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Creativity and Economic Development in the Paris Region: a Propitious Synergy

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The creative industries, a strategic and emblematic regional sector, are a driving force behind economic development and the attractiveness of the nation. Highly concentrated in urban centres, creative jobs have developed enormously over the last decade, meeting the challenges of the digital era.

There is something of an obsession on the international scene right now with the concept of the creative industries. Situated where economics meets culture, they are seen as a clear source of competitive advantage and a driving force behind the knowledge economy. Their profile is hard to pin down and how they work remains obscure. The potential of the creative industries in economic development still not fully appreciated, although the growing synergy between creativity and employment throws new light on the Île-de-France (Paris Region) economy.

Defining the Creative Industries

The United Kingdom has led the way in defining creative industry sectors. The Department of Culture, Media and Sport (DCMS) describes them as "*those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property*." They include various areas of economic activity, such as architecture, advertising, film and video, photography, radio and television, music, performance, arts and antiques, fashion, publishing (books, press), leisure software, design and craft.

Despite the wide variety of sectors which they cover, the creative industries have a number of common characteristics. They pool talents, jobs and structures, encourage collaborative work and tend to be strongly rooted in their local culture. Often they do not operate strictly on a profit-making basis. An integral part of the intangible economy, the creative economy does not operate according to traditional models or prevailing industry rationales.

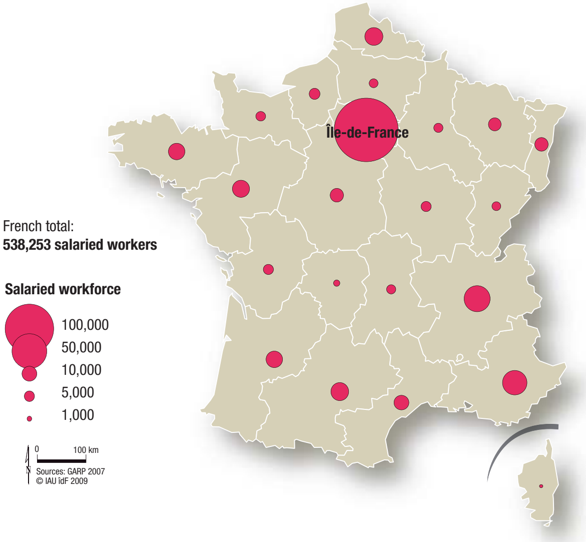
The English definition has inspired a large proportion of cities throughout the world. The approach taken by the Île-de-France is based on that of Greater London. Study results[1] broadly indicate that Paris is a creative urban centre which is every bit as buoyant as London.

363,000 creative industry jobs within the Île-de-France

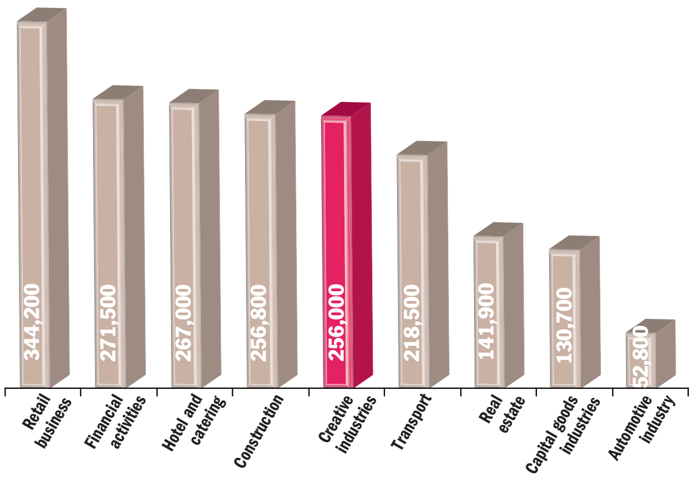
These jobs are mostly held by salaried employees (256,000), 42,000 held by self-employed workers and 65,000 temporary workers. The jobs carried out under the aegis of these activities are not all creative. They cover a wide range of functions which are more or less creative, and more or less skilled. In total, only 44% of those working within the sector have a creative profession. These essentially include journalists, technical production assistants in film, television and the performing arts, advertising executives, technical assistants in

(1) Camors C., Soulard O., *Les industries créatives en Île-de-France*: un nouveau regard sur la métropole, IAU îdF, March 2010. This study is downloadable from: www.iau-idf.fr/nos-etudes/themes/theme/developpement-economique.

