

Culture and the creative economy in Emilia-Romagna, Italy



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Cultural and creative sectors are a significant driver of local development through job creation and income generation, spurring innovation across the economy. Beyond their economic impacts, they also have significant social impacts, from supporting health and well-being to promoting social inclusion and local social capital. This paper offers a review of cultural and creative sectors in the Emilia-Romagna region, Italy, highlighting issues and trends in regards to employment, business, entrepreneurship and financing in cultural and creative sectors. It also reviews issues and trends relating to cultural participation and offers in-depth analysis on the role of museums in supporting local development. The paper provides analysis and recommendations to support the region in strengthening the local cultural and creative ecosystem.

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Executive summary

Cultural and creative sectors have a significant economic weight in Emilia-Romagna

Cultural and creative sectors (CCS) in Emilia-Romagna contribute significantly to the economic landscape in regards to GVA and numbers of firms. In 2019, the region generated one of the highest proportions of GVA from arts, entertainment and recreation in all Italian regions and saw GVA from the sector increase by 15% between 2010 and 2019. In 2018, CCS businesses made up 5.4% of all firms in Emilia-Romagna, slightly higher than the EU27 average of 5.2%. Emilia-Romagna has particularly high strength in architectural activities and specialist design activities, which account for 23% and 21% respectively of total CCS enterprises in the region. The growth in specialist design activities has been particularly marked, with the number of firms increasing by 10% between 2012 and 2019.

A significant proportion of employment in the region is in CCS but more can be done to address the precariousness of CCS jobs as well as female participation. CCS account for around 5% of overall employment in Emilia-Romagna based on regional CCS definition (see Annex A for data sources and definitions). Excluding software development and consulting and advertising and communication (for international comparability and following the Eurostat definition of cultural employment cultural employment (including cultural jobs in other sectors) in Emilia-Romagna accounted for 3.4% of overall employment in 2019. This is slightly lower than the average across Italy (3.6%) and across the EU27 (3.7%). It is important to note however that these statistics only capture data on people's main jobs, meaning that actual employment figures may be much higher when incorporating individuals who work in cultural employment as a second job. As in many OECD regions, cultural employment in Emilia-Romagna is characterised by high levels of precariousness and related income instability due to high shares of temporary forms of work. Women are underrepresented in cultural and creative sector employment in Emilia-Romagna, with only 36% of those working in creative and cultural sectors in 2017 being women. This is indicative of cultural employment in general across Italy (including both those working in cultural and creative sectors and those working in creative jobs elsewhere in the economy), where only 43% of those in cultural employment were women in 2020, compared to an EU27 average of 48% and an OECD average of 50%.

CCS are an integral part of Emilia-Romagna's regional development policy

CCS policies are strong in Emilia-Romagna and support spillovers in the wider economy. CCS policies traditionally focused on the funding and management of cultural institutions, with a strong emphasis on social inclusion and equality of access to cultural amenities throughout the territory. Since the 2000s however, regional policies have increasingly sought to leverage on the strategic role of CCS as an economic and social driver. CCS policies support an increasingly close relationship between CCS and other sectors, including the region's sophisticated manufacturing economy, and a progressive integration of CCS within the regional Smart Specialization Strategy. The regional Culture and Creativity Observatory continues to evolve to support evidence based policy making in Emilia-Romagna.

Regional public support to culture has increased over the past decade. While national spending on culture and recreation has been in decline since 2011, regional public support has increased considerably

and bank foundations are playing a large role in supporting the financing of CCS. The regional financing system of CCS has progressively evolved towards a multi-stakeholder approach, where multiple sources of financing are present, and public-private partnerships are encouraged.

CCS have been hit hard by the COVID-19 crisis although the impact was uneven across sub-sectors

COVID-19 has severely impacted CCS businesses and cultural employment in the region. Estimates suggest that CCS in Emilia-Romagna experienced a loss of EUR 58 million in revenues in the March–June 2020 period alone. Nearly half of this loss (EUR 27 million) occurred in the live performance and events sector. Cultural employment was also severely affected contracting by 7.5% between 2019 and 2020, compared to an average fall of 2.6% across the EU27 and 5.2% across Italy. As mentioned above, these employment figures are also likely to underestimate the actual scale of jobs lost due to the many secondary jobs in the sector.

