

REGIONAL MAPPING ITALY

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COUNTRY AND SOURCE INFORMATION

Country/Region: ITALY

Name Surname reference person:

Giovanni Vaia

References about existing mappings:

Io sono Cultura 2018

Name of Data Source:

ISTAT - National Institute of Statistics

NACE

Organization delivering data:

Symbola

UnionCamere

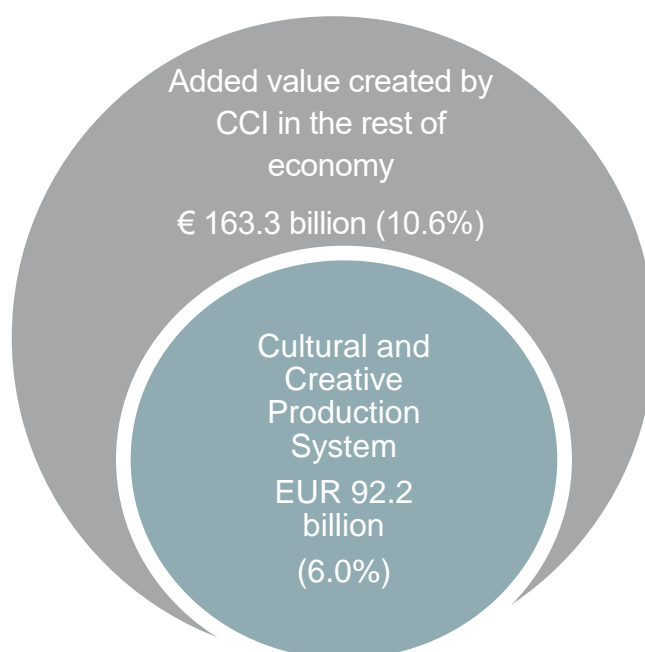
Ministero dei beni culturali e della attività culturali e del turismo

Essnet culture - European Union



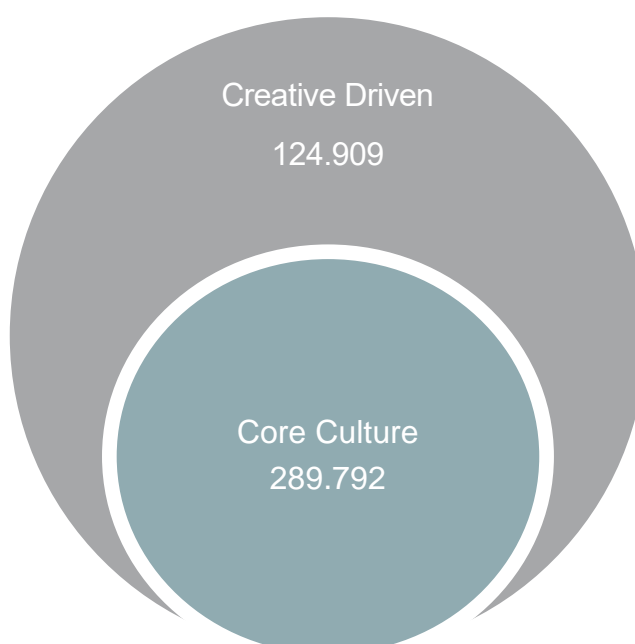
MAIN QUANTITATIVE DATA COLLECTED

Economic value of the CCI Sector:



Total cultural chain
 € 255.5 billion of added value
 (16.6% added value created by CCI in total economy)

