

Culture & Economic Performance



What strategies
for sustainable employment
and urban development
planning?



FOREWORD

The objective of the Forum d'Avignon – Culture, Economy, Media – is to strengthen the ties between culture and economy by turning to networks of experts and working groups in order to recommend points for reflection at an international, European and local level.

Ineum Consulting has carried out this study capitalising upon its understanding of public urban development planning policies, its consultants expertise (in the fields of culture, city marketing and media in particular) and its savoir-faire with regards strategic reflection.

In 2009, the first edition of the barometer on the cultural appeal of urban areas was presented to participants of the Forum d'Avignon – Culture, Economy, Media. The success of this study resulted in Ineum Consulting (soon to become Kurt Salmon) and the Forum d'Avignon preparing a second edition of the barometer.

To what extent is it possible to demonstrate the assumed connections between culture, the appeal of an urban area and its economic and social development? Under what terms would a city or rather metropolitan city be willing to put stock into culture in order to assure its own development against regional, national and global competition? What winning strategies should be deployed, depending on whether the urban area boasts a heritage, a set of skills or enjoys a pool of cultural vacancies?

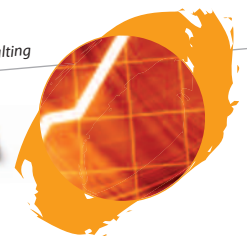
Against the backdrop of the third edition of the Forum d'Avignon – Culture, Economy, Media, held in 2010 at the Palais des Papes based upon the theme "New access, new uses in the digital era: culture for all?", this study aims to build upon the trains of thought that were brought to the fore in 2009. In particular, it analyses the relationships between culture and development in terms of cultural employment and cultural education. By using data and analysis established on a scientific basis, this study also aims to fuel debate on the most beneficial employment policy that will really showcase and flaunt the best of an area's assets and qualities. Various performance indicators were studied: culture-related professions of the future, specialist education policies and how to attract skilled workers, the location of industries and employment and, ultimately, the extent to which strategies are coordinated within a city or metropolitan area.

The 2010 study includes some new urban areas within the international barometer. It plots a sample group of 47 cities and urban areas in 21 countries onto the Culture Map which was developed in 2009 (cartography of cultural appeal) in order to challenge and validate certain hypotheses and conclusions put forward last year. Furthermore, the 2010 study continues to analyse the links between culture and the appeal of urban areas by focusing in particular on employment and education.

The purpose of the various trains of thought put forward in this study is to stimulate debate and do not lay claim to 'ranking' different cities in terms of their cultural appeal. For this exact reason, those responsible for carrying out this study invite the sample towns to offer their comments and suggestions (forum-avignon@ineum.com).

Happy reading

Vincent FOSTY, Marco LOPINTO, Marie-Joëlle THENOZ, Jean-Pascal VENDEVILLE, Ineum Consulting



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TABLE OF CONTENTS



I. CULTURAL SUCCESS FACTORS IN URBAN DEVELOPMENT PLANNING AND JOB CREATION

1. The appeal of urban areas: what links are there between economic and social development and cultural and academic investment? 4
2. Main conclusions of the study published in 2009 5
3. Objectives and scope of the 2010 study 6



II. CULTURE MAP 2010 : STRATEGIC CARTOGRAPHY OF DIFFERENT CITIES – OFFICIAL REPORTS AND FINDINGS

1. The ranking of cities integrated in 2010 confirms the typology defined in 2009 8
2. The importance of the choice of sectors and their development as part of the strategies deployed 10
3. The strategies adopted by “historical” and “convinced” cities seems to support the idea of setting up cultural businesses in their urban areas 12

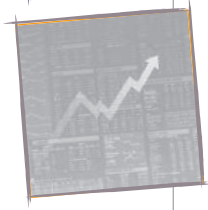


III. ADDED VALUE OF THE CULTURAL SECTOR IN TERMS OF EMPLOYMENT, THE ECONOMY AND SOCIAL COHESION

1. Influence, characterisation and trends in employment in the cultural sector 13
2. Culture contributes to sustainable development in employment 15
3. The cultural sector is a creator of economic value 16
4. New forms of cooperation between private enterprises in the culture sector, public bodies, training centres, and creators 17
5. The presence of higher education, cultural in particular, is a factor in the development of innovation in urban areas 19
6. Culture used as leverage for developing social cohesion and human capital 20



POINTS FOR REFLECTION 22



APPENDIXES 26

The bibliography and statistical sources of our study are available for download on the Forum d'Avignon website : www.forum-avignon.org



I. Cultural success factors in urban development

1. The appeal of urban areas: what links are there between economic and social development and cultural and academic investment ?

In a world that is becoming increasingly globalised and progressively more urban, cities and metropolitan regions, as part of their strategy of external appeal and growth, seek to attract capital, intelligence and dynamic minds.

Culture and creativity become major driving forces behind development with the rapid emergence of new technologies, transformation in the industrial economy and a society based fundamentally on creating and communicating information and knowledge.

In addition to the impact on tourism, the introduction of cultural activities, communication activities or showcasing heritage can also make a significant difference in terms of:

- Economic development (creating skilled jobs, establishing service industry activities with high added value, creating centres of excellence, etc.)
- Symbolic impact (image of the city, strengthening the social aspect, developing citizens' sense of belonging, etc.)
- Linking with other key sectors of a city (education and teaching, environment, etc.)

An urban region should also consider four types of feature that can play a significant role in terms of the area's appeal as part of its development strategy.

Urban attractiveness features			
Level of cultural activity	Knowledge-based economy	Living environment and general environment	Business development
■ Action-packed cities ■ Infrastructures and cultural services ■ Showcasing architecture ■ Diversity and multiculturalism	■ Quality of education ■ Knowledge of languages ■ Qualification of human capital ■ Research and innovation	■ Quality of healthcare ■ Nightlife ■ Living environment ■ Quality of life ■ Quality of telecommunications ■ Internal transport	■ Competitiveness over wages ■ Economic diversity ■ Cost and flexibility of access to property ■ Market access ■ External connectivity

Culture, defined by UNESCO as *"the set of distinctive spiritual and tangible, intellectual and emotional traits which characterise a society or social group and embraces, in addition to the arts and humanities, lifestyles, ways of living together, value systems, traditions and beliefs"*, allows economic and social objectives to be reconciled.

As for the European Union, it cedes pride of place to culture within its "Europe 2020" strategy that has its sights set upon developing an economy that is based on knowledge and innovation and thus paves the way towards a long term future.

At the beginning of 2010, the European Commission, in its Green Paper (*"Releasing the potential of cultural and creative industries"*), drew attention to the fact that *"the creative and cultural industries are made up of highly innovative organisations blessed with enormous economic potential, and form one of the most dynamic sectors throughout Europe"*.

There is increasing awareness of this potential among both public and private players. Numerous cities are already opting to embed culture firmly within their development strategy in order to revamp themselves or focus firmly on becoming an economy based on knowledge and innovation.

2. Main conclusions of the study published in 2009

The first edition of the Ineum Consulting study for the Forum d'Avignon investigated the links between culture and the appeal of urban areas:

- by examining the role of culture as part of the overall economy of an urban area, in its ability to generate sustainable activities and wealth, and
- by endeavouring to identify the factors behind a successful appeal strategy based on culture.

Analysis of eleven indicators for a sample group of 32 cities (from across the world) enabled us to create a cartography of rankings and strategies for these cities in terms of cultural policies and development (Culture Map).

This cartography highlighted and led towards defining:

6 main city types:

- emerging, ■ deliberates, ■ convinced, ■ historical, ■ shareholders, ■ pragmatic.

3 types of strategy:

- strategies for developing a unique identity (often driven by economic changes),
- strategies based on appeal within the context of competition (international, national or regional),
- strategies to reinforce social cohesion and improve living environment.

5 key levers to accelerate and anchor these strategies (these can be combined):

- creating alliances related to cultural engineering,
- promoting a cultural heritage (moveable heritage, buildings, non-tangible heritage),
- introducing an innovative cultural facility making use of an architectural concept,
- town planning,
- creating centres of cultural excellence implementing a collective and coordinated effort with private and public players.

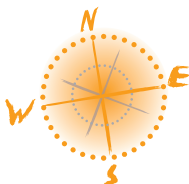
Innovation must be at the heart of any initiative launched: for example the architectural design behind the creation of new cultural facilities, the theme of cultural events, methods for developing both tangible and non-tangible cultural assets...

There were a number of reports and findings:

- There is likely to be a link between the level of cultural activity and excellent educational facilities on the one hand, and a city's economic performance on the other. However, the causality of this link is yet to be confirmed.
- The existence of a natural and/or cultural heritage represents a major benefit for a city. It gives it a competitive advantage and increases its visibility and appeal, provided it is utilised.
- Cultural policies and the development of higher education can replace a lack of tangible cultural heritage. In any event, the 2009 study demonstrated that the creation of ex-nihilo heritage leads to the implementation of a deliberate policy strongly supported by the public sector and requiring major investment.
- Development of a knowledge-based economy, bringing together cultural policy and higher education, also enables a city to attract and retain a population of high consumers of cultural products and services and creates a pool of skills and dynamic energy essential for innovation.

During the debates following the presentation of the study at the Forum d'Avignon 2009:

- The creation of cultural development centres or cultural vocational clusters with public authority backing was supported by all participants.
- The public authorities and international organisations were also encouraged to conduct statistical research and look at developing comparative practices to improve observational tools and the quality of comparable data in order to measure the impact of strategies based on culture and a knowledge-based economy with a view to providing clearer insight into the decisions made by public and private players.
- During the Forum, Pier Carlo Padoan, Deputy Secretary General of the OECD, in line with work completed by Sen-Stiglitz-Fitoussi, expressed the need to integrate social and cultural criteria as part of a society's performance, and not only to take account of the GDP.



Culture: "the set of distinctive spiritual and tangible, intellectual and emotional traits which characterise a society or social group and embraces, in addition to the arts and humanities, lifestyles, ways of living together, value systems, traditions and beliefs". (Unesco)



3. Objectives and scope of the 2010 study

a. Points for reflection and objectives of the 2010 study

Based on the 2009 findings and points for reflection, the key areas to reflect upon in 2010 are as follows:

- Having extended the sample group to 47 cities and 21 countries, does the ranking of cities in 2010 confirm the six major types of city identified in 2009?
- What influence does the cultural sector carry in the overall economy? Does the cultural sector generate activity and sustainable employment? How does the cultural sector contribute to the development of other sectors of the economy?
- How can the role of culture as a factor in the appeal and performance of urban areas facing global competition be assessed, and how can the added value to an urban area of a development policy based on culture be defined: economic value (products and services, exports), social and cohesion value, image, creation and innovation (patents, copyright)?
- Is it therefore possible to outline the conditions for a successful strategy designed to increase a city's appeal based on culture?

The objective of this study is therefore twofold:

- To define the links between culture and development, by focusing in particular on creating sustainable employment and expanding the study to 15 new cities and 2 new continents (Middle East/Africa and South America).
- To put forward points for reflection and identify the conditions that bring about strategies which do not rely solely upon an urban area's tangible and intangible heritage (museums, festivals, seasonal exhibitions, ...), but also on links between culture and education.

b. Definitions and scope of the 2010 study

The study examines the cultural sector as a whole, including:

- cultural activities (music, cinema, architecture...),
- cultural assets (paintings, photography, video games, films, music, antiques, musical instruments ...),
- cultural services (distributing audiovisual activities, promoting shows and cultural events, cultural education services...),
- higher education.

The study takes into account intangible and tangible cultural heritage as defined by the UNESCO conventions.

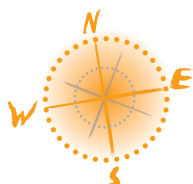
According to the Unesco Convention for the safeguarding of the world, cultural and natural heritage (16 November 1972) defines "cultural heritage" as:

- (a) Monuments: architectural works, works of monumental sculpture and paintings, elements or structures of an archaeological nature, inscriptions, cave dwellings and combinations of features which are of outstanding universal value from the point of view of history, art or science,*
- (b) Groups of buildings: groups of separate or connected buildings which, because of their architecture, homogeneity or their place in the landscape are of outstanding universal value from the point of view of history, art or science,*
- (c) Sites: works of man or the combined works of man and nature, and areas including archaeological sites which are of outstanding universal value from the historical, aesthetic, ethnological or anthropological point of view.*

"Intangible cultural heritage" as defined by the UNESCO Convention for Safeguarding Intangible Cultural Heritage (17 October 2003) is particularly evident in the following areas:

- (a) Traditions and oral expressions, including language as a vehicle for intangible cultural heritage;*
- (b) Performing arts;*
- (c) Social practices, rituals and festive events;*
- (d) Knowledge and practices concerning nature and the universe;*
- (e) Traditional craftsmanship.*

The study examines in particular the professions and educational opportunities available in this sector. If, in respect of cultural education, a classification or census was required at an international level, professions in the cultural sector were subject to clarification by UNESCO which, in its Framework for Cultural Statistics, puts forward a definition and classification which we then used in our analysis.