The museums sector is a great strength of Emilia-Romagna but has been hit particularly hard by the crisis. Before the pandemic, the museums sector in Emilia-Romagna was thriving and museums were playing a key role in local economic development and culture-led regeneration strategies. However, the sector has faced significant challenges over the pandemic period, with successive lockdowns resulting in an estimated loss in revenues of EUR 6.4 million.

However some sub-sectors, were better equipped to adapt and thrive during the pandemic. Market-oriented sub-sectors able to move activities online proved to be more resilient. Fashion, media and design businesses managed to find new streams of revenue in previously untapped market opportunities thanks to their online presence. However, cultural institutions such as museums, theatres or art galleries are still in the middle of the evolution toward digital (and hybrid) engagement and dissemination models.

The demand for culture is high in Emilia-Romagna

Emilia-Romagna had one of the highest cultural participation rates in Italy before the pandemic, but lockdowns have severely affected cultural participation across Italy. Among Italian regions Emilia-Romagna had the third highest share of people attending live performances and attendance rates have increased by 4.7% between 2017 and 2019. In particular, opera, theatre and dance attendance rates increased above the national average between 2015 and 2019. The region also had the second highest rate of household spending on recreation and culture with a little under 8% of all household spending falling into this category in 2018. However, COVID-19 has led to a significant drop of household expenditure on these items across Italy. While regional data are not yet available for 2020, national data show an average decrease in household spending on recreation and culture across Italy of more than 20% in 2020 compared to 2019. The emerging cost of living crisis is likely to result in these spending levels remaining low, or even dropping further.

Cultural and creative sectors can support the recovery in Emilia-Romagna

Before the pandemic, the CCS were on a growth path in Emilia-Romagna, and the region has an opportunity to capitalise on the sector's underlying strengths in the recovery. However, action is needed to address the long-term challenges affecting CCS, which have been exacerbated by the crisis. The region could build on its existing policies by supporting educational and training activities aimed at enhancing entrepreneurial competencies and digital skills of creative professionals, support new networking and learning opportunities for creative entrepreneurs and mobilise cultural and creative spaces, acceleration programmes, and cultural associations and institutions in providing training to local start-ups and small-scale ventures in CCS.

Additionally, the region could look to strengthen its financial ecosystem for CCS by focusing on bringing together public, private and community actors. Regional and local authorities can strengthen the financial ecosystem for CCS by facilitating information sharing between private sector funders and

CCS enterprises, individuals, and organisations, and by actively consolidating information around available funding sources. In addition, the region could look to reduce barriers in access to finance for CCS businesses and entrepreneurs by streamlining regulatory requirements in applying for funding as well as through supporting business and finance skills development of CCS professionals.

Emilia-Romagna could also look to build on its high cultural participation and strength in the museums sector to boost economic and social impact. The region could give look to further support efforts to leverage on the potential of culture to improve health and well-being outcomes including through further embedding the museums sector in local CCS and business ecosystems. Specifically, the region could look to partner with local schools, universities and health organisations in developing and piloting research and engagement programmes around the benefits of culture for health and well-being; support artists and cultural institutions in using their activities to promote of health and well-being; scale-up museums' capacities to contribute to multiple policy agendas (such as health and well-being, entrepreneurship); and couple financial support with other forms of public support (technical, human, financial). Addressing the digital needs of the museums sector and CCS more broadly could also contribute to enhancing cultural participation rates and reaching new audiences.



1 Cultural and creative employment and business trends



An economic profile of the Emilia-Romagna region

Emilia-Romagna is one of the 20 administrative regions of Italy, situated in the northeast area of the country. The region is home to 4.4 million inhabitants, 390 000 of whom live in its capital Bologna (ISTAT, 2022^[1]). Emilia-Romagna is divided into nine provinces: Piacenza, Parma, Reggio Emilia, Modena, Bologna, Ferrara, Ravenna, Forlì-Cesena, and Rimini. The population density (200 inhabitants per km² in 2019) is close to the national average. Moreover, the population is evenly distributed, with no dominant large city but rather an axis of medium-sized cities along the Via Emilia, where two thirds of the population and the majority of the industrial production are concentrated.