N. of companies in core CCI Sector



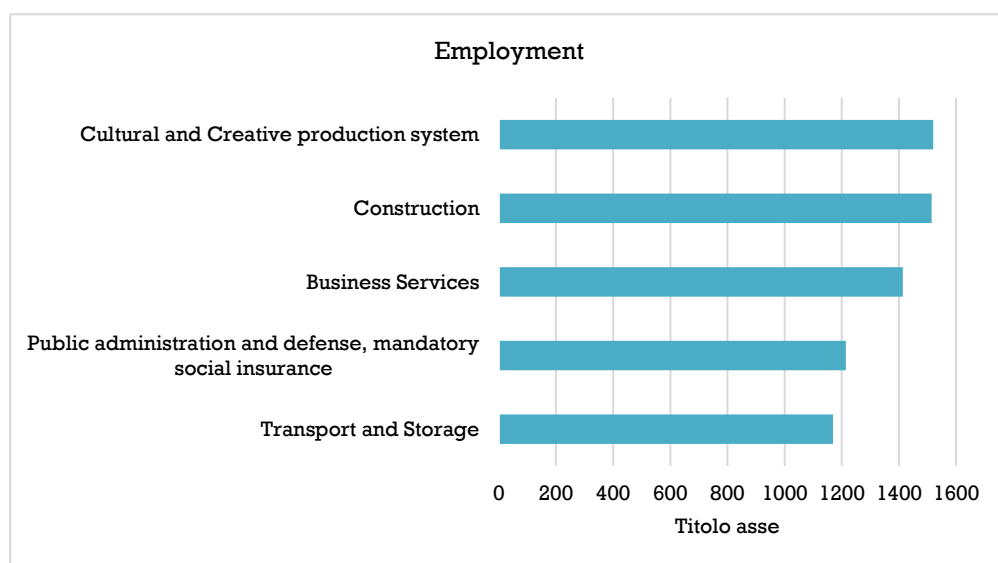
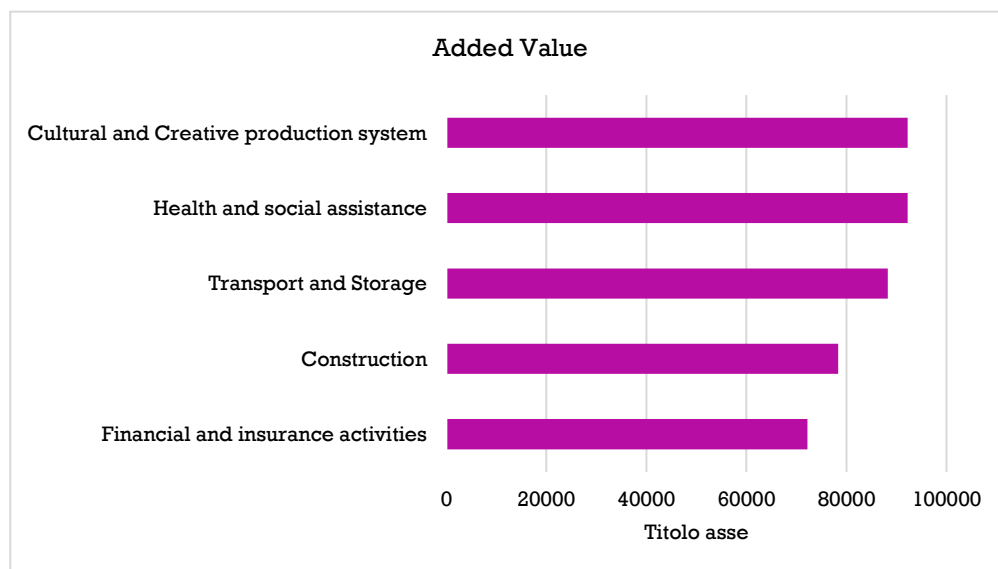
414,701 companies
 (6.7% of the total)



Distribution of CCI Sector

SECTORS	ADDED VALUE			EMPLOYMENT		
	Absolute value (mln euro)	% on total ICC	% on total economy	Absolute value (thousands)	% on total ICC	% on total economy
CREATIVE INDUSTRIES	13.404,8	14,5	0,9	260,8	17,2	1,0
Architecture and design	8.594,8	9,3	0,6	153,2	10,1	0,6
Communication	4.810,1	5,2	0,3	107,6	7,1	0,4
CULTURAL INDUSTRIES	33.608,5	36,4	2,2	488,3	32,1	1,9
Cinema, radio, tv	7.466,5	8,1	0,5	56,7	3,7	0,2
Videogames and software	12.011,9	13,0	0,8	163,6	10,8	0,7
Music	320,7	0,3	0,0	6,1	0,4	0,0
Publishing and printing	13.809,3	15,0	0,9	261,9	17,2	1,0
PERFORMING ARTS	7.932,9	8,6	0,5	140,8	9,3	0,6
HISTORICAL-ARTISTIC HERITAGE	2.823,7	3,1	0,2	51,0	3,4	0,2
CORE CULTURE	57.769,9	62,6	3,8	940,9	61,9	3,7
CREATIVE DRIVEN	34.479,9	37,4	2,2	579,3	38,1	2,3
CULTURAL AND CREATIVE INDUSTRIES	92.249,8	100,0	6,0	1.520,2	100,0	6,1

Comparisons with others economic sectors (2017)





