



Italian Quality and Beauty

Compact Report on the Cultural and Creative Industries in Italy

I Quaderni di Symbola

Executive Summary of “Io sono Cultura”, 2013

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“In the cover: picture by **Piero Fornasetti**, painter, sculptor, interior decorator, artist books’ printmaker and creator of more than eleven thousands objects.”

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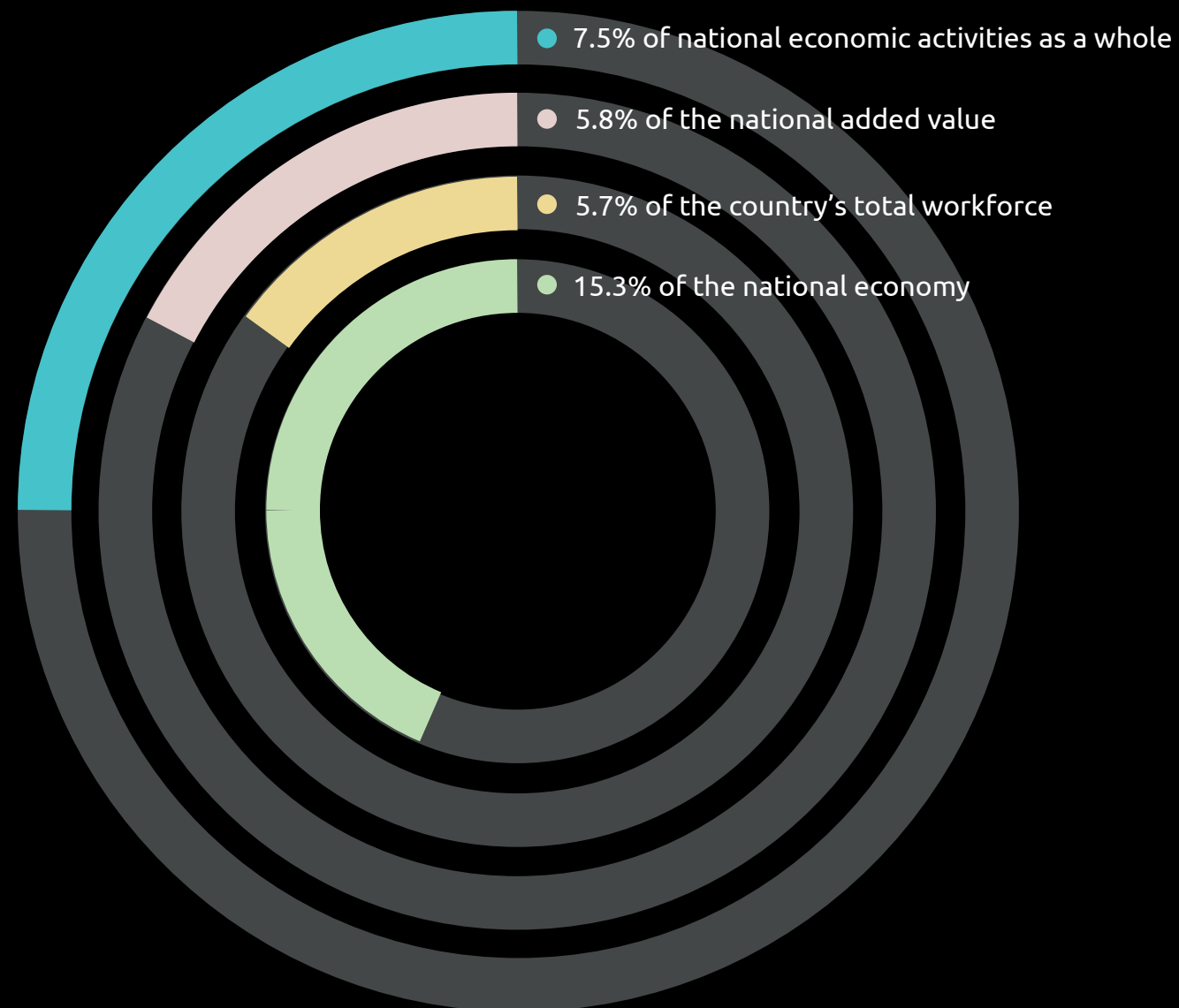
Rome, December 2013



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The Italian cultural production system almost amounted to 460,000 enterprises in 2012

equivalent to the 7.5% of national economic activities as a whole

To these businesses we owe an added value of 80.8 billion euro

equivalent to the 5.8% of the national added value

These enterprises employ 5.7% of the country's total workforce

nearly 1.5 million individuals

15.3% of the national economy

Culture can boast a multiplier of 1.7. The 80.8 billion euro the cultural system as a whole produced in 2012, hence activating a further 133 billion, the direct and 'induced' together totalled 214.2 billion Euros



1 Geographies

In this section of study **we can find** the description of the ongoing pace of the different sectors that form the diversified universe of culture in order to incorporate new trends, even if still immature, illustrated by exceptional realities that establish themselves as **best practice**.



1.1 CREATIVE INDUSTRIES

1.1.1 DESIGN AND CULTURE-DRIVEN INDUSTRIES: DESIGNING DESIGN, A SILENT REVOLUTION

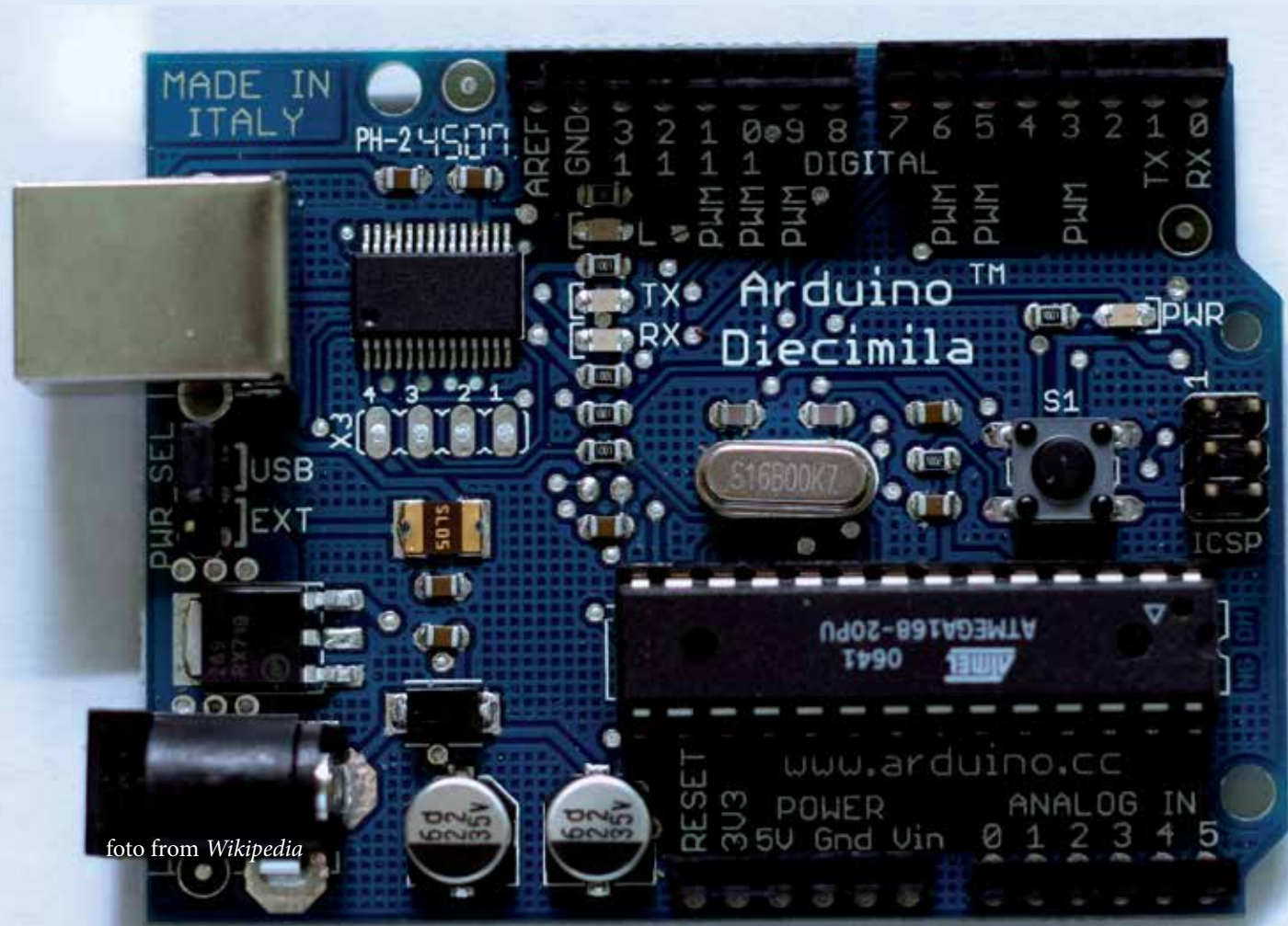


foto from Wikipedia

To better understand the meaning of the term “design”, we need to go back to its etymological root: from the Latin *de-signum* literally “relative to the project”. Seen from this perspective, design represents a *modus operandi* not only linked to aesthetic problem solving, but also to the ability to manage and solve more complex problems, such as: ideating new products, individuating new markets, and searching for new meanings. This definition particularly suits the Italian design that is able to bring to life daily objects incorporating a cultural value more than an economic one.

Design is the Italian excellence per antonomasia, and its history is linked to an extraordinary number of creators of objects that conquered the world in the Sixties with sofas, lamps, chairs, tables, in one word: style. The “Italian school of design” owes its success to masters such as **Mario Bellini, Gaetano Pesce, Pierluigi Cerri, Luca Meda, Piero Gatti, Antonio Citterio** and many others. These personalities have grown between choices and ornaments inherited by the designers of the beginning of the century, who where mostly broad-spectrum architects appointed to design objects and furniture. These were **Giò Ponti, Carlo Scarpa, Marco Zanuso, Vico Magistretti, Ettore Sottsass, Ignazio Gardella,**

Achille, Piergiacomo Castiglioni and so forth, whereas today the biggest designers are not Italian. Nonetheless, the entire system of Italian design has become the keystone of the new world of global design for having been able to draw strength from the unbreakable bond between design and enterprise. In fact, Italy maintains a strategic advantage in style thanks to its net of entrepreneurs who are able to attract the most talented designers in the world and thanks to its system of enterprises that produce the creations designed by the today’s best designers. To talk about design in Italy means to investigate on two phenomena. Firstly, the creative dimension of the manufacturing enterprise system having products that make use of both the tangible and intangible heritage of Italian territories, such as: the territory of Brianza in Lombardy; the north east for the production of furniture; the region of Emilia Romagna for the production of motors; the city of Sassuolo for the production of tiles; Tuscany for the production of marble in the city of Carrara and clothing in the city of Prato and in the Arno Valley; the region of Marche for footwear and Naples, in the south, where we can find the best coat tailor’s shops in the world. These are the Italian *territories of design*. They are real “cultural ecosystems” producing objects that are

able to spread the *Italian way of life* around the world. And we can also find the creativity of the metropolitan tertiary sector, which is at its most conspicuous in the area between the cities of Milan and Como, the so-called *infinite city*.

