

51st ERSa Congress in Barcelona 30th August – 3rd September 2011

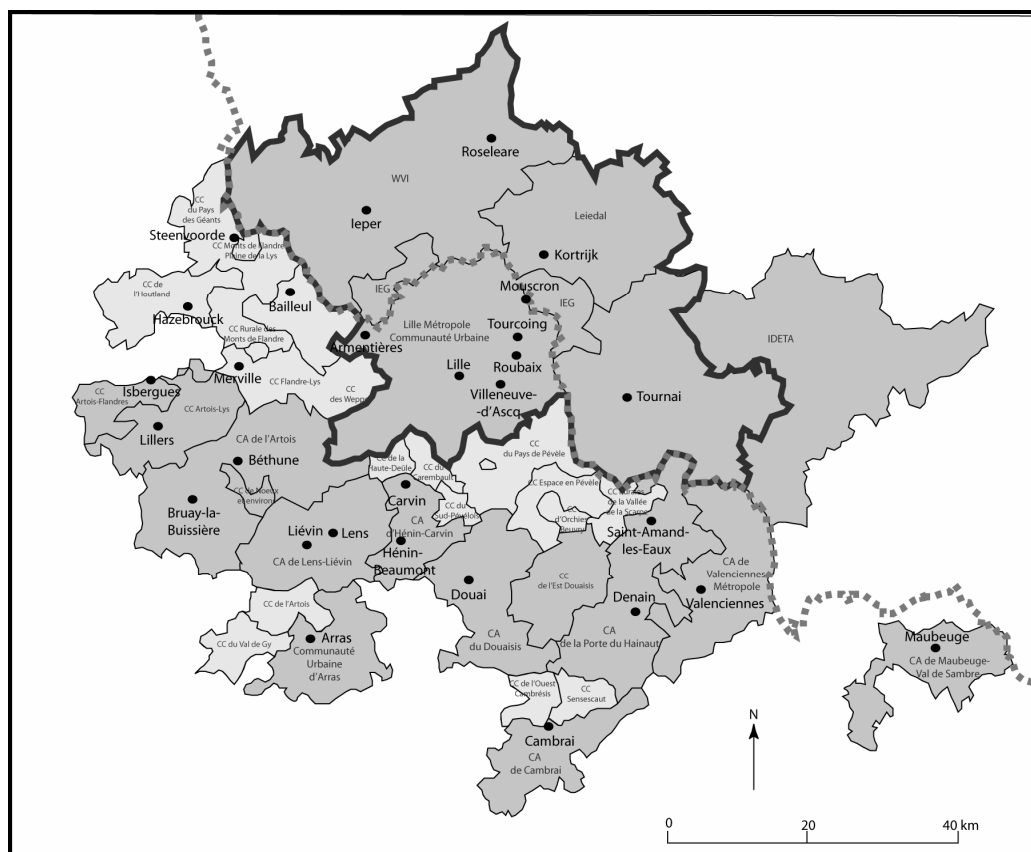
New challenges for European regions and urban areas in a globalised world Ordinary O session: “V. Tourism, cultural industries and policy”

Title: Creativity in the Lille metropolitan area: the example of the image sector

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In France, the Paris region is the traditional centre for decision-making and creative functions (Chantelot, 2006). Unsurprisingly, it concentrates most cultural industries – cinema, multimedia, TV, etc. However, some French cities, like Lyon, Marseille or Lille, have developed their own image sector. The aim of this paper is to study how other French cities, and more specifically a regional medium-sized city like Lille, could develop this type of activities. Lille is a city of the north of France. It is the capital of the Nord-Pas de Calais region, and the prefecture of the Nord *département*. The metropolitan area includes the cities of Nord-Pas de Calais coalfield (Béthune, Lens, Douai and Valenciennes), Arras and the south-east of Belgium (cities of Tournai, Roulers and Courtrai). This metropolitan area numbers 3,7 million inhabitants.

The Lille metropolitan area



Source: B. Lusso, 2010, TVES

Today, there is a general consensus on the importance of human capital to regional development, but there is still a debate around two key issues. The first involves the role of education and/or creativity (Rutten and al, 2003 ; Verdier, 2006), while the second revolves around the factors that affect its distribution (Wolfe, 2002 ; Cooke and Asheim, 2006 ; Asheim, Coenen and Vang, 2007). Since we know talent, associated with economic development, is spread unevenly, it is important to understand the factors that account for their varied geography. Most economists conceptualize talent as a stock or endowment, which belongs to a place in the same way that a natural resource might. But the reality is that talent is a flow, a highly mobile factor that can and does relocate. The key question then becomes: what factors shape this flow and determine the divergent levels of human capital and the distribution of the creative class – in terms of education and skill – across regions? We will see in what respect historical legacies and creative resources have determined the settlement of multimedia companies in the Lille metropolitan area, the fourth multimedia cluster after the Paris, Lyon and Marseille regions.

1. Inherited activities?

Ann-Lee Saxenian (1994) has shown the importance of regional culture and heritage in the constitution of an economic trajectory. The pre-existence of links between media, microelectronic or photographic industries and of an intense audiovisual production can support the emergence of essential know-how for the development of a multimedia and image sector (Braczyk, Fuchs and Wolf, 2000).