Contributions by geographical areas 2017

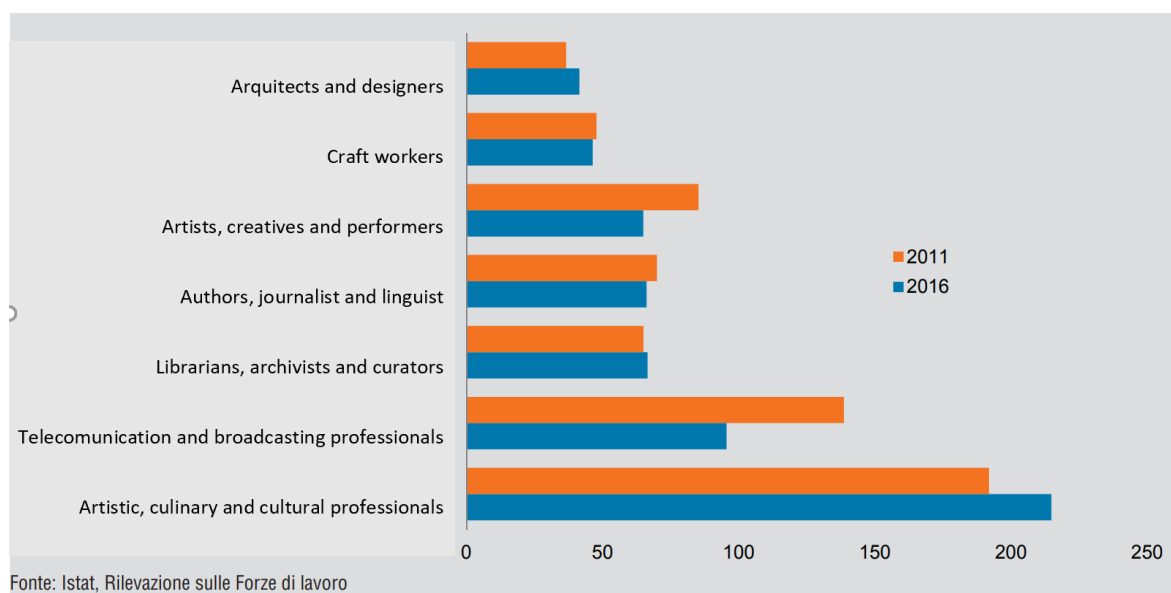
REGION	ADDED VALUE		EMPLOYEMENT	
	Mln euros	% on total CCI economy	Thousands employees	% on total CCI economy
Piemonte	8.160,6	6,9	130,0	6,8
Valle d'Aosta	279,6	6,9	4,5	7,2
Lombardia	24.154,4	7,2	350,1	7,4
Trentino-Alto Adige	1.916,9	5,1	33,1	6,1
Veneto	7.588,3	5,3	135,2	6,1
Friuli Venezia Giulia	1.790,6	5,3	33,4	6,2
Liguria	1.752,1	4,0	31,7	4,6
Emilia-Romagna	7.726,1	5,5	134,0	6,3
Toscana	6.060,8	5,9	104,4	6,2
Umbria	1.009,5	5,2	21,8	5,7
Marche	2.263,0	6,1	43,4	6,5
Lazio	14.888,5	8,8	204,6	7,7
Abruzzo	1.217,1	4,2	23,9	4,5
Molise	251,0	4,4	5,0	4,6
Campania	4.447,4	4,6	81,1	4,3
Puglia	2.756,1	4,2	59,9	4,3
Basilicata	381,4	3,5	8,3	4,1
Calabria	958,6	3,2	21,6	3,4
Sicilia	3.298,3	4,2	67,8	4,3
Sardegna	1.349,7	4,4	26,3	4,3
Nord-Ovest	34.346,7	6,8	516,3	7,0
Nord-Est	19.021,9	5,4	335,7	6,2
Centro	24.221,8	7,3	374,3	7,0
Mezzogiorno	14.659,5	4,2	294,0	4,2
ITALIA	92.249,8	6,0	1.520,2	6,1



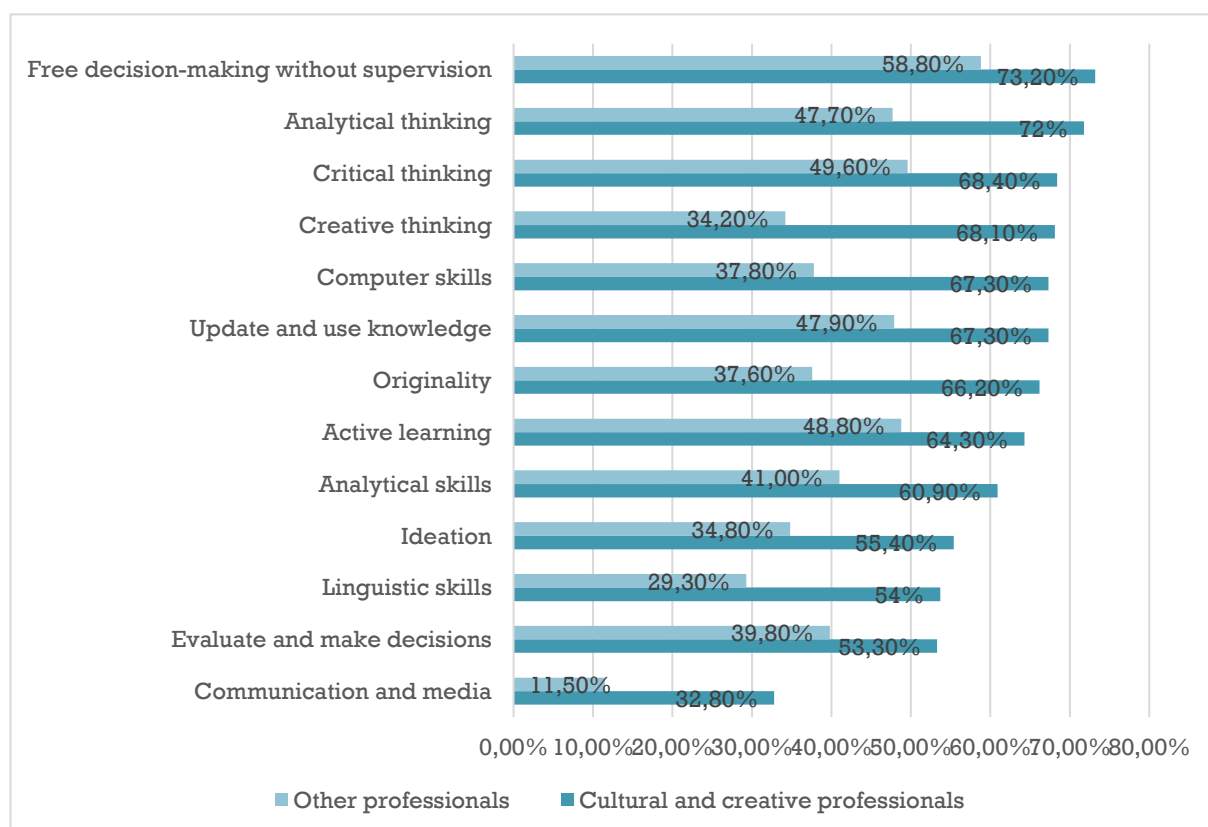
Professional categories involved (2017)