With respect to the first aspect, the success of Italian design is due to the fact that it has settled in the industrial districts, where the typical made in Italy products are mainly produced. And it is in these areas that a diffused creativity has developed, involving all those taking part in the industrial process, which is based on the use of professionals and the coding of knowledge and technical-scientific tools. The possibility to make use of this elaborate system of knowledge transmitted in an implicit way more than in a codified one and that is adopted not only by artisans but also by specialized technicians and labourers – who often do not know they are guarding a heritage of material culture of a determined place – is one of the characterizing elements Italian design. Other than this, there is the contribution of architects and designers, whose creative experience has developed with the main personalities of the Italian industry. The professionals in the creative field, who are willing to experiment, are asked to transform a complex demand into an object that

is able to give shape and fascination to the unit and to its function. The businessman, who are bold “enterprise captains” act as mediators who are able to interpret different languages and types of knowledge to make them merge into a synthesis – a product having a positive feedback on the market. This alliance represents the origin of the ability of Italian industry to treat the industrial aspect as part of a discourse that is cultural before being technical or solely productive. Indeed, the success of creative Italian industry has always been linked to the innovation of sense, which is the ability to interpret an object in an unprecedented way giving it new and innovative meanings and purposes. The history of **Artemide** is emblematic. It is specialised in the manufacture of technical lightening, where the competition is traditionally based on style. The vision of the company from the city of Bergamo has always pivoted on the idea that the light of a given space influences significantly – especially with its colour and shade – the mood and social interactions of people. Indeed, *Metamorfosi* (Metamorphosis) creates an atmosphere created by coloured light that can be modified according to the owner’s preferences. This is how Artemide has not hesitat-

ed to involve Luca Ronconi, a professional in lightening and theatre director, in the creative process of one of its latest creations. The result was the creation of a window-lamp that is able to reproduce all the shades of natural lightening, transforming reality into representation.

Other than in the territories where creative *made in Italy* products are produced, Italian design has also developed in the areas of the metropolitan tertiary sector, especially between Milan and Como, the “infinite city”, characterized by developed tertiary services and a considerable number of designers. In Milan there is a number of important education centres and some among the oldest schools of design. The first course in industrial design was born in 1994 at the **Polytechnic University of Milan**, which has now become the source of new talents, both for its number of students and lecturers and for the number of designers that enter the market every year. The figures are impressive: around 4,500 students, over 500 lecturers, 800 the total number of assistants and design followers, over 900 graduates working as professional designers in companies. The **Domus Academy** is another institution that was born in Milan in 1982, which over the last three years



has established itself as an institution of excellence for postgraduate education and research laboratory studies on the process of industrial creativity. Moreover, in Milan there is the *Triennale del Design*, which hosts the *Design Museum*. This institution was conceived as a place to exhibit modern industrial and decorative arts that could stimulate a synergic connection between industry, productive sectors and applied arts and it soon became well-known in the Italian cultural, artistic and architectural sectors as one of the major centres of comparison for new trends.

Among the Italian groups who have become a benchmark on an international level in recent years there is **Zeus** group of Milan, the label of a small group of designers from Milan lead by Maurizio Peregalli who, from the second half of the 80s, has become the promoter of one of the strongest and coherent reactions at the time of the spread of post-modernism. Their formal answer is connected to a material: metal. This is varnished in black and it is mostly used in the dryness of squared profiles. **Matteo Thun** is one of the biggest exponents of that Italian approach to design, which proposes objects that are able to recre-

ate the warmth and cosiness a home. Furthermore, there is the **Studio Iosa Ghini Associati**, linked to the architect and designer Massimo Iosa Ghini, one of the founders of the group *Bolidismo*, which is specialized in the design of chain stores around the world among which there is *Ferrari Store* in Europe, the United States and Asia. Last, **Giulio Iacchetti** and **Matteo Ragni** have been able to summon up the “new generation of Italian designers” in a collective project on the edge of an ambitious challenge: reach the general public and actualize the ambition of a “democratic design”. *The Coop*, an Italian industrial giant of food supply has believed in the potentiality of this group of young designers and in 2005 it exhibited 20 object-prototypes for house cleaning and laundry. This was followed by an exhibit around *Coop* supermarkets throughout Italy and thanks to the votes of the consumers it has selected 11 projects that are now for sale in *Coop* Supermarkets. Nowadays, great part of the sectors of excellence of *made in Italy* products are formed by design orientated enterprises that work in the industries of fashion, design, technical lightening, furniture, luxury shipbuilding, craftsmanship, and more recently in the

industry of taste. One of the most important aspects of the last decade is in fact the success of design as a working method and not only as a productive attitude. We can talk about pulviscular design, considering that a number of sectors that are far from the traditional influences of a project (mostly food, but also consumption technologies, sports, ceramic, padding etc.) owe a lot to the culture of design. It is especially the industry of taste and the immaterial element linked to food around which Italy is developing the new discipline to apply the principles of planning: food design. A growing number of designers are now working in the food industry and this has resulted in a significant qualitative growth of many products of the Italian wine and food sector, in terms of aesthetic, packaging and of communication. In the spaces of **Eataly** for instance, designers from all over the world exhibit their works: some of them enhance the most playful aspect, whereas others are more artistic and still others aim at promoting a bigger awareness of the consumption habits. The short supply-chain, the reappraisal of traditional qualities and the fabulous opportunity the Internet gives to create new networks and interactions are

the characteristics of other countless initiatives, such as **Food Chocolate Design**, a project by **Studio Happycentro** that brings together 8 traditional chocolate-makers, 8 food bloggers and 16 graphic designers who – by using their special recipes, their dedicated posters and exhibitions – have produced an innovative working method that is common to all new creative enterprises. The attention given to the promotion of the maker-culture and open design is also now becoming successful in Italy thanks to promoting activities and workshops. This type of planning culture involve the activity and the work of centres like **Fablab** of Turin (an association dedicated to fabbing and shared design), of **Vectorialism**, and the work of an author like **Massimo Banzi**, the co-founder of the open source microprocessor *Arduino* that since 2005 has become the most successful process of open source transformative hardware in the world, thanks to the versatility of its applications: toys, lightening, satellite devices. Benzi, and other planners of the *Interaction Design Institute* of Ivrea have planned an open source microcontroller that is sold for only a few Euros by assembling pieces present on the market.



“Dripping di pesce”, by Maestro Gualtiero Marchesi, photo by Massimo P.

1.1.2 ARCHITECTURE: THE CONTINGENCY OF ARCHITECTURE

Our journey in the country of architects starts from these figures: architects in Italy are 145,000 and represent 1/3 of all European architects with an average of 2.6 professionals per 1,000 inhabitants. These are the figures relative to genre: 40% are women and 40% of those who are registered in the professional association of architects are under the age of 40. Moreover, 6,800 architects are licensed every year and the overall number of architects in Portugal and Sweden equals that of those who are registered in the association of Rome.

On an international scale there are also cases of Italian studios compet-

ing at a high level in international contest, whereas the domestic scale comprises small and medium studios where the small scale – just as in the other sectors – means rapidity, flexibility, problem solving skills, the right attitude to work on the net, building temporary processes of a project and manage high levels of complexity.

Apart from the figures, there is another way to look at the Italian situation, which sees four main currents in relation to the prevailing topic of architectural research carried out by the different studios. The first one gives space to the landscape and city planning and its added value is the urban developing planning, like in the case of **Mario Bellini, Fuksas** and **Metrogramma**. Fuksas rightfully keeps gaining ground on the international professional world mainly concentrating on Europe and the Eastern and Mediterranean developing countries. The buildings that are being built in

Tblisi are impressive also for their monumentality. There are some other architects whose characterizing feature is “eco-friendly”, like **Renzo Piano** and Mario Cucinella. Among the most interesting projects in progress there is the new zero emission-area *Cascina Merlata* in Milan, not far from the Expo area. The creation of the biggest social housing event ever planned in Italy sees **Mario Cucinella Architects** studio in frontline with other important Italian architectural studios that give attention to the quality of the urban landscape through the materials used, the details of the street furniture and the design of public space, but also the design of the facades and the composition of the street barriers. Moreover, among the innovations we must mention the success of the group led by a researcher from Rome, **Chiara Tonelli** at *Solar Decathlon* last year, which ended up in the realization of a prototype of a high energy efficiency dwelling in Bolzano. *MED in Italy* is the project conceived by *La Sapienza* and *Roma Tre*

Universities of Rome, the University of Bolzano and Fraunhofer Italy and it has won the third prize in the international contest created by the United States Department of Energy considered as the best for green architecture. The third current is characterized by the eco-friendly concept seen from a social point of view. Among the architects who have worked most on these topics in Italy there is **Aldo Cibic**, for whom planning firstly means to create integrative processes among people and between people and the environment. Last, there is who chooses to work in the handcrafted sector without remaining limited to the local dimension. Architects like Bellini, Fuksas and Piano, who show the international market to the Italian professionals, are followed – mutatis mutandis in terms of scale and generation – by architects like **Cino Zucchi**, who formally intend to maintain a craftsman professional organization enabling the head of the studio to participate directly in every project.

With respect to the average quality of work, in the last decade there has been a small revolution that has increased the architectural quality of planning. Among the reasons for this improvement, there is the outbreak of an exasperated attention of the media towards architecture starting from the mid 90s. This phenomenon, for once in a vicious circle, has met the attempt to renovate universities and specialized information institutions by initiating a new dialogue with the other disciplines related to landscape and urban knowledge. Some cultural institutions have had an important role and have managed to become venues for representation and divulgation for the communities of the project: **MAXXI, Triennale of Milan** and **Biennale of Venice** are the leaders of the promotion and enhancement of Italian architecture around the world but also a way to bring it back into place.



Mario Cucinella Architects, Veneto City Model



1.1.3 COMMUNICATION

1.1.3.1 *Advertising. There is who can recover the recovery*

The impact the economic crisis has had on the biggest Italian agencies has accelerated the processes of deep transformation, seriously doubting about working methods, approach to the market, levels of employment and the production of ideas and also of the communication culture itself. Apart from the drastic decrease of investments in advertising, the will to change has also arrived by a system crisis that is connected to the “monocratic” presence of TV as the only means of advertisement.

In the 80s there were only few prevailing big companies, whereas today we see the proliferation of smaller enterprises that in some cases have initiated professional aggregations, big or small networks of talents that have been able to give vigour to the ancient and profitable contamination of competences – the real cultural heritage of *made in Italy* products. This is how over the last few years new advertising agencies have emerged and operate easily in both the traditional and social media managing to offer a

better and convenient service thanks to low bureaucratic costs. The will to create competitive networks in order to answer rapidly and flexibly to the buyers’ needs is remarkable. This aspect and the fact of being concretely submerged in the social and productive dimension of each territory are essential components of the new way of looking at the creation of new advertisement: a warm and unsophisticated mixture, made of knowledge and passion, which is the exact opposite of the expected cold professionalism coming from the international networks. This is how new enterprises like **Cookies** and **Le Balene** have emerged in Milan, **Art Attack** and **Marimo** in Rome, **Proforma** in Bari and so on.

Furthermore, we have been witnessing the birth of a well-structured network of freelancers, who are no longer just copywriters, but also planners, accounts managers, producers. Some have been recently dismissed from traditional agencies and others had already left of their own will during the “golden age”. We are talking about skilled, cultivated, flexible pro-

professionals: an authentic resource for companies and agencies not always capable of handling tasks commissioned by their respective clients. We must not forget that today the number of self-employed professionals in this field is higher than that of those employed by the agencies and that the number of small and medium companies is now a reality with a specific weight that would have been unthinkable only a few years ago. This is the case of **Hi Comunicazione**, which from the early two thousands managed to modify and structure itself flexibly, mixing advertising, digital communication and the production of film material and events. Today it is a significant reality, with offices in Milan, Rome and Padua. Apparently a separate case, **Altavia Italia**, part of an international group known for publishing, but actually with a much more well-structured competency, is undergoing an interesting experience aggregating small realities. Talking about experiences that have created a network, there is **Consorzio Creativi**, born in 2009. It has a network of professionals based in Rome and able to manage clients in different Italian cities thanks to the organizing flexibility and an innovative working method.