1.1 A weak cinematic tradition

The development of the multimedia industry depends on symbolic knowledge base (Asheim, Coenen and Vang, 2007) reputation phenomena (Benhamou, 2002). The Nord-Pas-de-Calais preserves an image of former industrial region, which is located near the capital region. Its climate is not very sunny and its inhabitants aren't regarded as creative, because the share of workmen in population is very important. However, the area has a cinematographic history which has as a characteristic to have accommodated a great number of social or realistic film productions. Directors showed more the mining cottages, the factories chimneys, the waste grounds and the working character of the region than the great dune extents of the Opale Coast or the urban centres architectural diversity. The examples are numerous: *La Dame d'Onze Heures* realized by Jean Devaivre (1946), *Germinal* by Claude Berri (1993), *L'Enfance Nue* by Maurice Pialat (1967) or *La Femme Flic* by Yves Boisset (1981). Thus, the Anne Fontaine's reaction, director of the film entitled *Entre ses mains* and turned in 2005 in Lille, appears legitimate: she acknowledged that she didn't think that the Lille could constitute a very pretty framework for her film. It is necessary to await the emergence of a new director's generation born in the Nord-Pas-de-Calais and turning regularly in these region (Arnaud Desplechin, Xavier Beauvois, Bruno Dumont, Christian Carion, Dany Boon) to observe a progressive inversion of the values. In addition, this dynamics is largely confirmed by the recent box office successes of *Joyeux Noël* (2005) by Christian Carion and *Bienvenue chez les Ch'tis* (2008) of Dany Boon, both entirely turned in the Nord-Pas de Calais.

However, the city has succeeded to develop independent medias, with two daily newspapers such as *La Voix du Nord* and *Nord Eclair*, and the more recent creation of seven

local TV stations: four general channels (*Wéo*, *Wtv Focus*, *Notélé*, *NTV*) and three specialized channels, the musical channel *Télé Melody*, the well-being channel *MyZen.tv* and the information media *Grand Lille TV*.

Local TV stations in the Lille metropolitan area

Name	Head office	Creation date	Owner	Theme	Geographical area of reception
Wéo	Lille	2009	La Voix du Nord Group	General channel	Nord-Pas-de-Calais region
Grand Lille TV	Tourcoing	2009	Télé Melody Group	Information	Nord-Pas-de-Calais region
Télé Melody	Tourcoing	2001	Télé Melody Group	Music	France
MyZen.tv	Tourcoing	2008	Télé Melody Group	Well-being	Europe, United Arab Emirates
Wtv Focus	Roulers	2000	Roularta Media Group	General	Flanders
Notélé	Tournai - Mouscron	1977	ASBL (association)	General	Belgium Hainaut
NTV	Harelbeke	2000	NTV Group	General	Flanders