- **Tot. N° 612.000 CCI professionals**

- **310.000 CCI professionals working in CCI Sector**



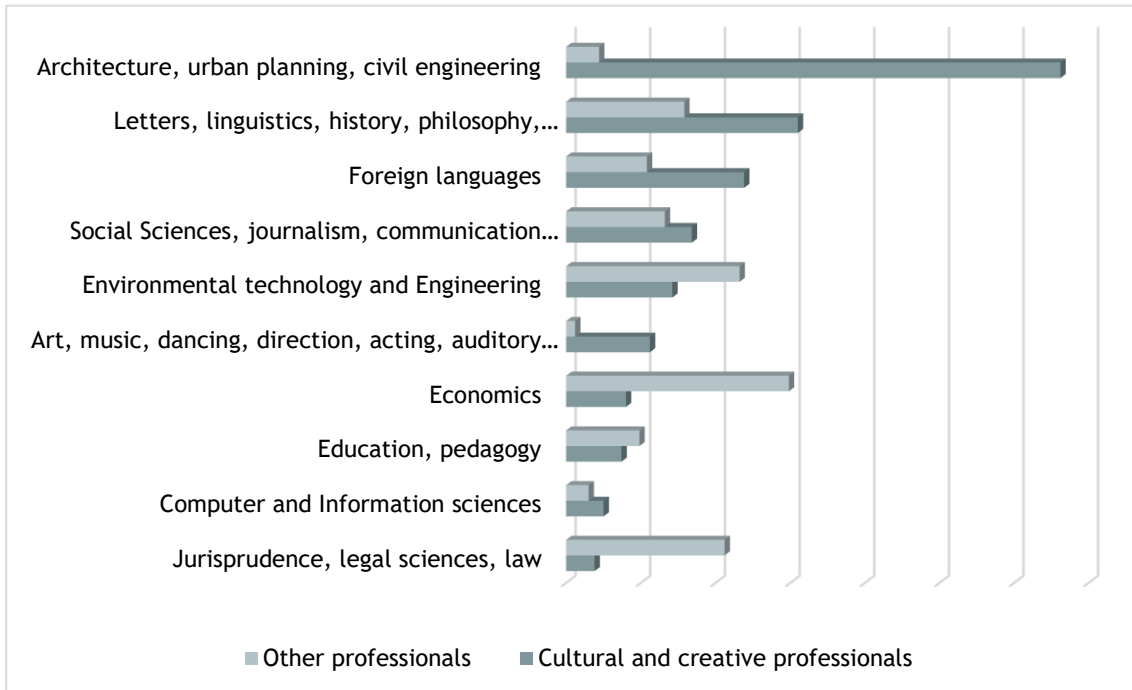
Skills and competences involved (2017)