There are no statistical tools shared on an international scale dedicated to measuring the part culture plays in an urban area's appeal which would steer the public players in the right direction in their choices for the development of their regions, and private players in their selection of investments and institutions.

Cultural occupations cover both occupations in cultural professions across the whole of the economy (such as design activities), and all occupations in cultural sectors of the economy (economic cultural activities).

UNESCO has defined a naming system for cultural occupations which enables professions within the sector to be defined. This is the International Standard Classification of Occupations (ISCO) under which cultural profession are defined as those associated with creative and artistic output and the management and preservation of heritage. This includes:

- generating, developing, maintaining or reflecting cultural or spiritual awareness ;
- creating, producing and distributing cultural goods and services which are generally associated with intellectual property rights;
- working to achieve artistic expression (visual arts, theatre, music, literature, dance).

Cultural occupations are professional activities with a cultural dimension such as book seller, writer, artist, architect, etc... All these professions are included, regardless of the employer's main activity.

Cultural education viewed within the context of the study refers to the sum of further education opportunities facilitating the development of skills which relate to cultural occupations.

Cultural organisations, in the strictest sense of the term, represent production and distribution organisations and companies dedicated to arts and the humanities: performing arts (theatre, music, dance, , circus, etc.), visual arts (art galleries, museums, etc.), libraries and heritage. In the broadest sense of the word, they include cultural industries producing and distributing cultural goods and services (film, CD, variety shows, publishing, craftsmanship, etc.) and media (radio, television, newspapers, periodicals, etc...)

c. Methodology applied to the 2010 study

This year's study focuses on 3 different sections: a quantitative analysis of a sample group of cities was carried out, completed via several studies of qualitative cases on an international level and via numerous interviews with international experts in order to compare various opinions and promote and encourage reflection.

The 2010 sample of cities analysed was expanded to include 15 new cities from 9 additional countries (taking the sample group to 47 cities) plus a further section concerning issues on cultural employment.

The quantitative analysis was completed via case studies on Avignon, Bamako, Mumbai, Brussels, Casablanca, Florence, Los Angeles, New Orleans, the Paris metropolitan region, as well as interviews with experts and those who have implemented strategies. The case studies completed in 2010 supplement those completed in 2009 (Montreal, Nancy, Abu Dhabi and Bilbao).

In addition to expanding the sample group of cities within the quantitative analysis, and the new case studies presented below, we conducted approximately 40 interviews with international experts.

The qualitative analysis is based on the detailed analysis of 9 cities selected according to 3 main principles:

- A geographical principle so as to have examples across several different regions of the world.
- A principle relating to the strategic choices. The cities selected are introducing cultural initiatives, and are really setting their sights on culture as a vehicle for their own development.
- A "cultural sector" principle in order to study strategies based around different sectors (performance arts, heritage, cinema...).

Furthermore, the size of the population in the city centre and in the metropolitan area to which it belongs was taken into consideration. This enabled us to analyse urban areas where the city centre has a population of fewer than 500,000 inhabitants, between 500,000 and 1 million inhabitants, and more than 1 million inhabitants.

The approach adopted to analyse these initiatives involved studying the various cultural strategies and opportunities by means of bibliographic research into each city supported by interviews with experts. The information collated enabled us to create an overall identity profile for each example, completed by utilising the detail of the major points of the strategy.

The case studies can be downloaded at www.ineumconsulting.com and www.forum-avignon.org





II. Culture map 2010: strategic cartography of

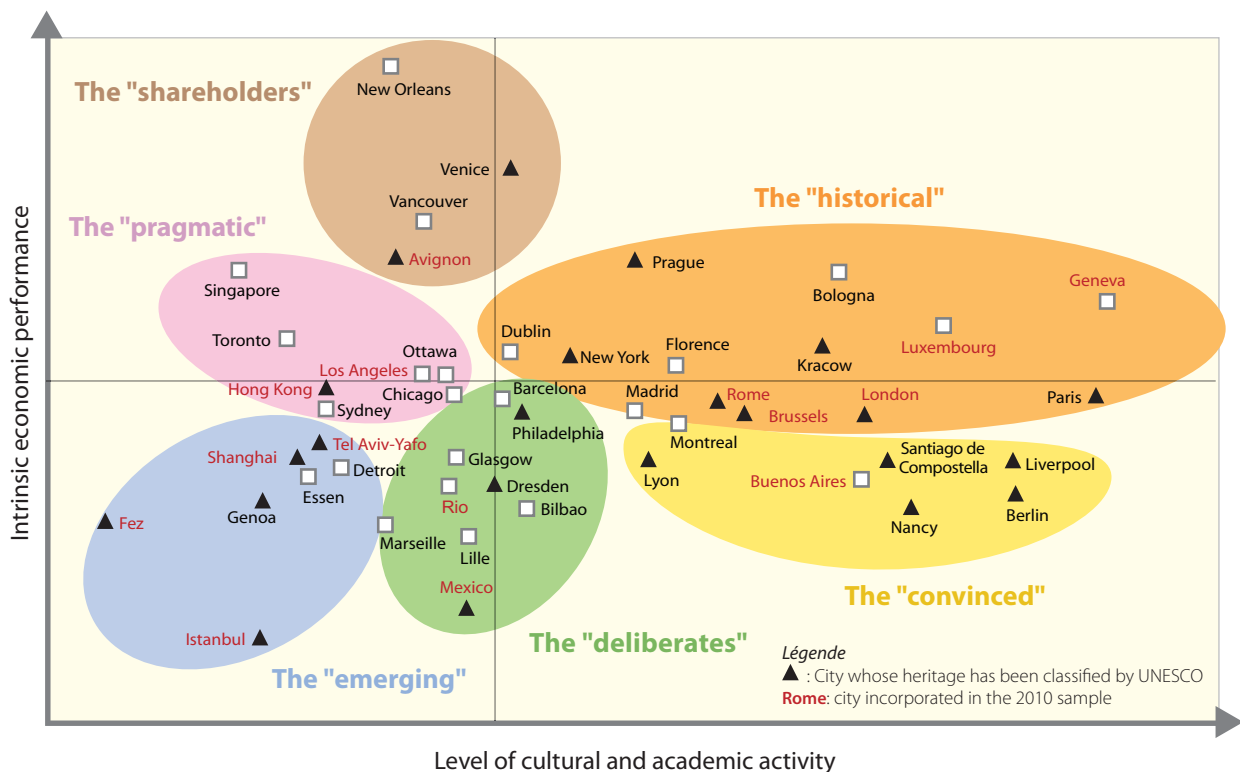
The qualitative and quantitative studies carried out have enabled us to draw upon several findings and propose a range of points for reflection with regard to the strategies implemented and the levers used to accelerate and embed the strategy. The study also raises new questions, and, based on a range of indications or deductions makes it possible to express new hypotheses.

1. The ranking of cities integrated in 2010 confirms the typology defined in 2009

The first edition of the Culture Map, presented in 2009, enabled us to define, on an experimental basis, a typology based on 6 categories of cities sharing similar strategic policies and circumstances. Inclusion in the 2010 Culture Map of 15 new cities confirms and supports this typology.

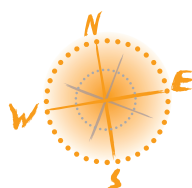
The Culture Map below plots different cities along axes of level of cultural and academic activity on the one side, and intrinsic economic performance on the other (according to methodology detailed in the appendix).

Culture Map 2010



We have characterised each group in greater detail by analysing each city's particular situation, with regard to the influence of cultural and/or educational policies in relation to other development policies, as well as the impact of historical heritage and the current economic situation.

different cities – official reports and findings



Inclusion of new cities in the Culture Map confirms and supports a typology based on six categories of cities sharing similar strategic policies and circumstances.

■ The “emerging”:

- They have low initial capital in terms of tangible cultural heritage or in terms of annual cultural budget per inhabitant (with the exception of Essen (€142) compared with an average of €43 for emerging cities). The proportion of university students is low (0 to 6%) because they have few higher education establishments. Their GDP per inhabitant is low: for example €1,058/inhabitant for Fez, €3,890/inhabitant for Shanghai, €6,708/inhabitant for Istanbul compared with an average of €24,320/inhabitant among the cities in the sample group. Despite unfavourable conditions, they are able to initiate cultural projects. As an example, Essen is currently at the helm of an ambitious cultural and academic development programme with other local authorities in the Ruhr region designed to develop and utilise its heritage as well as cultural and academic facilities in order to become a large, culturally attractive metropolitan district. Essen, along with Istanbul, are both also European Capitals of Culture in 2010.

■ The “deliberates”:

- They are viewed as newcomers to the sector and are beginning to establish, or have already launched, cultural projects (Barcelona, Bilbao, Dresden, Marseille, and Lille).
- They have a high annual public cultural budget per inhabitant (€97/inhabitant) or a high level of cultural heritage (for example: Rio boasts 56 major tourist sites, 44 museums, as well as 118 theatres and operas, yet its public cultural budget (€12/inhabitant) is below the average).

■ The “convinced”:

- They have heavily invested in cultural activities and are waiting to see the benefits from this investment. They are concerned with the link between culture and the economy and very often implement cluster policies (Lyon, Montreal...).
- Buenos Aires (3 million inhabitants) is placed in this category of cities. While it attracts only a few tourists in proportion to its population (0.75 tourists per inhabitant, or 2.3 million tourists per annum), it has (after Paris, London and Berlin) the highest number of theatres, operas and museums (123 museums, 176 theatres and operas), and its university accepts a large number of students (13% of the population, or 393,000 students), which is higher than the average for the cities in this category (8% for cities with more than one million inhabitants).

■ The “historical”:

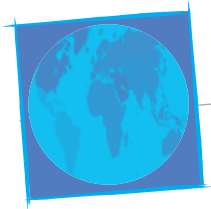
- They have significant historical and cultural heritage upon which they capitalise (Paris, Florence, Dublin, Prague, Bologna, and Krakow). They implement initiatives to reinforce their appeal by creating new cultural facilities with international reach (such as the opening of the musée des arts premiers in Paris in recent years), developing higher education (for example in Bologna where university facilities have been established outside the historic city centre in order to accommodate a greater volume of students). Tourism is very important but is not dominant. Their heritage is one of the pillars of their economic performance.
- Geneva, Luxembourg, Brussels and Rome fall within this category. Geneva, Brussels and Luxembourg enjoy the 3 highest levels of GDP in this sample group (respectively €52,214/inhabitant, €42,520/inhabitant and €37,700/inhabitant), but do not have a wide array of cultural facilities (average for the sample: 48 museums and 34 theatres or operas; the widest range of facilities are in Paris with 173 museums and 173 theatres or operas; Geneva: 35 museums and 29 theatres or operas; Brussels: 90 museums and 35 theatres or operas; Luxembourg: 12 museums and 6 theatres or operas). Conversely, they attract a high level of tourism due to their broad international exposure and their multilingual and multicultural character. They make significant investments in terms of public cultural expenditure (€745/inhabitant for Geneva, €748/inhabitant for Luxembourg).

■ The “shareholders”:

- Their economic performance stems mainly from tourism, exerting considerable effort into gaining the best leverage in terms of return on investment. In 2007, Venice received 14.6 million tourists with annual public cultural funding of €99/inhabitant. New Orleans welcomed 7.5 million tourists with annual public cultural funding of €10/inhabitant. Vancouver received 8.9 million tourists with annual public cultural funding of just €16 per inhabitant.
- The city of Avignon (92,454 inhabitants) welcomed 4 million visitors in 2007 (or 43 tourists per inhabitant). It ranks second after Venice in terms of the number tourists per inhabitant; whereas its annual public cultural funding was €136 per inhabitant (funding per inhabitant was €115 on average across the sample group). The city's cultural offering centres primarily on its theatre festival and the Palais des Papes, one of France's most frequently visited sites outside the Paris region.

■ The “pragmatic”:

- These cities are successful because they exploit opportunities to leverage development other than through culture, yet without overlooking it. Ottawa is a city known for its role in local government. Singapore, Sydney, Chicago, Toronto are major financial centres.
- Los Angeles and Hong Kong are cities in which culture is just one sector of activity. For example in Los Angeles, culture comes third after “Education, Health and Social Protection” and “Scientific and Administrative Services”.



2. The importance of the choice of specialized fields and their development as part of the strategies deployed

Qualitative analysis of a sample group of cities highlights the importance of the choice of fields and their development in the context of strategies implemented.

The cultural arena can be structured into eight specialized fields.

Analysing each field enables various cultural development strategies to be put forward according to the importance attached to each field and the support given to them.