Salaried employment in the creative industries in France, 2007



Salaried jobs within the main business sectors in the Île-de-France, 2007



Source: IAU îdF, Pôle emploi 2007.

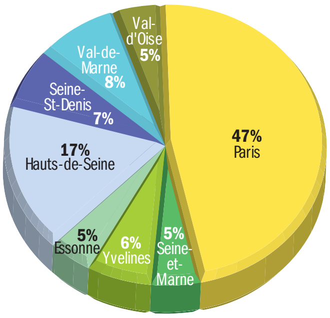
the graphic arts, fashion and decoration (including designers, stylists and graphic designers), dramatic artists, dancers, etc. Non-creative jobs include computer engineers and specialist executives, secretaries, administrative and financial managers of SMEs, administrative assistants, etc.

Half of all France's salaried creative industry workers

In 2007, the creative industries employed over 538,000 salaried workers in France. The Paris region shows the heaviest weighting, accomodating 48% of salaried French workers.

Outside of the Île-de-France, the Rhône-Alpes (Lyon region) and Provence-Alpes-Côte d'Azur are the two French regions with the highest concentration of creative workers and organisations, but the scale differs considerably: the Lyon region employs 44,700 salaried workers, i.e. 8% of French workers, with the Provence-Alpes-Côte d'Azur region home to 37,000 jobs, i.e. 7% of French workers.

Distribution of new creative businesses across the Île-de-France "départements", 2007



Source: IAU îdF, INSEE (French Institute of Statistics).

6% of salaried workers in the Île-de-France

The creative industries account for 6.2% of all salaried employment in the Île-de-France in 2007 (as compared to the average of 2.3% for other French regions), which is as much as the construction, hotel and catering, or financial industries. Moreover, 80% of creative industry workers are in the service sector (leisure and cultural business services). Only 20% of jobs are accounted for within the industry (publishing, press, sound and video recordings). So it might be more accurate to talk about "creative services" rather than the "creative industries".

Positive evolutions, driven by the digital revolution

Between 1994 and 2007, there was an overall upturn in the number of salaried workers in the creative industries within the Île-de-France. The workforce in this sector increased by a 2.6% annual average over the last thirteen years, representing an additional 72,000 people. This increase is double that seen in all other sectors put together (representing an average annual 1.2% increase).

The period in question falls into three phases: between 1994 and 2000, a strong increase in the ICT and software sectors, then an economic downturn between 2001 and 2004 in which the leisure software, advertising and publishing industries diminished sharply, before seeing another recovery between 2004 and 2007, with more varied results according to sector. Film, radio, television, photography and leisure software, increasingly technologically-based industries, were more dynamic over this period: special effects, animation, specialist channels and multiple broadcast media. Other sectors continued to develop, but at a pace below the creative industry average. Only the publishing sector showed itself to be in slight decline.

Creating Dynamic Creative Businesses

In 2007, over 5,100 new creative industry businesses were set up, representing almost 7% of new businesses in the Paris Region, across all sectors[(2)]. 9.8% of all creative businesses in France are set up in the Île-de-France. However, this new business creation rate is lower than the regional average for all sectors (11.4%). Creative businesses tend largely to be set up in the central area of the capital, with 47% in Paris and 17% in the Hauts-de-Seine area. This localisation is accompanied by an overspill effect into the communes neighbouring Paris, which offer suitable and cheaper premises, whilst retaining the advantages of the capital itself, e.g. access to qualified individuals, professional networks, a central consumption area, authentic location, etc.

