

CREADIS3
Interreg Europe



**CREADIS3:
MAPPING 1 -
COMPETENCES
& MAPPING 2 -
REGIONAL
CREATIVE
ECOSYSTEM.
EMILIA -
ROMAGNA**



**Servizio Ricerca, Innovazione,
Energia ed Economia Sostenibile.
Regione Emilia-Romagna
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1/ INTRODUCTION

This report is one of the first outputs of the CREADIS3¹ project, realized by Emilia-Romagna Region, as project partner.

The main purpose of the report is the carrying out of a mapping analysis on the regional ecosystem supporting cultural and creative industries (CCIs). It aims at identifying which actors are involved in the policies supporting culture and creativity, in which way and to what extent, allowing to have a view on the regional ecosystem around CCIs.

The mapping analysis has been carried out following the methodology suggested by the Lead Partner² (LP) of the CREADIS3 project, agreed by all project partners, which consists in 2 phases:

- *Mapping phase 1 - Competences*, for the identification of bodies involved in cultural and creative policies, in the various administrative levels.

¹ CREADIS3 "Smart Specialisation Creative Districts" (INTERREG EUROPE Programme 2014-2020) www.interregeurope.eu/creadis3
² Lead Partner: Regional Government of the Basque Country.

- *Mapping phase 2 - Regional Creative Ecosystem*, for the identification of the regional ecosystem around CCIs.

This report is based on the information available at the moment of its drafting, mostly obtained from the public entities included in the analysis and stakeholders involved, also through web sites and official regional bulletins.

Local stakeholders, involved in CREADIS3 activities, have contributed to the mapping analysis, by giving a support in the collection of the necessary information and data.

The report starts with a brief overview about the current context in Emilia-Romagna, in the culture and creativity sectors, before developing the mapping analysis.

Development culture and creativity in emilia-romagna

The cultural and creative industries (CCIs), in Emilia-Romagna, represent a key component of the regional economy, not only because of their positive dynamic, but also due to the growth in employment and the demand from consumers towards a growing regard for the quality of life and leisure-time activities. It's a system that incorporates a higher quality and range of skills, full of cultural and artistic options and spaces for young people to get together, those which attract a large amount of creative talent.

In the national framework, the region is highly established in terms of cultural consumption per head and, moreover, has great significance in the production of cultural activities and skills.

Emilia-Romagna has an important artistic and architectural heritage, with a significant presence of historical theatres, museums, libraries, art collections and cultural associations.

Among the urban poles, Bologna presents a high concentration of cultural and creative competencies thanks to the presence of humanistic faculties and academies, schools of arts and conservatories, network of theatres, museums and other cultural poles. Bologna hosts the oldest University in Europe, the University of Bologna, founded in 1088.

The region has an acknowledged tradition in music (musicians like Verdi, Toscanini, Pavarotti, but also contemporary pop and folk singers) and in cinema (Fellini, Bertolucci, Antoniani, neo realistic directors), as well.

Bologna has been recognized as European City of Culture in 2000 and City of Music UNESCO. Ravenna is considered as the Capital of the Bizantine art.

2/ THE CULTURAL AND CREATIVE INDUSTRY IN EMILIA-ROMAGNA

The cultural and creative industry in Emilia-Romagna is made up of:

- Core Sectors: Cultural Activities, Arts and Entertainment, Media and Creative Industries.
- Creative Services.
- Artistic Craftsmanship.
- Fashion Industry.
- Furniture.
- Food.
- Sectors as high tech and “High-End”, when in their products or processes there is a high content of creativity.

The following data (table 1) are extracted from the ERVET Report (*Orange Economy*, 2018) which used various sources (*Istat, Asia, Smail*), providing recent estimates in terms of Local Units and Employees in the core sectors. However, the weight of the CCI must be considered underestimated particularly in the field of historical, artistic and cultural heritage because public employees are not included.