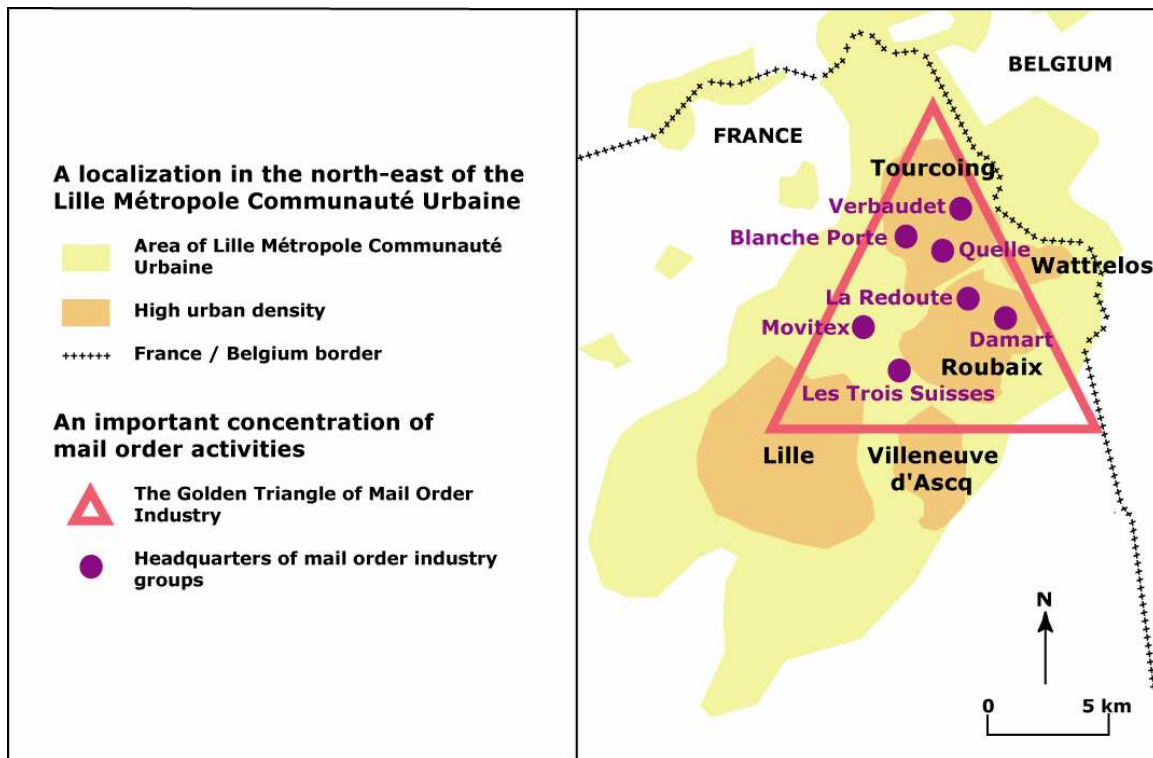
Source: B. Lusso, 2010, TVES

But, post-production isn't developed in Lille, in spite of the localization of a leader of the post-production, *Workflowers*. Such functions remain largely concentrated in the Paris region. The situation has improved thanks to the creation in Lille of a regional branch of the French TV channel *France 3* in the 1970s. Since 1975, the directors of *France 3* have decided to develop movie distribution, debates and regional broadcasts. On March 22, 1976, regional television became daily, with regional editions of the *France 3* news and local TV programs (*La Vie, tout simplement, Goutez-moi ça*). With the gradual emergence of a more local TV content, *France 3* has decided to build on its skills and on its various regional offices to develop TV movies and TV shows shot in the Nord-Pas de Calais region and in Lille, as illustrated by the TV films such as *Le Réveillon des Bonnes* (2007) or *Les Oubliées* (2008).

1.2 The mail order industry: a real asset?

However, a lot of former industrial cities are characterized by the synthetic knowledge bases (Asheim, Coenen and Vang, 2007). The French conurbation of Lille-Roubaix-Tourcoing was built thanks to the development of the textile industry over a century. The decline of these activities since the sixties parallels the growth of commercial firms and business services. Head offices of hypermarket chains and major mail order companies, such as *Auchan*, *Redcats* and *Les Trois Suisses*, founded by innovative textile entrepreneurs, have contributed to the creation of a cluster of knowledge-intensive business services. In the 1980's and 1990's, another mode of economic regeneration was based on the development of science and business parks. *Euralille* and its skyscrapers is the architectural beacon of this new service economy (Liefoghe, 2005).

The Golden Triangle of Mail Order Industry in the Lille metropolitan area



Source: B Lusso, 2010, TVES, from Schulz, Dorrenbacher and Liefoghe (2006)

The Lille-Roubaix-Tourcoing conurbation has become a true “mail order valley” which approximately counts 200 firms for a total of 31.000 employees. Twelve local firms appear among the most thirty important national companies, such as *Blanche Porte*, *La Redoute*, *Les Trois Suisses* or *Verbaudet*. Since the 1970s and the ICT revolution (minitel in the 1980s, Internet in the 1990s), the mail order selling processes have been largely computerized, offering new know-how in the telecommunications sector. So, large commercial firms (*Auchan*, *La Redoute*...) have adapted technological developments through the more systematic Internet. That explains the communication subcontractors firms development which produce website for the commercial companies, such as *Priad* or *Ankama*. In an industry as cyclical and delicate as multimedia sector, communication firms hope to differentiate themselves from their principals by diversifying activities. Thus, launched in 2001, *Ankama*, communication firm has quickly developed activities around video game, cartoons and comics.

2. Are training facilities a factor of creativity?

Yet the presence of major schools in the technical and creative fields can have significant repercussions for the constitution of a creative class (Florida, 2002).

2.1 Training facilities in the Marseille metropolitan area

In France, the largest schools which offer training in the image sector are mainly concentrated in the Paris region. However, many schools are to be found in the Lille

metropolitan area, which counts a lot of multimedia schools compared to the two other French cities of similar size, as the following table shows:

Number and status of training facilities in the Lille, Lyon and Marseille metropolitan areas

	Lille	Lyon	Marseille
Public	15	17	10
Private	18	21	16
Consular	5	0	1
Total	38	38	27

Source: L'Etudiant.fr

The Lille metropolitan area thus has 38 training facilities in the image sector, against 38 and 27 for the Lyon and Marseille metropolitan areas. 15 of them are public: they are mainly high schools or universities which offer a major or minor in arts or moving images. These schools were often created in the 1970-1980s in order to catch up on training in traditional industrial cities (Lille was a textile city in crisis and the south of the metropolis was home to the declining Nord-Pas de Calais coalfield) such as the public universities of *Lille 1* or *Lille 3* and the *Fresnoy Studio*. To this must be added art schools, which were often founded in the nineteenth century and are concentrated in cities with a long artistic history (Lille, Roubaix, Tourcoing, Valenciennes and Cambrai especially). In the former coalfield, three schools, the *Supinficom*, *Supinfogame* and the *Higher Design School* in Valenciennes, have a consular status and demonstrates, once again, the willingness of the *Valenciennes Chamber of Commerce and Industry* to develop news skills training (with analytical knowledge bases) that is often lacking in these territories. However, there is a greater number of private training facilities (18 against 15 public schools), often associated with the setting-up of local offices of regional private training groups that have opened decentralized training facilities in several French cities outside the Paris region. Examples are the *Euspcom* or *Efficom* communication school or *Pole IIID* graphics school. The aim is to create a parallel offer to Parisian schools and more specifically to other provincial cities.