The choice of fields is the direct result of diagnosis designed to determine the field(s) most relevant to the city's assets, objectives and degree of ambition as well as its ability to mobilise sources of energy and resources.



The strategies implemented by these cities may vary, but are more often than not focused on at least two fields for which they seek collaborations, synergies and the shared implementation of creative/innovative projects.

Three main types of strategy emerge:

- **Focus strategy:** some cities focus primarily on one or two fields, such as New Orleans, Nancy, and Avignon, whose strategies are anchored in the field of performing arts and one other field.
- **Diversification strategy:** other cities have gradually expanded their areas of competence into other fields. Florence, for example, whose historical fields are heritage and craftsmanship, is now also set to invest in restoration and luxury goods management (creative services).
- **Global strategy:** finally, other cities deploy support strategies across all fields by developing centres of cultural excellence, such as Paris for example, which accommodates every cultural field across its urban areas.

The table below provides a summary of the choice of specialized fields found in the 13 case studies.

	Heritage and museums	Performing arts	Audiovisual and media	Design and creative services	Architecture	Craftsmanship	Visual arts	Publishing and books
Paris	✕	✕		✕	✕	✕	✕	✕
Florence	✕			✕	✕	✕	✕	
Montreal	✕	✕	✕	✕			✕	
Brussels-Capital	✕	✕	✕	✕	✕			✕
Abu Dhabi	✕		✕		✕			
Los Angeles		✕	✕	✕				
Mumbai		✕	✕	✕		✕		
Avignon	✕	✕						
Bamako			✕			✕		
New Orleans		✕	✕				✕	
Casablanca	✕		✕		✕			
Bilbao	✕				✕			
Nancy	✕							

Caption: an « ✕ » indicates the presence of a cultural sector and its strategic importance for a city. Other less developed sectors may exist in the urban area but not be strategic.



Avignon, a "shareholder" city, has built its cultural strategy on performing arts by developing the festival and higher education in this field, as well as on its heritage.

Example of the focus strategy

The performing arts form a historical mainstay in terms of Avignon's cultural strategy. Founded in 1947, the "IN" version of the festival attracted more than 151,000 visitors in 2009, and the "OFF" version one million visitors. The number of shows and productions make this a festival that is unrivalled throughout the world. The financial return on the "IN" festival is estimated at approximately €14 million and the "OFF" festival at €40 million; the rewards in terms of visibility are profound for the city. The city also provides financial support to around ten theatres, and its urban area also houses one of France's premier operas outside Paris to stage new productions, thus providing a rich array of cultural variety for a city with 90,000 inhabitants. Furthermore, additional festivals have been introduced to lend a rhythm to the cultural and tourism year, spanning contemporary music, blues, jazz and dance...

In addition to developing performing arts, Avignon has put in place cultural education and training in this field. The Institut supérieur des techniques du spectacle (ISTS), a performing arts higher education institute, was founded in 1987. The university offers a Licence Master Doctorate course in theatre studies. Training on the cultural environment is planned to cover the areas of law, administration, managing cultural projects, communication and mediation... The university is currently considering forming a network with other educational institutions in the city so that they can offer students a complete educational environment (creation of an ecosystem) rather than education linked to a single school.

Avignon's visibility on an international scale enables it to exploit its historical heritage and thus develop cultural tourism – which forms the second pillar of its strategy. The Palais des Papes alone currently attracts more than 600,000 visitors annually, making it one of France's most visited attractions.

The city of Avignon is now turning its attention in two directions in order to maintain and step up its cultural development: greater involvement (particularly financial) on the part of neighbouring local authorities and the urban community of the greater Avignon region, whose population enjoys the cultural diversity supported primarily by the city of Avignon. This could allow support to be provided to the development of new cultural sectors such as the visual arts, music or cinema. The opening of the Yvon Lambert collection of contemporary art, for example, is in line with development of an arts sector.



Florence, a "historical" city whose economy is dominated by its cultural sector, is eager to move from "mass" culture and tourism towards the "high-end" in order to consolidate its position in its historical sectors and develop further in other sectors.

Example of the diversification strategy

Florence is the cultural city dedicated to the Italian Renaissance like an open-air museum which attracts more than 7 million tourists per annum. Florence's primary economic sector, tourism has come under threat due to the economic crisis.

Mass tourism undermines the city's image and the quality of life there. Florence, the historic home of Versace, Ferragamo, Gucci – manufacturers of luxury products (haute couture, leather goods ...) – is also threatened by the availability of "accessible luxury" and the declining importance attached to the "made in Italy" claim. Florence is therefore highly dependant on spending by foreign tourists and the export of luxury goods.

Today, the city's ambition is to raise itself up a notch, and to diversify its cultural economy away from production and towards spending on in the cultural sector. As such, promoting the city as a high-end destination in order to boost business tourism (Art & Business), structuring craftsmanship within a European lobby, extending expertise in art restoration to an international level, introducing a programme of contemporary events and bringing digital technology to museums are all recent changes designed to ensure that culture becomes a driving force behind the economy long term. Initiatives are already underway to support the development of premium quality, such as the networking of those involved in cultural further education (Firenze sapere, 2009) and craftsmanship (Artex, 1987); these initiatives are organised under a system of expanded governance. Within each of these platforms, public sector decision-makers and private players (chambers of commerce...) from Florence and the wider region meet to coordinate and promote together the whole range of Florence's areas of excellence (directory of businesses, schools...).

The internet is playing an increasingly important part as a marketing platform used to exploit the city's areas of excellence (fashion, craftsmanship, restoration) before, during and following fairs that are committed to culture.

At the forefront of entrepreneurial development, the Polimoda school provided an "end-to-end" solution across the cultural cycle, from setting up fashion and design luxury management services, and this with strong interaction between the local industrial district, the brands (Versace, for example) and exploration of emerging markets (Brazil, Russia, China, India).



Paris, an "historical" metropolitan city, relies on culture to maintain its ranking as a premium global tourist destination and dynamic city and to ensure that the city itself develops across all cultural sectors.

Example of the global strategy

Paris' extremely rich diversity of cultural attractions is one of the city's key appeal factors for tourists, residents and students alike.

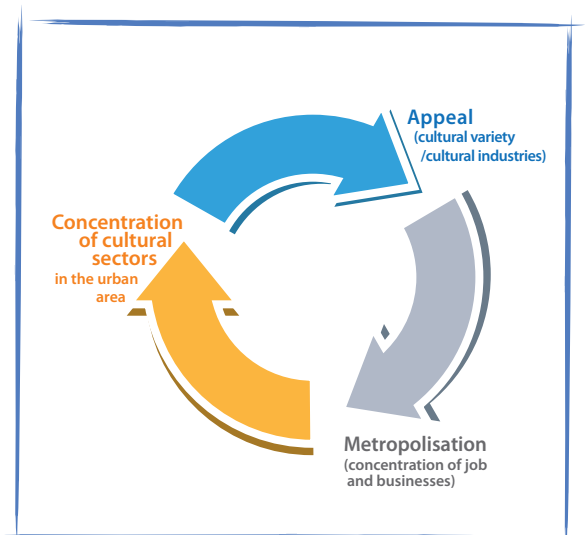
Its urban areas represent the full range of cultural sectors: Paris enjoys a prestigious heritage and a truly significant number of famous monuments, a unique selection of museums, 170 theatres, and 3 operas. Protagonists in the fields of cinema, publishing and music are grouped into clusters.

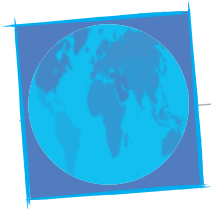
Paris welcomes close to 28 million visitors annually, while the Ile-de-France region attracts 44 million visitors, making this the world's number one tourist destination. Cultural tourism accounts for 12.8% of jobs in the capital, i.e. 147,000 direct jobs and almost as many indirect jobs; it is the city's top employer. Annually, this sector guarantees €8 billion in financial returns and €30 million of revenue in taxation from visitors' tax.

The Paris conglomeration occupies an important place among cultural industries globally, and is on the same level as New York or London. Cultural activities support its international renown and the identity of the region, and even that of France as a whole. Activities associated with these industries considerably increase the Ile-de-France's appeal.

This sector furthermore has a magnetic effect on other sectors such as leisure, tourism and providers of new IT and Communications Technologies.

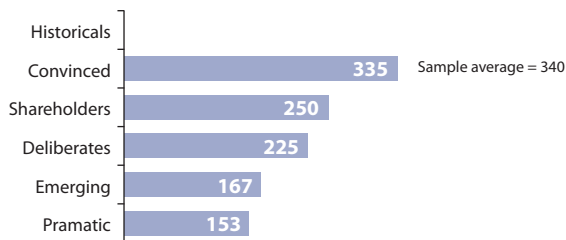
Cultural industries are of economic interest in terms of jobs, exports and revenue. The continued presence of a diversified body of cultural industries is a bonus which helps to reinforce the creativity, cultural identity and capacity for innovation needed to remain regionally competitive. Development of these industries is facilitated by the size of the metropolitan district. This "competitive advantage", which is evident in the case of Paris, illustrates one of the effects of a city being large: the more densely populated the urban conglomeration, the easier it becomes to achieve a concentration of cultural industries. Due to its population, this urban area is therefore more productive and has greater potential to innovate.





3. The strategies adopted by “historical” and “convinced” cities seems to ease the setting up of cultural businesses in their urban areas

Number of business in the cultural sector per 100,000 people in employment in 2007 by category in 21 cities sampled



Analysis of 21 cities in the sample group reveals an average concentration of 346 cultural enterprises for every 100,000 people in employment. “Historical” cities have 593 business per 100,000 people employed (i.e. 58% more). “Convinced” cities come in second, with 335 cultural businesses for every 100,000 people employed.

Number of business in the cultural sector per 100,000 people in employment in 2007 by category in the 21 cities sampled

This concentration effect appears greater in cities with more than one million inhabitants (401 cultural businesses per 100,000 people in employment, whereas the average for cities with fewer than 500,000 inhabitants is 291 businesses).

Furthermore, we see that cities with more than one million inhabitants have a density of cultural businesses which is more than 70% than that of cities with fewer than 500,000 inhabitants (cities with fewer than 500,000 inhabitants have an average of 291 cultural businesses for every 100,000 people in employment).



Florence: a craftsmanship sector comprising more than 1,300 businesses.

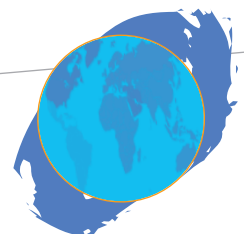
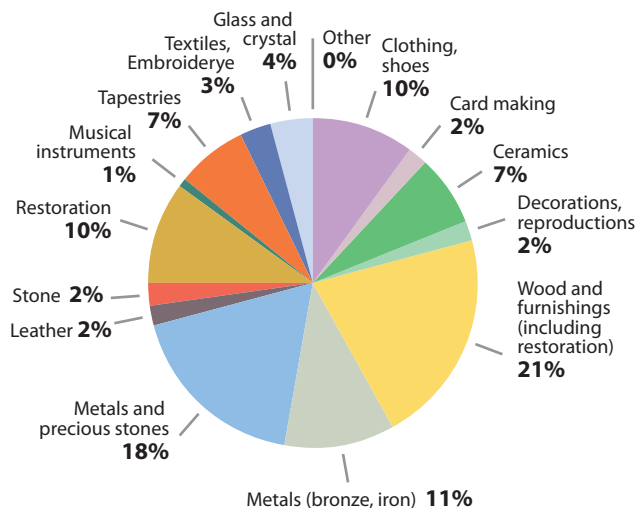
Example of the concentration of businesses linked to an “historical” city’s strategy

Florence’s craftsmanship sector comprises more than 1,317 businesses. 632 of them (or 48%) are based in Florence, and 302 (23%) in the first ring suburbs. Given that it is home to an exceptional heritage from the Italian Renaissance, Florence has developed unique expertise and sophisticated techniques to protect its works.

This sector is organised in line with the model of an industrial district, and largely supports the economy in Tuscany and Florence; it includes family-run SMEs which rely on local expertise in specialist crafts. Half of the businesses in this sector are sole-traders, and 85% have fewer than two employees.

This sector has strengthened its own organisation to establish itself on a regional European level and thereby protect its output and manufacturing and structure its marketing. As a result, the professional associations, with the support in particular of the City of Florence, the Province of Florence, the Florence region, Confartigianato Enterprise Florence and the Chamber of Commerce and Agriculture, formed Artex in 1999, a centre for traditional craftsmanship.