TABLE 1

Local Units and Employees of the CCI core and sub-category sectors - Emilia-Romagna

THE STANDARD SECTORS OF CULTURAL AND CREATIVE INDUSTRIES - DATA 2017	LOCAL UNITS	EMPLOYEES
CULTURAL, ARTISTIC AND ENTERTAINMENT ACTIVITIES	3.178	13.759
PERFORMANCES AND OTHER ARTISTIC AND CREATIVE ACTIVITIES	2.087	7.881
RECREATIONAL AND AMUSEMENT ACTIVITIES	965	5.216
ARTISTIC AND CULTURAL HISTORICAL HERITAGE	126	662
MEDIA AND CULTURAL INDUSTRIES	3.826	17.139
CINEMA AND AUDIOVISUAL	796	2.582
PUBLISHING AND PRINTING INDUSTRIES	1.109	5.299
PRODUCING RELATED TO THE PRESS SECTOR	1.557	8.255
MUSIC	225	380
TV RADIO BROADCASTS	139	623
CREATIVE SERVICES	21.575	46.688
ARCHITECTURE	4.079	4.560
ENGINEERING/DESIGN STUDIO	6.168	8.187
DESIGN MODA AND INDUSTRIAL	2.023	3.650
GRAPHIC DESIGN AND	1.342	2.120
PHOTOGRAPHY	1.090	1.756
COMPUTER SCIENCE, SOFTWARE AND CONSULTING	3.446	16.619
ADVERTISING AND COMMUNICATION	3.427	9.797
HANDCRAFTING	582	2.473
TOTAL PRODUCTION CCI	29.161	80.059
DISTRIBUTION OF ARTISTIC HANDCRAFT	2.902	5.013
DISTRIBUTION OF CULTURAL PRODUCTS	2.619	4.283
TOTAL SECTOR CCI STANDARD (CORE)	34.682	89.355

SOURCE: DATA SMAIL 2017 AND ASIA 2015, ELABORATIONS MADE BY ERVET REPORT 2018

These data show that the largest branch of the core sector is “Creative Services” with 46.7 thousand employees in architecture, design and design, photography, software, gaming, IT consulting, advertising and communication. This is followed by “Cultural and artistic activities” sector with 13.7 thousand employees.

The CCI companies of the Emilia-Romagna have a small size: over 12.8 thousand companies, about 60%, have only one employee; over 3,4 thousand companies have only two employees; 2,3 thousand companies are characterized by the presence of 3-5 employees. The sectors “Distribution of CCI products” and “Artistic craftsmanship” are much smaller companies, while “Information technology, software, consulting, advertising, publishing, communication” are generally the sectors with 5 employees or more.

Culture and creativity in the Emilia-Romagna S3 strategy

With the definition of the regional S3 strategy, in 2013-2014, culture and creativity have been included among regional S3 sectors. A specific working group was set up, with businesses, innovators and experts to define a strategy to develop the sector, launching new policies and supporting actions.

In the framework of the regional S3 strategy, CCIs are considered as emerging clusters with a high innovative potential and employment for the future (Priority B of the Emilia-Romagna S3 strategy).

CCIs represent one of the fields in which to invest for generating new industries and new employment opportunities, especially for young and cultural people.

CCIs aim at generating new knowledge intensive businesses, supporting creativity and non-technology innovation in traditional industries (like fashion, tourism, furniture, ...), supporting the modernisation and efficiency in public institutions for culture.

Emilia-Romagna works for combining cultural, technology and management capabilities, by reinforcing the business dimension and connecting CCIs to other industries and with tourism.

To this end, the regional CCI Clust-ER has been set up, as one of the 7 associations, so-called “S3 Clust-ERs”³, based on the S3 priorities. The CCI Clust-ER promotes a more efficient dialogue and more integration among research labs, innovation centers and SMEs, in the CCI field.

³ Clust-ER Associations are public-private partnerships among research laboratories, innovations centers, industries (market leaders, SMEs, startup), education and training systems, that share ideas, skills, tools, and resources to support the competitiveness of the most important production systems in Emilia-Romagna.

The regional S3 includes CCIs as one of the priority, articulated in 3 specific fields, *Smart Cultural Heritage, New Business Models, Digital Communication*, as shown in the following picture:



Emilia-Romagna as partner in the CREADIS3 project

Emilia-Romagna Region will benefit from the implementation of the CREADIS3 project, boosting the potential of the CCIs, thus contributing to territorial and regional economic development.

The main objective of the CREADIS3 project, indeed, is to align territorial public policy agendas to support the development of more efficient CCI policies in territories, aiming to generate innovation and economic development in European regions.