In digital commercial communication we find some very interesting case histories, even among Italian big advertising brands. Let's take "The Italian Experience", the initiative taken by **Lavazza**, the well-known coffee manufacturer that has created a platform through which a community made up of Italians and non-Italians fans of the Italian *Dolce Vita*, converse and confront each other "virtually" on the "coffee rite", on Italian cooking and so on. In Italy too, agencies structured in a more interdisciplinary way so as to supply content to digital commercial communication are gathering more and more ground. This is the case of **Hagakure**, an agency born with the aim of helping Italian and international businesses to interact with their markets using the Web and digital technologies. Again in Milan, we find **The Vortex**, which supplies Italian businesses with important communication and marketing tools and helps them fill knowledge gaps regarding digital media. With offices in Rome, Milan and Turin and a staff of around 80 people, **Xister** is an interesting reality half way between the digital and advertising, as we've known it to date.

1.1.3.2 Active Media

In Italy, the development of new technologies not only enhances each one's functionality, but it also spreads common knowledge whenever mere procedural prostheses become a new language, providing innovative interaction tools.

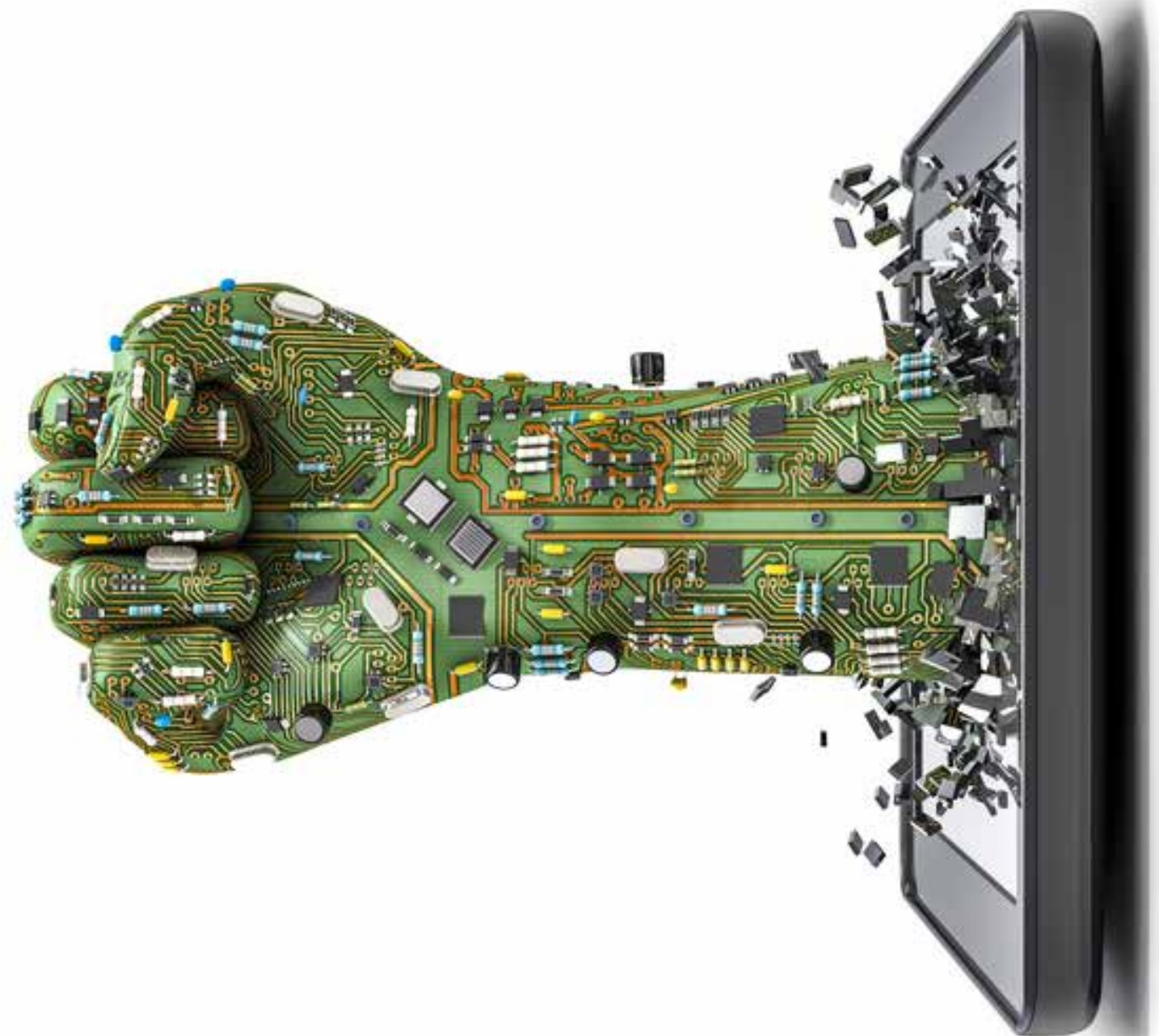
There is an Italian peculiarity to note in the evolution of the information society: the ability to give voice to those communities operating on the territory, enhancing the resources, individuating its genius loci and promoting new dynamics of participation that are able to invent economic processes of ideas like that of the "*short value chain*". In this way the web can go beyond that abstract atmosphere that characterize web technologies, in order to become an extraordinary sharing environment that is known for activating self organizing forms thanks to that non-intermediation that sets creative social energies free. In this way the bottlenecks of distribution are

avoided both for information and for products, affirming a need for non-intermediation that goes from the trade of agricultural and food products to the different shapes of politics. What have opened a new path are the meet-up, a forum network, which has contributed significantly to the development of **GAS** (*Gruppi di Acquisto Solidale* - ethical purchasing groups) already born in 1994 but only able to improve their quality of participation when in 2005 they found a place in Beppe Grillo's blog. Issues surrounding digital activism and social innovation are also the essence of activities carried out by specialized digital operators, with particular reference to platforms dedicated to petitions. Entirely made in Italy, but of global interest, we find *activism.it* – formerly *petiziononline.it* – a site that obtained funding for over 600,000 euro in the U.S. to help it expand its activities worldwide. The trend of involving the public in the creation and realization process of

a project (also) through its financing – “crowd-sourcing” and “crowd-funding” – is experiencing a lively period in Italy thanks to realities such as **DeRev**, a web platform that puts together all the functionalities and all that is needed to concretize the best ideas of social innovation proposed by the users. Thanks to a bill currently under consideration in Parliament on the equity crowd-funding, Italy is seen as a pioneer Country by the rest of the world as it is the only one who has created a detailed regulation of the subject. The equity formula is essential for the creation of technologic and innovative start-up societies. It enables the public to finance creations and receive a share in the society itself rather than a simple “rewarding” like in the case of the “classic” crowdfunding. This regime is parallel to that (far more complex) of corporate associations. This is a way to simplify and increase the participation in the birth of enterprises that can compete on both domestic and international markets thanks to their vocation.

At a higher level of mass involvement in collective actions, we find the general trend of the affirmation of what we could define “communities of practice”. **Swapclub.it**, for example, brings

together over 6,000 active “swappers”, i.e. women wanting to swap and share fashion accessories and clothes on the basis of a common digital activism on the platform, all with profiles and ready to exchange public and private messages. Finally, the potential of new active media in the sports sector is enormous, in particular in the light of certain mass phenomena that over the years have found a transmedia dimension based on gamification. This is the case of Fantasy Football with **Fantacalcio**, a meta-media channel that expresses the dynamics of the game of football catalysing the participation of millions of fans engaged in interacting, exchanging opinions and information around a challenge based on knowledge and skills.





1.2 CULTURAL INDUSTRIES

1.2.1 CINEMA:

I AM (NOT JUST) A LEGEND: FILMMAKING AS CULTURAL INDUSTRIES

Although the domestic market is more and more competitive, the aggressiveness of the foreign competitors and the reduction of taxes, the creative and industrial universe of the Italian filmmaking seems to keep showing signs of vitality. And we are not talking about Fellini, Monicelli and Pasolini that are today inevitably sublimated as legends, but we are talking of today's cinema. It has been a slow process that, thanks to film directors such as **Gabriele Muccino, Paolo Sorrentino, Matteo Garrone, Ferzan Ozpetek, Daniele Vicari**, has been able to expand the storytelling bases of the previous generation of filmmakers like Gabriele Salvatores, Carlo Verdone, Sergio Rubini, Nanni Moretti, Giuseppe Tornatore, Paolo Virzì, Mimmo Calopresti and Gianni Amelio. These are filmmakers

who are capable of looking at modern Italy and to describe it in a new way.

The audiences themselves have determined this renewed success of Italian films mainly linked to comedies that are the ones that most attract the Italian public. Although Italian auteur films are not too appreciated in Italy, they achieve excellent results abroad (complimenting remarks from the critics but not a great success on the market). Though still without an actual Star System, essential to give the business a continuity and a planning ability, our production seems to be excessively polarized between comedy and auteur films, with rare concessions to "genre movies", which however, as **Giuseppe Tornatore's** *The Best Offer* would suggest, seem to work quite

well at the box office. Italian cinema has now entered people's imagination as a catalyst of original stories, which makes our film industry one with the highest number of films presented (together with France) at international festivals, giving our stories the opportunity to circulate above all in that circuit. Positive elements that leave plenty of room for hope in important changes that may finally even help us go back exporting our films abroad. At the same time, Italian filmmaking is no longer an "assisted" industry, as it has been for decades thanks to the combined effect of two phenomena: the progressive decrease of public investment and the growing importance of indirect financing (tax credit and levying of tax on profits) the progressive establishment of indirect financ-

ing mechanisms has resulted in the increase of the number of productions. From the point of view of territory, the sector is characterized by different groups of firms on a regional basis, the main one being the Latium region, especially for cinema. Whereas many TV series are shot in the regions of Piemonte, Tuscany and Apulia, supported by important and well-established Film Commissions that work in an excellent way to support these pro-

ductions and often have big funds for the production companies that decide to shoot in that area. Despite this phenomenon wasn't launched until recently Italy has today 45 Film Commissions that differ on nature, dimension and budget. Examples of excellence, also abroad, are structures like **Torino Piemonte Film Commission** or **Apulia Film Commission**, which was made part of the *Euroscreen* international project financed by the European Commission for the development of cinema-related tourism.