Emilia-Romagna is one of the wealthiest and most developed regions in Europe. In 2020, the region's GDP was EUR 149 billion and GDP per capita, at EUR 33 600, was higher than the national average of EUR 27 800; one of the highest of all Italian regions (OECD, 2022^[2]). The percentage of 25-64 year olds with a tertiary education degree was 23.3% in 2021, above the national average of 20% (Eurostat, 2022^[3]). Emilia-Romagna also has a rather high presence of innovative start-ups compared to the national average. In 2019, 931 innovative start-ups (also accounting for academic spin-offs) were registered in the region – the third highest number after Lombardy (includes Milan) and Lazio (includes Rome) – accounting for 8.9% of companies (ART-ER, 2020^[4]).

Manufacturing still plays a leading role in the overall regional economy, with some of the most important industrial districts in Italy. Such districts relate to many different sectors, the most important being mechanical engineering, automotive, ceramics, automation and robotics, construction materials, and food processing and packaging. Other relevant districts in the region relate to the agri-food, fashion, and biomedical sectors. In 2021, Emilia-Romagna had the second highest export value of all Italian regions (after Lombardy) accounting for roughly 14% of total exports (ART-ER, 2022^[5]). Over half (64.9%) of exports were directed toward other EU countries, with 15.3% going to America and 15.5% to Asia. The mechanical engineering sector accounted for the largest exports (about 54% of overall regional exports), followed by the agri-food sector (representing around 15.5% of exports).

In terms of the labour force, Emilia-Romagna is also a top performer within Italy. Emilia-Romagna is one of the top Italian regions in terms of total employment rates. In the third quarter of 2021, the employment rate for 15-64 year olds was estimated at 69.8%, slightly higher than the average for regions in the North East at 68.1% and significantly above the national average of 59.1% (ART-ER, 2021^[6]).

Cultural and creative sectors (CCS) have a significant economic weight in Emilia-Romagna

The economic contribution of CCS in Italy is higher than the OECD average, but has fallen since 2011 and is below the EU27 average. Using the Eurostat definition of CCS (see Annex A), in 2018 CCS contributed just under 17 billion EUR to the Italian business economy, representing around 2.3% of total GVA (see Annex Figure A B.1 **Error! Reference source not found.**). This is a slightly higher share of national GVA than the OECD average of 2.2%, but slightly lower than the EU27 average of 2.4%, reflecting, in part, diverging patterns between Italy and the EU 27 in recent years. Moreover, CCS GVA in Italy decreased by 9.8% between 2011 and 2018, while across the EU27 CCS GVA increased by 7.6% over the same period (see Annex B).

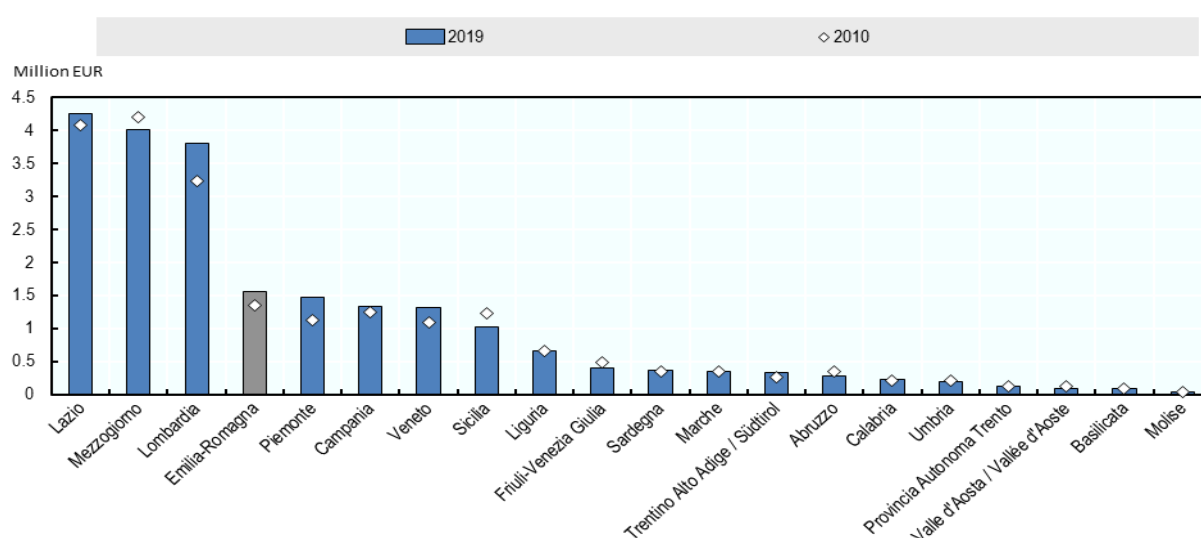
CCS GVA is difficult to measure at the subnational level. However, there are indications that a significant amount of GVA is generated from CCS in Emilia-Romagna. Using a slightly broader definition of creative sectors, in 2013 just under 8% of the GVA generated by creative businesses in Italy came from Emilia-Romagna (see Annex