In Emilia-Romagna, CCIs are essential in reinforcing the regional emerging culture and creative clusters which have a high innovative potential and employment for the future. There is a great interest in CCIs, especially by young and qualified people who, however, have often temporary employment. At the same time, there is a low entrepreneurial attitude in CCIs.

Thanks to the CREADIS3 project, Emilia-Romagna expects the activation of relationships, over time, between CCIs and other industries. Moreover, it will benefit from the development of new policies and tools to help young or potential CCI entrepreneurs in reaching international markets, through the establishment of consolidated networks among experienced organizations.

At the same time, Emilia-Romagna will benefit from others' experiences through cross collaboration, joint activities to be carried out, synergies between the different authorities in charge of CCIs and the transfer of best practices.

This is fully in line with the CREADIS3 priority theme *1 - Improving institutional governance*, and its sub-objective *c - Support international territorial attractiveness to increase investment in the creative potential of the region and retain talents/creative entrepreneurs*, led by Emilia-Romagna Region.

3/ THE MAPPING ACTIVITY IN THE CREADIS3 PROJECT

The Mapping activity is a very useful tool for carrying out an in-depth analysis about the regional ecosystem supporting CCIs. It allows to identify which actors are involved in the policies supporting culture and creativity, in which way and to what extent.

At the same time, possible gaps come to light, in a double meaning. First of all, in terms of sectors covered or not by CCI supporting policies and, furthermore, in terms of actions carried out or not.

Following the methodology suggested by the LP, and agreed by all project partners, the mapping activity has been carried out in 2 phases:

Mapping phase 1 - Competences

Each partner has identified bodies involved in cultural and creative policies, in the various administrative levels.

Mapping phase 2 - Regional Creative Ecosystem

Each partner has identified the regional ecosystem around CCIs, including support policies and tools, stakeholders involved and services provided.

Specifically, the analysis is aimed at identifying:

- CCI sectors on which doing the mapping.
- Administration levels involved in CCI supporting policies.
- CCI development actions.

As results of phase 1, the mapping gives evidence about the linking between CCI sectors and administration levels, showing if sectors are covered or not by public bodies and to what extent.

Phase 2 points out which actions and/or initiatives are developed by the different administration levels.

The mapping activity carried out by Emilia-Romagna Region

3.1. Mapping Phase 1 - Competences

Phase 1 of the mapping activity started with the **selection of CCI sectors** upon which carry out the analysis:

Cultural activities, arts and entertainment

- Live Show and other creative and artistic activities (Performing Arts).
- Recreational and amusement activities (Entertainment).
- Preservation and fruition of historical, artistic and cultural heritage.

Media and cultural industries

- Cinema and audiovisual
- Publishing, printing and related sectors
- Music (registered)
- Radio and television broadcasts
- Distribution of cultural products

Creative services

- Architecture
- Design
- Photography
- Information Technology (consulting software)
- Advertising and communications

Artistic craftsmanship

- Handcraft
- Trade of art goods
- Distribution of artistic and craft products

Fashion System

- Textiles and clothing

- Leather and footwear
- Other products fashion
- Fashion distribution

Home - Furniture

- Furniture and Kitchens
- Ceramic
- Other objects
- Distribution of furniture products

Food

- Production of pasta
- Production of wine and other alcohols

“High End” sectors

- Automotive
- Boating
- Tourism system
- Perfumes and Cosmetics
- Taste Industry and Creative catering

Then, the analysis continued with the **identification of the administration levels** involved in cultural and creative policies.

To this end, we focused the analysis on 2 public bodies:

- **Regional Government of Emilia-Romagna.**
- **Municipality of Bologna.**

These are the 2 main bodies for which we have proven evidence about their involvement in CCI policies. They have a significant role in the development of support policies for CCIs, through different departments dealing with initiatives and/or plans related to culture and creativity.

Concerning the Regional Government of Emilia-Romagna, the following 4 departments are mainly involved in cultural and creative policies:

- Department of Culture and Youth Policies.
- Department of Industry and Innovation.
- Department of Tourism.
- Department of Education.

Regarding the Municipality of Bologna, the following 3 departments participate in CCI policies:

- Department of Culture.
- Department of Economic Development and Tourism.
- Department of Youth Policies.

The mapping analysis has been carried out taking into account in which CCI sectors each department (regional or local) works with direct and worthy actions and/or initiatives.