1,317 craftsmanship businesses, Province of Florence, 2009





III. Added value of the cultural sector in terms of employment, economy and social cohesion

1. Influence, characterisation and trends in employment in the cultural sector

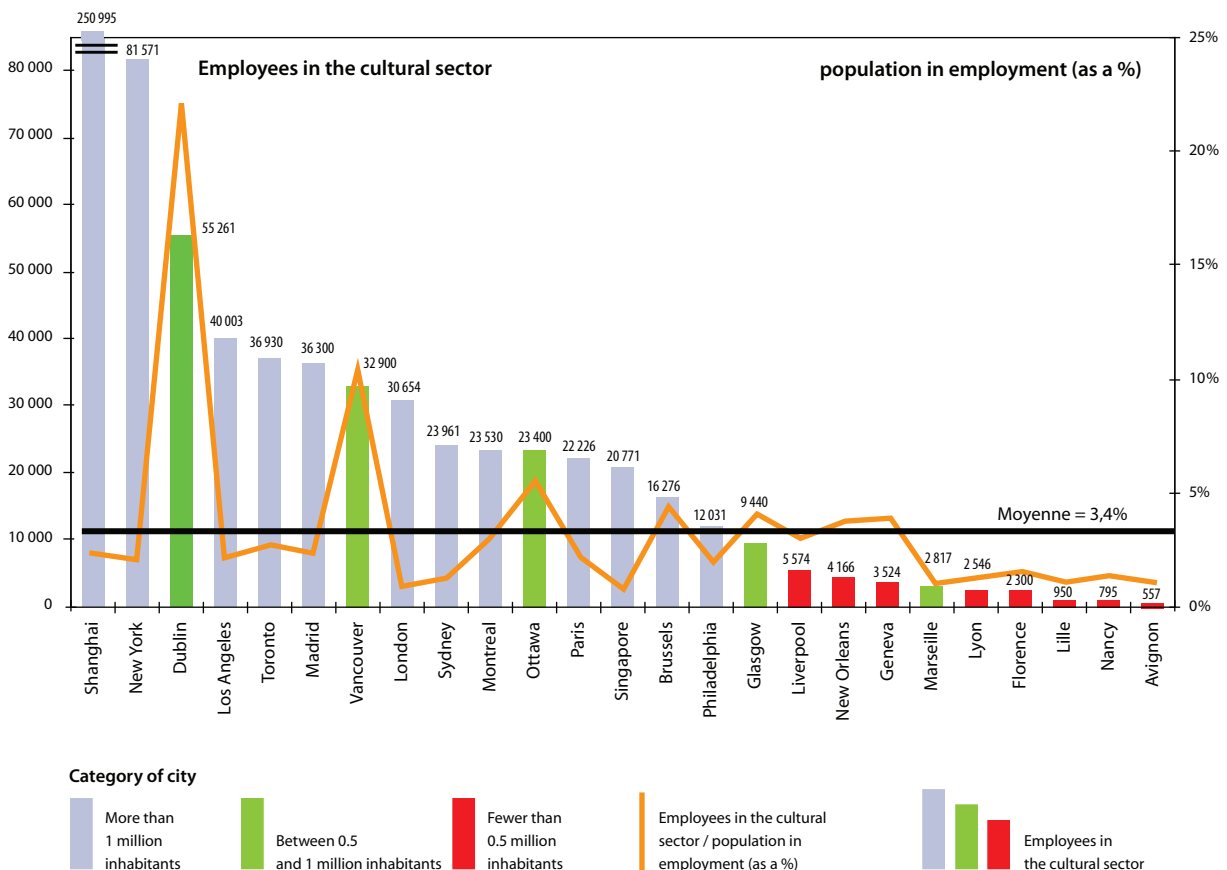
Of 25 cities analysed (cf. figure below), the study shows that 3.4% of the average population in employment in 2007 worked in the cultural sector; this is the equivalent of 3,430 people out of every 100,000 inhabitants.

By comparison, employment in the cultural sector in 2005 represented 3.1% of the total working population across the European Union (approximately 7.2 million people), accounting for 2.6% of the European Union's GDP and turnover of more than €654 billion. This means that culture contributes more to GDP than the production of chemicals, rubber and plastics (2.3%), and employs more people than the combined populations of Greece and Ireland.

In addition, while total employment figures across the European Union fell between 2002 and 2004, employment in this sector increased (+1.85%) over the same period. The sustained increase in creative jobs within the cultural sector is supported by the digital culture, and the strong increase in demand from both the domestic and the business arena for cultural products and services.

The period of "transformation" opened up by the rapid development of digital technologies, and the digitalisation of cultural products brings with it new employment opportunities. Demand for increasingly interactive and personalised content in response to new expectations in terms of mobility (smartphones being one example), new technological possibilities (3D animation, augmented reality...) available to those with creative minds, and the growth in cultural tourism are all positive factors in developing employment.

Number of employees in the cultural sector for a limited number of cities

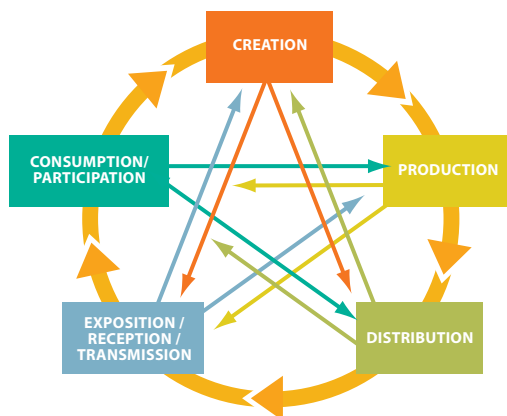




An analysis of cities by size emphasises that:

- The percentage of the population employed* working in the cultural sector is as on average 2.1% for cities with more than 1 million inhabitants (sample of 12 cities).
- The percentage of employees in the cultural sector as a proportion of the population in employment is on average 9% for cities with a population of between 500,000 and 1 million inhabitants (sample of 5 cities).
- The percentage of employees in the cultural sector as a proportion of the population in employment is on average 2.1% for cities with fewer than 500,000 inhabitants (sample of 8 cities).

The cultural chain proposed by UNESCO



Economic and political stakeholders are gradually becoming aware of the potential for development within the cultural sector. Employment appears to be progressing at the two extremes of the cultural chain:

- Upstream of the cultural chain, new media and "content producers" will emerge on top, including in terms of employment. This sector currently suffers a major lack of manpower. For example, occupations pertaining to content – i.e. creative occupations – will continue to experience increased growth rates (website design, multimedia, software, publicity, publishing, media, education, entertainment, etc.).
- Downstream of the cultural chain, in cultural management/engineering, and the development of services relating to a cultural product. For example, occupations linked to cultural tourism activities (managing heritage sites, cultural mediation, events organisation, restoration of works of art, research...)

In simplified terms, the value chain covers three main steps: "Creation/production", "Distribution", "Conservation/utilisation"

* Population in employment; according to the International Labour Organisation's definition, the population in active employment means those individuals forming part of the working population (in other words, the total number of people aged between 16 and 64 in paid employment during one reference week), with the exception of the unemployed.



Marseille: a city looking to its plus points to capitalise upon culture with a view to forging ahead in its development of tourism to support the fight against unemployment.

Example of a development strategy to promote employment downstream of the cultural chain

The tourism sector currently represents 6% of the local economy in Marseille. Marseille welcomed 4 million tourists in 2009, and the cultural sector in the same year accounted for €700 million in economic returns.

These returns come from a range of activities: hotels, catering, transport, the souvenirs business, local products, shops bearing the label "made in France", hotel laundry services, printers editing tourism brochures, construction (as a result of the increase in the range of hotels, the town planning project running alongside development of the port, the building of conference centres, etc.).

Marseille is striving towards accelerating this development and is implementing a clear development strategy based on culture.

Its commitment to being awarded capital of culture 2013, for example with the construction of the MUCEUM museum, bears testimony to this strategy. At the same time, Marseille aspires to take advantage of its position as a major Mediterranean port in order to develop the cruise sector: one cruise passenger (an individual who takes a leisure trip on a pleasure ship) on average generates revenue of €140 for the local economy, added to which the cap of one million cruise passengers it set to be exceeded in 2011/2012.

The other sectors embedded within Marseille's strategy are a reflection of the city's appeal: the city is exploiting its tangible, intangible and also natural heritage and developing business tourism and conferences, further bolstered by its impressive transportation network (airport, TGV, port).



How is a private company from the entertainment sector helping to develop local skills and create jobs? Example showing initiatives being implemented by Vivendi in Ouarzazate (Morocco).

Example of private sector involvement in job creation upstream of the cultural chain

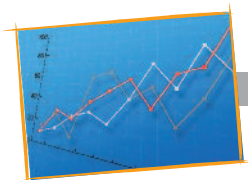
Several initiatives supported by the Vivendi group bear testimony to the importance of developing local skills within the cultural sector, whether this is to promote true cultural diversity or to improve the urban area's economic performance.

By way of example, Vivendi has been supporting students' education at the Ouarzazate institute for specialist cinema studies (ISMC, which has 220 students) since 2009. This professional training at the ISMC has resulted in twelve documentaries being made over the course of the year. As part of this, Vivendi was the official founding partner of the first edition of "Rencontres internationales de cinéma sous la tente", a cinema festival which took place in Ouarzazate from 10th to 12th March 2010, attracting 350 participants.

Eleven cinema schools from Burkina Faso, Morocco, Tunisia, Canada, Spain, the United States and France were represented. Three long and 50 short pieces of footage shot by the students were shown and then debated "under the tent" during the course of the three-day event. A website was specially created for the occasion: www.les-rencontres-sous-la-tente.org. The meetings served to develop the skills of ISMC students and raised the profile of Ouarzazate's cinematic studios among the leading cinema schools, encouraging them to film here in the future.

For a group like Vivendi, supporting programmes such as these forms part of a new approach to support sustainable development. Indeed, Vivendi, which sits at the heart of the sphere of content and networks, leaves an "intellectual" or "cultural imprint", unlike industrial groups which leave an "environmental imprint". Vivendi sees culture as one of the pillars of sustainable development since it stimulates creativity, facilitates intercultural exchange and fortifies social cohesion.

In addition, since 2003, Vivendi defined three specific challenges in relation to the field in which it is influential: promoting cultural diversity; supporting and protecting young people; sharing knowledge. Sustainable development criteria based on these three specific challenges form part of the variable remuneration package awarded to the Group's leadership team.



Analysis of copyright revenues illustrates the generation of direct value in the creative sector and the distribution of musical works, graphical images and the visual arts/photography, as well as literary, dramatic and audiovisual output

Example of creating direct value in the cultural sector

Note: the amounts indicated are under-estimated for certain countries (Canada, Belgium, Australia, Brazil, Mexico and Turkey) due to some data from certain organisations concerning the collection of copyright fees in these countries not being available.

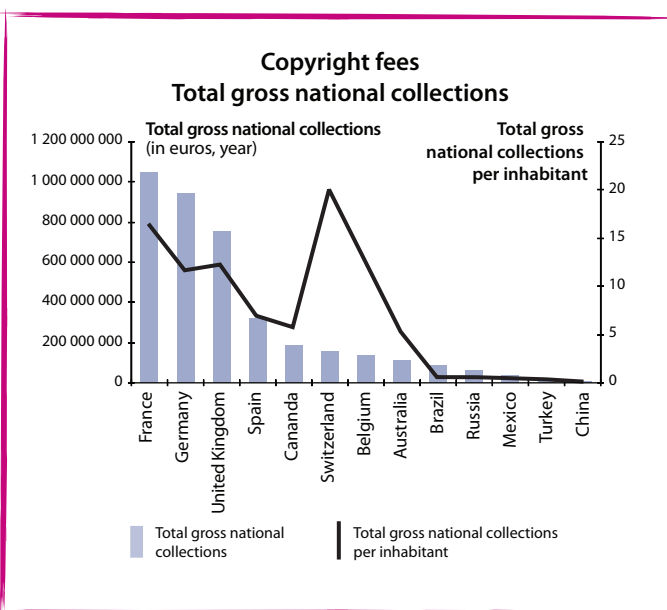
Revenues generated in the fields of music, the visual and graphical arts, photography, literature, and dramatic and audiovisual works, although they vary according to the country, can be very high.

Differences can be explained on the one hand by dynamic creativity in each country (authors, composers and editors), and on the other hand by how difficult it is to collect fees in certain countries (a multitude of collection agencies can complicate collection), by piracy and by failure to protect intellectual property.

This analysis reveals high levels of revenue which may exceed €15 per annum and per inhabitant (in the case of France and Switzerland), and which on a national scale represents several hundred million euros (€1 billion in France in 2009).

The direct value analysed in the table below is generated from the first two stages of the cultural chain (Creation and Distribution). In order to capture this value, urban areas thus need to be open to players intervening in these first two stages of the chain.

The third stage of the chain (Conservation/ utilisation) also provides opportunity to create value and bring about development.



Consideration of each stage of the chain maximises value creation.