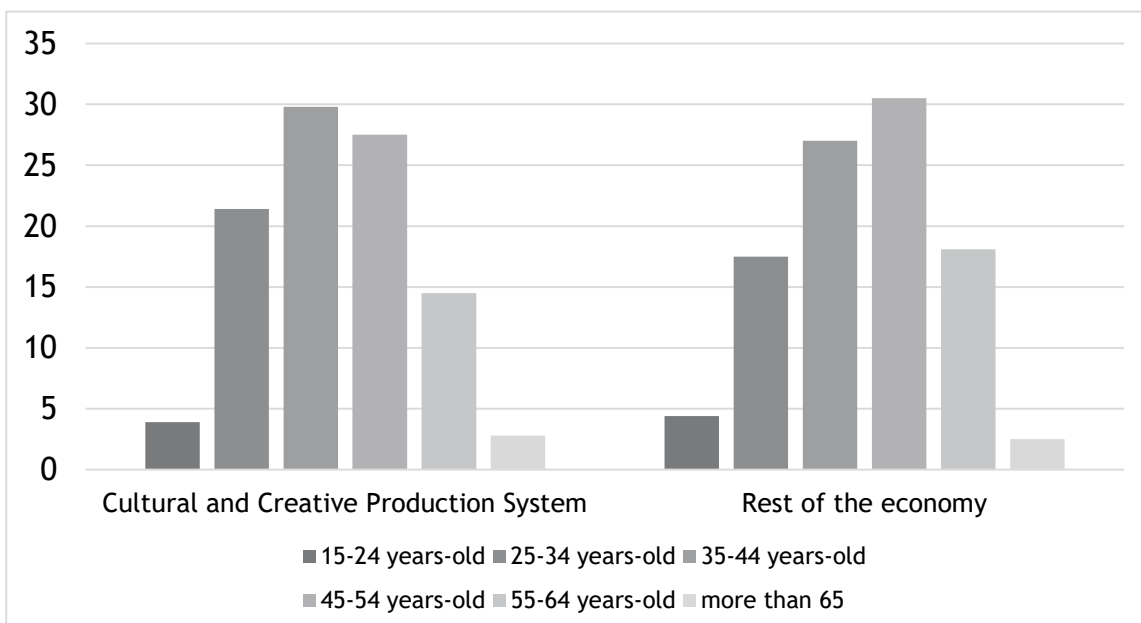


Main KPIs in CCI Sector (2017)

More qualified employment

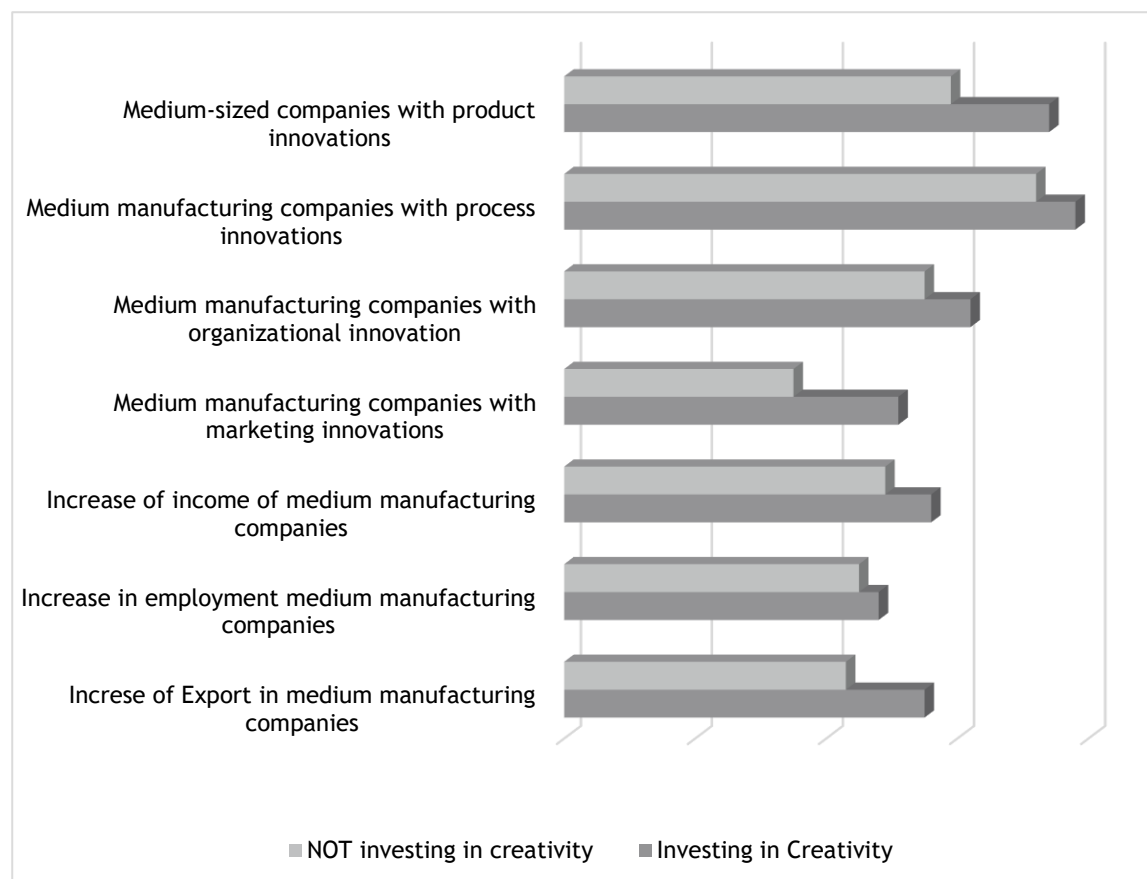


Youth employment





Companies investing in creativity



CCI CLASSIFICATION AREA # 1

1st AREA

Activities of preservation and enhancement of historical and artistic heritage (museums, libraries, archives, monuments)