In the Tables of competences per administration level used (tables 2 and 3), the level of involvement of each department has been marked by X, according to their weight in CCI support policies.

Summing up what results from the analysis at **regional level** (as shown in table 2):

- *Cultural and Historical Heritage, Cinema and Audiovisual, Music and Radio and Tv broadcasts*, are sectors in which 3 concerned departments of the Regional Government are involved.
- For the majority of sectors, 2 concerned departments of the Regional Government are involved.
- *Entertainment, Publishing and Printed media, Advertising and Communication, Craftsmanship*, are sectors supported by only 1 department of the Regional Government.
- The *Department of Industry and Innovation* and the *Department of Education* are those with a major involvement in CCI actions and/or initiatives.

Considering the **Municipality of Bologna** (as shown in table 3):

- Performing arts, Cinema and Audiovisual, Publishing and Printed media, Music and Radio and Tv broadcasts are sectors in which all 3 concerned departments are involved.
- Entertainment, Cultural and Historical Heritage, Photography, are sectors in which 2 concerned departments are involved.
- The other sectors are supported by only 1 department.

TABLE 2

Mapping 1: Regional Government of Emilia-Romagna

CCI SECTORS	EMILIA-ROMAGNA REGIONAL GOVERNMENT			
	CULTURE AND YOUTH POLICIES	INDUSTRY AND INNOVATION	TOURISM	EDUCATION
PERFORMING ARTS	X			X
ENTERTAINMENT			X	
CULTURAL AND HISTORICAL HERITAGE	X		X	X
CINEMA AND AUDIOVISUAL	X	X		X
PUBLISHING AND PRINTED MEDIA		X		
MUSIC AND RADIO AND TV BROADCASTS	X	X		X
ARCHITECTURE		X		X
DESIGN		X		X
PHOTOGRAPHY	X		X	
INFORMATION TECHNOLOGY		X		X
ADVERTISING AND COMMUNICATION			X	
CRAFTSMANSHIP		X		
DISTRIBUTION OF CULTURAL AND CRAFTS PRODUCTS		X	X	
FASHION		X		X
CERAMIC AND FURNITURE		X		X
FOOD PRODUCTS AND INDUSTRY		X		X
TOURISM SYSTEM			X	X

TABLE 3
Mapping 1: Municipality of Bologna

CCI SECTORS	MUNICIPALITY OF BOLOGNA		
	CULTURE	ECONOMIC DEVELOPMENT AND TOURISM	YOUTH POLICIES
PERFORMING ARTS	X	X	X
ENTERTAINMENT	X	X	
CULTURAL AND HISTORICAL HERITAGE	X	X	
CINEMA AND AUDIOVISUAL	X	X	X
PUBLISHING AND PRINTED MEDIA	X	X	X
MUSIC AND RADIO AND TV BROADCASTS	X	X	X
ARCHITECTURE		X	
DESIGN		X	
PHOTOGRAPHY	X	X	
INFORMATION TECHNOLOGY		X	
ADVERTISING AND COMMUNICATION		X	
CRAFTSMANSHIP		X	
DISTRIBUTION OF CULTURAL AND CRAFTS PRODUCTS		X	
FASHION		X	
CERAMIC AND FURNITURE		X	
FOOD PRODUCTS AND INDUSTRY		X	
TOURISM SYSTEM		X	

3.2. Mapping Phase 2 - Regional Creative Ecosystem

Phase 2 of the mapping focuses on what **types of action** are covered by the administration levels involved in CCI support policies. As a result, the regional ecosystem around CCIs is identified, including support policies and tools, stakeholders involved and services provided.

The following are the main agents involved in the region:

- Research laboratories of the so-called High Technology Network
- Technopoles
- Innovation centers
- Incubators
- High education centers
- Open labs
- Co-working spaces
- SMEs

The so-called Clust-ER dedicated to CCIs has been founded, as a different and more structured way of collaboration between research and enterprises. They are permanent working groups where laboratories and enterprises share project ideas, skills, tools, and resources to support the competitiveness of the most important production systems in Emilia-Romagna.