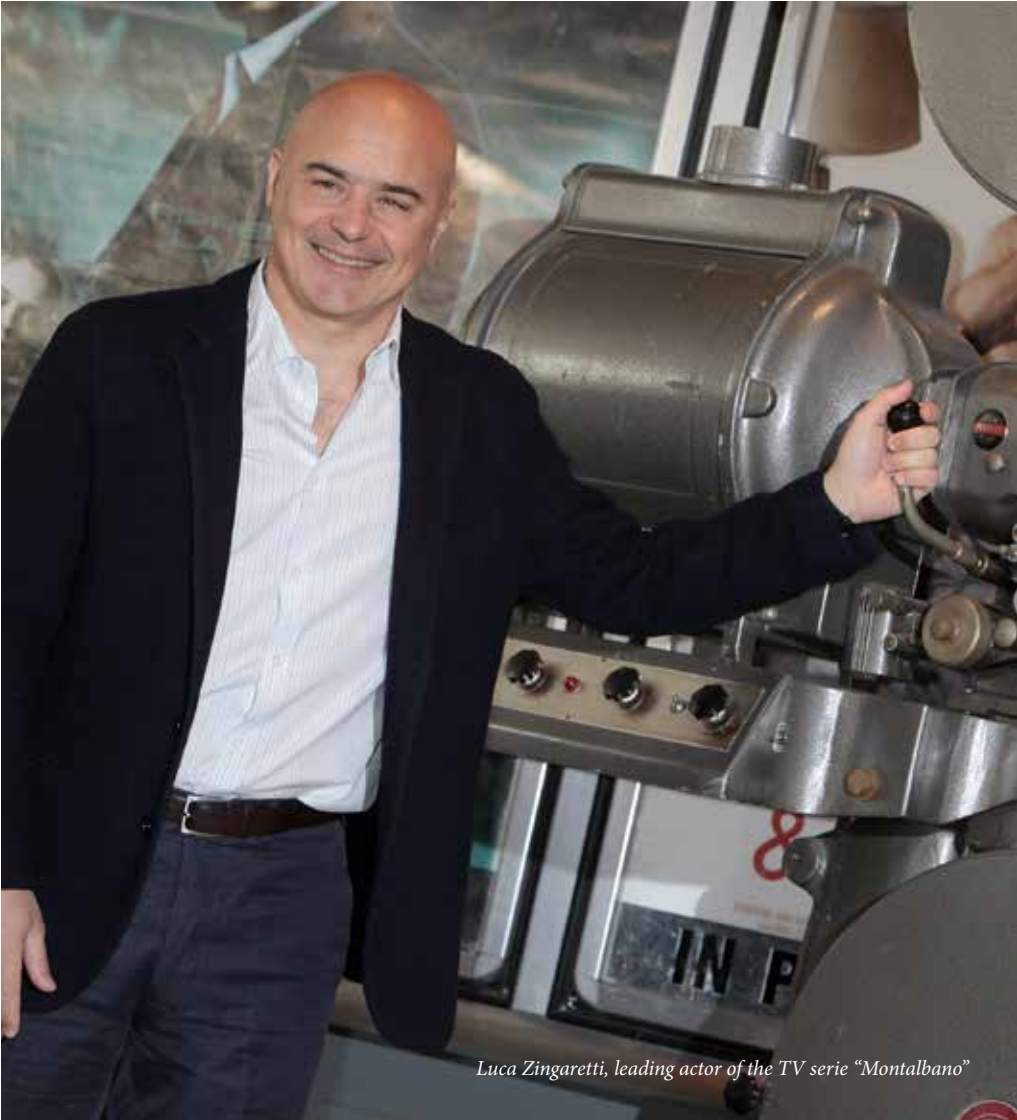


1.2.2 TELEVISION SYSTEM

The Italian market is characterized by a strong presence of audience around the two main players: **Rai** and **Mediaset**, even though this phenomenon is decreasing. Together with **Sky**, Rai and Mediaset collect 93% of the entire market. Traditional television, despite still being the “mainstream” media, especially for the older generation, is being progressively replaced by other platforms.

The offer on the *Digitale Terrestre* (Digital TV) now enables to have access to a bouquet of over 70 channels, 50 of them being “free” and 20 “pay”. The biggest broadcasters have immediately led the new platforms: they have confirmed their centrality on the digital TV both for the number of channels offered and for the viewing figures due to their general channels and the growing digital channels. In 2011, two channels for the female audience were launched: *Mediaset’s La 5* and *Ti Media’s La7d*. Both seem to have registered high viewing figures. There has also been a new channel dedicated to Art: **Sky Arte Hd** – the Italian version of the British channel Sky Art. And

even more recently, **Effe TV** was created, where “Effe” stands for *Feltrinelli*, giant Italian publishing company that aims at becoming the main high quality entertainment channel. Between the end of 2010 and the beginning of 2011 the main Italian players launched some “ad hoc” platforms for the web: public television did so through the portal **Rai.tv**, Mediaset through **Net TV** and Ti Media through **Cubovision**. In fact, according to the young generation, the net is a way to overcome television for what concerns entertainment: 52.6% of children and teenagers between the age of 12 and 18 stated that they have started to watch less TV since they have begun using the internet. Only 47.9% of them reckon that TV still is the main information channel. In this new scenario, over the last two years we have witnessed the growth of TV channels “from below”. This is how in 2010 there we have seen a growth in the number of “web TVs”. These are small broadcasting stations that communicate with the local administrations, have an active role on the territory, organize events and act



Luca Zingaretti, leading actor of the TV serie “Montalbano”

as “community managers” by going “on air” exclusively on the net. The micro web-TVs are growing mainly where there is a need for filling an information gap: in the region of Abruzzo after the earthquake tragedy, they have doubled and today there are 32. The most remarkable growth is that of enquiry channels. The annual monitoring promoted by the observatory **Altratv.it**, in collaboration with AgoraVox, describes a strong involvement with the local community (according to some surveys, 71% of channels is appreciated by the users) but lacks of the interest of the institutions (34%) some of which even want to boycott them (8%). From the point of view of territory, this layout has not changed over the last years. The big TV transmitters are based in Rome and Milan, whereas local transmitters that have survived the switch-off are spread around the territory. The situation of TV series is different though. The regions involved are Piemonte, Tuscany, Apulia, Campania and also Latium. These regions are where important Film Commissions are based, and these allocate big funds to the production companies of the TV series that are shot in those regions. The production of TV series has had a period of growth in 1995/96 television season and that

of 2003/2004, increased by 397% in Italy. As some prime examples show, TV series can function as the way to enhance the potentialities of the territory. In the region of **Piemonte** for instance, the region has utilised TV series to renovate the image that the region had always had: a region merely connected to industry and the production of cars. The TV series **Elisa di Rivombrosa** has significantly restarted the area where it was shot in Piemonte by generating fandom and the interest of the public who wanted to “see and touch” the area as a souvenir. Another remarkable example is the one that took place in the southeast of Sicily, thanks to the popular series about the chief of police **Montalbano**. Many episodes shot in beautiful places around Agrigento and Ragusa have added fascination to the adventures of the Sicilian Police officer. Last, there is the case of the series **Un posto al sole**, which has always stood out for its ability to represent real life. For this reason the connection with Naples, the city where it is shot, is very strong. The series represents true news stories and the social problems linked to the city, being able to set the episodes in present time.

A professional broadcast microphone, likely a Neumann U87, is mounted on a boom stand. The microphone is silver with a black grille and is positioned diagonally across the frame. The background is dark and out of focus, with some light reflecting off the microphone's body and the stand's metal parts.

1.2.3 THE RADIO OF THE FUTURE: BETWEEN NEW DIFFUSION CHANNELS AND NEW STORYTELLING CONTENTS

Italy has the highest number of radio transmitters on its territory in the European context. Only few of them are national transmitters, whereas the majority are local transmitters broadcasting to areas as big as regions, provinces, and often even cities. At the end of 2010 the estimated number of national broadcasting stations was 25 (5 of which were public) and 1,100 were local stations. The number of local broadcasting stations has decreased significantly in the period between the 90s and the half of 2000s, even though over the last five years it seems to have settled.

On a territorial level, transmitters seem to be more well established where people feel more attached to their land. The strong connection with the

local communities is shown through the choices of show schedules and entertainment programs that reflect the characteristics of certain areas without going too far in provincialism. One need only consider the important role of transmitting information that many of them have. Among the most significant there are: the various local **Dimensione Suono Companies**, the local **Kiss Kiss**, **Radio Subasio**, **Birikina**, **Globo**, **Marte** and so on.

Several traditional radio networks have innovated their show schedules by developing storytelling projects connected to their particular formats. **Virgin Radio**, the rock station owned in Italy by the *Finelco* publishing and broadcasting group, introduced very effective storytelling moments with special features on the lives of the

artists on its playlists. So doing, this national broadcaster has created a territory where to harmonically host brands associated to its young listeners who interact with the same code. Another station owned by the same group (*Finelco*), **Radio 105** has introduced special features to its schedules hosted by external contributors, such as sexology or criminology experts, allotting lighter entertainment shows in separate easily identifiable slots. **Radio24**, the talk radio station owned by *Confindustria* (an organisation representing Italian manufacturing and services companies) already took the path of entertaining storytelling some time ago, with shows such as *Destini Incrociati* - Crossed Destinies, a format based on very fast and visual narratives that has subverted the rule

of proximity with the listener to tell stories of human existence, stories of surprising encounters or scenarios on every sort of subject: from art to sport, from literature to cinema, from current affairs to showbiz. **Radio Capital**, the network owned by the Espresso publishing and broadcasting group, has also successfully introduced storytelling slots to its schedules.

But an absolute novelty in this sector is represented by those firms that are also acting as radio content providers. Digital platforms such as **portlandradio.net** offer on demand podcasts featuring radio series with stories on all kinds of subjects: Sport, cinema, publishing, fiction, literature. And also food, design, history, and architecture. Just like *Monocle24*, the Italian web portal *portlandradio.net* also develops content close to the values of the firms that support the project as a whole or only some of its individual thematic productions. As is the case of *Racconti di Vite* (Vine Stories, note that in Italian the word for “vine” can also

mean “lives”, as in the plural of “life”), a production dedicated to the most prestigious cellars in Italy, which with its narratives – available in Italian and English, to benefit an international audience – describe one of our country’s most representative products, wine. A whole new channel therefore opens.

1.2.4 **ANIMATION**: NEW MARKETS CONQUERED BY SMALL SET-UPS

The Italian animation industry is a rather recent phenomena: the first drafts were made for advertisements of great success in Italy collected by the well known program called *Carosello*, but a proper industry was only created 15 years ago. At present, Italian animation has been able to catch up and can now produce high quality TV series, both on a technical and content point of view, thanks to those companies that have been able to sell their creations around the world during the last 5 years. Today Italy is the third biggest European producer of animation films counting 265-hour broadcasting on 17 TV channels (13 of which are digital) and with a 47 million euro yearly turnover (13% of the total in Europe). In Italy there are over



100 companies – often really small – that work for an estimated amount of business of 120 million euro.

The biggest Italian company is **Rainbow**, born in the region of Marche. It was founded and it is led by Iginio Straffi, who has brought the first Italian TV series called *Tommy and Oscar* abroad. The big success in merchandising of Italian animation characters came with the series *Winx club* that has had a worldwide success in 130 countries conquering the entire world of children, especially girls. The other centrepiece of the Italian series production is **Atlantya** thanks to the different formats that make the main character *Geronimo Stilton* appear in publishing, animated series, apps and gadgets. Another enterprise among the biggest for the high quality of its creations is **Mondo TV** that is keeping working on the project started in 2011 with the *Isola del Tesoro* (Treasure Island), a series based on Stevenson's classic.