2.2 Main curriculum

In the Lille metropolitan area, 147 training facilities are opened to 4,500 students. We notice a very strong correlation between the training offered by these schools and regional economic features, as outlined in the following table:

The main types of training offered by the schools of the Lille metropolitan area

	Number in Lille
Art	30
Audiovisual	11
Infography, video games	21
Telecommunications, visual communication, advertising, design	50
Computer, electronics	35
Total	147

Source: L'Etudiant.fr

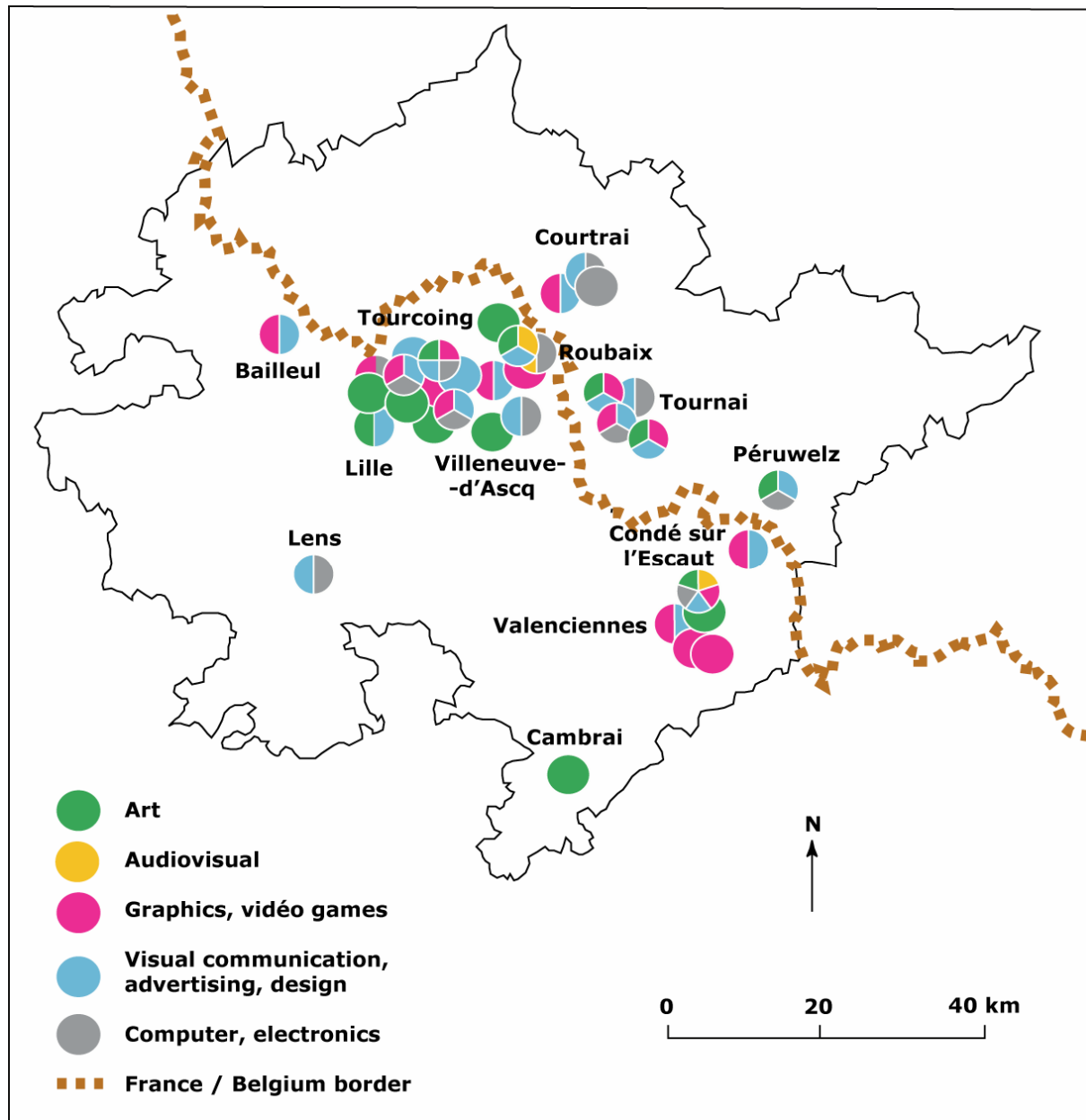
In the telecommunications, advertising and design sector, courses are the most numerous and represent a third of the training offer. We can add to this set computer and electronics schools (representing more the 50% of the total training supply). The development of professional training in this specific area is mainly related to the rise in the 1980s of the mail order selling computerization and of the needs for a skilled workforce. Then, we have graphics and art schools (drama, music and dance), which make up for one third of the training offer in the image sector. Only the audiovisual sector remains in the background. The Lille metropolitan area isn't an important shooting region and has therefore less significant training needs.

If we analyze the training facilities in the Lille metropolitan area, we find that 22 schools offer very short curricula (A-levels or A-levels +2 or +3). These are vocational training qualifications (CAP, BTS, *license professionnelle*) specifically targeted at the needs of local firms. Thus, it is hardly surprising that such training is predominantly offered by the private sector rather than by state schools in order to train more quickly the potential labor force and that the training remains very general and does not equip the graduates with any specific know-how. This can be a disadvantage for the development of specific skills in the audiovisual and multimedia sectors. As a result, there are far fewer schools offering an A-levels +5 or A-levels +8 degree (only 16 in the Lille metropolitan area) and the ratio between the public and private sectors is more balanced. Thus, it should be noted that only universities offer a longer curriculum giving access to the Ph.D. level, as is the case of Universities of Lille 1, Lille 3 and Valenciennes. We find a confirmation of these observations in the geographic distribution of the main training facilities of the image sector.