Table A B.1). Of the sectors included in the Eurostat definition of CCS, 9.3% of national GVA in printing and reproduction of recorded media and 9.5% of national GVA in publishing services came from the region. The region was less strong in the audio-video and TV-based sector, which has a high geographical concentration around the two ‘media cities’ in Italy – namely, Milan and Rome.

The Emilia-Romagna region generates some of the highest GVA from arts, entertainment and recreation of all Italian regions. Although the industrial category “arts, entertainment and recreation” covers some activity outside of CCS (such as gambling and sport) and excludes some CCS activities (such as film, TV and radio), it does give an indication of the strength of performing arts, museum and heritage sectors in the region. In 2019, Emilia-Romagna generated the fourth highest GVA from arts entertainment and recreation of all Italian regions, increasing by 15% between 2010 and 2019 (Figure 1.1).

Figure 1.1. Value-added of arts, entertainment and recreation across Italian regions

2010 and 2019 in chain-linked 2015 prices



Note: Arts, Entertainment and recreation covers all of NACE 2 section R.

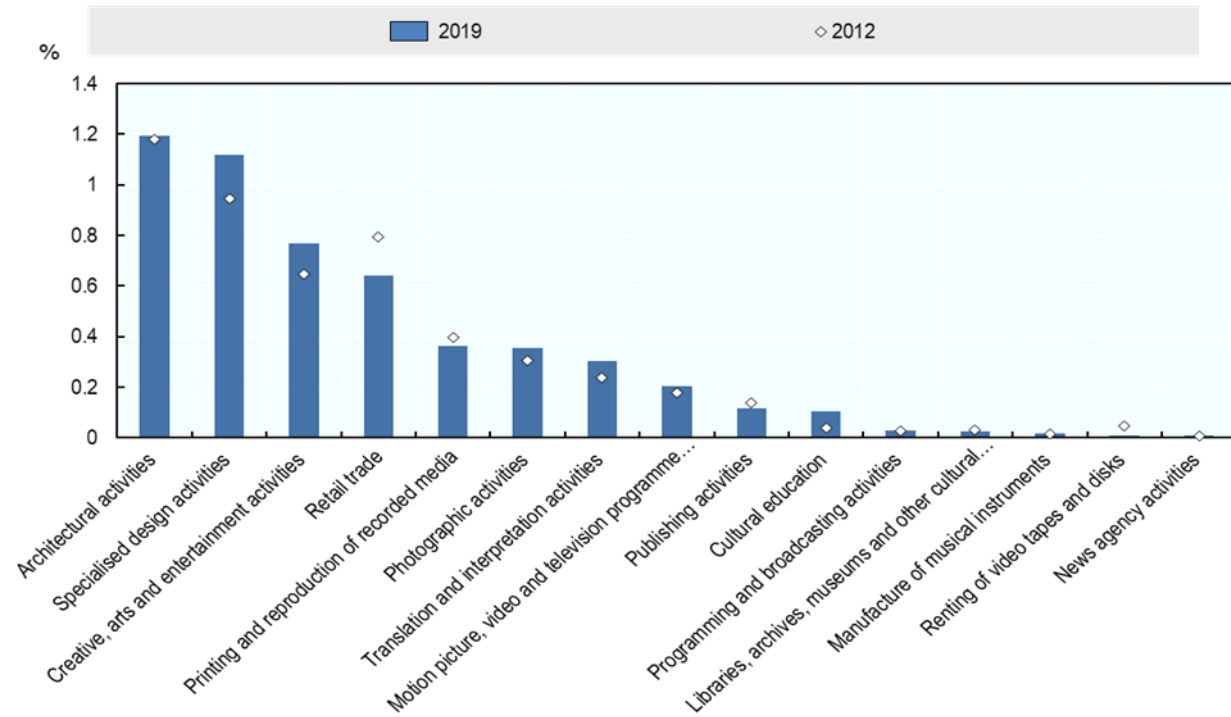
Source: ISTAT; Value added by industry

Cultural and creative sectors make up a large proportion of the enterprises and jobs in Emilia-Romagna