The trans-media approach to animation products has changed many things in production and has led to the creation of new business models that are more flexible than the old animation companies of the past. These topics are discussed in the major events of the sector, like the new spring edi-

tion **Romics**, dedicated to animation languages of digital avant-garde (from *motion comic* to *machinima*) along the lines of **Cartoons on the Bay**, the *Rai* event, which over the last few years has widened its margins of research towards the cross-media. A trend that is even stronger is that of festivals that have always focused attention not only on *tout-court* animation but also on the technological and digital evolution applied to it and to the special effects industry. Among these there is the Bologna **Future Film festival**, which has always followed the progress in the sector carefully by overlooking the future of animation. Year 2013 has represented a turning point for this festival that has given birth to a new event in Italy called **ExpoPixel**, an actual digital entertainment fair that has enabled the main Italian and foreign companies to get to know each other and confront each other on the changes that digital innovation is bringing in the sector. These changes have effects on the fruition and distribution of animation products but also on their designing and realization.

Today, one of the fields giving the sector the biggest boost is advertising, which, along with music videos, engages Italian production companies in the making of animated videos and

in digital post-production. Among the companies that have distinguished themselves in recent years for their innovative drive and dedication to qualitative research for their products we should mention the **Dadomani Creative studio** and **Abstract: Groove**, both Milan-based. The former has been arousing interest since 2007 for several advertising campaigns using stop-motion, the traditional frame by frame animation technique here revitalized and made more contemporary through digital post-production. While *Groove* is a studio made up of designers, copywriters, directors, animators, authors, musicians and digital effects experts all specialized in the use of the new technologies to create, with techniques such as motion graphics, innovative advertising campaigns for fashion companies. Another virtuous example is the **Magicind Corporation** project. This extremely young production company, born as a small start-up, is located in a small town in the province of Parma at an altitude of 1,000 metres and produces video and content for various media, from cinema to ads, from viral communication to music videos, from documentaries to shorts, right up to artistic installations, experimenting with their most characteristic animation technique:

stop-motion. Moving along the Italian peninsula, we find the Verona-based **Happycentro**, also specializing in stop-motion and which, as well as in animation, is also active in the world of design, illustration and graphics. This is the kind of multi-professionalism also offered by open structures such as the Rome-based **Mace**, where animation experts in Plastiline produce ads working with architects, designers and fashion experts. **Klesha Productions** in Apulia works with motion graphics, something which allows, without over-the-top budgets, to produce original material mixing various animation techniques: from 3D to stop-motion, from 2D to papercut. The types of products *Klesha* prefers are music videos and book-trailers, but also ads and short films. A characteristic common to all these studios is the fact that they all work using mixed techniques, some very old, but updated and made more interesting also through the use of “poor” animation materials: daily objects, paper, scissors. As if, considering the mega-blockbusters coming in from the U.S. and other countries, we Italians were forced to find our very own specificity, a signature style enhancing “know-how”, almost in opposition to technology. But our young creative teams don't

only work with basic and low-cost techniques. They also experiment with the most sophisticated digital and immersive techniques. **Maga Animation Studio**, for example, has made the production of 3D cartoons its signature style, measuring itself successfully and passionately with the largest international realities in this sector.

The transmedia approach to animation products has led to some remarkable changes in production and has implied the birth of new business models, more elastic compared to the granitic animation companies of the past. One of the current trends is the setting up of new realities through the association of several companies in the sector dealing with different aspects of the production process. The most interesting example in Italy is **Lynx**, an experiment involving **Musicartoon**, **JobAnimation** and **RedWhale**, three subjects with quite different characteristics: one more dedicated to technical production, the other to marketing and the latter to writing. The three companies merged and have worked on several common projects (*Cooking Girl*, *Gagà in space*, *Criky Freaky*) sharing their skills in the production process. With this new set-up *Lynx* presents to the “broadcasters” of the new trans-media market (no lon-

ger just simply the TV market) its projects, designed according to the new logics of “storytelling”. This is also how cooperative platforms are born, like **Kublai**, an all-Italian platform for the exchange of competencies between creators that even subscribes to the *creative commons* licence, one of the most important of its to enter the era of digital makers with full rights.



Winx, by Rainbow

1.2.5 FROM **DIGITAL INTERACTIVE** ENTERTAINMENT TO INTERACTIVE MULTIMEDIA WORK

The Italian turnover of the videogame industry accounts for one billion euro, reconfirming for the fifth consecutive year the “Beautiful Country” as the fourth European country in the videogaming sector. With an 8% growth (before the economic crisis begun in 2008 it was growing by 20-25% a year), the videogame industry in Italy is the entertainment sector that has registered the yearly highest growth rate.

The video-gaming industry was born in the 70s and it has developed significantly during the 90s after the boom of domestic consoles. In Italy the sector has developed later, however in the last decade it has been catching up. The establishment of a video-gaming culture has led in 2008 to the creation of the **AIOMI –Associazione Italiana Opere Multimediali Interattive** (Italian Association for interactive multimedia creations), created to enhance the artistic and historic result of videogames. The core project of the association is the **VIGAMUS**, the first Museum of Italian videogames (second in

Europe) and the **Italian Videogame and Digital Conference Centre – IVDC** organization, which is now at its 6th edition and it was hosted at the opening of the Rome Videogame Museum. Furthermore, throughout the years it has seen international personalities of the videogame world industry, such as Peter Molyneux, David Cage, Phil Harrison, American McGee.

For videogame development, **Milestone** remains Italy's top developer. The Milan-based company mainly specializes in racing games and owns licences for some of the most important competitions in racing sports. The fabric of Italian businesses is richer and more diversified for the second large family of videogames, i.e. the Full Digital for Mobile, Tablet and Digital Channels sectors. Within this universe we find successful software houses operating, such as **Artematica Entertainment**, one of Italy's “oldest” and top producers-developers of videogames and advergames on various platforms. Another company in the field of con-

tent creators is **Ubisoft Studios** counting 50 employees. The Milan-based studio is one of the many Game Studios owned by the French giant Ubisoft, one of the biggest publishers on an international level. The studio in Milan is in charge of the development of some titles that are entirely transferred to the Italian team for development and to be then published in the rest of the world.

On the contrary, in the full digital gaming sector for Mobile/Tablet/Digital Channels (the other big sector of videogames) the Italian scenario is characterized by a higher number of realities also because of a lower need for investment and development team. Nonetheless, they are sometimes micro-realities and can count on their significant creative talent. Most of them are based in Lombardy, but there are also development teams in Liguria, Campania and Apulia that, throughout the years, have demonstrated their ability to work on interesting concepts, some of which, like BANG!, have been developed by



“MUD”, by Milestone

the society from Benevento called **Spinvector**, with interesting commercial results on an international level. The society has demonstrated a great technical ability and creative spirit with the creation of the version for the mobile sector of the card game BANG!, which is one of the 10 best selling card games in Europe in the traditional paper version. Among the most interesting teams to keep an eye on there is the Milan-based **Digital Tales** that has a development team founded by a former Milestone, author of interesting titles on mobile gaming for the international market, such as *Battle Loot Adventure*, Italian best videogame that won the “*Drago d'Oro*” (Golden Dragon) in 2013, the official prize for best videogames in Italy. There is also the Naples-based **Raylight** that has shown a great ability in developing on digital platforms and also on portable and domestic consoles, working on important titles for international publishers.

1.2.6 OTHER **BOOK** STORIES

This industrial sector, comprising over 2,200 publishers, employing almost 40,000 people with a 3.3 billion euro turnover, over the last forty years has been characterized by a counter-cyclical trend: it reaches better results in the worst economic and social times and vice versa. From 1995 onwards, we have witnessed a phenomenon of radicalization with the decrease in the percentage points of the “weak readers” (those who don’t read more than three books in one year) and an increase in the figure relative to the “strong readers” that have managed to reverse the negative trends.

Due to these peculiarities on the market, in Italy the initiatives aiming at the promotion of reading have started to orient towards the strong readers, although raising the number at the basis is the real challenge to face. Indeed, when publishers tried to work on the divulgation or when they proposed innovative offers, they have had some evident results: let’s look at collections like **BUR**, the **Oscar** and “**Mil-lélire**”.

Nowadays, the community of readers in Italy accounts for hundreds of big and

small localities that host and organize events linked to books, festivals on literature, fairs and meet-the-author events. Books contribute in the growth and enhancement of Italian heritage. This happens in Bergamo with the **Bergamo Scienza** (Bergamo Science), in Bologna with the **Children’s book fair**, in Cagliari with the **Leggendo Metropolitano** (Metropolitan Reading) and **Tuttestorie** (All Stories), in Cortina d’Ampezzo with **Una Montagna di Libri** (A Mountain of Books), in Courmayeur with the well-known **Noir Festival**, in Cremona with the **Le Corde dell’Anima** (The Cords of Soul), in Cuneo with **Scrittorincittà** (Writers in Town), in Genoa with **La Storia in Piazza** (Stories in the square) and the **Festival of Science**, just to mention a few.

When it comes to books, technology consolidates habits and attitudes. It does not chance them. Young readers who read more are in fact also those who look more for information of the Internet. Those who were born in the digital era are among the “strong readers” in Italy. Despite figures being still low, in Italy the digital book market currently represents the most dynamic and creative segment of the

publishing industry, with a development of production that has taken Italy in two and half years to 60,589 available titles, that represent 8.3% of all “commercially alive” titles. The number of eBooks offered monthly between February 2012 and February of this year has grown by 78.5%. In 2011 there were 0.59 digital titles per reader, whereas today we find 2.43. Along with the old production chain that exists in spite of everything, over the last years another production chain has started to develop in Italy that has wide borders and for this reason it is not well described and defined yet. It describes a reality that is dynamic, active and able to enhance the potentials of the books and of their contents like an essential “good” in the sector of events and storytelling – the best and most innovative way to enhance many segments of the quality of Italian’s economy.

Some of the most active publishers on the multimedia market include **Minimum Fax**, a company that has turned a new idea into a TV format embraced by *Sky Arte*. Reading a book means sharing a story, with who wrote it, with those who have already read it

and those who will in the future. This

gives life to Book show, a very narrative show that, to keep the attention of its viewers alive, counts entirely on the aesthetics of images. The verb “**ADD**” is also the philosophy behind an extremely interesting young publishing company from Turin that selects and edits its offer with extreme care. Whereas, **Chiarelettere** continues to confirm itself as the most active

breeding ground for stories on the current Italian reality. It is an independent multimedia publisher (books, DVDs, blogs) that has been capable of creating a space for free information, participation and debate and a publisher capable of acting with the timeliness of a daily newspaper and with a regard for the most refined contemporary nonfiction. But also the big publishers measure themselves with

the young generation by linking the language of books to that of image thanks to the help of the Internet. This is what **Feltrinelli** has done by inviting the readers to represent their favourite book with photos: a creative exercise of great success that was published on an e-book and that can be downloaded from their website.



1.2.7 COMICS IN ITALY, BETWEEN BOOK MARKET AND RE-SERIALIZATION

Comics continue to be a relatively dynamic and particularly creative industry in Italy where it has held a role of excellence on the international market for at least a century. For decades Italy has been part of an international stream of exchanges between top authors and publishers, since the days of the *Corriere dei Piccoli* up to the so-called “Italian Disneys”, and with the post- Second World War boom of exports to South America (with the group of “Venetians” that included Hugo Pratt), Britain (with the contents supplied to *Fleetway* and DC Thomson) and France (with translations into French of features from *Alpe*, *Bianconi* and *Bonelli* publishers). Within the context of a progressive globalization of this sector too, a very visible aspect is precisely this renewed success of made in Italy creativity. Indeed, in years two thousands, Italy has produced significant material both in the direction of mass consumption and in that of the sophisticated “artsy” product.