Sector	Indicators
Artistic and Historical Heritage	<ul style="list-style-type: none"> - Added Value bln euro: 2,8 - % on total economy: 3,1
91. Artistic and Historical Heritage	91.01 Libraries and archives: n° 498 <ul style="list-style-type: none"> - Income 79.150 mln - Employees 2.427
	<ul style="list-style-type: none"> - 91.02 Museums: n° 205 - Income 143.997 mln - Employees 2.011
	<ul style="list-style-type: none"> - 91.03 Management of historical sites and monuments: n° 191 - Income 227.198 mln - Employees 5.186
	91.04 Activities of botanical gardens, zoos and nature reserves: n° 126 <ul style="list-style-type: none"> - Income 105.071 mln - Employees 993
	TOTAL <ul style="list-style-type: none"> - N° of enterprises 1.020 - Income 555.416 mln - Employees 10.617



CCI CLASSIFICATION AREA # 2

2nd AREA

Non-reproducible activities of cultural goods and services, defined as Performing arts and visual arts, synthesized with everything that revolves around the shows live (theater, concerts, etc.).

Sector	Indicators
Performing arts	-Added Value bln euro: 7,9
90. Creative, artistic and entertainment activities	<ul style="list-style-type: none"> - 9001: artistic representations: n° 10.497 - Income 861.568 mln - Employees 12.767
	<ul style="list-style-type: none"> - 9002: support activities for artistic representations: n° 4568 - Income 714.807 mln - Employees 8.404
	<ul style="list-style-type: none"> - 9003: artistic and literary creations: n° 13.145 - Income 735.671 mln - Employees 16.182
	<ul style="list-style-type: none"> - 9004: management of artistic structures (theatres, musical concerts, etc.): n° 308 - Income 188.194 mln - Employees 1.550
	<p>TOTAL</p> <ul style="list-style-type: none"> - N° of enterprises: 28.518 - Income 2.500.240 mln - Employees 38.903



CCI CLASSIFICATION AREA # 3

3rd AREA

Activities related to the production of cultural goods and services according to a logic industrial repeatability, defined as cultural industries (cinema, radio - TV; video games and software; automation, publishing and printing; music);

Sector	Indicators
59: Movies, videos, tv programs, music and sound recording and production activities.	<ul style="list-style-type: none"> - N° 7.266 - Income 4.7 bln - Employees 25.079
60: Radio and television programming and transmission activities	<ul style="list-style-type: none"> - N° 1.546 - Income 6.7, bln - Employees 14.272
581: Edition of books, periodicals, software and other publishing activities	<ul style="list-style-type: none"> - N° 4.770 - Income 7.6 bln - Employees 31.941
324: video games and toys production activities	<ul style="list-style-type: none"> - N° 359 - Income 674.869 mln - Employees 2.662
6201: production of software not connected to the edition	<ul style="list-style-type: none"> - N° 20.289 - Income 19.8 bln - Employees: 142.004
	TOTAL N° of enterprises: 34.230 Income : 39.5 bln Employees: 215.958



CCI CLASSIFICATION AREA # 4

4th AREA

Creative industries related to the world of services (advertising, communication, architecture and design, crafts,)

Sector	Indicators
Creative industries	- Added Value bln euro: 13,4
631: Data processing, hosting and related activities, web portals	- N° 32.058 - Income 9.2 bln - Employees 113.155
7021: public relations and communication	- N° 6.820 - Income 997.996 mln - Employees 11.296
711: architectural and engineering studios activities	- N° 194.129 - Income 19.6 bln - Employees 253.060
7311: advertising agencies	- N° 14.918 - Income 6.2 bln - Employees 52.803
7410: specialized design activities	- N° 30.828 - Income 3.7 bln - Employees 49.292
7420: photographic activities	- N° 14.078 - Income 752.912 mln - Employees 18.878
	TOTAL - N° of enterprises: 292.832 - Income: 37.7 bln - Employees:



CCI CLASSIFICATION AREA # 5

CCI Professions	N° or % of cultural and creative professionals in non core cultural
Designers	13%
Architects	7%
Graphic designers	6,5%
Photographers	6,2%
Event organizers	5%
Communicators	5%
Videomakers	3%
Artists	3%
Author, writers, storytellers	1,5%
Video Producers	1,5%
Musicians	0,5%
Actors, performers	0,5%
TOTAL of CCI professionals in non cultural sectors:	47%



STAKEHOLDERS

ORGANIZATION	KEY STAKEHOLDER	MAIN ACTIVITY/MISSION
Regione veneto	Project Manager Agenda Digitale	Develop Digital Innovative And Creative Culture
University of padova	Professor Of Management - Cci	Develop Research And Academic Knowledge On Cci
fondazione nordest	Senior Researcher	Study And Analyse The North-East Of Italy Social And Economic Context
galileo visionary district	Project Manager	Support The Competitive Development Of Local Sme
italypost-wefactory	Founder	Communicate The Entrepreneural Culture To A Large Public
Cre-ta	Director	Create A Community Of Innovative And Creative Professional
CINI foundation	Director	Improve The "Knowledge Of The World" - And The Reflection On Political And Social Current Events That Promotes Multidisciplinary Research
makerfaire	Art Director	Maker Faire is the Greatest Show (and Tell) on Earth—a family-friendly showcase of invention, creativity and resourcefulness.
ALTAGAMMA	Senior Researcher	Since 1992, Altagamma mission is to increase the competitiveness of the High-End industry, contributing to Italy's economic growth.
FONDAZIONE CAMPIELLO	Piero Luxardo	Established in 1985 by Veneto industrialists with the aim of contributing to the promotion and dissemination of Italian culture through the realization of events, conferences, and organizes and manages the Literature Price Campiello.