2.3 Geographical distribution

As for geographical distribution, it is hardly surprising to notice an intense metropolitanization process, insofar as the main urban centers concentrate the training offer, with Lille-Roubaix-Tourcoing conurbation well ahead and Tournai and Courtrai following closely. The Nord-Pas de Calais coalfield cities are not so much represented with the exception of Valenciennes, where an University with a department specialized in computer, multimedia and graphics sectors, is located. As far as training for A-levels +2 or +3 is concerned, the domination of Lille, Roubaix and Tourcoing is very clear, with a strong specialization in the arts, graphics, video games and telecommunications fields, while the Belgian cities are more focused on computer, electronics, visual communication, advertising and design schools.

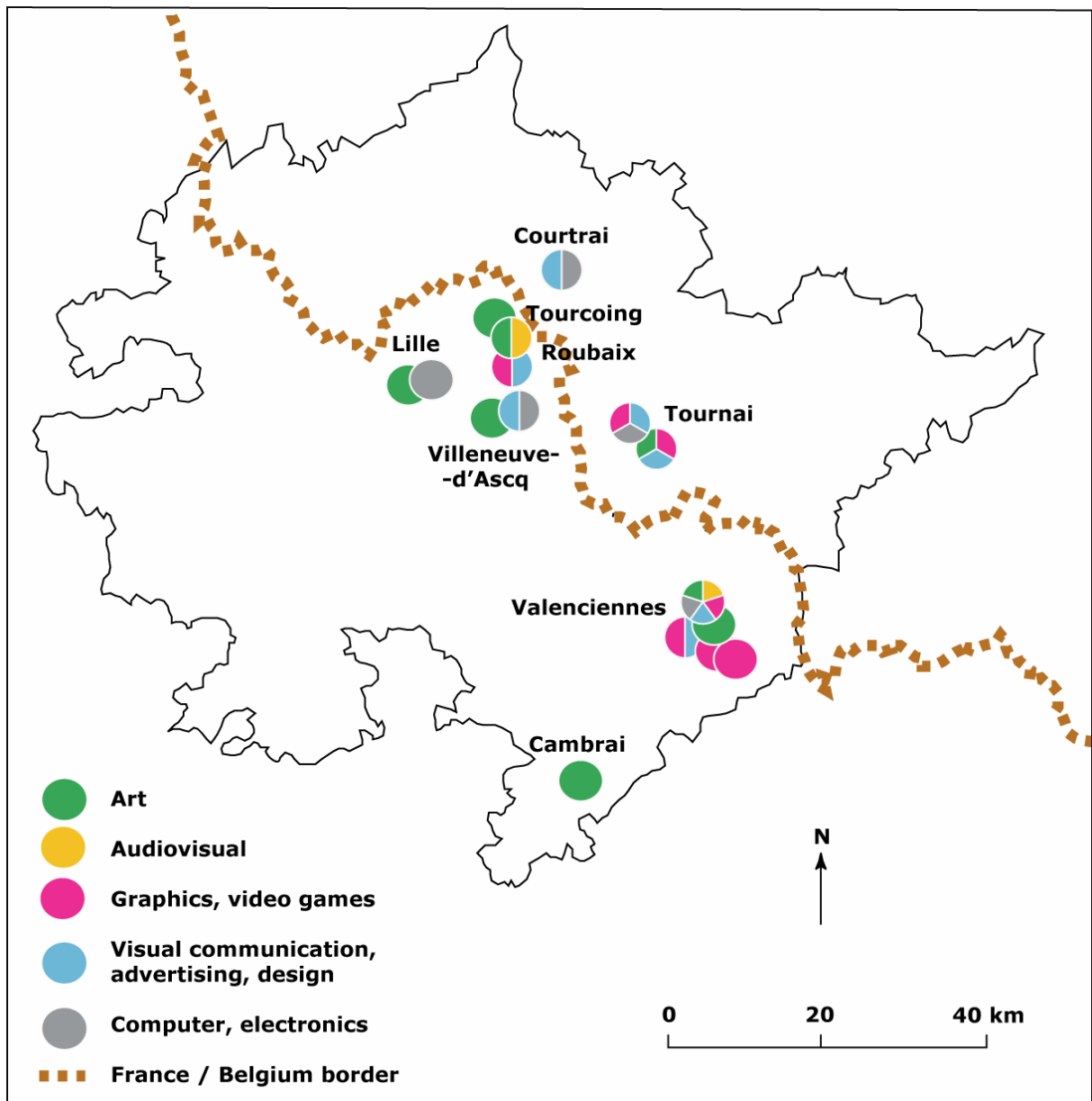
Policies and company initiatives: the development of technician schools (A-levels +2 or +3) in the Lille metropolitan area



Source: B. Lusso, TVES, Lille 1, 2010, from L'Etudiant.fr

The map for second- (A-levels +4 or +5) and third-cycle (A-levels +8) training shows a real deficit in the Nord-Pas de Calais coalfield – with the exception of Valenciennes – and the Belgian cities. Lille, Roubaix and Tourcoing offer a curriculum which is less varied and much less more focused on the arts and computer sectors. When comparing the different maps, we also notice a strong segregation between the different parts of these sectors: indeed, the undergraduate training for arts, graphics arts, video games or computer science is often characterized by longer curricula than is the case for audiovisual activities (where the training offer is largely focused on technical aspects and often leads to precarious jobs) or for communication (many BTSs are offered which generally lead to unskilled jobs).