On the one hand, after the worldwide success between 2011 and 2013 of the Disney series *Witch* (created by an Italian team), the contribution of Italian authors to renowned American series like *Spider-Man* (Sara Pichelli, Giuseppe Camuncoli) or *Avengers* (Stefano Piccoli) has appeared even more incisive; on the other, there has also been a consolidation of the fortunes of a new generation of Italian authors who, in the wake of a genealogy opened by the masters of the 60s and 70s (**Pratt, Crepax, Toppi, Buzzelli, Giardino, Micheluzzi**) has begun to win some of the most prestigious European and U.S. prizes (this is the case of **Igort, Gipi, Manuele Fior**, the group from *Canicola* magazine). In a 2012 estimate, the specialist magazine *Fumo di China* mapped out the phenomenon of an authentic “migration of talents”, reconstructing the scenario of works produced by Italian authors for foreign publishers: between 2004 and 2011 approximately 90 authors have worked in this way, with well

over 200 publications between books or albums. Without counting simple translations, in one decade Italian authors produced something like half a thousand books and/or albums produced by publishers and magazines in around a dozen countries. Comic publishing in Italy is still marked by a sharp polarization, both in geographical terms – most publishers are located in Milan and Bologna/Modena – and market terms. On the one hand we have the activity of the traditional publishers of popular serials, like **Sergio Bonelli** and **Walt Disney Company Italy**, leaders at newsstands next to other formulas – like humorous strips (*Lupo Alberto*), or the ‘noirs’ and the other pocket series (*Diabolik*, *Alan Ford*) – nowadays quite residual. On the other, in the channel of specialist bookshops or the 300 something comic shops, we see an extreme fragmentation of the offer, with several small to medium publishers specialising in various traditions (manga, super-heroes, independent

comics, popular Franco-Belgian tradition, experimental works), niches now marked by the leadership of a multi-genre and multi-brand publisher like **Panini Comics**, which operates in a dozen or so countries between Europe and South America. One of the distinctive features of Italian comic publishing is its configuration as still strongly related to the newsstand channel, whilst elsewhere (France, U.S.) this is an essentially minoritarian one. And because of this peculiarity, the main overall transformation factor is the growing “conversion to the bookshop” of the comics market: i.e. an increased weight of works distributed in bookshops by publishers distinct from the traditional newsstand market players and involved both in the repackaging for the bookshelf of newsstand products and in designing works – the formula of the *graphic novel*, for example – expressly conceived for bookshop consumption. A phenomenon, the latter, which has taken a step forward in 2012 too. One example above all: the acquisition by the film and publishing group **Fandango** of comic book and illustration publishers **Becco Giallo** and **Orecchio Acerbo**, leaders respectively in the “reality comics” and quality *picture books* segments.

In the meantime, this sector has consecrated, for a while now, the city of Lucca as the City of Comics per excellence. It is the centre of the most important international exhibition of comics, animation films, illustration and gaming. **Lucca Comics** is now at

its 18th edition and it presents itself as an important occasion to meet the international operators and a growing number of exhibitors and of participants (this year they have reached their record with a number of participants of over 200,000 people).



“Valentina”, by Guido Crepax

1.2.8 MUSIC IS MORE AND MORE LIQUID

Italian Music develops along three lines corresponding to three different musical languages with their own financing mechanisms. Firstly we find the institutional language of the opera: a well-established world, which has developed strong financing mechanisms with its own representing bodies and have an au pair dialogue with the Regions and the Government. Along side there is a vast music industry linked to pop music and commercial rock that is able to live thanks to the audience benefitting from live events in big venues. Last, there is the niche music (rock, jazz, international music etc.), which is vital in terms of creativity but weaker in terms of financing. It's in this sector that we find the most interesting cases of contemporary music and local sonorities that are strong in the locations where they live.

Over the last years, live events have grown significantly for two categories: on one side the famous international and national artists, on the other side the niche events, able to be appreci-

ated by an international audience as well, counting on their specificity and territoriality and having a decisive role in giving the chance to emergent groups to be seen. Among some of the events there are: the **MEI**, the most important Italian event for independent music; the **Notte della Taranta**, the biggest music festival dedicated to the *pizzica* (a popular Italian folk dance originally from Salento in the region of Apulia) and to its fusion with other musical languages; the **Time in Jazz**, the music event created by the trumpet player Paolo Fresu, well known around the world and from the north of Sardinia, who has always been appreciated for his original spirit and for the ability to combine music and environment together in a mixture of art and nature.

The Internet has changed this sector: there is more and more music available on the net and the music is more and more "liquid". The most interesting case is the arrival of Spotify in Italy, the international system enabling anyone to listen to music in streaming on personal devices from a range

of tracks that is becoming larger and larger.

The net has started up an important revolution of the "do it yourself" not only for what concerns consumption, but also as a creative practice, modifying the way to "make music", innovating culture and creativity of the young generation by introducing new elements unknown to production companies. In this way the production of independent groups have started to be exported abroad representing Italian culture. This method is low cost, quick and the net is used in an intelligent way to "test" products, international stable connections and the presence of big festivals. Among the most impressive phenomena there is **Benny Benassi**, the young DJ and producer from Reggio Emilia who comes from the *Arci and Case del Popolo*. After having produced a number of successful albums in the sector of dance music, he was contacted by Madonna to realize two songs in her new album. Another example is the twenty-year-old Sicilian **Albero Sansò**, independent producer of electronic



music. Thanks to his participation in the contest organized by the English group Franz Ferdinand to remix their latest album *Ulysses*, he was selected by the band among over 500 DJs. His studio is today a small international factory that Fatboy Slim, the DJ from Brighton at the top of International charts, has wanted in his label Southern Fried, for which **Supa** now produces albums. There are of course other genres and the Italian rock produced by independent labels is reaching an unprecedented success on the market, regularly publishing albums that have an extraordinary ratio between investment and profits not only generated from the sales but also from live events. Labels like **42 Records**, **Ghost** and **La Tempesta** have become labels that guarantee the high quality of any product beyond the artist. Talking about Bologna, **Irma Records**, the label that has introduced the "lounge" genre to the world has celebrated 20 years of activity in 2013 and it has opened a twin label in Tokyo.

1.3 HERITAGE



1.3.1 THE POSITIVE EXPERIENCE OF INDEPENDENT ENTITIES IN CULTURE MANAGEMENT FOR LOCAL DEVELOPMENT

If on one side, the government has progressively eroded the resources for the safeguard and enhancement of historical and artistic heritage and of the production of culture, on the other side the local administrations have invested in culture, as this is considered a key factor for the growth of their territories, hence they have allocated on average 3% of their budget to cultural heritage.

Therefore, more than the government and the Ministry of Culture (MiBAC) it has been the local governments that have started to enhance the cultural heritage, also in spite of the fact that a great part of this heritage is their property (more or less half of Italian museums are owned by the municipalities and by other local governments). The Ministry of Cultural Heritage and Activities have in fact halved over the last decade. This process is causing problems to the budget of the local administrations where the funds allocated to culture have dropped to 2.6%.

Over the last twenty years, the legal subjects managing heritage and cultural activities promoted by the local governments have represented the framework of the integrated system of the cultural and touristic assets of Italy. These legal subjects were born in the 90s after the introduction of a number of innovative laws through which the local governments have assigned the management of heritage and services linked to the cultural, touristic and environmental sectors to independent organizations, associations, special institutions and societies that are actual “public service companies”. This process was initiated to meet the need to conciliate the safeguard and enhancement of heritage by integrating the duties of the public sector with the resources of the private one. All the legal subjects took part in this process and started to manage cultural goods and activities such as museums, theatres, libraries and natural areas, created by the public authorities

owners of these places and that play a leading role in this growing trend. This is how from the 5 companies started up in 1990 we have now 400.

By looking at some of the most significant and representative Italian cultural firms, including the **Turin Museums Foundation**, **Musica per Roma Foundation**, **Zètema Progetto Cultura**, **Fondazione Barumini Sistema Cultura**, **Azienda Speciale Palaexpo**, the **MAXXI Foundation**, the **Milan Triennial** and the **Venice Civic Museums Foundation**, we can see how cultural firms have played a leading role in changing culture management. The profits of the last five years highlight a significant reduction from public funding (-8,5%) and an even higher contraction of resources from private funds (-27%), compensated by a strong increase in auto generated revenue (+49,5%), which indicates the great efficiency of these structures and the great efforts made for their sustainability even in times of crisis. This trend had big con-



photo by Musacchio Ianniello, courtesy of Fondazione MAXXI

sequences on self-financing capacity, which increased by 15% in the period under examination, with an average incidence of 60%.

Also taking hold is a tendency to entrust public goods to entirely private subjects in the attempt to enliven the fabric of towns and cities with cultural life. A fine example of this is the case of the former Fire Station in Ferrara. Ferrara provincial council, after trying unsuccessfully to sell the site, in disuse since 2004, decided to lease it free of charge, after a public competition, for a minimum of five years to the non-profit association **Grisù**. One of the best associations in the private sector is the **Rome Foundation** that has managed the exhibition area of the Museum of Rome Foundation, formerly *Museo del Corso*, since 1999. Up until now, it has organized over forty exhibitions in collaboration with the most prestigious international museums and it stands out not only for the high quality of the exhibitions but also because it researches innovative solutions aiming at inclining people towards art through cultural seminars, conferences, and special events.

On the rise in various parts of the country are those networks of individuals and enterprises that by meeting up favour the creation of new models

for the management of the heritage and of innovative creative workshops capable of producing added value. Examples are the currently being formed network of historical villas on Lake Como (Olmo, Grumello and Sucota) and their respective parks as part of the **Chilometro della Conoscenza** (Kilometer of Knowledge) project and similar projects for the **Villas of Veneto** and the **Stately Villas of Lombardy**, five historic residences, all “culturally and economically” online.

Another element crucial to a full development of the sector is the consolidation of a chain of businesses, research centres and enterprises networks, able to offer a broad range of services for the enhancement of the cultural heritage. From subjects working in restoration, to those that supply the new technologies that are revolutionizing the way the cultural and natural heritage is promoted, managed and enjoyed. Tuscany, the Italian region with the most protected archaeological and architectonic sites (6451), is fertile ground for the growth of regional centres for technology applied to the cultural heritage, thanks to the variety and liveliness of the subjects operating in that territory, not necessarily in the field of the cultural heritage alone.



photo Luca Campigotto, courtesy of Parco della Musica



1.4 CORE OF THE ART

1.4.1 THE PERFORMING ARTS: BETWEEN CRISIS AND NEW PROJECTS

The performing arts is one of the sectors where relations with the territory and the local institutions are strongest, and many of the structures that operate professionally in this field are co-funded by local authorities, Regional Governments and the State. Live shows in Italy are a consolidated system, with large figures involved. Quoting only the main categories, we can count: 17 public enterprise resident theatres, 15 private enterprise resident theatres, 35 resident theatres for innovation (research and experimental theatres, child and youth theatres), 14 Opera and Symphony Foundations, 28 traditional theatres, 13 orchestra and concert institutions. In 2012 the Ministry for the Heritage and the Arts approved a total of 1,752 funding requests. This system includes institutions that represent Italian culture worldwide and companies devoted to research of languages.