QUALITATIVE DATA COLLECTED

3 or more key concepts or sentences defining cultural and creative industry sector:

1. "Cultural and creative activities are related to the ability to transform art into a new innovative product."
2. "Every company is a cultural good. Culture in this area is not the classic definition like art, cinema and entertainment, it is an handcraft world."
3. "Cultural and Creative business, considering its link to AVM, are a set of activities which work in collaboration with the manufacturing world."
4. "Creative activities are mainly services related to design, architecture or communication."
5. "Cultural activities are related to arts and cultural heritage."
6. "From the point of view of my organization the cultural and creative economy is a new economy, born from the union between art and technology"

3 or more categories used for classifying cultural and creative economic activities

1. "Creative activities are companies that can identify and produce some are different and disruptive new ideas."
2. "In our workspace we put together professionals from marketing and communication, storytelling, architects, engineers, stylists, agri-food marketing, photographers, a movie director, event organizer, illustrators.
Here, there is everything for creative activities."
3. "We use ISTAT classification to classify economic activities. It is not easy, because it is so much formal, but at least we have access to real data."

3 or more categories used for classifying creative driven industries

1. "Creative Driven Industries are companies that can valorise the ability to introduce and propose innovations, through creative activities, not necessarily linked to design, but also to marketing and communications. The main goal is to creatively transform the value they offer to our environment."
2. "Manufacturing industry is creative driven. Manufacturing processes are cultural and creative, in our observatory, even the most advanced processes are strictly cultural and creative. Not only textile or wood furniture, which are the most suitable in this definition, but sectors such as engineering, automotive. We have seen extremely advanced processes which are also creative."



3. “Creative driven is the definition of the second step we propose in Cre-ta: not only we bring together creative professionals in the same space in order to generating new ideas, we also provide them with technology, prototyping and, above all, with contacts with local manufacturing companies, thanks to which creative ideas become scalable objects and products.

We are therefore talking about a creative element, which becomes artisanal and then becomes manufacturing. This is a real creative-driven process.”

4. “Manufacturing industry traditionally it is not included, except in a few cases, in a creativity or cultural classification. Nevertheless, in our Italian reality, all manufacturing companies are actually very creative. Made in Italy world doesn’t produce simple goods or products, it produces cultural goods. This is the creative driven definition.”

5. “Creative driven economic activities represent the new horizon of contamination between culture and business. It represents a new type of fruition of culture, beyond the current model (cultural and creative as direct use, or events related to art and heritage).”

Most important/strategic and developed cultural areas in the region / nation

1. Conservation of cultural heritage, especially in terms of history of art.
2. Food and Agrifood
3. Artisans’ tradition
4. Made in Italy design

Main programmes or projects developed in the CCI sector at a regional national level:

Most important national or regional CCI support policies mentioned (project name, main activities, main partners, main investments,...)

1. Fablab - 2015 - Veneto Region, 18 fablab centres, university, training institution, citizens, businesses; 2 mln euros funding; Activities which involve citizens and businesses with the aim of fostering the development of a digital culture in citizens and supporting Veneto businesses in their Digital Transformation.
2. InnovationLab - 2019 - linked to the fablab project; 7 mln funding
3. POR FESR 2014-2020 is a plan for social and economic growth in the sectors of industrial development, the digital agenda, the environment and innovation. 600 mln funding; Regione Veneto, Italian state, EU, cities administrations in 4 helix approach.



4. The Veneto Art Superintendence Programme which map and give life to corporate museums.

Most important programs/project promoted by the institutions in CCI Sector, describe briefly:

1. Programme of training and support activities to CCI and creative driven experiences (for ex. Scuola Italiana Design, Politecnico Calzaturiero, Altagamma educational programmes, etc.)
2. Programme of communication and network creation between the CCI and creative driven industries and the large public
3. Project for a community of creative professional, giving them a technological and educative support to reach the local manufacturing companies and make ideas new products.
4. Programme for companies' innovation and digitalization made by creative and cultural values.

3 or more goals expected in the project realization.

1. To create innovative competitive advantage for CCI and creative driven industries.
2. To create culture and awareness about real innovation concept, technology and creativity.
3. To communicate and create networks and contexts for economic, social and cultural development.

3 or more goals reached

1. Creation of an ecosystem of CCI businesses (Wefactory, Altagamma, Cre-ta ecosystem, etc.)
2. Meeting and training opportunities for different stakeholders on cultural, creative and innovative issues. (FabLab a scuola, Wefactory, MakerFaire)
3. Bring technology and innovation in schools, business and public sector. This goal is still work in progress in the dimension of creating culture and awareness on the creative use of these tools for cultural development.