An urban area which holds no appeal for artists and creative people not only deprives itself of the value generated during the creation stage, but also of the value engendered during the distribution and conservation/utilisation stage.

Once the work is created, the value generated during the distribution stage can be developed: in addition to the initial distribution, repeats of the work (particularly in digital format) and distribution (across a variety of channels: TV, internet, DVD...) increases authors' and broadcasters' remuneration, helps to raise the city's profile and supports the development of new revenues.

If value creation is to be optimised, it is therefore important to consider the three stages of the chain (creation, distribution, conservation/utilisation), and ensure that creation is well supported, a prerequisite for value creation in the next two stages of the chain.

2. Culture contributes to sustainable development in employment

Analysis of the unemployment rate and its evolving trend appears to demonstrate that there is correlation between implementing a development strategy based on culture, and a reduction in the rate of unemployment.

From a sample of 45 cities, it appears that those cities whose confirmed strategy is to develop their appeal based on the level of cultural and academic activity see a greater fall in the rate of unemployment.

These strategies are part of a long-term cycle. Observation over a 10 year period shows that:

- cities which have had a cultural strategy in place for more than 10 years have a low rate of unemployment and this rate continues to fall significantly.
- cities which have launched a cultural strategy more recently do not enjoy a low rate of unemployment, but are seeing the rate of unemployment fall by more than the average.





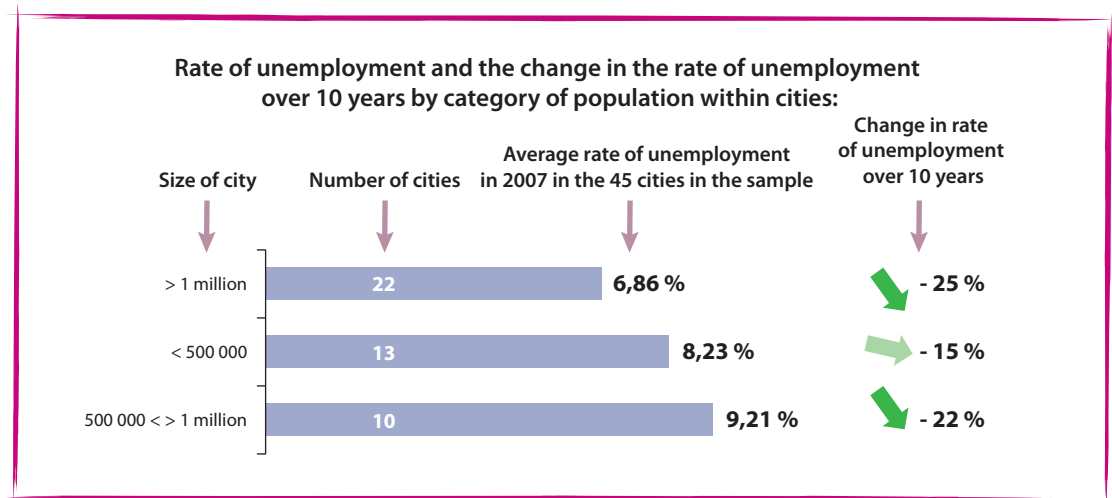
In 2007, the average rate of unemployment in cities in the "historical" and "shareholders" categories was below the average rate of unemployment for the sample group (7.8%). Cities which have implemented a cultural strategy more recently ("deliberates" and "convinced") have a higher rate of unemployment than the average.

An analysis of the change in the rate of unemployment over a 10 year period (between 1997 and 2007) reveals that the rate of unemployment in cities categorised as "historical", "convinced" and "deliberates" falls at a more dramatic rate than in the other cities (and at a greater rate than global unemployment, which fell by 16% during this period). "Emerging" and "shareholders" cities see their levels of unemployment falling less quickly.

For example, certain "convinced" (Liverpool, Montreal), "deliberates" (Bilbao, Glasgow), and "historical" (Rome, New York) cities show a significant improvement in their rate of unemployment (5.3% in 2007 compared with 16.1% in 1997 for Liverpool; 9.1% in 2007 compared with 11.5% in 1997 for Montreal; 6.1% in 2007 compared with 14.3% in 1997 for Buenos Aires; 12.4% in 2007 compared with 16% in 1997 for Bilbao, 5.8% in 2007 compared with 11.7% in 1997 for Rome; 4.4% in 2007 compared with 9% in 1997 for New York).

This would seem to indicate that culture contributes towards a sustainable increase in employment.

Furthermore, this effect appears to be amplified where the city has a large population:



3. The cultural sector is a creator of economic value

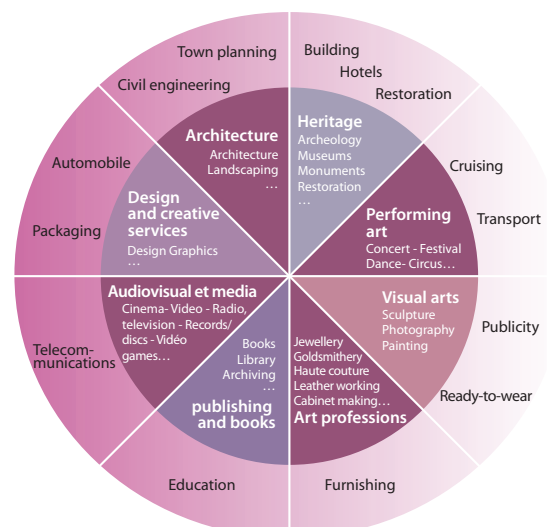
The cultural sector is not a sector isolated from the rest of the economy. It is an important generator in the direct creation of value, particularly in activities involved in the producing/distributing of cultural content.

Beyond that, it is also a factor of indirect economic development in many other areas of activity, due to the distributing of artistic competencies (for example design skills applied in the automotive sector), and the passing on of innovations and new ideas beyond the cultural sector.

The potential of value and jobs in the cultural sector should not therefore be seen in isolation, but also taking into account the indirect development that this sector and its particular competencies can generate in many other sectors.

The professions at the interface between these sectors are the professions of the future. The exchanges between the cultural sector and the associated sectors may be technological and technical exchanges, or exchanges of competencies.

The eight specialist fields in the cultural sector, and illustrations of the links and interactions with the other economic sectors



Technological and technical exchanges

The culture sector is at the heart of innovation processes. Some cultural activities do indeed form the basis for innovations, some of which can find applications in other sectors of activity, provided that assistance and guidance is provided with this transfer. These transfers are then drivers of development beyond the cultural sector. The players behind these innovations are for the most part cultural research institutes which can rely on a university structure or another structure. To protect the results of their research they have to file patents before seeking to take advantage of and communicate these innovations.



How a player in contemporary music is taking part in designing the car of the future.

Example of the distribution of innovations generated by the cultural sector to other sectors of activity

In France, the IRCAM, Institut de Recherche et Coordination Acoustique/Musique (an institution dedicated to the study and creation of contemporary music associated with the Centre Pompidou) carries out research work in the areas of acoustics, signal processing, informatics, musicology and music cognition.

The results of this research form the subject of patents, and contribute to the development of international standards (for example the MPEG-4 audiovisual standard).

The artistic applications of this technology are not limited to music, but equally are used by the other specialised cultural sectors, in particular the performing arts, cinema, video games, etc.

These techniques are also widely used in non-cultural sectors, for applications in which virtual reality is used for simulation purposes (telecommunications, the automotive sector and the aerospace industry) or for manipulating complex data (biology, data mining), in which the sound dimension plays an important part in the realism of the simulation.

By way of illustration, as part of a project with the automotive sector, the IRCAM is currently working with Renault towards defining the artificial sound for its electrical vehicles of the future. The aim of this research: to produce a device so that the electric vehicles produce a sound, and therefore can be heard by pedestrians (silence being a cause of accidents), and that the "sound design" of the car restores the personality of the car in question.

Communicating artistic competencies

Highly-developed artistic technical competencies and the need for a certain level of quality are inherent to the cultural sector, but are often used by other sectors of the economy. For example, the creations that are produced by the haute couture industry are then passed on to the clothing sector and the high street sector; design skills are directly called for in many sectors...

Xavier Greffe, Professor, Université de Paris I, Panthéon-Sorbonne, France, a specialist in the culture economy:
"Passing cultural competencies on into other sectors of activity enable culture to be used as a development lever and to create jobs and value beyond the cultural sector".



How artists and creators pass on their cultural and artistic competencies to other sectors.

Example of the contribution made by cultural competencies to the development of other sectors

The Monnaie de Paris (Paris Mint) is working with Christian Lacroix. The great couturier recently became the artistic adviser to the Monnaie de Paris, applying his skills as a designer in a new sector. He will design collectors' coins and medals for this establishment which specialises in the production of coins, which in particular struck nearly €9 billion coins between 1998 and 2002. This is an example of a new application for the skills of this great name in fashion outside the sector in which he has made his name, who is also putting his talent into the designing of trains, tramways, hotels or even theatre costumes.

Another illustration: the high street shop H&M regularly looks for designers to enhance its collections and develop its activities: Karl Lagerfeld, the artistic director of Chanel since 1983, the singer Madonna and the designer Matthew Williamson, the specialist in Jimmy Choo luxury accessories, have all collaborated with H&M, applying their skills in areas beyond their original profession.

4. New forms of cooperation between private enterprises in the culture sector, public bodies, training centres, and creators

Analysis of the cities of Los Angeles, Bamako, Montreal, Nancy, New Orleans, Abu Dhabi, etc. shows that the most powerful leverage in terms of creating activities and sustainable jobs lies in putting in place new innovative ways to stimulate cooperation between private enterprises in the culture sector, public bodies, training centres and creators.

Various forms of cooperation have been developed: patronage, support for training programmes for the professions and jobs in the cultural sector (professions in the arts, cultural industries, etc.), ease of access to places where ideas can be exchanged, expertise, technical resources and funding, joint research and support projects for creativity, fund raising), the exporting of cultural engineering, etc.



How Cristallerie de Saint Louis is taking part in passing on skills in the glass arts.

Example of Private-Public cooperation in training a skill base in the arts professions

For a number of years the company Cristallerie de Saint Louis has been using its own glass craftsmen as trainers at the Centre for training in the glass arts in Sarrebourg, and in return takes on students who are doing their training, at its industrial site in Saint Louis lès Bitche, in Lorraine.



How American universities raise private funds to support cultural R&D and become a cradle of cultural innovation.



France is exporting and promoting its cultural engineering.



Los Angeles and Mumbai: two metropolitan cities that rely on cinema to develop economically but also to export their values.



Los Angeles: breaking down the divisions between the "cinema" cluster and the "video games" cluster: towards an enlarged cultural centre of excellence? 3D and the alliance between video games and cinema: an evolution towards the future for cinema production.

Example of private funding for university studies in the cultural sector

Two very important forms of private funding, specific to the American context, can be added to the traditional sources of public funding:

■ fund raising: campaigns to raise funds from former students (the main source of donations), companies, and other economic players. In 2004-05, the total value of gifts received by all American establishments was valued at 25.6 billion dollars, 28% of which came from alumni (former students), 27% from private foundations, 20% from private individuals and 17% from companies.

■ endowment funds: financial capital from the universities, consisting of and added to by the donations received and some of the returns from this capital. On average, their investments made a return of 9.3% in 2005.

Example of cultural engineering between States and cultural establishments

As part of the Louvre des sables project, Abu Dhabi has signed an agreement to acquire cultural engineering services: French experts will train the curators of the Abu Dhabi museum and will deliver a number of seasonal exhibitions every year (transfer of expertise). They will help Abu Dhabi to create its universal museum, which will be authorised to use the Louvre "brand name" for thirty years. In the first ten years, with eleven other national museums, the Louvre will loan hundreds of exhibit pieces to the Abu Dhabi Louvre.

Example of cooperation and competition in the cinema sector

American cinema is the leader in the global market and represents 60% of worldwide revenues. By comparison, India makes more films than the United States (more than 1,000 compared with about 800 every year), but its target audience is essentially a regional market, as well as the Indian diaspora.

Since the 2000s, India, and more particularly the cinema industry in Mumbai, the capital of "Bollywood", has changed its strategy to speed up the internationalisation and professionalisation of its cinema and audiovisual industry, in particular through alliances and co-productions with Hollywood, and to improve training. For its part, Hollywood is aiming at the Indian market, by adapting its films to the values and codes of Indian films, and by producing films in India.

As part of these two parallel strategies, the key players in the two countries are now in a process of "cooperation and competition". Beyond their objective of developing the sector and increasing cinema revenues, these two "civilisations" are seeking to export the values of their societies. Amit Khanna, CEO of Reliance Entertainment: "We want to play a central role, politically and economically, but also culturally. We have values, Indian values, which we want to promote. We are going to tackle Hollywood on its own ground, not simply to make money but also to affirm our values. People will have to count on us. Hollywood represents the cinema industry of the 20th century; we are building the industry of the 21st century".

