

# Action 4.5: regional analysis report Image and audiovisual Hub on the French Riviera

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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 strategic need of the SME's working in this field.

We decided to survey this sector in order to build-up a real economic and creative network on the French Riviera taking into account CCI's way of working and needs, as well as existing supports, best practice and project.

## 1-Short-Description of our Region: French Riviera

French Riviera is one of the most attractive European regions with the following assets :

- Europe's first science park
- Young and international population
- Highly-skilled and talented workforce
- Excellent infrastructure, 2nd busiest airport in France
- A thriving IT cluster, recognized worldwide

### Keys figures:

Population: 1.1 million inhabitants

Economy: over 100,900 establishments

Net sales: € 51.25 billion

A workforce of some 437,700

Growth: over 117,000 jobs created during the past 10 years

Many cultures: internationals account for almost 12% of the population;

1,000 companies with foreign capital

37,000 students in higher education program

Attractiveness: 11 million visitors

## 2-Overview of Creative Industries in the field of Image and audiovisual on the French Riviera:

### 2.1 Key figures

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



## 2.2 Image and Audiovisual Hub Ecosystem

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

### 2.2.1 Branches in the Hub

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.

### 2.2.2 : 3 Sub hub in the Ecosystem

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

### 2.2.3 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 such 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.



### 3-Regulations, Policies, Funding for Creative Industries

#### 3.1 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.

### 3.2 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).

### 3.3 Financial support:

#### 3.3.1 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 it 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.

#### 3.3.2 At the regional level,

There are two organizations who can provide some financial support in the 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).

### 3.4 Non-monetary funding:

The Provence Alpes Cote d'Azur is also providing some business centers focusing on innovative 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.

## 4-Needs of your region in the field of creative industries from an entrepreneurial as well as from a regional point of view.

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.



Expectations 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.



- a SWOT-Analysis in the thematical field of your hub.

## 5- Positive Support Measures & Good Practices

Best practices in related field can be underlined as useful for “image and audiovisual” hub :

- Club action brevet

Club action brevet is an industrial and property club to promote networking and channeling information to SME's. The Club Action brevet (CAB) has been designated for industrial property in order to foster the culture and practices of the protection of innovations in the French SME's. objectives of this best practices is to inform innovative firms about specific practices of industrial property depending on the industry context, stimulate industrial property policies and strategies within SME's, sustain innovation protection strategies within SME's and facilitate communities of practices between innovative firms, management and specialist of industrial property. The methodology of Club Action Brevet is to organize some conferences with some industrial property specialist, organize some debates meetings, develop some patents intelligence, provide some industrial property coaching of SME's to implement a strategy, and make some researches about patenting feasibility studies.

- ECOBIZ collaborative platform

Ecobiz is a networking and channeling information platform to SME'S. Ecobiz was designed to meet the some expectations from firms and economic development stakeholders. This platform allows to network and developed some cooperation and business exchange, facilitate the access and the circulation of information, and allow federating imitative dedicated to firm growth. The objectives are to stimulate economic development trough clusters cross fertilization, promote networking throughout the whole value chain and strengthen networks visibility and cooperation. The platform

is free and has a secure access, is composed by different communities (sustainable development, human resources...).

This work package allows us to clearly and deeply investigate a new economic and creative industry on the French Riviera. Thank of this survey, the French Riviera chamber of commerce and the French Riviera film commission will be able to propose specific services to support a strategic sector and allow them to increase their competitiveness.

### **6-Ideas for new support measures (new initiatives in progress...)**

Cannes Technopole de l'image is a new project offering working space for CCI's working in the Field of Image and audiovisual. Whereas, PRIMI is a regional support stakeholder offering services to companies focusing on transmedia.

CCI Nice Côte d'Azur, through CCALPS, is becoming the local desk of PRIMI in order to propose PRIMI's services to French Riviera CCI's. These services could be delivered partly in the new technopole thanks to CCI Nice Côte d'Azur / Primi partnership.

Moreover, this work could become part of the "creative valley" initiative in order to enhance these services to other creative field.