

**CREADIS3**  
Interreg Europe

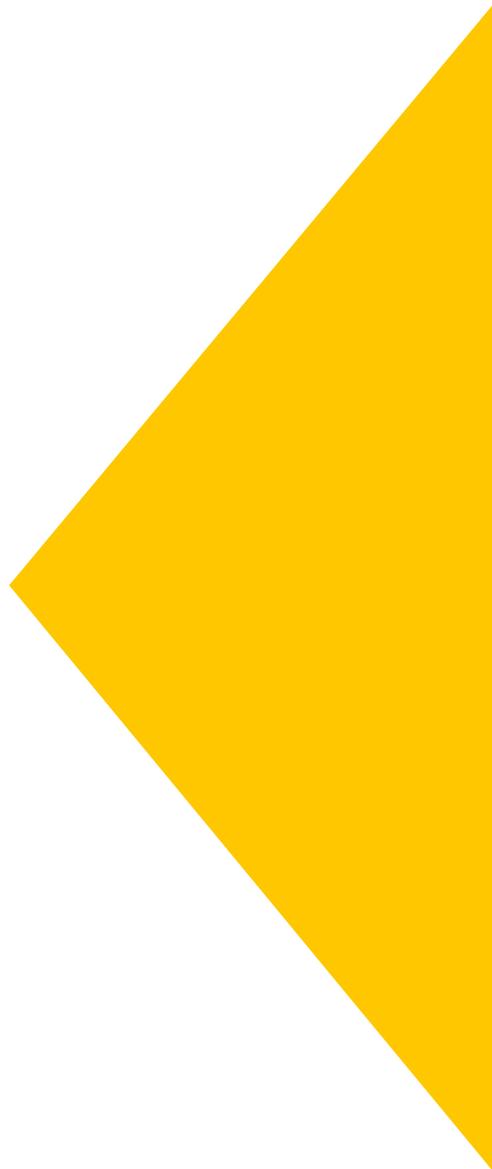


# **CREADIS3: REPORT ON TERRITORIAL DIAGNOSIS. EMILIA-ROMAGNA**



**Emilia-Romagna Region**

June 2018



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# 1/ GENERAL INTRODUCTION

## 1.1. The Project

### **Introduction**

CREADIS3 – “Smart Specialisation Creative Districts” is an INTERREG EUROPE project, focused on Cultural and Creative Industries (CCIs), with a partnership coming from 6 EU countries: Regional Government of the Basque Country; Regional Council of Central Finland; Emilia Romagna Region; Public Service of Wallonia; Ministry of Culture of the Slovak Republic; Region of Western Greece.

## **Main objective of CREADIS3**

The main objective of CREADIS3 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.

It is declined in 6 sub-objectives, along 2 priority themes:

- Improving institutional governance.
- Boosting CCIs contribution to regional development.

## 1.2. The partner and the project

### **Main objective within the project**

Emilia-Romagna Region will benefit from the implementation of CREADIS3, boosting the potential of CCIs, contributing to territorial and regional economic development. CCIs are essential in reinforcing the regional emerging culture and creative clusters, which have a high innovative potential and employment for the future.

Emilia-Romagna Region 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 entrepreneurs in reaching international markets, through the establishment of consolidated networks among experienced organizations.

At the same time, the Region 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 good practices.

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### **History of the report**

First version: January – February 2018

Updated version: August – October 2018

## 2/ REGIONAL CONTEXTS

### 2.1. Territory's general profile

Emilia-Romagna is a region located in the north-eastern part of Italy. It has 9 provinces (Piacenza, Parma, Reggio-Emilia, Modena, Bologna, Forli-Cesena, Ravenna, Ferrara, Rimini) and 331 Municipalities. It has a good strategic position thanks to an efficient infrastructure system that connects it with central Europe and with northern and southern Italy. Transversally the “Via Emilia” crosses the main regional logistic nodes. The high-speed railway line connects Bologna and Reggio Emilia with Turin, Milan, Florence, Rome, Naples. There are three international airports, several interports and the port of Ravenna.

The production structure is characterized by small and medium-sized enterprises (SMEs) and the leading sectors are: automotive; mechanical engineer; automation, robotics; naval construction; ceramic; food; biomedical; tourism. Leader brands in the automotive industry, such as Ferrari, Ducati, Lamborghini and Maserati are made in Emilia-Romagna. The estimated growth of gross domestic product for 2017 was 1.8% and the expected growth in 2018 should be slightly higher, equal to 1.9%. In 2017, total employment reached the level of 1,973 thousand units, about 16,000 more employees than in the same period of 2016 (*Ervet 2018 study on ISTAT and Prometeia data*). Emilia-Romagna is confirmed as the first Italian region by growth rate together with Lombardy. The number of companies is about 406 thousand units and in the last five years those with over 250 employees have increased by 5.9%.

The fashion industry is the sector most in trouble, but the Region has activated with various support actions.

The tourist industry recorded 54 million admissions in October, up 6.2% compared to 2016.

Bologna (capital of Emilia-Romagna) hosts the oldest University of Europe, the University of Bologna, founded in 1088. With 3 other universities in Modena and Reggio Emilia, Parma, Ferrara and with the presence of the Polytechnic in Piacenza of the Catholic University (both Milanese), the region offers a wide range of academic courses, from art to humanistic to scientific subjects.

The region hosts many highly specialized research centers, including the National Research Council (CNR), with 11 scientific institutes and other national research organizations in various fields (physics, nuclear physics, astrophysics, nanotechnology, energy and environment, health, etc).

