIES

- Regional and international exhibition events
- Urban Investissement and renovation programs
- Living lab
- Smart cities strategy and Sustenable developpment strategy (Greater Lyon Climate change planning)
- Citytechs opportunities for promotional activities, cross fertilization and dissemination
- European and national certification Zero emission builiding

THREATS

3. Lack of cross fertilizations and R&D dissemination
4. Financial issues for creative industry and building sector
5. Deeper collective marketing strategy, packaged offers and time to market

Regional SWOT analysis Story arts :

STRENGHTS

- Territorial network
- Individual originality
- R&D with Imaginove cluster
- Festivals and creative events

WEAKNESSES

- Lack of training
- Research and training concentration in Paris

OPPORTUNITIES

- Easy networking with Imaginove cluster, Script office of Rhone-Alpes Cinema, private master class
- Strong tools for cross fertilization and cross media R&D
- Physical places for creative with Pixel and Subsistances
- Lyon International Novel festival and Polar Festival

THREATS

- Finance requirements
- Up to date and anticipative training
- Gap to the mass market selling

« According to you, what are the key factors which can contribute to creative companies success ? »

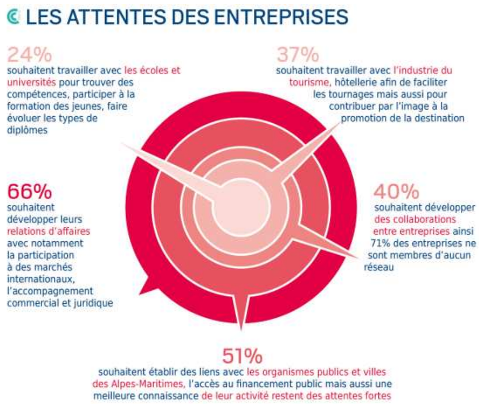
88 answers = training; 78 = innovation; 73 funding raising; 63 networking; 33 internationalization; 23 services shared; 22 fiscally

6.6 Nice

Needs and expectations related to four different fields have been underlined by CCI's as they are by SME's: 18% of need are related to employment, 73% related to financial support and 74% are related to commercial aspect and access to national, European and international markets.

of the CCI's in the field of image and audiovisual are:

24% : collaboration with universities and research centers
37% : cross fertilization with tourism industry
40% : networking such as information, meeting partnership development, and physical places to develop those networking.
51% : collaboration with public stakeholders
66% : business development with the need of a promotional website to allow CCI's to propose their services to international market.



6.8 Switzerland

Perceived needs of the region is to frame the critical issues into a process through which professionals and makers can learn strategies for creating more fruitful relationship models between them and the local realities within the global market of the audiovisual productions.

The development of the audiovisual and creation sector requires the development of an entrepreneurial friendly system for the optimization of internal procedures (government and administration), the spreading of audiovisual formats more and more digitally distributed through multimedia channels and diverse platforms (networks, peer-to-peer, social media etc.) and the design of a network for the diffusion of small and creative opportunities connected to local and international entities and to a variety of different sectors.