Milan's **Piccolo Teatro** distinguishes itself for the high quality of its cultural events but also for the excellent management of funds. This prime example of stable organization in Italy was founded in 1947 by Paolo Grassi and Giorgio Strehler. Two figures will be enough to explain this success: 50% of the audience attending the *Piccolo Teatro* is aged under 26, despite the shows are not expressly thought to address a young audience; 52% of funds come from different channels of self-financing and this is the highest percentage in Europe. Some innovative theatre companies have had success also on an international level thanks to their continuous research. Among the most popular names there is that of **Societas Raffaello Sanzio**, which has been researching for over thirty years and aims at putting together the classical features



of theatre and a more innovative communicative technique, the most deep and radical that sometimes reaches a “cortical” communication of pure sensation. The theatre of **Emma Dante** from Palermo is becoming more and more successful on the international scale due to the attention it gives to physical actions and the often obsessive movements of the characters having a pace and rhythm that become the leading structure of the shows. Last, there is the recent success of the two playwrights and directors **Ricci-Forte** described by the critics as the *enfants prodiges* of Italian contemporary theatre.

With regards to the various areas, the region of **Emilia Romagna** stands out in Italy both for the rich concentration of historical theatres and for being recognized as one of the most significant areas in Italy for the production, con-

sumption and diffusion of live events. Indeed, in this region, in the 80s companies like **Teatro Valdoca**, **Teatro delle Albe**, the already mentioned **Societas Raffaello Sanzio**, **Giardini Pensili**, **Masque Teatro**, **Motus** and **Fanny & Alexander** were founded. In the city of Modena there is the **ATER - Association of Theatres in Emilia Romagna**, founded in 1964 to favour the opera productions with collective contracts that supported the management of theatres. Moreover, in this area there is one of the most significant festivals in this sector – the **Santarcangelo International Festival in the Square** – both from a cultural point of view and for the way it is organized. Concerning the initiative of the local governments of Emilia Romagna, it was founded in 1971 and it has been able to transform the town of *Santarcangelo* in an actual “stage” bringing to live an ante litteram example of “urban regeneration” linked to culture. Between 2009 and 2011 the Festival of Santarcangelo has handed over its management to three companies as an experiment, these being Societas Raffaello Sanzio, **Motus** and **Ravenna Teatro**, experimenting a new and successful artistic and managerial formula. Within and alongside this system, we find a less visible one, ascribable to

the field of cultural welfare, which also achieves important artistic results. The reference here is to the theatre as instrument of mediation and integration, to Social Theatre or Community Theatre, to which some very interesting initiatives were dedicated in 2012, such as the international conference *I teatri delle diversità* (Theatres of Diversity) held in Urbania and promoted by the magazine of the same name, or the conference *Immaginazione Contro Emarginazione* (Imagination against Marginalization), held by the Arts Department of the University of Bologna. We could mention a long list of experiences, from the **Teatro Carcere**, the prison theatre that has achieved a considerable fame thanks to the work, among others, of Armando Punzo, to the project that Nanni Garella has been running for over ten years with the Bologna **NPO Arte e Salute** (Art and Health), a theatre company composed of psychiatric patients. These activities redraw the aims and values of action in the field of the performing arts, no longer measurable according to traditional parameters, but only by adopting new standard paradigms.

1.4.2 VISUAL ARTS. ART AS “ITALY SYSTEM”

From the second half of the 90s onwards, Italy has experienced two different phases, the first being the “invasion” of contemporary art museums, thought to be an efficient way to relaunch a city. But this first phase was then followed by austerity. Meanwhile, in the gallery sector there are venues of excellence, which represent the access of works on the market, and also keep researching and promoting their activities. Last, the sector of patronage of the arts that seems to be experiencing an innovative period.



Fashion Office, Fondazione Pistoletto

In fact, Italian museums are “monads” having no support, nor cultural strategies that should assure their stability. This is why they manage to reach high quality levels and periods of steep decline. Among the realities that have managed to enhance their particular features through valuable cultural events, there are **MART of Rovereto** and the **Museum of Contemporary Art of the Rivoli Castle**. The first mentioned is essential for those who study the Futurism movement, whereas the Rivoli Castle (the first contemporary art museum in Italy and the best known worldwide) since year 2000 has opened its doors to young artists with scholarships for single projects and in 2012 it started to select works to include in its permanent collection. Still talking about creative emergencies, it is worth to mention an interesting announcement called **Movin’up** promoted by the Ministry of Cultural Heritage and Activities to help support the international mobility of young Italian artists in foreign institutions. With respect to art gallery owners there is a number of private realities following *avant-garde* itineraries, pioneering experiments, and talent scouting. These people are able to

guide the choices of the major investors and are also defenders of some of the Italian cultural places, strong supporters of a dialogue with local governments, and promoters of a number of collaborations with Italian and foreign museums. **Lia Rumma** (based in Naples and Milan), **Massimo Mini- ni’s** (in Brescia), **Christian Stein’s** and **Massimo de Carlo’s** (both in Milan) and **Alfonso Artico’s** (in Naples) galleries are among the most influential in Italy and worldwide. Furthermore, **Studio Marconi** based in Milan and **Studio Morra** based in Naples, are both referring points for the artistic groups of the Sixties and Seventies, who let memory play an active role in the artistic enhancement of nowadays, by combining archives and historical exhibitions with new and young artists. Lately in Italy a new phenomenon, the neo-patronage of the arts has started to expand thanks to some knowledgeable fashion designers such as François Pinault, a multibillionaire entrepreneur who owns the PRP group and is also the owner of **Palazzo Grassi** and **Punta della Dogana** in Venice; and also Miuccia **Prada**, who has supported the latest trends in Milan for a long time. In 2011 she started her

activity of reclaiming **Ca’ Corner della Regina**, a building of 700s looking over the Grand Canal in Venice. Furthermore, **Ferragamo** foundation is committed in re-experiencing important moments of its past and **Trussardi** is organizing exhibitions in particular buildings of Milan. When talking about patronage of the arts, one cannot forget the case of **Ermanno Casoli Foundation**, born in 2007 to liven a modern system of cultural patronage, around which many initiatives live with the aim to incentivise and consolidate a constructive dialogue between artists, designers, architects and many industries in the area. For what concerns the Italian artistic production, several significant trends emerge. Some are already consolidated at an international level and others still keep to a local dimension, especially the consequences of the excess of communication we are all subject to. Let’s just think of the work of art of **Maurizio Cattelan**, who provocatively states that the quotations of his works are directly proportional to his media presence. On the other side there are some who insist on the revaluation of the concept of beauty and the im-

portance of content such as **Fiumara Arte** by Antonio Presti, a Sicilian patron who has for a long time dedicated himself to his heritage and development of artistic activities in which the ethic and aesthetic aspects are bound together. He sees art as a way to intervene concretely for the development of a society aiming at being rather than appearing. And also **Pistoletto Foundation** founded in 1996 thanks to Michelangelo Pistoletto, who in the artistic city of Biella promotes the role of the artist as someone who is directly and responsibly involved in the dynamics of the society where he operates. To conclude, various signals confirm vitality, or rather a longing for commissioning, in this case in the poorer guise of the “site specific”. If it’s true that the Internet is undoubtedly changing the “diktats” that once decreed the validity of one artist or the other by the experts, on the other hand it is also emphasizing the reality of those who live, as has always happened throughout the centuries, with their studio work produced on commission. Today, more than ever, more and more people are bearing witness to a traditional commissioning process. In

support of this thesis we find Terni Church, commissioned to Paolo Portoghesi, who called **Oliviero Rainaldi** to sculpture the altar and the interiors in general, or Mario Botta with **Enzo Cucchi** for the church of Santa Maria degli Angeli on Mount Tamaro, or Pier Luigi and Natalina Remotti, who commissioned their foundation to, amongst others, Pistoletto and Garutti: therefore, not only works of art, but “structures”, from floors to balustrades and so on.

1.4.3 EVENTS MANAGEMENT

1.4.3.1 The Economics of Events: Profiles of Innovation

Today we don't look at an event as a single happening, but more and more as a "driver" for the growth and enhancement of an entire socio-economic system. This concept is of particular interest in Italy where, it has distinguished itself in the European context over the last years for the dimensions of the festivals. Live events in Italy have been successful in terms of quantity, variety, and diffusion around the Country and the big crowds of

people participating. According to the latest figures, there have been 1,200 festivals, 8,000 professionals involved, over 400,000,000 euro direct investments and 10,000,000 spectators. Among the events that are becoming actual "industries of experiences" there are some that are now well established. These had an original idea around which communities have started to grow and adhere by putting

their abilities at the disposal of the main concept of the festival. For example, people don't go to the **Mantua Literary Festival** because they are fond of literature, or the **Furniture Fair** because they are fond of design, but because taking part in these events makes people feel passionate about these arts although they have never been so. Among the most successful cases there have been locations that have made full use of the events using

them as development drivers to become iconic locations: Malpignano has become the **Night of the Taranta**, Spoleto has been and still is the **Two World's Festival**, and for at least a decade Perugia has been **Eurochocolate**. Another successful sector is that of events linked to the diffusion (sometimes through actual shows) of academic topics, such as the **Festival of Economics** in Trento, **Festival of Philosophy** in Modena, **Festival of Science** in Genoa, **Festival of the Mind** in Sarzana. These were not only successful events but also labs for the innovation of methodology and planning, starting from the hard contents with often no appeal if out of context. If we want to read the evolution of the format of Festivals we must look at the events that are called cross-media, like **International** in Ferrara, **Republic of Ideas** in Bologna and **Radio 3** in Cervia. Each of these events originates from a community of readers and listeners that are part of the publishing sector or sometimes of a political and cultural project that renovates its sense of belonging, consolidates the

community and expands its success. There are also events that have recently made of the think tank formula, among stakeholders belonging to specific sectors, their strong suit like **DNA Italia**, which every year in Turin tries to consolidate, with the strength of their numbers and the participation of operators in the cultural production chain, a full awareness on the real potentials of development linked to the enhancement of the Italian natural and cultural heritage. Or like **ArtLab**, organized by the Fitzcarraldo Foundation, which after the early editions in Turin became an itinerant event, landing in 2011 in Lecce, in the context of a Region that has proved to be extremely reactive in the promotion of new visions in the creative industries. The difficulty of pinpointing precise standard measurements to assess the value of legacy is one of the issues causing the biggest concern on an international level, and one of the most recent experiments on the subject is Italian. In terms of innovation in the measurability of the effects of an event, **DeRev** – a Web platform dedi-

cated to social innovation – proposed a unicum on the international panorama. In occasion of the 2013 edition of the **America's Cup in Naples**, *DeRev* opened a special independent feature dedicated to the event with the aim of compiling an assessment of the event's 'social' impact using the tools of the Web and gathering a series of statistical data of great use for proposing and producing new standard measurements of responses given by users to a collective stimulus such as a major event. The results talk of 1,900,000 interactions of single users on the social media, giving us a precise profiling of the issues and themes that were perceived most.



Opening Ceremony of the Winter Olympic Games, Torino 2006

1.4.3.2 Trade Fairs in the Metamorphosis of Territorial Capitalism

A business amounting to one and a half billion euro; around 4 million square kilometres occupied and 2 thousand employees: these are the figures that show the importance of the business of fairs. Fairs have in fact become a load-bearing axis for the economy: each year during fairs, negotiations for the value of 60 billion euro, are agreed upon and these generate 115% of Italian export thanks to over one thousand fairs organized around the entire country, 200 of which are international and over 300 are national. Thanks to these figures Italy ranks second in the European market of fairs after Germany, but ahead of France and Spain.