The upgrading of the training (A-levels +4, +5 or +8) in the Lille metropolitan area



Source: B. Lusso, TVES, Lille 1, 2010, from L'Etudiant.fr

The metropolitan area thus offers a rather honorable variety of training in the image sector, with 4,500 students trained each year, representing as much creative potential. What we see is a significant geographical correlation between the location of training facilities, the location of industrial and regional assets, and the concentration of activities related to the image sector in Lille. However, in a region whose cinematographic and multimedia activities aren't well developed, we may ask what the future of young graduates is. Do they remain in the Lille metropolitan area or do they migrate to other regions and countries?

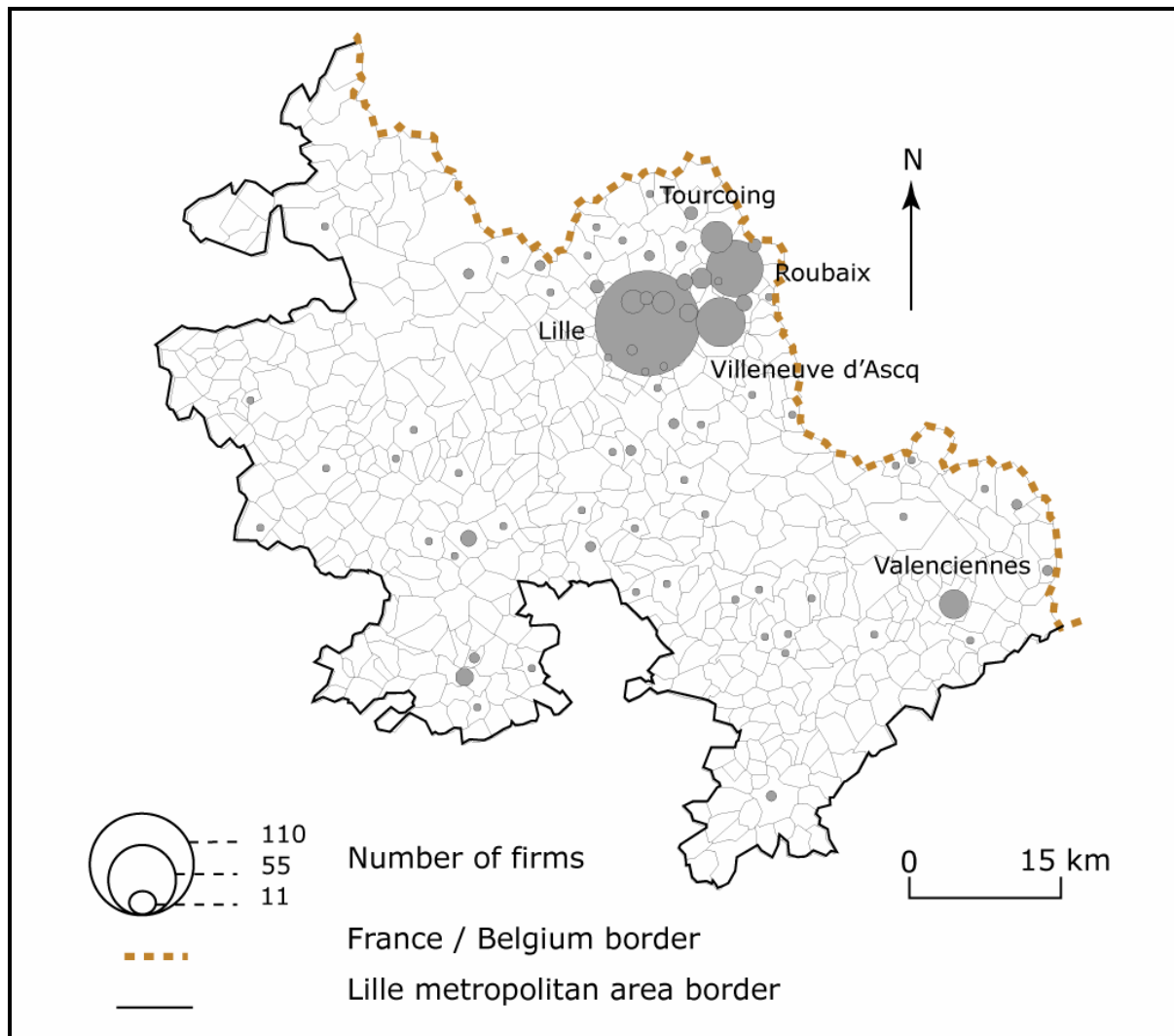
3. The creative class and the mobility of graduates

Most economists conceptualize talent as a stock or endowment, which belongs to a place in the same way that a natural resource might. But the reality is that talent is a flow, a highly mobile factor that can and does relocate. What about the Lille metropolitan area?