Example of cooperation between two cultural centres of excellence

The sector comprising the "Arts, events and recreation, hotels and catering" of Los Angeles employs 209,000 people, or 11% of employed staff in the city. It is the 3rd sector of activity after the "Education, health and welfare" sectors and "Scientific and administrative and waste management services".

The cinema industry based around Hollywood is a major development centre, accounting for most of the value generated worldwide by this activity. In 2001 Hollywood accounted for 80% of the film market internationally, and 70% of television programmes. The cinema industry is continuously on the up (approximately a hundred more films made every 5 years) but has been struggling since 2008.

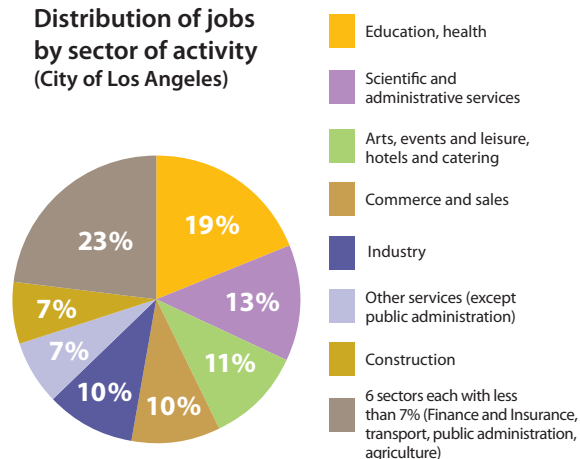
Universities and their laboratories are closely involved in this sector of activity, working with companies, and are taking part in defining the cinema of the future.

The cluster around video games is also a pivotal strategic area. The video games industry and the cinema industry are joining forces to accelerate the development of their respective industries, with the video games sector relying in particular on cinematographic skills to produce their scenarios, and cinema relying on video and 3D to integrate artificial images and increasingly innovative special effects.

In Los Angeles, there are more and more exchanges between Hollywood and the producers of video games and these take place in respect to two different areas: creative and economic. Increasingly, therefore, the largest producers of video games (Activision, THQ, Electronic Arts...) are taking on more and more collaborators coming directly from the movie industry.

Los Angeles is also host to festivals that are renowned all over the world, museums (the LACMA - Los Angeles County Museum of Art, the Getty Center, the MOCA - Museum of Contemporary Art, etc.).

Distribution of jobs by sector of activity (City of Los Angeles)

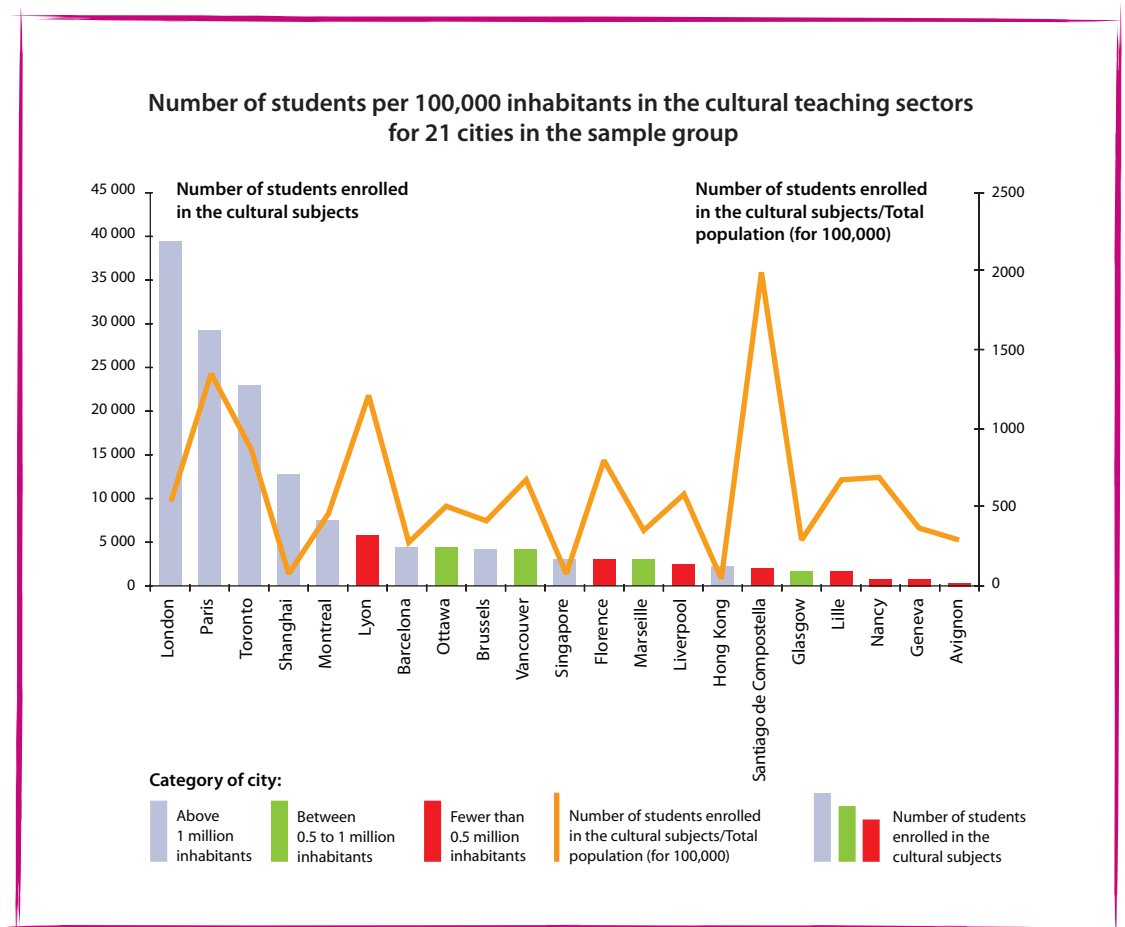


5. The presence of higher education, cultural in particular, is a factor in the development of innovation in urban areas

Urban areas devoted to cultural training do indeed have the upper hand, but this is not synonymous with a guarantee of local employability or of the creation of sustainable jobs.

Of the 20 cities in the sample for which we have information, there are on average 586 students per 100,000 inhabitants in the cultural industries. The cities in the sample group which do not reach this threshold and/or which do not have a sufficient framework of companies or bodies that can take on students undergoing training, and offer opportunities for placements, encounter difficulties keeping these people in their area.

The likelihood is that there is a critical number that has to be reached in terms of training facilities.



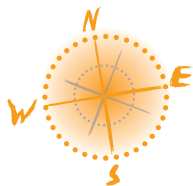
If in principle the 8 cultural specialised fields can be developed, they are not all necessarily adapted to the specific context of the urban area.

For example, can cities with fewer than 500,000 inhabitants attract the creative set on a sustainable basis? How can the city's specific boons, and in particular the cultural heritage, be taken advantage of without becoming locked into extreme specialisation? How can other fields, and the jobs of tomorrow, be developed which bring with them innovation and therefore economic development?

Faced with this difficulty the city of Avignon has committed itself to a process aiming to perpetuate the positive effects of its festival and of its heritage on the economy of Avignon and the employment market, in order to enhance the training it offers and at the same time to find new areas for growth.

The qualitative analysis of the cities shows that the creation of cultural training generally follows on if a specialised cultural area exists already. Schools and universities have built in the need to provide training that matches the professions developing in their area in order to ensure that the students are employable. The involvement of players in the training industry, as trainers, but also in the definition and development of the content of the areas where training is needed appears to be spreading. Links between universities and companies can also be made in the context of research projects undertaken by university research laboratories in line with the needs of the companies. These links are developing in France, and are already well established in the United States, for example in Los Angeles in the cinema industry. In Los Angeles, the universities are following a pattern of teaching and research, crossing pure artistic disciplines with the sectors of architecture, urban policy, informatics and the sciences. Also they are fully integrated with cultural centres of excellence which carry out research and development projects with the "industrials".

The success factor is all the more important as people working in the area of culture generally have a higher level of education than those employed in the economy as a whole.

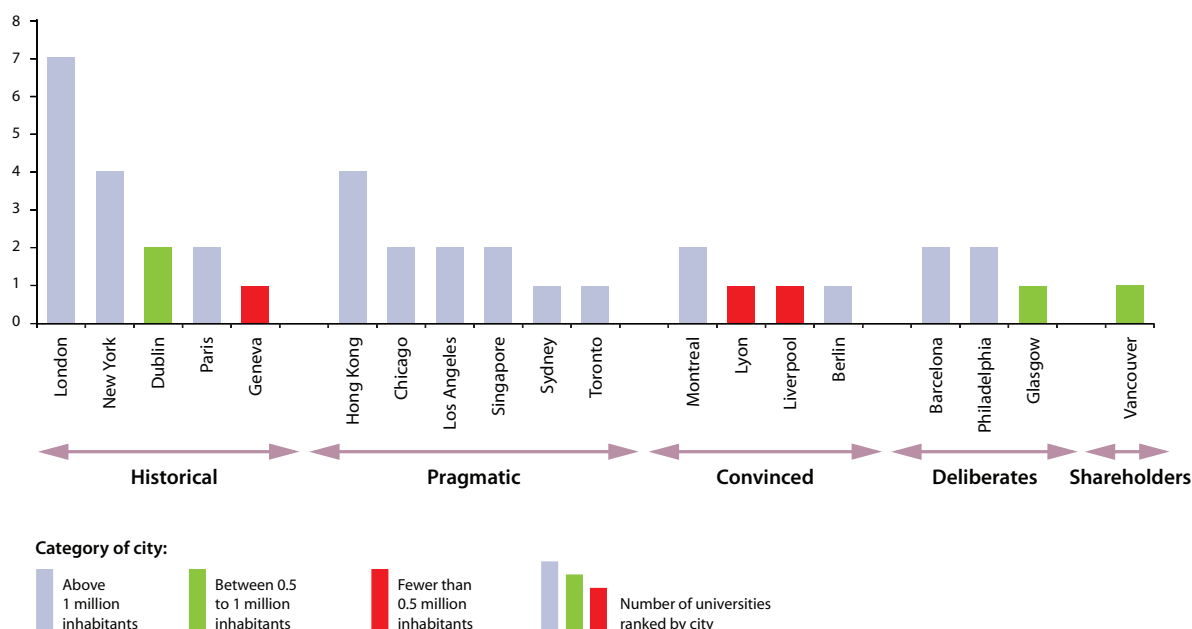


In 2005, nearly half of the people working in the area of culture in the European Union were graduates, against a quarter in the economy as a whole.

Backing culture and developing employment in culture enables a town to raise the level of training of its population, to put in place the conditions in which innovation can develop and thereby make its region a creative area.

In its 2010 edition the annual world ranking of universities by "Times Higher Education" lists 39 universities belonging to our sample of towns in the top 200 of the ranking. The "historical" cities category is the category with the most universities ranked by "Times Higher Education", with 16 universities (notably 7 in London, including Imperial College which is 9th in the ranking, 4 in New York and 2 in Paris). The category of "pragmatic" cities is in second place with 12 universities ranked, of which 4 are in Hong Kong, 2 in Singapore, 2 in Los Angeles and 2 in Chicago. The category of "deliberates", such as Barcelona, Philadelphia and Glasgow, and the "convinced", such as Montreal, Lyon, Liverpool and Berlin, each have 4 universities in the ranking. The "shareholders" are represented only by Vancouver and its University of British Columbia.

Number of universities ranked in the "Times Higher Education" in the cities in the 2010 sample group



6. Culture used as leverage for developing social cohesion and human capital

Many of the cities in the sample use culture as leverage for development and 'rejuvenation', and for promoting social cohesion, the living environment and the image of their urban areas (Glasgow, Liverpool, Lille, Bilbao, Essen...). Major events such as the "European Capital of Culture" can act as a catalyst for an entire community that aspires to develop its living environment and its image.

By way of illustration, the process of transformation of the Ruhr, and more particularly of Essen, is emblematic. Better known as being the former industrial lung of Germany, the Ruhr and Essen have marked their revitalisation on the European scene for ten years, by promoting their cultural, industrial and social heritage. The initiatives introduced by this great German conurbation of 5.3 million inhabitants have been rewarded by it being granted the status of "European Capital of Culture" in 2010. This is the first time that an entire region consisting of 53 towns and cities has had the title of "European City of Culture", with a slogan that sets the tone: "Change through culture – Culture through change"!

The development of this region in terms of culture and universities has intensified: now it has 1,000 industrial monuments, 200 museums, 100 cultural centres, 120 theatres, 100 concert halls, 250 festivals and celebrations, hundreds of attractions

and cultural, sporting and leisure events and also 5 universities and many research institutes. All this is an indication that the Ruhr is indeed reviving itself and this the area is empowered to design the right project so that it becomes once again a great metropolis at the heart of Europe.