3 or more definition of their collaboration (positive/negative)

1. Multistakeholder networks features the most projects in CCI sector.
2. The Veneto region projects are based on the 4-helix approach. The subject involved are: Public Sector, University, businesses and active citizenship and their positive collaboration is the first need for its success.
3. Only one interviewee claims the difficulty of working within a network composed by very different stakeholders due to the lack of clear common goals.



3 or more cultural or creative processes identified in Advanced Manufacturing Industries

1. Most of the interviewees declare that AVM are protagonist of cultural and creative processes thanks to their ability to develop products which are in fact cultural and creative goods.
2. Some of the interviewee state about the central role played by digitalization and industry 4.0 in generate more innovation in creative and cultural processes within AVM.
3. The entry of artists into companies, surpassing even the most accepted presence of designers. Many advanced manufacturing companies in the technology sector in particular are creating residency programs for artists (along with engineers, analysts, etc.) who are very fruitful for their innovation processes.

3 or more CCI programs/project which cooperate with Advanced Manufacturing Industries (briefly described) or motivation to not cooperate.

1. The most important programme which interviewees identified as cooperating with AVM is InnovationLab and the POR Fesr related to digital innovation. They see a natural link between innovation and digitalization and Creative driven processes within AVM.
2. Among those who do not see cooperation projects for CCI with AVM, the motivation given concerns a lack of understanding and long-term planning within the programmes.



Best practices

Punto Soave is a start up born with Cre-ta 5 years ago which had a great story of growth. It begun with the idea of a designer and a chef with no expectation but much competences, study and enthusiasm. They create customized dishes for starred restaurant, representing artistically their interpretation of recipe stories and traditions. After 5 years they produce personalized and artistic dishes for the majority of starred restaurants in Europe.

They have interacted for a long time with the network of creative professionals in a co-working space. Than they connected with ceramic producer, and it has been the most important relationship to give more tangible value to their idea. And last, but not least, they have been very close to restaurateurs, they studied a lot about them and listened to them.

It is a good practice because it is a successful case of two young but good professionals, which had a crazy idea where cultural aspects and creativity were mixed in a perfect way with local manufacturing context.

Bonotto is a Veneto textile company which made the artistic value of the product its strenght. Bonotto is a case where we can find elements of both luck and quality: the founder was an art collector and he managed to combine this personal interest with his business.

The entrepreneur was sensitive and open-minded; he gave different meaning to their textile products. He understood the importance of a differentiated production line when globalization changed the textile market by using technology and especially art perspective. Bonotto represents the real meaning of Italian cultural process as pragmatic purpose inside the product.

Via dei birrai 32 is a micro brewery placed in Valdobbiadene, the famous prosecco area. it is a business impressive because they made a marriage among beer, creativity and aesthetics work perfectly.

They invented impressive multifunctional and sustainable packaging as clocks, kennels for cats, compass for architect's design, smartphone supports, etc.

They also created an app and a gamification tool, where they interact directly with costumers. And last, but not least, they built an innovative hop cultivation in that region and created a refined taste recipe for the product: beer.

They thus emerged in a dense market where it is very difficult to stand out from the others. They have grown economically, and they are a reference in the sector thanks to a totally unconventional design process.

They represent the positive output of the network between creative professionals and public funding projects.



This is a good practice because it represents the perfect combination of creativity, digital innovation designed for the public and a quality product.

Challenges

A challenge reported is to not totally differentiate art and creativity from business, as a first class or second class type of culture. Creative people should consider AVM as a part of culture too, to find a proper dialogue between these two environments.

In many cases, creativity is considered a cost by SMEs, that are often focused on the production aspect. Companies should understand the value of creativity, in terms of profits too, and realize that design and ideation are processes that have the same importance as the production itself.

In Veneto region creative processes are carried out by fragments. Cultural entrepreneurship is fragmented, not cohesive. Individual companies make their own piece, but without territorial connection.

The lack of metropolitan areas in Veneto region. Creativity and metropolitan context merge perfectly: metropolitan areas are natural networks for exchange knowledge, ideas and the perfect place for contacts between diversities

The main difficulty about implementing real innovative projects within CCI and AVM is the public sector resistance to change.

Opportunities

A great opportunity is represented by the successful connection between creative professionals and local manufacturing centres or districts, made by SMEs, which are our economic context, and our lifeblood.

Nowadays we are living in times of social, cultural and economic changes, which are showing us a lot of new opportunities, starting from technology and communications. The world is now an interconnected network of people, who can constantly communicate without time or space limitations. I think that Italy should try to stand out in the global markets, and valorise the “made in Italy” label, spreading it all over the world.

The great tool of structural funds made for the benefit of territorial subjects allows the Veneto region to make the difference.



<p>The greatest opportunity in the Stuttgart Region is to have the CCI recognized as an equally important industry e.g. as the automotive sector, and have creatives being involved in all steps of the value chain. This would also be the ideal goal.</p>