3.1 Graduates leaving the region

In 2009, the Lille metropolitan area counts a total of 320 firms in the image sector (which is low in view of the 4,500 students trained each year in training facilities of the Nord-Pas-de-Calais), with a very high prevalence of audiovisual firms (80% against 20% for the video game).

Geographical distribution of image sector firms in the Lille metropolitan area



Source: B. Lusso, from to INSEE, SIRENE database, 2009

This represents 3,500 employees, including 800 technicians and 600 occasional workers and comedians. As for distribution, we see a strong predominance (just under one third) of the few rewarding institutional films, while the software-video game production and

film post-production account for only 18 and 11% of image sector firms in the Lille metropolitan area. Thus, it appears that the activities of low content and value added dominate in the Nord-Pas-de-Calais, keeping the region in a situation of outsourcing from to Paris region, mainly based on the shooting of low cost films. If we analyze the distribution of the image sector firms, we note the very high prevalence of the Lille conurbation, concentrating over 80% of image sector regional companies. Valenciennes, who has however a good variety of training facilities in the image sector, counts few firms.

Only 70% of graduates remain in the Nord-Pas de Calais region and hardly more of them stay in the Lille metropolitan area. The problem is equally due to a mismatch between the job supply and the real needs of companies as to poor job opportunities in the Nord-Pas de Calais region. Young students are trained in Lille or Valenciennes and leave the region to go where conditions are more favorable (in Île de France, in the United States and in Canada). Paradoxically, the Lille metropolitan area suffers from a shortage of talent in the image sector. Moreover, given the “technicization” of the image industry (due to the quantitative and qualitative growth of technical ability and knowledge), hiring now combines the two dimensions, technical and creative, making it more difficult to find an adequate applicant. Thus, in the game industry, the few development studios located in Lille, Roubaix, Villeneuve d’Ascq or Valenciennes encounter serious difficulties to hire employees, particularly in programming, computer graphics and game design. It is due to the lack of sufficiently numerous and qualified training facilities.

In the movie industry, the problem is to employ temporary workers long enough to allow them to collect their unemployment benefits. Indeed, nearly two-thirds of the employees having worked at least one hour in the performing arts in 2007 in the Nord-Pas de Calais region worked less than 500 hours and are considered as casual workers. This situation does not encourage the creation and maintenance of a sufficient pool of people with skills and experience on which production companies can “draw” when they produce a movie. This sometimes leads some workers to leave the Nord-Pas de Calais region for the Paris urban area. Lille suffers from an excess of training when considering the real needs of a region which remains a filming location for some French directors, who often come with their own teams.

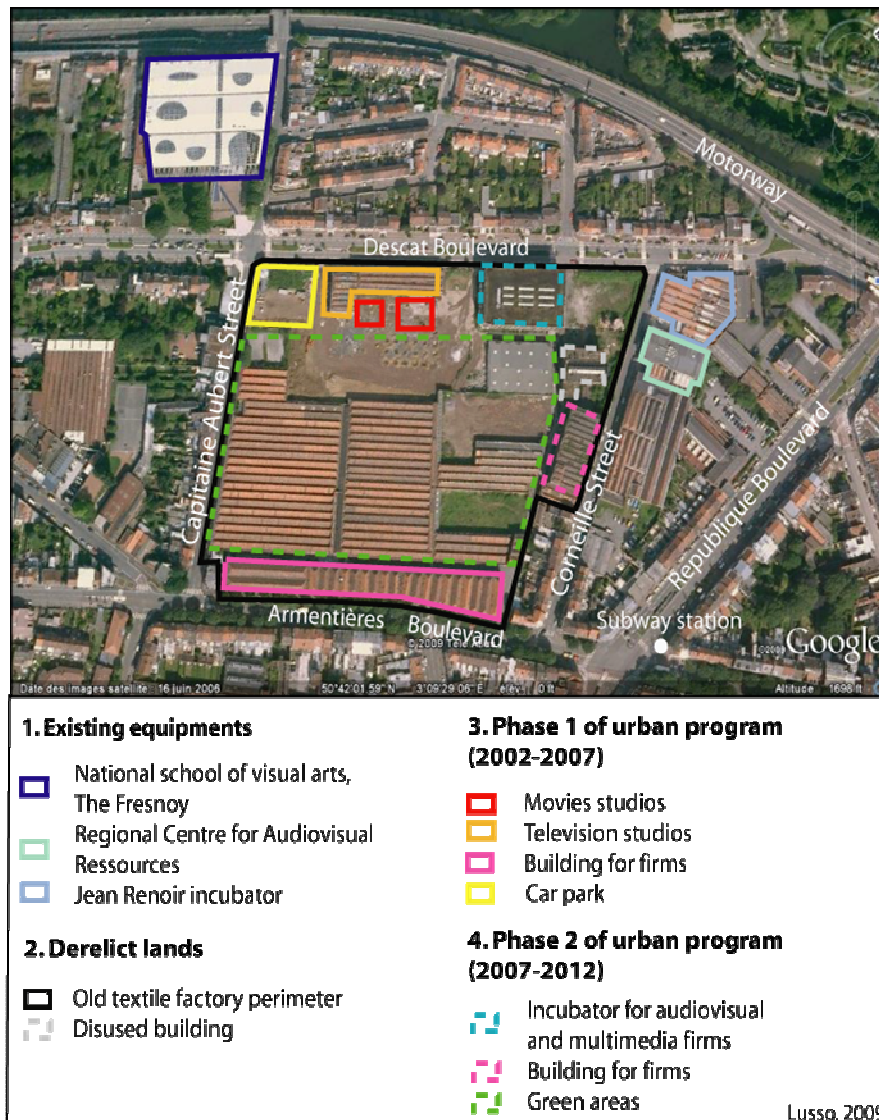
3.2 Public policies to stop the mobility of the creative class