The emergence of this region has come about as a result of the joint willingness of the economic, political and social communities who have wanted to build a great cultural metropolis, promoting the identity of the Ruhr, both for its former heritage and its industrial past.



How a city uses culture to rebuild itself through social cohesion – the strategy of New Orleans after it was hit by Hurricane Katrina.

Example of the development of social cohesion through culture

In 2005, before Hurricane Katrina, the city of New Orleans had 455,188 inhabitants. The hurricane brought with it total devastation and flooded 80% of the city. After Katrina, residents having fled from the city, the population fell by half (in July 2006). The traumatism was terrible for a city where more than 70% of the population (the highest level in the country) had lived for generations. In 2009, 4 years after Katrina, the city returned to 80% of the population level of 2005.

The Mayor of the city's ambition is to develop culture in order to take advantage of its beneficial effects in terms of social cohesion and to create new opportunities in the cultural economy, to generate activity and jobs.

Mitch Landrieu, who was at the Forum d'Avignon in 2009, former Lieutenant Governor of Louisiana and mayor of New Orleans since 2010, said that: "it is their attachment to their city and their culture that enabled the people of the city to survive and move on. It is the spirit of this city, its culture, which drove the residents to return. Even though many had no home or work, many people fought to maintain its culture. They have continued to come in droves to attend jazz festivals. It is as though all the residents refused to give up their culture, which is the cement that binds this State".

As far as the economy is concerned, the "Cultural Economy Initiative" is an ambitious strategy whose aim is to sustain cultural production as a creator of jobs, according to the slogan "In Louisiana, culture means business".

To achieve this, an attractive system of tax credits has been put in place to accelerate the creation of companies and jobs in four areas in particular: film/audiovisual, music, video games, and the art market.

In 2009, under the tax credits for the "film" industry, 1 dollar invested saw returns of 6.64 dollars. 7,000 jobs have been created in the cinema industry. Louisiana is now the 3rd largest centre in America for film production, after Hollywood and New York.

As far as the performing arts are concerned, a study by Tulane University has shown that the Mardi Gras festivities (a 12-day carnival) have an impact on tourism throughout the year: for each dollar that the city spends, in return it earns \$4.48 (transport, hotels, catering).





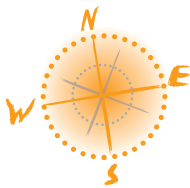
Points for reflection

The winning cultural strategies are those that enable an urban area to tap into a significant part of the potential for creating economic value by the development of its cultural appeal.

These strategies are all based on well identified “cultural levers”, individually or as a combination. In our 2009 study we classified these levers into five categories:

- the creation of alliances related to cultural engineering;
- the promotion of a tangible or intangible heritage;
- the implementation of a cultural facility making use of an architectural concept;
- the link between cultural investment and a town-planning initiative;
- the development of centres of cultural excellence.

This year, as a conclusion to the work presented in this study, we would like to stimulate opinion on a number of questions that play a key part in determining the conditions for implementing these “cultural” levers and the strategies they underpin.



To consider the integration of a cultural aspect when defining an overall development strategy would enable to benefit from the sustainable development that it can generate.

1. Include culture more systematically in the overall development strategies to take advantage of its potential for sustainable economic and social development

The quantitative and qualitative analysis that has been carried out underlines the importance that the cultural sector can play in the economic development of an urban area.

Taking this assertion as a starting point (and beyond development strategies that are purely cultural), to consider the integration of a cultural aspect when defining an overall development strategy would enable the community to make use more systematically of the potential for development brought by culture, and to benefit from the sustainable development that it can generate.

Consideration should therefore be given to integrating cultural programmes in all the European programmes, thereby encouraging an integrated approach to urban areas.

At local level, some public administrations develop their organisation to facilitate the combining of cultural subjects and development subjects (economic in particular) in order to integrate both aspects.

Drawing up an inventory of the current situation as is, of the assets and of the weaknesses in terms of culture is essential in defining an informed cultural development strategy.

Having a clear picture of the players, jobs, financial support, and more generally of the strengths and weaknesses of the cultural sector in an area appears to be necessary for defining an informed strategy, at each level of granularity (city, metropolitan area, region...). The lack of a consolidated view makes it difficult to carry out a global analysis of the financial resources that sustain culture. How in this case can it be established whether subsidies are being frittered away or how can it be identified whether every action and each financial grant is relevant? A consolidated inventory would enable local administrations with budgetary constraints to optimise the effectiveness of their cultural strategies and of their subsidies for culture, for example by giving them the means to choose which sector(s) and which establishments to support (taking into account their dependence on government subsidies, the economic and social activity they generate...)? Which festivals to support (according to any strategic objective they have in terms of the visibility of the urban area, the number of jobs created...)? Which professions or which research projects to back (depending on the potential for development and the economic impact if this is the objective set by the urban area)? ...

As the 2009 version of our study emphasised, there are very few mechanisms for collecting quantitative data for the purposes of analysing the cultural sector, whatever the degree of granularity of the analysis (transnational, national, regional, and territorial).

Among the data which is least available, but which is very useful for defining the strategy, are: the amount of government subsidies assigned to the cultural sector, the number of jobs in the cultural sector, the number of graduates in the cultural industries, the number of enterprises in the cultural sector, and the annual number of tourists.

Some data is available for a high degree of granularity, but not for the “city” level, for example GDP per inhabitant or annual migration.

The quantitative mechanism must also make it possible to monitor the effects of the strategy that has been implemented in order to measure the contribution of culture to the economic performance and the development of the urban area’s appeal in the long term. After all, collecting this data requires that first of all there has been a clear definition of the cultural sector and of its borders.

The choice of specialised fields in defining the cultural development strategy is key.

Before choosing between a strategy of focalisation, diversification or a global strategy, an urban area choosing to support a strategy of cultural development has to take into account the size of its population, its financial resources, and its ability to build a strategy jointly with other adjacent areas, the sectors, competencies and businesses that are already present.

The existence of a skill-base, of a network of businesses and of cultural training in one or more sectors will encourage a strategy that is based on these sectors in order to enhance the development of these areas. Establishing a new sector may be more or less straightforward and require more or less effort. For example, the setting up “ex nihilo” of an art craftsmanship sector (which is often based on a network of recognised historical competencies and which are associated with the image of the city) appears to be less straightforward than setting up a cinema sector, whose primary concern is the introduction of production tools and whose success at the outset may be based on reduced costs (which can be supported by a suitable tax facility). Setting up a heritage and museums sector from scratch is possible but requires substantial investment (as in Abu Dhabi for example), all the more so as the construction of an establishment such as a museum can be integrated as part of an urbanisation project, improving or establishing a training facility, even a transport and telecommunications development project.

The urban area’s objectives should also be taken into account when choosing specialised fields. Developing a festival as part of a performing arts sector may contribute towards achieving the objective to increase the urban area’s visibility and to revamp its image. On the other hand, this sector may create fewer jobs and create less value than an audiovisual sector, even if its development can be optimised (by extending the activity of the festival beyond the festival itself and by enhancing the third stage of the cultural cycle, in particular by using new technologies...).

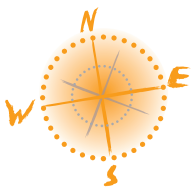
2. Encourage new types of cooperation and decompartmentalise teaching, to facilitate innovation and job creation

As a result of the various situations that have been analysed it is evident that a favourable dynamic in terms of activity and job creation is created in an urban area, so becoming a place to exchange know-how and physical contacts, when the following ingredients are present:

- the physical concentration in the same place of creative people, artists, master craftsmen, teachers, researchers, students, philanthropists, financiers and businesses, which, because of the network effect and diversity, enables conditions to be created that foster innovation and creativity in many cutting-edge industries;
- the existence of projects (particularly R&D) involving a number of decompartmentalised teaching disciplines and aiming at specific outcomes often financed by private enterprises. The idea being to multiply bridges between the university (and its research laboratories) and cultural enterprises, and to create an environment that fosters innovation for the cultural and digital arts industries by supporting technical R&D, for example by creating trans-regional or even trans-national interdisciplinary centres;
- professional training schools alongside higher education training facilities that continue to focus on high-end professions and on the future working together with companies (for example, at the University of Southern California (USC), all graduate courses including the presentation of a finished professional cultural product, financed by the producers. This enables creativity to become an integral part of education and to pass on this creativity to partners in the professional world in a spirit of innovation. The development of institutionalised and solid partnerships between administrations and enterprises would be a catalyst to this process);
- cultural facilities and cultural activities on a large scale even within universities themselves (for example, in the United States there are more than 700 professional art galleries, more than 2,300 “performing art centres”, and more than 345 auditoria for pop and rock concerts in universities, ... Another example: in France, in Villeurbanne, the Double Mixte is a 10,000 m² space created as a result of the initiative undertaken by private partners on the La Doua Campus, and is run by a private company);
- implementing innovative systems of governance and cooperation in projects enabling public and private players, enterprises and individuals to achieve tangible results that create economic value and jobs creating a “win-win” situation. In some countries the personal financial contribution of individuals through patronage, gifts and legacies in university research projects is a key factor.

One of the outcomes of these trains of thought could be to improve employability, in particular among young people.

By way of example, in 2009 the city of Florence launched the Foundation for Restoration, to facilitate interaction between all the private and public players in this emerging sector, to support the sector on an international scale, to inform public markets and to develop continuing education. The École de la Manufacture de Pierres Dures (“School for the Manufacture of Hard Stone”), one of the best in the world, combines restoration with scientific research. The Institut Spinelli stands by its offer of a Masters in conservation management. Finally, Florence promotes its excellence through local and international professional exhibitions (the creation of the Florence Art and Restoration Fair in 2009, Expo Shanghai 2010, the Biennale of Culture in Florence in 2010, the FIRPA of Grenada in Spain in 2011).



In order to foster a favourable dynamic and for the city to become a place to exchange know-how and physical contacts, many ingredients are required.



Another example is Los Angeles where the universities (USC, for example) operate according to a system of teaching and research, crossing pure arts disciplines with the sectors of architecture, urban policy, informatics and the sciences. Also they are fully integrated in centres of cultural excellence which carry out research and development products with the “industrials”. In the United States, universities and film schools often have their own digital studios that are of the same quality as those of the major players and are also financed by them and maintain these direct links with “start-ups” in the digital and internet industry.

For the medium-sized cities we have also seen the multiplier effect obtained by the putting in place of cooperative ventures and alliances with other cities to accelerate development and result in a joint project (for example between Nancy and Metz with the creation of the University of Lorraine, bringing together the universities of the two cities to create a centre of excellence with an international profile meeting the required number with 55,000 students). This is a case of promoting the pooling of cultural competences and creating cultural centres of excellence over larger urban areas in order to boost the appeal of medium-sized towns and cities which could suffer in their cultural development as a result of a population not reaching the critical size.

3. Using digital technologies to enhance heritage, tangible or intangible, promote it and facilitate access to it

The digital technologies of today enable more and more personalised and interactive content to be produced and distributed very widely and rapidly. How can digital technologies accelerate still further the appeal and economic development of a territory? How can the production of digital content be encouraged (shows, exhibitions...), and how to facilitate their distribution nationally and internationally?

Nowadays, for example, 3D, touch tablets and enhanced reality are seen as facilities of the future in cultural places. In the world of culture and museums, 3D has always played a pivotal role, opening the doors to people becoming truly immersed in the works and buildings. It is applied both in terms of the place (aspiring to create environments where people can become immersed) and the works.

3D is used in particular in the field of restoration to identify the different conditions of a work of art or of a building.

One of the first environments fully interactive in 3D appeared in 1999: Virtual Leonardo, developed in collaboration with the polytechnic school of Milan, where visitors can stroll through a world in 3D showcasing the inventions of Leonardo da Vinci. Since then the technology has progressed and software can create virtual 3D museums, scanners are being developed to digitise the works without even having to touch them...

Recently, Dassault Systems and the Museum of Fine Arts in Boston launched a project to virtualise the Giza Plateau in Egypt. Dassault Systems offers its expertise to this project in real-time 3D, simulation and the visualisation of archaeological data to create interactive experiences in which specialists and also the general public can immerse themselves. These ultra-realistic 3D technologies will be used in teaching and research projects and will enable new forms of collective, individual and multi-platform experiences to be created, on the internet or in the most complex virtual reality or enhanced reality devices, from games consoles, relief screens or even cinemas.

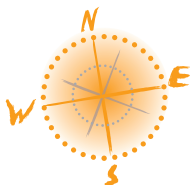
The result of a collaborative venture between Dai Nippon Printing (DNP) and the Louvre Museum, the Louvre - DNP Museum Lab project is aimed at exploring new ways of approaching works of arts, in particular due to using multimedia tools. The original design of the Museum Lab presentations integrates both competencies in the area of cultural mediation and the results of research carried out by the Louvre Museum. They can be produced due to the data and image technologies used by DNP. The applications that have been developed and evaluated in the context of this partnership include in particular the use of very high definition to visualise and explore them, touch screens to enable the user to have a more personal experience of the works, image recognition combined with the use of multimedia music players to enhance the visitor's experience, and this be continued off site by way of public internet.