Following the methodology suggested by the LP, the analysis has been carried out considering the actions identified in the EU Policy Handbook “How to strategically use the EU support programmes, including Structural Funds, to foster the potential of culture for local, regional and national development and the spill-over effects on the wider economy?” (April 2012):

- Competence development, in terms of creation, management and access to financing.
- Creation, mainly intended as support to creation/production.
- Entrepreneurship, in the sense of support to firms.
- Innovation, in terms of supporting programs for innovation.

- Growth.
- Financing, considering calls for public funding.

Considering the 2 administration levels analyzed in the phase 1 of the mapping, the Regional Government of Emilia-Romagna and the Municipality of Bologna, the involvement of each department has been marked by **X**, 1 or 2 according to their involvement in each of the actions identified.

Due to the information available, the mapping comprises the aggregate of sectors, for each action.

Starting from the analysis of what is carried on by the **Regional Government of Emilia-Romagna**, all the above-mentioned actions are covered (as shown in table 4):

- All 4 concerned departments develop supporting programmes for Innovation and calls for public Financing related to CCI sectors;
- Creation is mainly supported by both the Department of Culture and Youth Policies and the Department of Industry and Innovation;
- Support to firms, that is Entrepreneurship, is mostly ensured by the Department of Industry and Innovation, but also by the Department of Culture and Youth Policies and the Department of Tourism;
- The Department of Education has the main role in supporting actions related to Competence development;
- Actions related to Growth are those less developed.

Regarding the **Municipality of Bologna** (as shown in table 5):

- All 3 concerned departments work for supporting Creation and develop calls for Financing CCI sectors.
- The Department of Economic Development and Tourism is actively involved in all concerned types of action and mainly in supporting firms Entrepreneurship; moreover, it's the only department supporting programmes for Innovation.
- The Department of Youth Policies covers all the actions except Innovation.

TABLE 4

Mapping 2: Regional Government of Emilia-Romagna

ACTIONS	REGIONAL GOVERNMENT OF EMILIA-ROMAGNA			
	CULTURE AND YOUTH POLICIES	INDUSTRY AND INNOVATION	TOURISM	EDUCATION
COMPETENCE DEVELOPMENT	X		X	XX
CREATION	XX	XX	X	
ENTREPRENEURSHIP	X	XX	X	
INNOVATION	X	XX	X	X
GROWTH		X	X	
FINANCING	X	X	X	X

TABLE 5

Mapping 2: Municipality of Bologna

ACTIONS	MUNICIPALITY OF BOLOGNA		
	CULTURE	ECONOMIC DEVELOPMENT AND TOURISM	YOUTH POLICIES
COMPETENCE DEVELOPMENT		X	X
CREATION	XX	X	X
ENTREPRENEURSHIP		XX	X
INNOVATION		X	
GROWTH		X	X
FINANCING	X	X	X

4/ CONCLUSIONS


The mapping analysis has been very useful as tool for having an overview about the current situation of the regional ecosystem supporting CCIs.

It makes known the presence of gaps which occur both in relation to sectors and to actions and/or initiatives developed by the different administrative departments.

In Emilia-Romagna, despite the great interest in culture and creativity by public bodies at any administrative level (Regions, Provinces, Municipalities), there is not yet complete coordination among resources and actors, as well as a difficulty in recognizing the CCI sector as a whole.

There is not a unique and agreed way to perceive the creativity and the various administration levels are involved in CCI supporting policies in a slightly fragmented way.

There is not a medium-long term development plan, for CCI sectors, in the region.



There is a great need for increasing managing capabilities and integration of creative, technology and management competencies.

Regional administrations are strongly interested in including the creative sector in regional development policies, looking to the needs of CCIs. In the region, there are good opportunities for CCIs because of the high demand for culture and calls for tenders.

There are also good opportunities of integration with other industries strongly needing creative inputs (automotive, fashion, ceramics, tourism, food).

Moreover, the setting up of the regional Clust-ER CREATE will support CCIs. It is an association of public and private bodies (companies, research centres and training institutions) that share skills, ideas and resources to support the competitiveness of the CCI sector. The Clust-ER promotes a more efficient dialogue and more integration among research labs, innovation centers and SMEs, in the CCI field.

Emilia-Romagna Region will certainly benefit from the mapping analysis undertaken in the framework of the CREADIS3 project, thanks to the vision outlined. This will help in defining new and efficient programs and initiatives supporting CCIs.