The most important fairs in Italy are linked to the main sectors of *made in Italy* products: furniture, food and fashion. The trade fair as competitive territorial asset, not so much and not only because it is the place where a product is put on show, indeed trade fairs today carry out several roles: first of all, one of the crucial attributes of the fairs system is its ability to interpret change and re-representation –

and in some cases anticipation – of economic trends in a supply chain or system of a Country. We are therefore witnessing an explosion of the concepts of exhibition spaces and time, with the expansion of parallel events. Selling exhibition spaces remains one of the main objectives of fair organizers, but it is no longer the only one. The objective that's emerging more and more is that of setting up an event that will create excitement, distinctiveness and cultural innovation. And fairs are more and more taking on the role of capitalists of networks, the role of functional bodies connecting their territory to the rest of the world.

A textbook case of all Italian event-fairs and of the interdependence between the institutional fair event and the parallel events is undoubtedly that of the Milan **Salone del Mobile** (the International Furniture Fair) and the **Fuorisalone** (Outside the Fair), two extremely different events, but that in their diversity express quite well what a post-Fordist trade fair is today, at

least in Italy. It is also an event that in these crisis years has stood out for being in a certain sense “anticyclical”, achieving even in a difficult year like 2013 very positive performances, with over 2,500 Italian and foreign exhibitors divided between the main international furniture fair itself, the *Furnishing Accessories Exhibition*, the *Satellite Fair* and the two biennales, the *Euroluce International Lighting Exhibition* and the *Office Furniture Exhibition*, and a total of 324,093 visitors overall. More than on the furniture fair – which operators now consider a “consolidated” machinery – attention is concentrating more and more on the parallel *Fuorisalone*. The liveliness it expresses is considered by many the clearest exemplification of the economic and social vitality that has always been the trademark of the Milanese metropolis. Another relevant fair in the furniture sector is **Cersaie**, international fair of ceramic for building and bath furnishing.

Data reveal the strong growth in recent years of three trends in the world

of trade fairs. The first is specialisation, with an increase in niche exhibitions or events related to professional or epistemic communities. One of the many examples we could quote is **Fà la cosa giusta** (do the right thing), the Milanese fair of ethical living and Fair Trade. The second trend is fairs opening up to an international and no longer local dimension, to get in touch with buyers, distributors, partners and large corporations, taking the whole chain of distribution with them. A sign of this trend is the proliferation of missions and tours abroad by Italian fairs. The results are evident: in 2013 the fairs organized abroad by the fairs of Milan, Bologna, Verona, Vicenza and Parma have risen by 41% compared to 2011. The interested countries are a few (among which there are China, India, the U.S., Brazil, Russia) and the patronages focalized on the typical *made in Italy* products: fashion leather, food and wine, footwear, gravestone building, cosmetics and mechanics. The Fair of Milan alone organizes around sixty events abroad, especially in the Brics countries. After the partnership with the footwear industry in order to export **Micam** in China, a project is being carried out and it regards a dossier of fashion for the Fair of Milan- **Pitti Image** – United States. The fair of Parma is committed in taking **Cibus** (the Par-

ma International Food Exhibition) in Thailand, where it has already brought one hundred Italian food businesses into a new and potentially very profitable market for the *made in Italy* agricultural and food industry. In the same domain we can also point out **Cosmoprof** (the Bologna Cosmetics Exhibition), the only global Italian fair with two consolidated appointments, one in Hong Kong and the other in Las Vegas, and Veronafiere, which with **Vinitaly in the World** promotes Italian wine excellence throughout the world. And there's more: the interchange activity between global fluxes and the local is also carried out by organizers “with no borders”, like **Milano Unica**, which takes

128 Italian textile businesses to China for Beijing's *Intertextile Apparel Fabrics*, or *Cosmit*, which takes Italian furniture to Russia. The third dimension, finally, is the environment, with exhibitions such as **Solargreen** (Veronafiere), the most important Italian fair (and also one of the biggest worldwide) dedicated to energetic sustainability and the green economy. **Ecomondo**, is the most qualified platform for South Europe and the Mediterranean for the enhancement and reuse of materials and development of the green economy; and Rebuild is an event dedicated to the requalification of the real estate heritage.



Salone del Mobile, Milano



2 New Business Tools and Cultural Non-Profit

2.1 CO-WORKING, INCUBATORS AND ACCELERATORS IN ITALY

Co-working centres in Italy such as The Hub, Talent Garden, Start MiUp, Multiverso, just to mention a few, grow alongside with the establishment of a net of enterprises and mentorship services, in order to favour synergies among enterprises and support them during their development process.

HUB2HUB for instance, was promoted by **The Hub Milan** association, which has partners like *Fondazione Cariplo*, *Borsa Italiana* (Italian Stock Exchange), London Stock Exchange Group Foundation and aims at scouting successful cultural ideas, to repeat in other European countries. The network facilitates the transmission of competences to young teams in other European countries, who will repeat the same format. The first **Talent Garden** was born in Brescia. The Tag galaxy then extended to the cities of Bergamo, Padua, Pisa, Turin and Milan and it will soon arrive in Genoa and Bologna and south central Italy for a total of 5,500 m² in Italy.

92% of places are constantly taken by people who look for a network and a community to integrate in. This is especially due to the 300 events that each year put 450 talented people in contact with 62 start-up companies in the various Tags. **Speed MIUp** is a group of enterprises and professions specialized in capacity building of business and management and in the growth of innovative start-ups and of professionals. The group was initiated with an agreement signed by the Chamber of Commerce and Municipality of Milan to support employment and entrepreneurship, and it has involved *Bocconi* University right away. **Multiverso** is acquiring a regional dimension with the new quarter based in the city of Lucca and the upcoming ones in Siena and Arezzo.

In Europe around 60 funds of investment have been counted with an interest towards the ICC (International Chambers of Commerce). It is worth noting the pioneering experiences in

Italy of **Incredibol** in Bologna (promoted by the Municipality and focalized on the development of creativity professionals) and of **Creative Clusters** in the region of Campania (founded by the Region itself and the University of Salerno that was focalized on the pre-incubation and recognized as European best practice).

2.2 FINANCING NON-PROFIT CULTURE

Culture and non-profit are closely related. The Third Sector's Cultural activities represent around 20% of those it pursues globally, a share comparable to its other main compartments (social services, healthcare, education). The drastic reduction in funds from the public sector (almost -40% in real terms in the last 10 years) and the impossibility of making up for it with private funds, point to an evolution of the sector towards a business mentality. There is no single solution to the problem, which needs to be faced from every angle: generating turnover (with the help of adequate marketing strategies), fundraising, costs control, mergers, and an eclectic use of the latest financial tools, both for assets and liabilities.

With respect to sports, the cultural heritage universe draws much less on public-private partnership. In theory, public-private partnerships, and project financing in particular, can mark, at least as a recovery of the cultural world with respect to sports, a signif-

icant change of pace. The private (especially if non-profit) can progressively take on an active role as promoter of an intervention and manager of a structure. A virtuous example in this sense is the intervention of conservation for **Palazzo Cigole Martinoni** in the province of Brescia, carried out in project financing by a private NewCo, with a share held by a local foundation, and by the company winner of the contract for the restoration operation. Hence we find a joining of forces between Public Bodies (Regional Government, Provincial Council, City Council, local Chamber of Commerce), the private-social sector (the local foundation, a contribution by the Cariplo Bank Foundation) and the for-profit sector (the contractor and Banca Prossima, the bank that granted long-term funding).

There are also cases of for-profit/non-profit partnerships, where public intervention is limited to funding. The most interesting cases are those where a fairly strong integration between the business of the for-profit

enterprise and socio-cultural intervention takes place. A current case, which also illustrates the role of new technologies in culture and in the social sector, is that of *LIA (Libri Italiani Accessibili – Accessible Italian Books)*, an initiative aimed at making the reading of e-books easier for the partially sighted and the blind.

An area worthy of further examination is everything that revolves around marketing. In the case of the National Academy of St Cecilia, the osmosis between the prestige of the old musical institutions and management practices has allowed the Academy – while still maintaining a rigorous control of costs – to effectively segment old and new customers, reconsidering them as clusters receiving different communication modules and new services, and to experiment a more proactive approach towards cultural patronage. All these operations have generated economic balance and self-funding (over 53% in 2011).





3 Training

Over the last twenty years, training in the sector of cultural management in Italy has been fragmented, underdetermined and weak in the process of integration into the sector. Cultural organizations have progressively approached professional training in the cultural management sector and also the regional governments have tried to respond to the new requests by supporting a growing number of training initiatives, especially with the use of European funds. This resulted in a general and transversal training offer on a local level, generating the creation of a considerable number of small courses (in terms of length) and not highly qualified or qualifying, creating a weak and schizophrenic framework. Just as in other sectors, training has spread in different areas and levels with different results: some (few) have addressed the training activities towards a cultural development in and for the enhancement of their territory, whereas others (the majority) have favoured their needs in the short term of cultural organizations.

By looking at the academic sector and the university professional courses, we can see that the anomaly in Italy is even more evident because of the difference between the number of people employed in the cultural sector and the number of students enrolled in university professional courses. Despite having the highest number of students enrolled in cultural university courses, Italy has a low number of employees in the same sector.

An interesting training offer is supplied by the **Italian Publishers' Association** (AIE), aimed at both university students with an MA course organized in partnership with Milan University and the Alberto and Arnaldo Mondadori Foundation (FAAM) – the only post-graduate course specific to the publishing field – and to professionals and businesses in the sector, for whom the professional *FormEDI* courses have been designed. For these professional courses, AIE carries out a requirements analysis using an international benchmarking system in ABPTOE (Associ-

ation of booksellers and publishers), a monitoring on individual courses (number of participants/types of company/class assessment) and on feedback activities, starting from trends taking place in the sector and relative requirements, analysed also on an international scale. In 2010 the Association signed an agreement with Rome's *Tor Vergata* University that initially aimed at a sector survey focusing on the publishing market in Rome and the whole region of Latium and then at planning and supplying periodical seminars by AIE staff and co-workers as part of specific graduate courses. With respect to segments in the cultural sector, although the aim of the training courses is to transmit “transversal competences”, these take on different variations. In the sector of performing arts, more attention is given to planning roles, whereas the sector of event organization (**Almed** training offer) points to the training of project managers and production directors for cultural planning and organization, and also to staff assistants for mar-

keting and communication and institutional communication (both public and private), and assistants for sponsoring and fundraising.

The MA marketing and management course at **Lumsa** University offers places in the creative sector, audio-visuals, and event organization management. **Holden** school mainly addresses the narration sector by training editors, scriptwriters, writers and copywriters who can then work in publishing companies, advertising and radio companies, TV and Film production, theatre and start-up companies. The MA course at **La Sapienza University** is specific for the training of Digital Cultural Collection Managers: experts in creating, collecting, managing and distributing digital material.

Today, design that starts from the culture code becomes above all the expression of the creative enterprise and is the one sector that is most characterized by contaminations from other sectors (food design, services design, fashion design and so on) where the tendency towards self-entrepreneurship with the creation of start-ups is very high. Milan's **POLI Design**, a Con-

sortium of the Milan Polytechnic with the patronage of the Italian toy-manufacturers association, now hosts the first ever course on toy design, which sets out to train, in terms of content and methods, a new generation of designers capable of managing complex design processes, coordinating the most diverse skills. The Management Lab set up by **IED** (European Design Institute) is a container totally devoted to training on issues related to creativity management in business processes.

The courses of the **Centro Sperimentale di cinematografia** (Italian National Film School), finally, are directed at training talented young people who wish to undertake a career in the film industry.



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