3D also adds to audiovisual material in a new way; for example, in March 2008 the rock group U2 released “U2 3D”, a 3D film of its concerts produced during the group's Vertigo world tour.

The development of films in 3D gives viewers a new visual experience, so 3D brings a new value to the content and productions shown in the cinemas of today, and the 3D televisions of tomorrow.

New technologies also feature prominently in the video games sector. They forge advances with regards the quality of the image, fluidity and playability, and therefore provide a new experience in terms of the player becoming truly immersed in the game.

Each of these examples illustrates the possibilities that go hand in hand with new technologies towards creating new products and therefore creating value. Nevertheless, certain conditions must be combined to enable the development of these new ways of promoting our existing heritage: as well as protecting technological innovations and the products are generated as a consequence, building links between research centres and key players involved in the marketing industry and offering specific support in the test and experimentation phases are essential.



Digital technologies open numerous new possibilities for heritage promotion and enhancement, from production to broadcasting.

4. Encourage the long term development of festivals and major events and promote and endorse them to strengthen appeal and brand image

Culture rests in part on the specific aspects of an urban area: its natural, tangible and intangible heritage (languages, traditions...). Promoting these specific aspects underlines their unique features, and helps to maintain the pride felt by the inhabitants in terms of their sense of belonging.

In themselves cultural activities create a social link, and more particularly the major events (biennales, festivals, fairs...). Moreover, cultural activities and assets that are exported bear the values of the society that has created them.

Choosing to create a festival or to organise a major event appears to be an effective lever in cultural development strategies. This is all the more true if the objective is to renew the image of the area and to develop its visibility. In some circumstances, major events can also support economic activity.

What new mechanisms are possible, or can be strengthened and promoted, so as to continue to encourage partnerships, including international partnerships, following a major event (for example, Essen, European Capital of Culture 2010)?

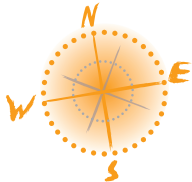
The primary objective behind this plan being to promote the long-term development of festivals and cultural events by establishing a fixed consultation process between public partners, and by implementing a long-term development plan (including training, financing, development of a logo, etc.).

The city of Montreal has also agreed on a three-year development plan, with three main festivals held in the city (International Jazz Festival, the Just for Laughs Festival and the FrancoFolies festival), and has committed to contributing funding annually of approximately 1.2 million dollars. In addition, the Canadian government has announced funding of approximately 30 million dollars a year as part of the "Community Development through arts and heritage" programme, including a part allocated to the festivals. During 2007-2008, almost thirty festivals and events shared more than 13 million dollars in Montreal, awarded by various departments and bodies forming part of the Quebec government.

One of the other objectives of this initiative is to consolidate Montreal's position as an international centre for audio-visual production and a leader in digital creativity. To achieve this, the project "Montreal, cultural metropolis" supports, in a properly planned way and in the long-term, the Quebec Film and Television Council. Its objective is to increase the size of the audiovisual industry to support digital creativity, in terms of digital arts and cultural industries. Over the last few years, Montreal has increased its appeal with the creation of several dynamic digital arts companies based there. This success is largely due to the collaboration between investors, managers, artists and technical experts.

Strategy is the art of making difficult choices. In the field of culture and developing urban areas, this difficulty is all the greater as the timescale that has to be taken into account is of the order of ten years or even more, which makes it an important factor for the sustainable development of an urban area.

There are, nevertheless, elements that cannot be analysed or be the subject of statistical or economic models, and these are the political will of one or more individuals, their ability to have a vision of the bigger picture and the freedom of action in the long term to implement it. This in itself constitutes a point for reflection for another study.



In 2007 Montreal launched a development plan for large-scale cultural and digital arts festivals, aiming to consolidate its position as an international centre for audio-visual production and a leader in digital creativity.



APPENDIXES

Detail behind the methodology and the indicators used as part of the quantitative analysis framework

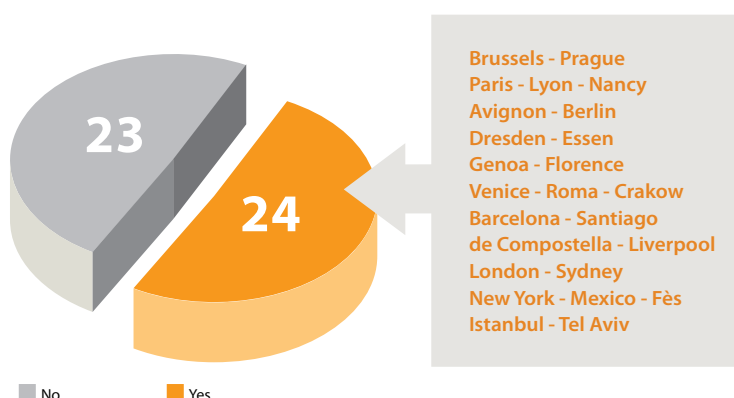
The 2010 barometer includes 15 new cities compared to the barometer carried out in 2009, falling under the same scope (same indicators, same year of reference). By means of 11 indicators, listed below and communicated by national or international bodies (OECD, Eurostat etc) a ranking in two main indicator categories has been defined: economic performance on the one hand and cultural and academic activity on the other hand.

The 11 indicators adopted in 2009 have been collated for the new cities and divided into the two large categories of indicators used in 2009 in order to gauge the links between an urban area's appeal and culture. Three additional indicators have been incorporated for this 2010 study and are applicable to a limited number of cities from the sample, in order to delve more deeply into analysing employment and cultural training.

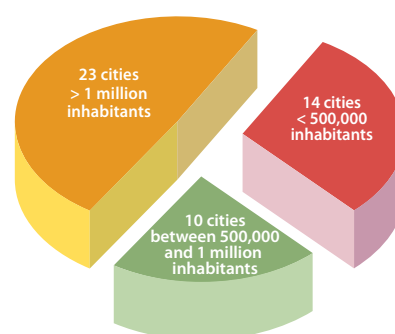
The cities selected as part of this sample group may appear a surprising choice; the choice can however be explained via the desire to achieve a sample of cities that spans all the continents, although still remaining reliant on availability of information. In order to be able to draw conclusions in an international context, this sample group comprises 47 cities hailing from several different geographic areas (Europe, America (North, Central and South), Asia, Oceania, Africa/ Middle-East) located across 21 countries : Germany, Argentina, Australia, Belgium, Brazil, Canada, China, United States, Spain, France, Great Britain, Israel, Italy, Luxemburg, Morocco, Mexico, Poland, Czech Republic, Singapore, Switzerland, Turkey.

The sample is balanced : half the cities have a cultural heritage classified as World Cultural Heritage by UNESCO (24) and the cities are categorised according to their population in order to examine the possible effects of threshold.

Cities with a UNESCO-classified cultural heritage



Cities of the sample by population size



This study is based on the use of existing statistics, issued by public sources. The eleven indicators employed in 2009 have been reused and added to, paving the way for an enhanced selection of cities that is set to refine and polish the analysis of links between culture and an urban area's development. The division of these indicators into two categories has been readdressed. The aim of the first category is to characterise a city's intrinsic economic performance and the second is to evaluate the level of cultural and academic activity.

- 1. The intrinsic economic performance enables a city's internal economic dynamism and its appeal to be analysed**
 - a. GDP per inhabitant,
 - b. share of the economically active population in relation to the total population (in %),
 - c. unemployment rate (in %),
 - d. migrant influx,
 - e. number of tourists per year in relation to the total population.
- 2. The level of cultural and academic activity makes it possible to analyse both cultural and educational capital in higher education, and the comprehensive effort put in by the city every year towards its cultural policy**
 - a. number of major tourist attractions (or places of interest),
 - b. number of museums,
 - c. number of theatres and operas,
 - d. public cultural expenditure per inhabitant,
 - e. number of students attending university in relation to the total population,
 - f. number of universities.

Three new indicators have been brought into play applicable to a limited selection of cities from the 2010 sample with a view to examining more closely the influence of the cultural sector on the overall economy in terms of employment and number of businesses in the cultural sector but also in terms of the volume of students in higher education specialising in culture:

- a. Number of jobs in the cultural sector,
- b. Number of businesses working in the cultural sector,
- c. Number of students in higher education studying "culture".

The monetary figures on these indicators have been levelled so that they can be compared according to the exchange rate published by the Bank of France on the 9th September 2009:

1€ = 1,4522 \$ US 1€ = 1,569 \$CA 1€ = 0,8793 £ 1€ = 134,13 Yen

Analysing their ranking

A cartography has been drawn up based upon each city's rank against each indicator category as in 2009. This rank was obtained by the average weighted against marks taken by each indicator according to the following method:

- Calculating the mark: indicator figure/ best figure in relation to the indicator x 100
- Applying a weighting factor to each indicator:

Intrinsic economique performance	GDP / inhabitant	20 %	Cultural and academic investissement	Number of major tourist attractions	10 %
	Share of the population economically active in relative...	20 %		Numbers of museums	10 %
	Unemployment rate	20 %		Number of theatres and operas	10 %
	Migratory influx	20 %		Cultural expenditure per inhabitant	30 %
	Number of tourists per year in relation to the total population	20 %		Number of students compared to the population	30 %
				Number of universities	10 %

Use of a graph specific to the three indicators added this year will complete the analysis.

Limitations

This barometer is faced with four main limitations:

- The lack of availability or non-publication of certain information: this new addition of the barometer and the Culture Map has led to researching more recent statistical information for all of our indicators. It transpires that the public based update cycles are lengthy. Given that information collated is not systematically available on a more recent year of reference, we have therefore chosen to retain the information base used in 2009, expanded due to the cities recently added to the sample group. Furthermore, we should take stock of the fact that the level of analysis used is the city itself. This administrative level has the largest volume of recent, comparable, available information accessible.

However, some indicators are not available for this degree of granularity. In some cases, the information only exists at the wider metropolitan area level.

- Incorporating some cities as part of an important urban area: the analysis is conducted at the city level, but certain conclusions must be drawn whilst taking into account the fact that some cities are integrated as part of a wider urban area granting them access to facilities, an economically active population, cultural or industrial initiatives, introduced to the wider urban area (or wider metropolitan area). In France, this applies to cities such as Lille (population of the city: 226,000 inhabitants, population of the Metropolitan area of Lille made up of 85 towns: 1.15 million inhabitants), or Lyon (population of the city: 472,000 inhabitants, population of the Grand Lyon area made up of 57 towns with 1.2 million inhabitants), Nancy (population of the city: 105,468 inhabitants, population of the Grand Nancy area made up of 20 towns with 270,000 inhabitants) or even Marseille (population of the city: 839,043 inhabitants, population of Metropolitan Province of Marseille made up of 18 towns with 1.02 million inhabitants).

- The difficulty is in isolating the different types of economic impacts of cultural policies, in particular the economic impact of an urban area's tourism activities, and how this connects with other public policies (transport, mobility, social policy etc.).

- Assessing the effects in the long term; whilst some effects can indeed be measured in the short term (the tourist influx, for example), the majority can in fact only be truly analysed in the long term (appeal).

The bibliography and statistical sources of our study are available for download on the Forum d'Avignon website : www.forum-avignon.org



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■ Ineum Consulting

Ineum Consulting is a strategy organization and management consulting firm. Ineum Consulting objectively helps its clients make strategic operational and technological decisions.

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■ Forum d'Avignon

As an international, original and innovative event, the Forum d'Avignon ambitions to bring the spheres of culture, finance and the media closer together and propose new ideas and solutions at global, European and local levels. Event debates are organized along with expert networks and university professors. The Forum d'Avignon was created after the ratification of the UNESCO's convention on cultural diversity and was backed by the French minister of Culture and communication since its creation. Focusing on culture, economy and the media, the Forum d'Avignon fosters original meetings between the key players of the cultural, economic and political sectors, as well as the creative industries of our digital era set in a global context.

Bringing together culture and cultural industries, cornerstones of the knowledge economy, the Forum d'Avignon assesses culture's economic and social aspects, including both social cohesion and job creation. Culture is not only an intimate experience. Culture is also an economic activity creating employment and contributing to a city's attractiveness.

The Forum d'Avignon was launched in order to provide a space for dialogue and reflection on these issues. It brings together, at a global level, a significant number of those people who contribute to the creation, production, financing and promotion of cultural projects including artists, intellectuals, government representatives, heads of business, as well as cultural industries representatives and sponsors.

For more information visit www.forum-avignon.org



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