The standard of living in Emilia-Romagna is rated among the highest in Italy and in Europe, thanks to high quality health care services, sustainable urban structures, services, large presence of voluntary organizations, numerous natural parks, a rich artistic and cultural heritage, excellent food and wine traditions (high number of PDO and PGI products such as Parmigiano Reggiano, Prosciutto di Parma, balsamic vinegar of Modena, etc.).

Bologna, together with Florence and Milan, is the smart city of the future according to the 2017 ICity Rate report implemented by FPA1. Emilia-Romagna shows a high level of quality of life according to the OECD report on the Better Life Index (BLI) published in 2015.

<sup>1</sup> <https://profilo.forumpa.it/wp-content/uploads/2017/10/I-city-rate-2017-sintesi.pdf>

**TABLE 1****Main socio-economic and socio-demographic data in Emilia-Romagna**

Surface area	22.452,78 Km2
Population (01/01/2018 ISTAT data)	4,452,629 inhabitants
Population density	198.31 inhabitants/Km2
GDP (2016)	€ 153,927.1 mln
GDP per capita (2016)	€ 34,602
Unemployment rate (2017)	6.2%
Employment rate (2016) (% working age population)	68.4%
Number of Firms (September 2017)	406,092
Exports (2017)	€ 58 billions

**SOURCES**

ISTAT (ITALIAN NATIONAL INSTITUTE OF STATISTICS)

EUROSTAT- REGIONAL LABOUR MARKET STATISTICS

EUROSTAT- REGIONAL SCIENCE AND TECHNOLOGY STATISTICS

ERVET, ORANGE ECONOMY IN EMILIA-ROMAGNA, 2018. REWORKED VERSION ON ISTAT, ASIA AND EUROSTAT DATA OF THE EMILIA-ROMAGNA UNIONE CAMERE STUDY CENTER.

## 2.2. Territory's CCI Profile

Emilia-Romagna has an important artistic and architectural heritage with a significant presence of historical theaters, museums, libraries, art collections and cultural associations. The IBC of the Region - Institute for Cultural and Natural Artists - has created a catalog that can be consulted online where there are sites and works of art.

Each capital has its specific characteristics: Ferrara was elected City of the Renaissance; Ravenna is a city of mosaics and is characterized by eight paleochristian monuments declared Unesco heritage; Modena, symbol of Romanesque art, has three UNESCO sites; Bologna, city of Music and European Capital of Culture in 2000, is an active creative center; Faenza has the International Museum of Ceramics; Cesena hosts the Malatestiana Library, a place included in the UNESCO World Memory Register; Parma has had the Unesco recognition of the Creative City of Gastronomy, to cite only some of the excellences of the territory.

The region has a recognized tradition in music (musicians like Verdi, Toscanini, Pavarotti, but also pop and folk contemporary singers) and in the cinema (Fellini, Bertolucci, Antonioni, neo-realistic directors).

The cultural and creative sectors represent an important component of the territorial economy, in fact the regional administration has included them among the sectors of the Smart Specialization Strategy.

Table 2 shows a general overview of the CCI sectors present in Emilia-Romagna according to a wider framework, as suggested by the European Commission in the 2016 document *Boosting the competitiveness of cultural and creative industries for growth and jobs*. It includes in addition to the core CCI sectors, artistic craftsmanship, fashion manufacturing (Fashion district), furniture, the cultural driven food sectors, tourism, the distribution of products and services, the *High-tech* sectors and the so-called *High-End* or rather sectors characterized by a strong creative element in products or processes (in Emilia-Romagna is very important sector as automotive or gastronomy).

In Table 3, some data refer only to the CCI standard sectors in terms of local units and employees. In 2017 in Emilia-Romagna, the weight of the core CCI standard sectors on the total regional economy can be estimated at 5.4% in terms of value added and 7.6% in terms of unit of work.

**TABLE 2**

Sectoral scheme of economy of creativity: standard CCI sectors, material culture, other sectors of impact

### ECONOMY OF CREATIVITY - A WIDER FRAMEWORK

STANDARD CCI SECTORS				MATERIAL CULTURE			
CORE SECTORS	CORE SECTORS						
Cultural activities, arts and entertainment	Media and creative industries	Creative Services	Artistic craftsmanship	Fashion System	Home - Furniture	Food	Sectors "High End" (European Commission 2016)
Live Show	Cinema and audio-visual	Architecture	Handcraft	Textiles and clothing	Furniture and Kitchens	Production of pasta	Automotive
Recreational and amusement activities	Publishing, printing and related sectors	Design	Trade of art goods	Leather and footwear	Ceramic	Production of wine	Boating
Preservation and fruition of historical, artistic and cultural heritage	Music (registered)	Photography		Other products fashion	Other objects	Productions of PDO and PGI products	Tourist System
	Radio and television broadcasts	Information technology (consulting software)					Perfumes and Cosmetics
		Advertising and communication					Taste Industry and Creative catering
	Distribution of cultural products		Distribution of artistic and craft products	Fashion distribution	Distribution of furniture products		

#### INNOVATIVE HIGH-TECH COMPANIES

SCHEME FROM ERVET 2018 "ORANGE ECONOMY IN EMILIA-ROMAGNA" REPORT ON ATECO, ISTAT DATA

**TABLE 3**

Local units and employees for macro-categories of the standard CCI sectors - Emilia Romagna (2017)