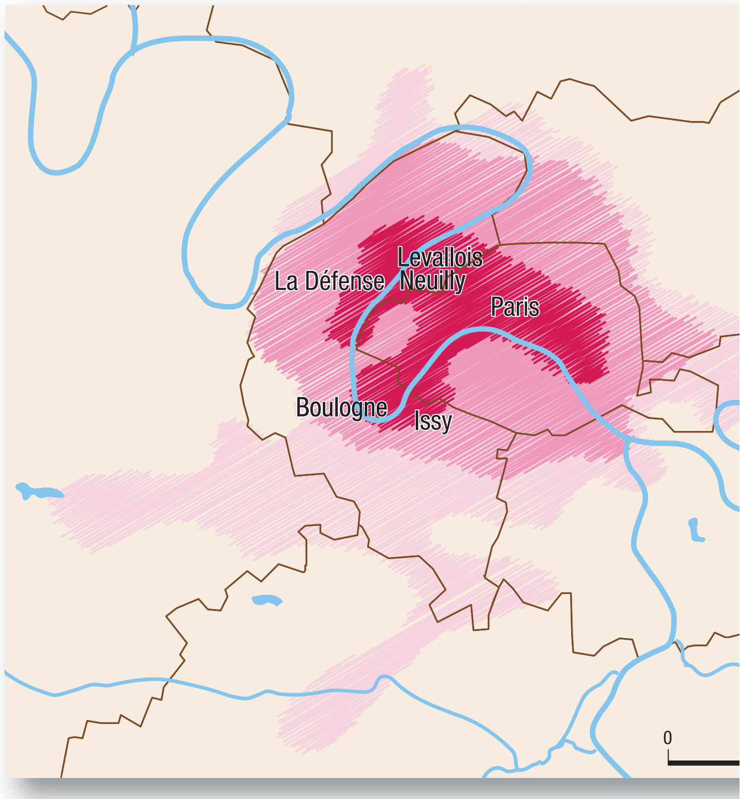
Over three-quarters of Workforce based in Paris and Hauts-de-Seine Area

The creative industries are very much concentrated in the Île-de-France in the city of Paris and its immediate environs. Although all *départements* saw their working populations increase between 1994 and 2007, their preponderance relative to the Île-de-France has grown. Paris remains the undisputed leader, but it underwent "soft" growth to the benefit of the Hauts-de-Seine area which benefited from the redistribution of the creative industries into the communes bordering Paris such as Issy-les-Moulineaux, Boulogne-Billancourt, Levallois-Perret, etc. Similarly, the Seine-Saint-Denis area experienced a boom, with its workforce doubling over this period, leading to the emergence of a cluster of creative industries within the north-east Paris area. Growth in the areas of Seine-et-

(2) Source: INSEE (French Institute of Statistics), French register of companies and establishments.

Community-based creative activiti

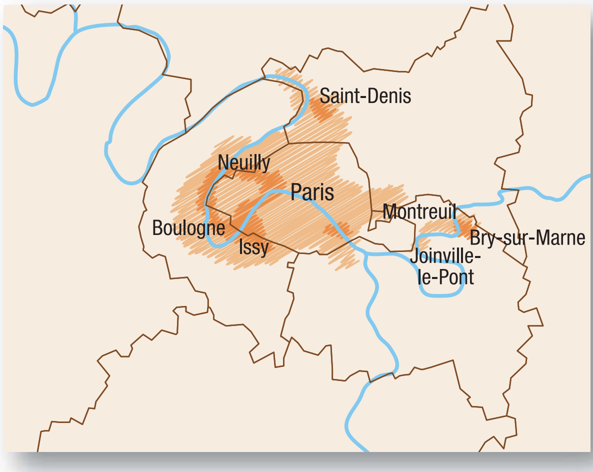
Creative Industry Clusters in the Paris region



There is a strong tendency towards geographical clusterin
Paris, concentrated in Paris itself along the Seine, contin
and the central *arrondissements* of the right bank, continui
area. Almost all creative industry activity is concentrated int
force, consumers and producers of content, contractors, fin
identity of the creative cluster.

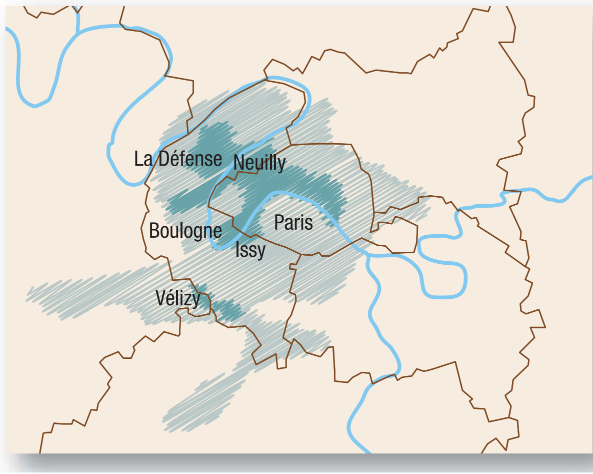
Publishing (books, press)

