



WP4 Report CCI Lyon- PP4

1. Short description Lyon metropolitan area :

3 Million 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 asserts 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,

2. 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

3. Regulations, policies , funding for creative industries

Funding mesures

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:

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 substances " : 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, ESMO, 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 € |

4. Needs of our region in the field of creative companies :

SWOT Fashion

| | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><u>STRENGTHS</u></p> <ul style="list-style-type: none">• <u>European capital for technical textiles</u>• <u>Strong know how</u>• <u>650 creative companies</u>• <u>15.500 salaries (25% national)</u>• <u>R&D</u>• <u>Incubators Passage Tthiaffait</u>• <u>A network of Textile culture Heritage museum</u> | <p><u>WEAKNESSES</u></p> <ul style="list-style-type: none">• <u>A lack of cross sectorial and cross industrial and creative job training</u>• <u>Individual creativity, none for mass market</u> |
| <p><u>OPPORTUNITIES</u></p> <ul style="list-style-type: none">• <u>Research and famous institution in Lyon : IFTH, Techtera Cluster</u>• <u>Fashion University (Université de la mode Lyon II)</u>• <u>Strategic vision of Lyon Textile Museum</u>• <u>New Connectivity with others fashion hubs in Alpine space area : Milan and Turin (RTE-T)</u> | <p><u>THREATS</u></p> <ul style="list-style-type: none">• <u>Externalization of design and production out of Alpine space and European countries</u> |

SWOT urban design

STRENGTHS

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

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 Sustainable development strategy (Greater Lyon Climate change planning)
- Citytechs opportunities for promotional activities, cross fertilization and dissemination
- European and national certification Zero emission building

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 :

STRENGTHS

- 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 Substances
- 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 internationalisation

23 services shared

22 fiscality

5. Positive Support Measures

Master class in art of writing in fashion

Main objectives : Involvement of local actors, networking

Targets : professionals of fashion and textile/ and related industries: designers/ jewelery

Methods : innovative training with innovative topic/ renowned speakers

benchmarking;

analysis of the environment ;

set up a think tank-

Master class in art of writing with international script doctor support (held on October 2012)

6. Ideas for new support measures

- Using methods in story arts appreciated and recognized by the international public while reflecting and respecting Europe's cultural identity, we want to improve the quality of writing, indispensable to any shooted project in order to create a promotion policy that strives for a stronger European creative industry in the field of audiovisual, cross sectorial approaches, clustering at a European level.
- Targets on digital art of writing : scenarist, script writers, realisateur, producers, videogame companies.
- Creating incubators in rural and urban areas linked with urban competencies. It may includes services and rendez-vous between industrial and public procurement and small and medium enterprises as creative companies with clustering approaches located in metropolitan area.