	NUM. LOCAL UNITS	NUM. EMPLOYEES	% LOCAL UNITS	% EMPLOYEES
<b>CULTURAL ACTIVITIES, ARTS AND ENTERTAINMENT</b>	3.178	13.759	9,2%	15,4%
<b>MEDIA AND CREATIVE INDUSTRIES</b>	3.826	17.139	11,0%	19,2%
<b>CREATIVE SERVICES*</b>	21.575	46.688	62,2%	52,3%
<b>ARTISTIC CRAFTSMANSHIP/HANDCRAFTING</b>	582	2.473	1,7%	2,8%
<b>TOTAL PRODUCTION CCI</b>	<b>29.161</b>	<b>80.059</b>	<b>84,1%</b>	<b>89,6%</b>
<b>DISTRIBUTION OF CRAFTSMANSHIP PRODUCTS</b>	2.902	5.013	8,4%	5,6%
<b>DISTRIBUTION OF CULTURAL PRODUCTS</b>	2.619	4.283	7,6%	4,8%
<b>TOTAL CCI SECTORS</b>	<b>34.682</b>	<b>89.355</b>	<b>100%</b>	<b>100%</b>
<b>% TOTAL EMILIA-ROMAGNA</b>	7,6%	5,4%		

SOURCES: FROM THE ERVET REPORT 2018, ERVET ELABORATIONS ON SMAIL DATA (2017) AND ASIA DATA \* (2015)

\* NOTES ABOUT SOURCES

SMAIL DATA (2017) UNIONECAMERE EMILIA-ROMAGNA. THESE MEASURE THE EXTENT OF LOCAL ACTIVE UNITS AND ASSOCIATIONS WITH EMPLOYEES.

DATA ASIA (2015) REGISTER FREELANCE PROFESSIONALS WITHOUT ANY KIND OF STAFF, SUCH AS THE CATEGORIES OF ARCHITECTS, DESIGNERS, DESIGNERS, ECT WITH VAT NUMBER.

Emilia-Romagna is a region characterized by many festivals, events, exhibitions, cultural events, so it enjoys an excellent Cultural Vibrancy (“The Cultural and Creative Cities Monitor”, Edition 2017). There is a favorable environment of production and cultural consumption and a good attitude to create networks among the actors.

The cinema sector has about 50 festivals, the most popular (year 2018): the XXXVI edition of Bellaria Film Festival dedicated to independent cinema; the XXXII edition of Cinema Ritrovato in Bologna (unicum in the programming of unpublished and / or restored films); the 19th edition of the Future Film Festival of International Animation and New Technologies; the XIV of the Biografilm Festival dedicated to biographies and life stories. Many festivals and exhibitions also in other sectors, for example: Festival of European Photography in Reggio Emilia; Bologna Design week; International Exhibition of Ceramics; Fruit Exhibition Event dedicated to independent publishers; Festival of Philosophy; International Festival of contemporary dance in Ferrara; the Busker Festival in Ferrara (international festival of street musicians).

Emilia-Romagna is the largest district in Europe in terms of “entertainment”: water parks, wildlife, sports attractions (Atlantica, Safari Ravenna, Acquafan).

Moreover, in many cities, abandoned spaces are being restored in centers of cultural and creative production. In the way emerged realities with a significant social and cultural impact: “Grisù Factory” in Ferrara, “Kilowatt” and “Greenhouses of the Gardens” in Bologna, “Indecisi Spaces” in Forlì, “Rete Almagià” in Forlì, “La Polveriera” in Reggio Emilia.

Bologna was recognized as European City of Culture in 2000 and City of Music UNESCO. The concentration of people, universities and spaces for creativity make Bologna an attractive cultural pole.

Emilia-Romagna is appreciated by all the world for food quality: 45 products with DOP and IGP certification, top chefs such as Massimo Bottura, critics such as Pellegrino Artusi, FICO Eataly World (the largest agri-food park in the world, in Bologna), the production of Parmigiano Reggiano and Prosciutto di Parma (Parma is the first Italian city declared World Heritage Site for its gastronomy).

Furthermore, the Region historically boasts excellence in the fashion and tailoring sector: Giorgio Armani, the Acqua di Parma, MaxMara and Marina Rinaldi, Blumarine and Twin Set, Ada Masotti (La Perla), Elisabetta Franchi, Bruno Magli and Margherita Furlanetto (Furla) and others.

### **CCI within the RIS3 strategy**

With the definition of the Regional S3 strategy, in 2013-2014, CCI has been included among regional S3 sectors. A specific working group on CCI 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, CCIs are considered as emerging clusters with a high innovative potential and employment for the future (Priority B of regional S3). CCIs represent one of the fields in which to invest for generating new industries and new employment opportunities, especially for young and cultural people.

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”<sup>2</sup>, 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.

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:



<sup>2</sup> 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.

# 3/ CCIS SECTOR ANALYSIS: EVOLUTION AND CURRENT SITUATION

## 3.1. Evolution

With reference to the CCI sector, the commitment of the Emilia-Romagna Region has increased especially in last 10 years.

During the 90s some important regional laws were issued on CCI topics. Then, since 2008, regional policy has developed following a gradual path. Some pilot initiatives started in 2008 (like INCREDIBOL! or specific projects launched by regional departments or financed at a European level).

In 2012, the Region identified the CCIs as one of the sectors that could benefit from the regional funding programme, after the first study dedicated to this sector carried out in order to better understand and measure its characteristics.

The following is an almost exhaustive list of different plans, legislation or another key milestones of the regional CCI industry and policy.