In order to retain the workforce trained in the region, the Nord-Pas de Calais Regional Council has launched a support policy for emerging economic sectors. In 2007, it has implemented the *Nord-Pas de Calais Images Cluster*, one of which is devoted to the audiovisual, animation, publishing and the distribution of TV programs activities. The aim of this structure is to develop cooperation between the image sector actors. But the cognitive diversity generated by a social group stimulates creative individual potential (Miliken, Bartel and Kurtzberg, 2003). Thus, in 2004, public authorities envisaged creating a Media District in the Lille conurbation. The Media District was planned to benefit from that background and to foster such dynamics. The *Union zone* was chosen because of the proximity of two cultural facilities, the Regional Centre for Audiovisual Resources and the National School of visual Arts named *The Fresnoy*. This last site was a popular entertainment place which closed in 1984. The building was restructured to accommodate a world-class Art School, exhibition galleries, a cinema, research laboratories and workshops for artists. *The Fresnoy Studio* is the

focal point of a Media District development programme launched in 2002 in a nearby old textile factory.

The purpose is to promote know-how and technology transfers, but also to create a “coopetition” system between the firms in this cluster. In accordance with the “triple helix” (Etzkowitz and Leydesdorff, 1997), the challenge is to bring together in one place companies, public institutions and training and research facilities to foster the emergence of a cluster and attract new and young creators.

The Plaine Image Pole in Tourcoing



Source: B. Lusso, TVES, Lille 1, 2009

Thus, two studios are located on this cluster which also hosts the local TV channels Grand Lille TV and Tele Melody. Measures are also being taken to attract firms and producers with the commissioning of large office spaces sometimes surrendered to the companies for very small fees. To support the creation and development of companies, an incubator will be established in 2012 at the Media Pole. So as to build connections between schools, research institutes and companies, public authorities have planned to build training facilities on this pole. Within a few years, the Media Pole should host the graphic arts school

Pole *IIID*. The proximity between schools and firms should enable graduates to fit more easily into the professional world and should provide firms with an on-site skilled workforce able to develop innovative projects. Public institutions are also present. The Media Pole is home to the *Regional Centre for Audiovisual Resources* and to the *Nord-Pas de Calais Images Cluster*.

Apart from TV and film studios, the success story of that urban project is the *Ankama* video games company. Created in 2001, this start up employed 300 people in 2009 thanks to its successful *Dofus* on-line game. This success and the Fresnoy Studio are attractive for other firms and the development of the site has been spectacular since 2006. Recently, the public authorities decided to change the name of the programme. It is called *La Plaine Image* to compete with the vast urban project called Film City, currently developing north of Paris, in the industrial city *La Plaine Saint Denis*. However, is it possible for Lille Metropole to compete with Paris in fashion, film and media industries?

Conclusion

In the Lille metropolitan area, the image sector is very fragile and emergent, because of a (too) small local creative class. Historical heritages are limited. The Nord-Pas de Calais isn't an important shooting region and the multimedia development is related to the computerization of the mail order selling. If the schools of the Lille metropolitan area train more than 4,500 students per year, 70% of them still leave the area to find better working conditions. To stop the loss of creators, public authorities have implemented policies to support the image sector. Despite the presence of few historical legacies and voluntarist public policies, it seems difficult in a highly centralized country like France, where cultural life is concentrated in the Paris region, to see the development of a powerful image sector. This finding is the same for other French cities, like Marseille and, to a lesser extent, Lyon.

Creative human capital is becoming important for economic development, but what can be the creative class in a traditional industrial city of 1.2 million inhabitants and a metropolitan area of 3.7 millions inhabitants? Are the engineers, artists, designers (and so on) creative enough when compared with those from Paris, London or New York? The historical economic development was based on exports of regional products or services. It is not sure whether the young multimedia entrepreneurs of the Lille metropolitan area are able to sell in national markets, except if they work for hypermarkets or mail order companies. It is not certain whether the *Ankama* success story can be reproduced. The regional film industry itself is in competition with all the film and media districts being developed in Paris, Lyon, and Marseilles, for example. Thanks to the university departments or schools specialising in creative knowledge, creativity is a regional resource for new jobs and firms in emergent creative industries, and for innovation in traditional industries. However, in a competitive economic world, regional wealth could depend on the ability of stakeholders to stimulate networks between artists, engineers, designers and entrepreneurs who make up the so-called creative class. The aim is to foster creative milieus by the exchange of new skills and knowledge between various intellectual, social and cultural groups. Our hypothesis is that creativity can be a regional resource if and only if the creative milieus are included in networks at different scales.

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