

# Where game designers win awards

EXPERIENCE PROVENCE

Located in Southern Europe's Silicon Valley

## MARKET AND FINANCING

### EUROPE

- Biggest regional market in the world after the United States
- □ 3.9 bn. worth of video games sold in 2008
- Turnover increased by more than □ 5 bn. between 1996 and 2009
- Europe recorded € 7 bn. sector profits in 2008
- Interaction with the American market: the United States have 34% of the European market, while Europe's share of the American market is 11%.
- The European market is worth □ 76 bn a year (distribution, communication, production, publishing...)

- i2010 initiative: Set up a true single European market for video games and stimulated innovation, with a budget of □ 9 bn allocated to ICT's and NICT's.
- EU support for "serious games" to respond to four needs: helping children with learning difficulties, preparing future citizens for a society comprised of virtual worlds, modernizing the system and developing advanced skills (innovation).

### FRANCE

- 25.4 million gamers in France in 2009
- Biggest European market after the United Kingdom
- □ 270 M spent in France in 2009 on casual games
- □ 115 M spent in France in 2009 on mobile games
- □ 3.4 bn sector turnover in 2008
- Biggest budget in the cultural sector in France
- Headquarters of Ubisoft, Gameloft, Vivendi Universal Games and of many independent studios such as Ankama, Quantic Dream, Cyanide Studio, Monte Cristo Games, Eugen Systems and Lexis Numérique.

- Tax credit covers 20% of production costs with a maximum of □ 3 M per year.
- The RIAM network launched by the CNC and OSEO in 2007: provided support for around 15 selected projects in 2008 for a total of □ 3.9 M and □ 10 M in 2009.
- The PLAY ALL project: a game design engine and technological standard pooled among a number of middleware companies and innovating research laboratories. The budget of □ 12.9 M

spread over 24 months is jointly financed by the local authorities and the government.

- Supported by the Ministry of Culture: The Ministry is supporting the creative and educational aspects of video games with a number of initiatives.

### THE PACA\* REGION:

- 8,000 multimedia jobs including 1,200 in the video game sector
- 2,100 audiovisual and multimedia structures
- Forty or so companies set up in the region
- Marseille is the second biggest media hub in France for the audiovisual industry
- A wide range of expertise and specializations are represented in the region: home and handheld game consoles, on-line or mobile games, middleware...
- Exceptional growth in a mere 10 years

- The regional economic development plan (SRDE), by mid 2009, had created 26 certified regional hubs for interdependent economic development and innovation (PRIDES), including Pôle Sud Image and the SCS Competitive Cluster; providing opportunities for synergy (MedMultimed)
- Policies aimed at promoting the video game industry: tax relief for young innovating enterprises, interest-free loans, research tax credits representing 30% of future expenses, production tax credits representing 20% of production costs.
- Subsidies of more than 60% for R&D projects.
- PACA Labs project funding: Launched at the end of 2008, the measure provides support for projects involving the testing of technologies and digital services within the region. Eleven projects were selected the first year of which five have already contributed to financing the creation of 10 SME's and 3 university laboratories.



\*PACA: PROVENCE-ALPES-CÔTE D'AZUR

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EU top 5 place for talent \*

## THE VIDEO GAME CLUSTER



### Development studios

- **Bip Média:** An independent video game publisher and multimedia content provider based in Hyères and specialized in brain/strategy/management games and casual games for PC, Nintendo DS and Wii. Major titles: Kirikou DS and Plus Belle la Vie DS.
- **Megara Entertainment:** The first video game development studio to be set up in the center of Cannes works closely with the Institut des Jeux Vidéo de Cannes and other regional partners.
- **Exkee:** A video game studio founded in 2003 and based in Marseilles, Exkee develops games for PC, next gen consoles and mobile terminals. It has many titles to its credit, including ColorZ, voted best French game of 2009.
- **Lexis Numérique:** Lexis is one of the major independent game studios in Europe with more than five million games sold worldwide through leading partners such as Ubisoft, Electronic Arts and Disney. The company has topped the sales charts several times with its children's games, including the Uncle

Albert and Horsez series. The Experiment won the Grand Prix at the 2007 Montreuil festival. The studio has been praised by the American and European press as being one of the most creative studios in the world.

- **C4M:** A publisher of games and applications for mobile terminals on multiple platforms: Java, BREW, Symbian, Blackberry and iPhone. Major titles: Plus Belle la Vie, Playtomo. The company had a 2008 turnover of €510,000.
- **Gargul Studio:** One of France and Europe's main publishers of games designed for advertising purposes, with clients such as Gulli TV, Canal J and Tiji. Founded in 2003, the studio has seen steady growth of 50% per year, in terms of both turnover and staff numbers.

### Technology companies

- **Stonetrip:** developers of the only multimedia, interactive, multi-user, cross-platform, 3D real-time application development platform.
- **Autodesk Inc.:** Autodesk is the world's 5th largest publisher of design and engineering software for PC's, laptops and Internet and the oldest after Microsoft. Its software is used by more than 9 million people in 160 countries. Its turnover in 2008 was almost €1.8 bn.

### Distributors

- **Indeego Games:** Develops PLAYINDEE™,

the Web 2.0-based platform for collaborative game design, aimed at stimulating new content and using a digital distribution channel, while retaining a pay-per-play structure. The company supports the development of independent games in Europe.

### Environment

- **Belle de Mai Media Park:** The Belle de Mai Media Park, through the Marseille Innovation enterprise incubator and the National Multimedia Incubator, supports and assists innovating and high-tech start-ups to set up in the region.
- **Pôle Sud Image:** Its primary missions are to oversee the running of the regional network of professionals in the visual arts sector, to provide support for the most buoyant sectors in terms of job creation, such as 3D animation.
- **Gamesud:** regional association of Provence based video game studios.
- **IMGA:** In 2004, NCC Partners created the International Mobile Gaming Awards (IMGA), an international competition for mobile games. Today, the IMGA is the biggest competition of its type in the world with hundreds of companies from 42 countries taking part in 2008.
- **Playground Project:** In 2009, NCC's Maarten Noyons launched a new concept, the PLAYGROUND project, both a festival and a platform for creating geo-location games.

## Marseilles – At the heart of the Lyons – PACA – Montpellier triangle

Marseilles and its immediate region are closely tied into an inter-regional network that includes two other important players in the video game sector in France, Lyons and Montpellier. As a result, Marseilles has been able to develop a triangular system of connections that has allowed it to take advantage of the other two hubs' experience and status.

The Lyons region is represented by Lyon Game, an association of video game publishers set up to promote the industry and by Imagine, the competitive cluster based in the Rhône-Alpes region.

Montpellier is the home of Ubisoft, France's largest game studio. Furthermore, the Languedoc-Roussillon region has received an added impetus with the setting up of PixLR, an association regrouping digital technology and video professionals in the region.

\* Source Financial Times, March 2010

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