- Regional Law n. 37/1994 “Rules on cultural promotion” (modified in 1997 and in 2002), addressed to cultural institutions, associations and cultural organizations, public and private subjects, for the diffusion, promotion and fruition of cultural activities.
- Born in 1974, and reorganized with the regional law n. 29 of 1995, the IBACN, the Institute for Artistic, Cultural and Natural Heritage of the Emilia-Romagna Region. It promotes fact-finding, operative, research activities for the enhancement of the historical and artistic heritage.
- Regional law n. 13/1999 “Rules regarding show business”, oriented to who work professionally, and for at least three years, in the fields of theater, music, dance, cinema and audiovisual. The law recognizes the live performance as a fundamental aspect of the territory, as means of artistic expression, of training, of cultural promotion, of social aggregation, and as a strategic factor of economic development.
- Regional law n. 18/2000 “Regulations on museums, libraries and archives”, for the conservation, development and promotion of cultural heritage and institutions.
- In 2007 and 2011, a 3-year agreement called GECO “Giovani Evoluti e Consapevoli”, signed between the Emilia-Romagna Region, the Ministry of Youth Policies and the Italian Ministry of Economic Development, for the promotion of youth culture, also for supporting the creative startups.
- In 2012, sectoral study “Culture and creativity - riches for Emilia-Romagna”, realized by ERVET (in-house Joint Stock Company of the Emilia-Romagna Region), with a detailed analysis of the regional CCI sector.
- In May 2012, 2 regional programs were developed, identifying CCIs among the 8 regional sectors to be supported:
  - Regional Programme for Productive Activities.
  - Regional Programme for Industrial Research, Innovation and Technology Transfer.

- Regional Law n. 16/2014 for the “Safety and Promotion of dialects in Emilia-Romagna”.
- Regional Law n. 20/2014 on cinema and audiovisual, for the promotion of cinematographic and audiovisual culture, as well as of the multimedia industry.
- Regional Law n. 3/2016 “Memory of the Twentieth Century. Promotion and support for the enhancement of the history of the twentieth century in Emilia-Romagna. “
- Regional Law n. 11/2017 “Support for local publishing”.
- Regional Law n. 2/2018 “Rules on the development of the music industry” to support the entire music supply chain: from the educational-training to the production, distribution, promotional.
- In 2018, study on the CCI Orange economy in Emilia-Romagna, realized by ERVET (in-house company of the Emilia-Romagna Region, which operates as a territorial development agency to support the Region), with collaborations from different Departments of Emilia-Romagna Region and other key actors in regional CCI sectors. It’s the updating of the first sectoral realized by ERVET in 2012 (above-mentioned).
- Web portal “Emilia-Romagna Creativa” ([www.emiliaromagnacreativa.it](http://www.emiliaromagnacreativa.it)), an integrated communication system for all the local events and projects (promoted by the Department of Culture of Emilia-Romagna Region).
- Furthermore, the Region supports culture and creativity also through youth policies (spaces for aggregation, coworking, fablabs, tools, services for the start-up, professional training); support for youth artistic production (GA / ER association); Youngercard facilities for young people up to the age of 29.
- Emilia-Romagna Region is involved in some CCI projects on European scale, in addition to CREADIS3: Chebec, Urbact, Atlas, Region Arts. Moreover, the region is leader of the network “RICC - Regional Initiative for Culture and Creativity”.

## 3.2. Current situation

CCIs have been included among the priorities of the Smart Specialization Strategy of Emilia-Romagna. The objectives of these sectors are competitive strengthening and employment growth of the regional economic system. The three areas of intervention identified are: Smart Cultural Heritage, New Business Model and Creative Processes, New Customers and Digital Communication.

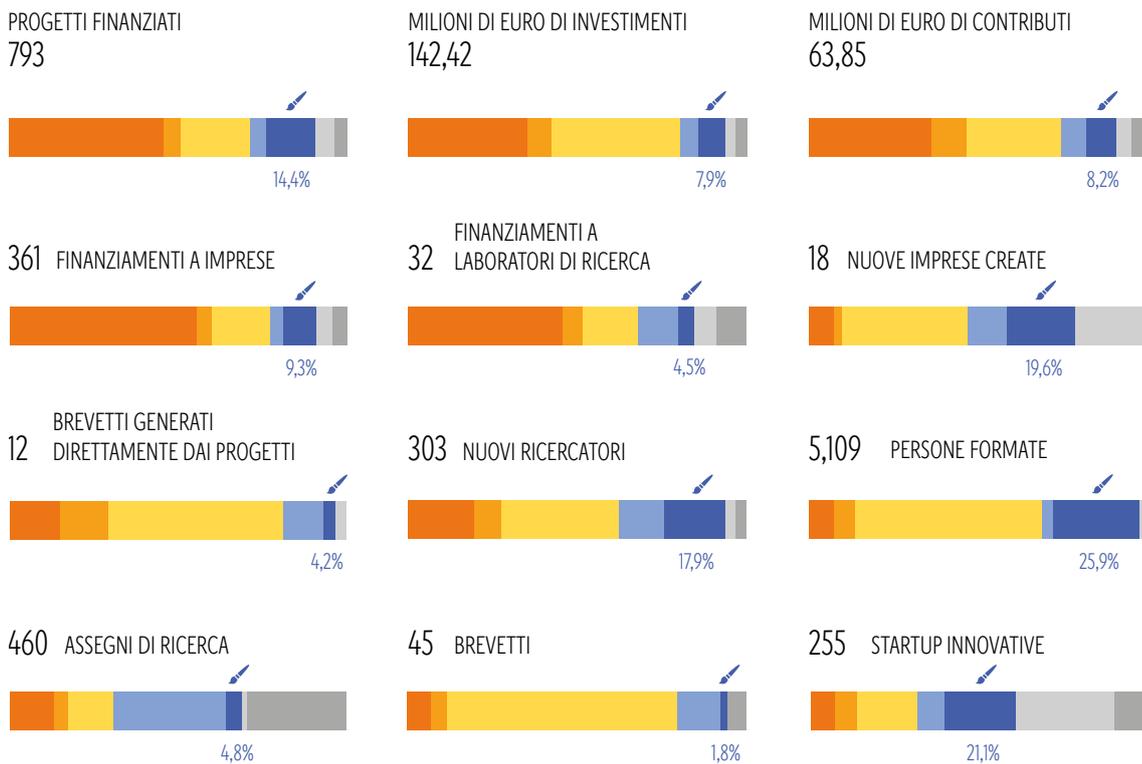
The Smart Specialization Strategy is implemented with different types of measures (policy mix) that include both direct interventions - actions that contribute to strengthening the research and innovation ecosystem – and indirect measures as those for the competitiveness of companies (productive investments and internationalization) and the territory (human capital, broadband connection and digital agenda).