CCS account for more than 1 in 20 firms in Emilia-Romagna. Using the Eurostat definition of CCS, around 8% of all CCS enterprises in Italy were located in Emilia-Romagna in 2019, with the number of CCS enterprises in the region totalling 17 800. In 2018 the number of CCS enterprises as a proportion of the total business economy in the region was slightly higher than the EU27 average (5.4% compared with 5.2%), but slightly lower than the average across Italy (5.8%). Emilia-Romagna shows particular strengths in architectural activities and specialist design activities, with these sub-sectors representing 23% and 21% respectively of total CCS enterprises in the region. The growth in specialist design activities in the region has been particularly marked, with a 10% increase in specialist design enterprises between 2012 and 2019. The region has also shown high growth in creative arts and entertainment, as well as in cultural education. In line with international trends, the region has seen a reduction in the number of publishing enterprises and retailers of cultural goods.

Figure 1.2. Cultural enterprises as a share of all enterprises in the business economy in Emilia-Romagna

2012 and 2019



Note: Business economy here includes NACE Rev. 2 sectors B to J, L to N, and S95. Cultural and creative sectors include C18, C3212, C322, G4761, G4762, G4763, J5811, J5813, J5814, J5821, J59, J60, J6391, M7111, M741, M742, M743, and N7722.

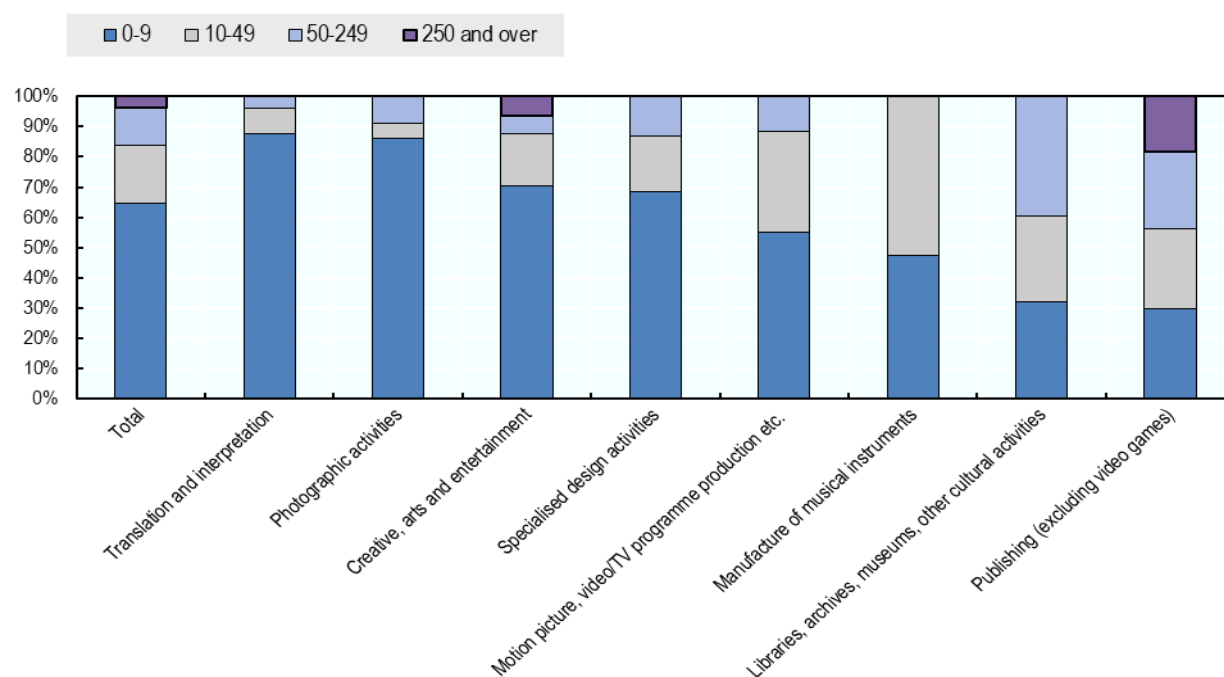
Source: ISTAT; Local Units and Persons Employed -ASIA (Italian National Business Register)