Film, radio and television

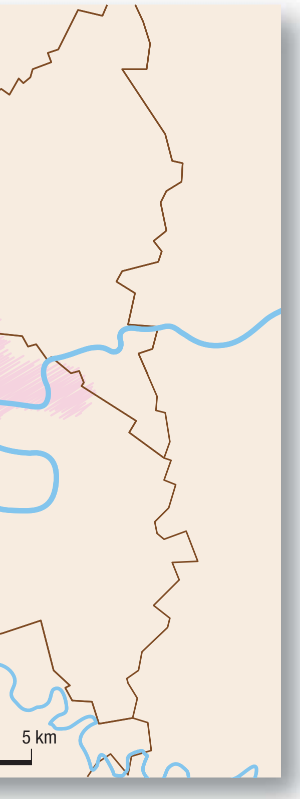


Advertising

Leisure software



es: dominant “cluster” phenomena



Cluster centre

Area favoured by several creative industries

Area favoured by a sector of the creative industries

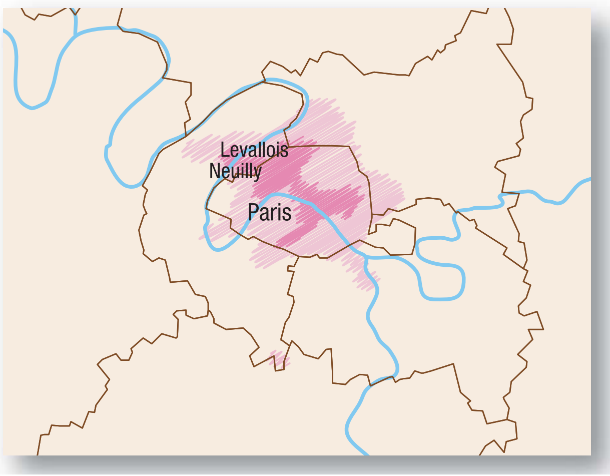
Methodological note:
This map represents an inclusive view of the following sectors: film, radio, television, photography, publishing (books and press), music, live entertainment, advertising, architecture, design and leisure software. The fashion, arts and antiques sectors are not included on this map.

g. The heartland of the Île-de-France creative industries is in
uing through Issy-les-Moulineaux and Boulogne-Billancourt,
ng through Levallois-Perret, Neuilly-sur-Seine and the Défense
o these areas. The concurrent existence of a specialised work-
ancial organisations and institutions creates the synergies and

Architecture

Design

Music and Performance



Area favoured by industry

Cluster centre

0 10 km

Sources: IAU îdF, INSEE (French Institute of Statistics), Pôle emploi, APCI (Design)