The following scheme summarizes the main strategies of the Region in the CCI.

POLICY NAME	SECTOR TARGETED	MAIN FEATURES	ON-GOING STRATEGY
<b>Support for innovative start-ups</b> (ROP-ERDF 2014-2020)	The call for tenders supports companies that use advanced digital technologies for business applications in the CCI, ITC, social innovation and company	Support is for machinery, equipment, patents, rental costs, establishment costs, etc.	Yes
<b>Support for the development of infrastructures for the competitiveness of the territory</b> (Action 5.1 – Regional Operational Programme)	Multimedia Software Design	Infrastructures for co-working and project design	Yes  (It is one of the three good practices selected. Please refer to the detailed information in the Good Practice template)
<b>Innovation and diversification for SMEs</b> (Action 11.2 ROP-ERDF 2014-2020)	All CCI sectors	SMEs as beneficiaries; SMEs as providers (design, software, communication)	Yes
<b>IncrediBOL! Project</b> (promoted and coordinated by the Municipality of Bologna and financed by Emilia-Romagna Region)	CCI associations; companies; individual creative artists	Support for cultural and creative realities through services, financing, space, training, consulting, etc.	Yes  (It is one of the three good practices selected. Please refer to the detailed information in the Good Practice template)
<b>Mak-ER</b> The fabLab network of Emilia-Romagna, supported by ASTER	Digital fabrication, advanced manufacture, connection of artisan tradition and technology.	Network of laboratories, each of them has spaces, equipment, people.  Dissemination of the culture maker.	Yes

<b>Fashion Valley Project</b>	Value chain of fashion and local manufacturing	Support the fashion industry by creating a network, enhancing historical archives, mapping brands and sub-contracting.  Valorization of the history, know-how, skills of the entire fashion industry in the area.	Yes
<b>Emilia-Romagna High Technology Network and Technopoles</b>	Work and research spaces	In each capitals of the Region, there are Technopoles, research laboratories, innovation centers, which encourage the exchange of knowledge, skills, experience and promote creativity projects.	Yes
<b>ERVET - Territorial Development Agency (in-house company of the Emilia-Romagna Region)</b>	Actions in the regional planning of economic development of the territory	Technical assistance to the public administration and local authorities	Yes
<b>ASTER - Consortium for innovation and technology transfer of Emilia-Romagna</b>	A Consortium composed by Emilia-Romagna Regional Government, the six regional Universities, the National Research Council-CNR, the Italian National Agency for New Technologies, Energy and Sustainable Economic Development (ENEA), the National Institute for Nuclear Physics (INFN), the Regional Union of Chambers of Commerce, working in collaboration with regional Business Associations and Innovation Centres.	ASTER works in collaboration with enterprises, universities, research centres and institutions for the development of the innovation ecosystem of the territory.  In the CCI field, it coordinates some activities of the Clust-ER CREATE. Moreover, it manages the Emilia-Romagna StartUp platform.	Yes
<b>Clust-ER CREATE</b>	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: <ul style="list-style-type: none"> <li>- collaborative research between companies and research entities;</li> <li>- sharing of research resources and infrastructures (sharing of equipments and development of joint labs);</li> <li>- development of demonstrator and pilot plants;</li> <li>- advanced training;</li> <li>- technological transfer actions;</li> <li>- actions aimed at the internationalization;</li> <li>- technology forecasting activities;</li> <li>- creation of innovative startups</li> </ul>	Yes

Following are some data from the online monitoring platform S3 which measures the outputs of regional policies (Survey of 20 August 2018 from the website <http://www.regione.emilia-romagna.it/s3-monitoraggio/output.html>). In the picture, the blue color 2 indicate the CCI sector.



**English translation of the picture above**

793 Projects funded	142,42 millions of euros of investments	63,85 millions of euros of contributions
361 Public funding to companies	32 Public funding to research laboratories	18 New businesses set up
12 Patents generated directly by the projects	303 New researchers	5.109 Trained people
460 Research grants	45 Patents	255 Innovative startups

### 3.3. Creative Districts

The Cultural and Creative sector plays a key role in Emilia-Romagna, not only in terms of economic development and job creation, but also in terms of social innovation, urban rehabilitation and life quality improvement.

For this reason, with the definition of the Regional S3 strategy, in 2013-2014, CCI has been included among regional S3 sectors. A specific working group on CCI 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, CCIs are considered as emerging clusters with a high innovative potential and employment for the future (Priority B of regional S3). CCIs represent one of the fields in which to invest for generating new industries and new employment opportunities, especially for young and cultural people.