Similar to international profiles, micro enterprises dominate CCS in Emilia-Romagna. Using the ART-ER¹/ ERVET definition of CCS², analysis of 2017 data shows that over 90% of businesses in cultural and creative sectors were micro enterprises (fewer than 10 employees), and around 61% (two-thirds) of all CCS businesses have only one person (Table A B.2). Only 0.1% of all CCS businesses in the region had more than 250 employees. More recent data using the Eurostat definition of CCS show that the majority of CCS employment in Emilia-Romagna also comes from micro enterprises (Figure 1.3). In 2019, just over 60% of employment in CCS sub-sectors for which data were available was in micro enterprises. In particular, just over 70% of employment in creative arts and entertainment businesses came from micro enterprises.

¹ ART-ER is the Emilia-Romagna Joint Stock Consortium created with the purpose of fostering the region's sustainable growth by developing innovation and knowledge, attractiveness and internationalisation of the region. It was created after the merger of ERVET and Aster in 2019. Until 2019 ERVET was responsible for fostering the promotion and development of the territory including analysis of CCS.

² The main difference between the two definitions is the inclusion of "software development and consulting" and "advertising and communication" sectors in the ERVET/ ART-ER definition, which are excluded from the Eurostat definition.

Figure 1.3. Distribution of CCS employment (Eurostat definition) by enterprise size, 2019



Note: CCS total includes NACE2 sectors 322; 581; 59; 741; 742; 743; 90; 91

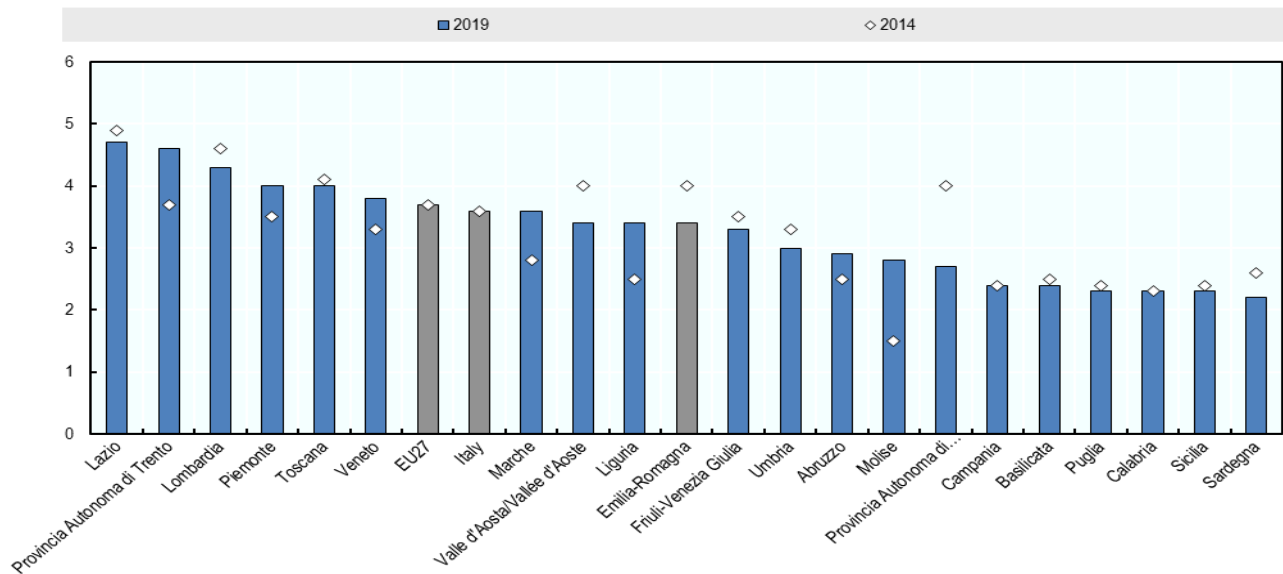
Source: ISTAT, Local Units and Persons Employed, from ASIA (Italian National Business Register)