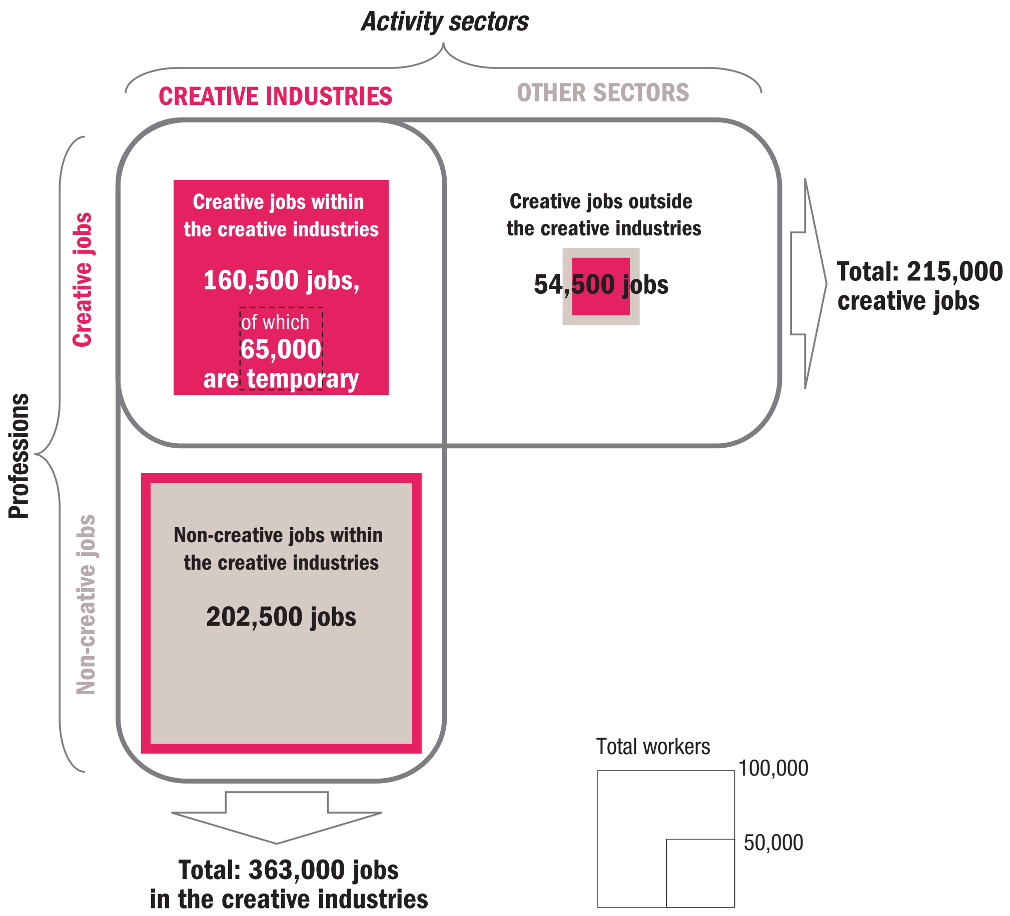
Evaluating the Creative Professions

Not all creative industry workers have a creative job. For instance, institutions within the film and video sector employ both workers within the creative professions (actors, directors, sound engineers, etc.) as well as non-creative professions (secretaries, accountants, commercial agents, etc). On the other hand, creative work is not limited to workers with a creative profession within the creative sectors. Workers with creative jobs also work within other sectors.

The Trident approach identifies three such types of worker:

- Workers who are doing a creative job within the creative industries (e.g. television journalist): 160,500 people. So three quarters of those with a creative job work within the creative industries.
- Workers who are doing a creative job outside of the creative industries (e.g. automotive industry designer): 54,300 people.
- Workers who are doing a non-creative job within the creative industries (e.g. accountant in a publishing house): 202,500 people. Overall, 56% of jobs within the creative industries are done by non-creatives.

Trident of creative jobs in the Paris region



Sources: IAU îdF, Census 1999 / INSEE (French Institute of Statistics), Pôle emploi, Congés Spectacles fund © IAU îdF.

Marne and Val-de-Marne on the other hand remained relatively subdued in comparison.

Urban Centres Step up Creative Industry Policy Decisions

There have been various measures implemented to support the development of these growth activities. Study visits to London and Copenhagen throw some light onto two specific methods of intervention. Essentially, the Scandinavian approach focuses on social welfare, research and education, whilst the Anglo-Saxons place greater emphasis on policies which encourage innovative and business activities. The Scandinavian model aims to create conditions which will propitiate the growth of the creative industries as a whole, rather than implement a support strategy for the more attractive sectors such as design and media. English policies are focused more on the commercial aspects of these industries, support for export, intellectual property rights management, etc. and less on the cultural aspect of the creative industries.

In Europe, the European Commission has identified this sector as playing a key role in the economy of its member states. A recently-published green paper highlights this move towards harmonising supportive policies. Five key areas were identified: the professionalisation of the sector, local development, the need for a regulatory framework for copyright management, as well as the importance of digitisation and access to industry financing.