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

In May 2017, the Clust-ER CREATE was set up, as one of the 7 associations (so-called “S3 Clust-ERs”) based on S3 priorities. They are public-private partnerships among research laboratories, innovations centers, industries (market leaders, SMEs, startup), education and training system.

The Clust-ER CREATE promotes a more efficient dialogue and more integration in the CCI field, by sharing skills, ideas and resources to support the competitiveness of the sector. In particular, the Clust-ER CREATE promotes:

- Collaborative research between companies and research entities.
- Sharing of research resources and infrastructures (sharing of equipments and development of joint labs).
- Development of demonstrator and pilot plants.
- Advanced training.
- Technological transfer actions.

- Actions aimed at the internationalization.
- Technology forecasting activities.

4 Value Chain have been identified within the Clust-ER CREATE:

- CULT\_Tech - Technologies for digital culture.
- A.D.Di.C.T. - Advanced Design & Digital Craft Technologies.
- Fashion-ER Valley - Digitisation, sustainability, product innovation and organisational innovation and sustainability for the FASHION industry in Emilia-Romagna.
- MULTI MODEL - MULTImedia - New Business MODEL.

## 4/ CCI-S SECTOR CHARACTERIZATION

### 4.1. Stakeholders

**Stakeholders** selected by Emilia-Romagna Region, involved in CREADIS3 project, are among the “key players” within the regional CCI ecosystem.

Following the criteria for selection provided by the project lead partner, regional stakeholders have been chosen because considered as those who will be able to give a significant support for the implementation of project activities, as well as for the impact on CCI regional policies.

Concerning the different levels of administration, the regional level is the one directly involved in the development of support policies for CCIs. In particular, different departments, within the Emilia-Romagna Regional Government, deal with initiatives and/or plans related to culture and creativity. For this reason, the following are the first stakeholders involved:

- Emilia-Romagna Regional Government - Department of Economic Activities, Research and Innovation
- Emilia-Romagna Regional Government - Department of Culture
- Emilia-Romagna Regional Government - Department of Tourism and Trade
- Emilia-Romagna Regional Government - Department of Education, University and Labour
- Emilia-Romagna Regional Government - Delegation to the EU

At local level, the Municipality of Bologna has been involved for its significant role in supporting CCI policies, as also shown by the success of one important initiative, the so-called IncrediBOL! project, promoted and coordinated by the Municipality of Bologna and financed by the Emilia-Romagna Regional Government.

For the other stakeholders involved, Emilia-Romagna Region has taken into account those actors having a relevant role in the development of the regional CCI ecosystem. Among these, the following 3 actors who strictly collaborate with the Regional Government, also in the development and implementation of cultural initiatives:

- ASTER - Consortium for innovation and technology transfer of Emilia-Romagna.
- ERVET - Joint Stock Company of the Emilia-Romagna Region.
- LEPIDA – In-house Company of the Emilia-Romagna Region.

The University of Bologna has been also involved, in particular:

- The Department of Architecture.
- The Fine Art Academy of Bologna.

Among the other key players, 2 regional incubators:

- Incubator “Urban Hub Piacenza” (located in Piacenza).
- Incubator “Rimini Innovation Square” (located in Rimini).

Finally, members and representatives of the CLUST-ER CREATE have been involved.

## 4.2. Mapping 1 - Competences

**Phase 1 of the Mapping**, focused on **Competences**, has been carried out by identifying bodies involved in cultural and creative policies, in the various administrative levels.

Mapping 1 started with the selection of CCI sectors upon which carry out the analysis. Then, the analysis continued with the identification of the administration levels involved in cultural and creative policies. 2 public bodies have been taken into consideration, which are the 2 main bodies with 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.

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.

Concerning the **selection of CCI sectors** upon which carry out the analysis, in paragraph 2. B. TERRITORY’S CCI PROFILE of this report, we have indicated the sectors of culture and creativity in Emilia-Romagna: “core” sectors (Cultural Activities, Arts and Entertainment and Media and Creative Industries), Creative Services, Artistic Craftsmanship, Fashion industry, Furniture, Food, and sectors as high tech and “High-End”, when in their products or processes there is a high content of creativity.

The following data (table 4) 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 4**

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
<b>CULTURAL, ARTISTIC AND ENTERTAINMENT ACTIVITIES</b>	<b>3.178</b>	<b>13.759</b>
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
<b>MEDIA AND CULTURAL INDUSTRIES</b>	<b>3.826</b>	<b>17.139</b>
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
<b>CREATIVE SERVICES</b>	<b>21.575</b>	<b>46.688</b>
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
<b>HANDCRAFTING</b>	<b>582</b>	<b>2.473</b>
<b>TOTAL PRODUCTION CCI</b>	<b>29.161</b>	<b>80.059</b>
Distribution of artistic handcraft	2.902	5.013
Distribution of cultural products	2.619	4.283
<b>TOTAL SECTOR CCI STANDARD (CORE)</b>	<b>34.682</b>	<b>89.355</b>

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.

Surveys with the number of employees and categories give us a clearer picture of CCI companies (**Tables 5. e 6.** at the end of the Report, Chapter 9 Attachments).

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.

In the following table 7, with the same criterion (number of employees and local units), ERVET provided data on the material culture sector or cultural driven in Emilia-Romagna.

**TABLE 7**

Number of employees and local units

	LOCAL UNITS WITH EMPLOYEES	EMPLOYEES	ACTIVE COMPANIES WITH EMPLOYEES	EMPLOYEES
<b>FURNISHINGS</b>	4.147	37.920	3.410	37.918
<b>FASHION</b>	7.069	35.242	6.364	36.039
<b>FOOD</b>	880	6.494	706	6.937
<b>TOTAL PRODUCTIONS</b>	<b>12.096</b>	<b>79.656</b>	<b>10.480</b>	<b>80.894</b>
<b>FURNISHINGS DISTRIBUTION</b>	3.091	7.509	2.115	7.256
<b>FASHION DISTRIBUTION</b>	16.391	35.098	11.913	34.121
<b>TOTAL DISTRIBUTION</b>	<b>19.482</b>	<b>42.607</b>	<b>14.028</b>	<b>41.377</b>
<b>TOTAL MATERIAL CULTURE</b>	<b>31.578</b>	<b>122.253</b>	<b>24.508</b>	<b>122.271</b>

The sectors of production of material culture count in 2017 over 12 thousand local units and about 80 thousand employees. The fashion sector is undergoing major restructuring, after a period of crisis and contraction (-17% of local units) there are signs of slight recovery (the sector however remains at the center of the Region’s attention).

Summing up the data of the core sectors and those of the material culture we can count about 66 thousand units and almost 212 thousand employees.

The other sectors will not be examined here, but we provide some data on the so-called “high-end” sectors: the Cars sector has 413 companies and 14,762; Boats 138 companies and 1,472 employees; Hotels 5,266 companies and 35,906 employees and Perfums & Cosmetics 116 companies and 1,638 employees (*source: SMAIL Unioncamere 2017*).

As far as the **administration levels** included in the Mapping, the regional level has an important role in the development of support policies for CCIs. In particular, within the Emilia-Romagna Regional Government, different departments deal with initiatives and/or plans related to culture and creativity.

For this reason, the following 4 departments have been taken into account:

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

Indeed, it's inevitable to include in the analysis the Municipality of Bologna for its significant involvement in supporting CCI policies. As for the Regional Government, different departments, within the Municipality, 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.

Summing up what results from the analysis at regional level (as shown in the table 8):

- 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.

**TABLE 8**  
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 TV RADIO BROADCASTS	X	X		X
ARCHITECTURE AND ENGINEERING		X		X
DESIGN		X		X
PHOTOGRAPHY	X		X	
DIGITAL (ICT AND IT SERVICES)		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

Considering the **Municipality of Bologna** (as shown in the table 9):

- *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 9**

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	X
CULTURAL AND HISTORICAL HERITAGE	X	X	
CINEMA AND AUDIOVISUAL	X	X	X
PUBLISHING AND PRINTED MEDIA	X	X	X
MUSIC AND TV RADIO BROADCASTS	X	X	X
ARCHITECTURE AND ENGINEERING		X	
DESIGN		X	X
PHOTOGRAPHY	X		X
DIGITAL (ICT AND IT SERVICES)		X	
ADVERTISING AND COMMUNICATION		X	
CRAFTSMANSHIP		X	
DISTRIBUTION OF CULTURAL AND CRAFTS PRODUCTS		X	
FASHION		X	
CERAMIC AND FURNITURE			
FOOD PRODUCTS AND INDUSTRY		X	
TOURISM SYSTEM	X	X	X

### 4.3. Mapping 2 - regional creative ecosystem

**Phase 2 of the Mapping** focuses on what **types of action** are covered.

To this end, following the methodology suggested by the CREADIS3 lead partner, 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.**
- **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 **Emilia-Romagna Regional Government**, all the above-mentioned actions are covered (see table 10):

- 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 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.

**TABLE 10**

Mapping 2: Regional Government of Emilia-Romagna

ACTIONS	EMILIA-ROMAGNA REGIONAL GOVERNMENT			
	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

Regarding the **Municipality of Bologna** (see table 11):

- 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 11**  
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

#### 4.4. Good practices

For the selection of good practices, Emilia-Romagna Region took into consideration regional initiatives, in the field of culture and creativity, proved as successful in the region, that means those initiatives which have already obtained some measurable results in achieving their specific objectives.

In addition, the potential for transfer has also been considered, that is if the initiatives (or some aspects of them) could be potentially interesting for other regions to learn from.

##### **Good practice 1 - INCREDIBOL! (Bologna's Creative Innovation)**

It's a successful project, started in 2010, to promote creative and cultural activities in the Emilia-Romagna region. It is coordinated by the Municipality of Bologna and supported by the Emilia-Romagna Region, in conjunction with public and private players.

The project is aimed at supporting the creative and innovative professions and companies, from Emilia-Romagna Region, in particular during their start-up phase, offering them a combination of tailor-made opportunities.

Many services are offered: help desk for first counseling; free training courses; internationalization opportunities for enterprises; collecting and sharing of information.

### **Good practice 2 - Support for the development of infrastructures for the competitiveness of the territory**

In the framework of the Regional Operational Program “Territorial Development and Attractiveness”, the Emilia-Romagna Region promotes a specific call for the startup of business incubators, with a particular focus on CCIs.

Thanks to this initiative, aimed at developing infrastructures for co-working and project design, a network of CCI incubators and fablabs has been set up in Emilia-Romagna.

### **Good practice 3 - EmiliaRomagnaStartup/CREATIVE ([www.emiliaromagnastartup.it/it/creative](http://www.emiliaromagnastartup.it/it/creative))**

It's the main regional initiative for startups, or future entrepreneurs, aimed at creating a unique regional access point for the provision of up-to-dated services for innovative, creative and knowledge-based startups: updated information on calls for startup; indication of all offices, co-working spaces or laboratories available for startups; support from experts; etc.