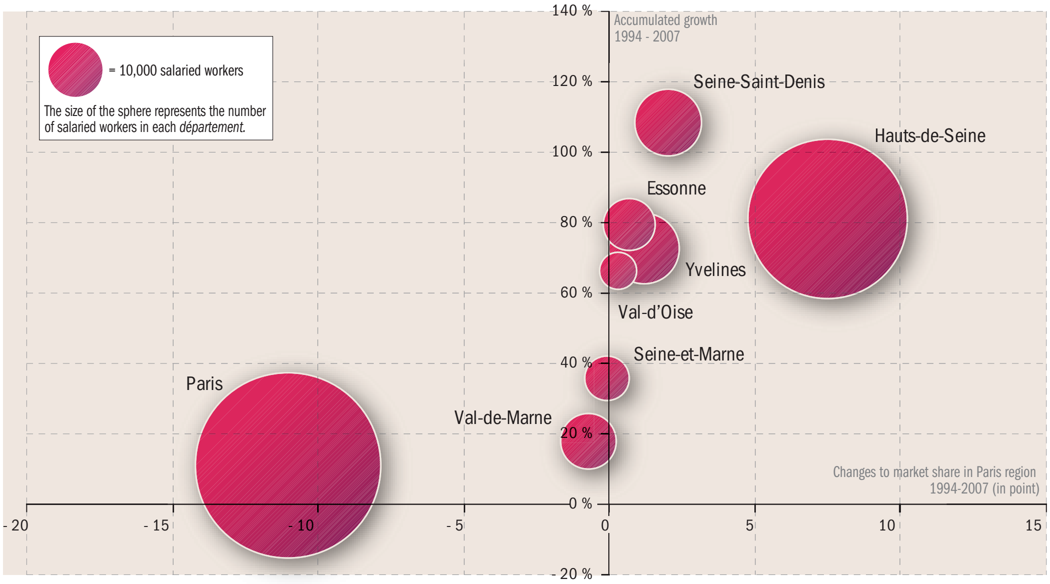
The Île-de-France Needs to Meet Several Challenges to Assert itself as a Creative Capital

Whilst the creative industries are undergoing far-reaching change in a competitive global marketplace, the French capital still needs to tackle a number of challenges. Changes relating to the digitisation of content and the place occupied by the internet have turned the various creative industry sectors upside-down. Similarly, changes in consumer patterns and practices have given rise to other needs (mobility, instant access, etc.); new jobs and new markets have emerged, bringing with them a restructuring of the players around these issues. What's required is support for skills, a response to the needs of new creative businesses (digital services and content) and to develop the potential of these industries at international level.

Selecting Regional Policies to Support the Creative Economy

Long dealt with at national level, policies supporting the creative economy are becoming regionalised, but the view of these activities as a discrete economic sec-

The Creative Industries in the Île-de-France: département rankings



Source: IAU îdF, Pôle emploi 1994-2007

tor, creating long-term employment in the capital, rather than being merely a cultural issue, is a recent one.

Several policies to support the creative industries are now being implemented. Outside of support for the cluster Cap Digital, which is by its very nature a multi-sector venture, government intervention does not deal with the creative industries as a whole, but rather the various sectors within it, such as film, radio and television, performance, books, design, music, or, more recently, arts and crafts professions.

The classic signposting of support for cultural industry sectors (film, radio, television and book publishing) and performance should these days take account of the convergences taking place between the creative industry sectors and their use of digital content and services. Support for the Île-de-France's creative industries comes through a global view of regional creativity and innovation which lumps together culture, economy and technology.

Odile Soulard, Carine Camors

The Scope of the Creative Industries

The workers within the sectors which make up the creative industries are more or less quantifiable. There is broad consensus for the Anglo-Saxon approach, which satisfactorily pins down six of the ten sectors which make up the creative industries: advertising; publishing (books, press); music; performance; film, radio, television and photography; architecture; leisure software and digital publishing.

However this definition is limited as it does not take into account all sectors which make up the creative industries. The definition is being consolidated and the understanding of the various sectors is changing in line with the statistical data available. Therefore the results shown are limited. Additional studies have been undertaken in order to better define the less well understood sectors such as arts and antiques, fashion, design and craft.

The jobs in the creative industries (CI) in the Paris Region, 2007

	Total workers
Architecture	15,100
Film, radio and television	36,700
Publishing (books, press)	48,100
Leisure software	67,700
Music, Performance	26,600
Advertising	54,400
Arts and Antiques	4,300
Fashion	3,100
Design	nd
Craft	nd
Salaried CI employment	**256,000**
Temporary workers	65,000
Self-employed (non-salaried)	42,000
Total CI jobs	**363,000**

Sources: Pôle emploi, Congés Spectacle fund, Census 1999 / INSEE (French Institute of Statistics); IAU îdF initiative.

Further reading:

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Online:
- http://www.iau-idf.fr/nos-etudes/themes/theme/developpement-economique.html

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