The web portal has been enriched with a new section, dedicated to CCIs, so-called “Emilia-Romagna STARTUP/CREATIVE”, for the promotion of networking, internationalization and information on financing opportunities.

# 5/ SWOT ANALYSIS OF THE CCI SECTOR



STRENGTHS		WEAKNESSES	
1	Good sources of competence generation	1	Business size too small
2	High local demand for culture	2	Low awareness of being a sector and difficulty in structuring (at national level)
3	Tradition and presence of excellencies	3	Low business vision and, therefore, sustainability over time
4	Good “Cultural Vibrancy”	4	Few investments from the private world
5	Capillarity of infrastructures in the territory (coworking spaces - fablabs, services, university network)	5	The network should be further enhanced with multi-maps (place branding, creative realities, experiential tourism)
6	Good communication between regional governance, research and CCI companies. The way of operating the ecosystem creates a virtuous circle	6	Lack of integration between the analogue and digital contents of various sectors
		7	Low level of cluster organization
OPPORTUNITIES		THREATS	
1	Changes in technology paradigms	1	Intellectual migration
2	New forms of consumption	2	Weak position in the global value chains
3	The possibility of mixing different knowledge	3	Economic and social situation
4	Support for creative cultural realities at a national level		
5	Development strategies / new business / new creative models putting together data that already exist (open data)		

## 6/ CONCLUSIONS

1. Emilia-Romagna region presents high potentialities in the CCI thanks to high cultural heritage, traditions and sources of competences.
2. In the region, there are good opportunities for CCIs because of high demand for culture and calls for tenders.
3. There are good opportunities of integration with other industries strongly needing creative inputs: automotive, fashion, ceramics, tourism, food.
4. The sector is highly populated by educated workers and entrepreneurs and there are several places of aggregation.
5. There is a great need for increasing managing capabilities and integration of creative, technology and management competencies.
6. There is a need to differentiate needs of each CCI sector and greater attention at the national level.

# 7/ APPENDIX



**TABLE 5 and TABLE 6**

Structure of the CCI companies by class of employees and by categories (from Ervet 2018)

	CULTURAL, ARTISTIC AND ENTERTAINMENT ACTIVITIES	MEDIA AND CULTURAL INDUSTRIES	CREATIVE SERVICES	ARTISTIC CRAFTSMANSHIP / HANDCRAFTING	DISTRIBUTION OF CULTURAL PRODUCTS	TOTAL CCI	% CCI
<b>1 EMPLOYEE</b>	1.718	1.529	6.346	1.643	1.597	12.833	15,9%
<b>2 EMPLOYEES</b>	768	1.042	3.054	1.158	882	6.904	8,6%
<b>FROM 3 TO 5 EMPLOYEES</b>	960	1.947	3.901	1.242	648	8.698	10,8%
<b>FROM 6 TO 9 EMPLOYEES</b>	816	1.792	3.440	491	173	6.712	8,3%
<b>FROM 10 TO 19 EMPLOYEES</b>	1.431	3.063	5.886	734	288	11.402	14,2%
<b>FROM 20 TO 49 EMPLOYEES</b>	2.123	3.347	4.645	650	298	11.063	13,7%
<b>FROM 50 TO 99 EMPLOYEES</b>	1.354	1.921	4.454	454	131	8.314	10,3%
<b>FROM 100 TO 249 EMPLOYEES</b>	2.316	1.471	3.482	648	218	8.135	10,1%
<b>&gt; 250 EMPLOYEES</b>	2.333	1.501	2.219	395	0	6.448	8,0%
<b>TOTAL</b>	<b>13.819</b>	<b>17.613</b>	<b>37.427</b>	<b>7.415</b>	<b>4.235</b>	<b>80.509</b>	<b>100%</b>

	CULTURAL, ARTISTIC AND ENTERTAINMENT ACTIVITIES	MEDIA AND CULTURAL INDUSTRIES	CREATIVE SERVICES	ARTISTIC CRAFTSMANSHIP / HANDCRAFTING	DISTRIBUTION OF CULTURAL PRODUCTS	TOTAL CCI	TOT. E-R
<b>1 EMPLOYEE</b>	12,4%	8,7%	17,0%	22,2%	37,7%	15,9%	14,3%
<b>2 EMPLOYEES</b>	5,6%	5,9%	8,2%	15,6%	20,8%	8,6%	6,7%
<b>FROM 3 TO 5</b>	6,9%	11,1%	10,4%	16,7%	15,3%	10,8%	11,1%
<b>FROM 6 TO 9</b>	5,9%	10,2%	9,2%	6,6%	4,1%	8,3%	8,8%
<b>FROM 10 TO 19</b>	10,4%	17,4%	15,7%	9,9%	6,8%	14,2%	12,0%
<b>FROM 20 TO 49</b>	15,4%	19,0%	12,4%	8,8%	7,0%	13,7%	11,5%
<b>FROM 50 TO 99</b>	9,8%	10,9%	11,9%	6,1%	3,1%	10,3%	7,7%
<b>FROM 100 TO 249</b>	16,8%	8,4%	9,3%	8,7%	5,1%	10,1%	9,0%
<b>&gt; 250 EMPLOYEES</b>	16,9%	8,5%	5,9%	5,3%	0,0%	8,0%	18,9%
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

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### **Sitography**

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- Cities Monitor Bologna
- City Rate