CCS account for 5% of overall employment in the region, using the ART-ER/ ERVET definition. The number of people employed in CCS increased by 3.1% between 2017 and 2019 double the rate of growth of CCS businesses (1.5%). However, these positive trends are not evenly distributed across all sectors. Over the same period operators in “Artistic handicraft” activities saw a decrease in both local units (–0.3%) and employees (–0.7%), as did operators in “Media and cultural industries” (–0.8% local units and –0.3% employees). Conversely, operators in “Cultural, artistic, and entertainment activities” increased by 7.3%, with employees up by 5.3%. Operators in “Creative services” also saw growth (up 0.3% in local units and 4.9% in employees).

Using internationally comparable definitions, that rate is a bit lower. The Eurostat definition does not include “software development and consulting” and “advertising and communication” in CCS. The other difference with the ERVET definition is that the Eurostat definition of cultural employment takes all employment in CCS and adds cultural jobs outside of these sectors (for example, a graphic designer working for a car manufacturer, see Annex A). Using this approach, CCS account for 3.4% of employment in Emilia-Romagna in 2019 (Figure 1.4). This proportion is slightly lower than the average across Italy (3.6%) and across the EU27 (3.7%). However, it is important to point out that these statistics only capture data on people’s main jobs, meaning that actual employment figures may be much higher when incorporating individuals who work in cultural employment as a second job. Using this definition, in Emilia-Romagna there has been a decline in cultural employment from 2014, in both absolute and relative terms. In 2014, there were around 77 100 people in cultural employment in Emilia-Romagna, but in 2019 this number had fallen to around 69 200. Similarly, while the share of cultural employment in the region was 3.4% in 2019, it was at 4% in 2014. Although, on average across Italy, cultural employment as a share of total employment has fallen slightly over this time period, there is no clear pattern of decline across regions, with some areas, such as Trento and Marche showing significant growth in cultural employment shares from 2014 to 2019.

Figure 1.4. Cultural employment as a share of total employment in Italian regions

2014 and 2019



Source: Eurostat; Cultural employment by NUTS2 regions

Cultural employment is characterised by high levels of precariousness. In Emilia-Romagna, individuals working in CCS consist mainly of autonomous, self-employed workers, and of those in employment, many are employed under temporary or short term contracts (Box 1.1). As illustrated in Table 1.1, the incidence of autonomous forms of work is particularly high in television programming and broadcasting activities (74%), architecture and engineering (66%), and other professional, scientific, and technical activities (78%).

Table 1.1. Distribution of employees and self-employed workers in selected sectors in Emilia-Romagna, 2017

Sector	Employees, %	Self-employed, %
Printing and reproduction of recorded media	81	19
Publishing	74	26
Motion picture, sound recording and music publishing activities	100	0
Television programming and broadcasting activities	26	74
Telecommunications	87	13
Information and communications technologies	73	27
Information service activities	86	14
Architecture and engineering	34	66
Advertising and market research	75	25
Other professional, scientific and technical activities	22	78
Cultural, artistic and entertainment activities	46	54
Libraries, archives, museums and other cultural activities	100	0
Sports, entertainment and leisure activities	62	38

Source: ERVET (2018)

Creative workers operating in Emilia-Romagna experience high levels of uncertainty because of the strong presence of temporary forms of work. In facing such high levels of uncertainty, creative workers show two apparently contrasting attitudes. On the one side, they display great anxiety in trying to overcome precariousness of work, lack of welfare benefits, and reduced incomes. On the other, they show a desire for self-realisation in the creative field even if that implies combining temporary contracts and moving from one employer to another in their attempt to sustain their creative careers.

Box 1.1. Employment in the entertainment sector in Emilia-Romagna

The entertainment sector includes film and theatre activities, concerts, sports activities, dance activities and entertainment activities with music, touring amusement activities, fairs and exhibitions, and multi-genre activities. In Emilia-Romagna, the entertainment sector employed 11 840 individuals (2019) with around a third of those being employed in technical or administrative roles. The sector has seen significant employment growth in the last few years, with an increase of 23.5% in comparison to 2015. In line with overall trends in many CCS, individuals in the entertainment sector are mostly employed through temporary and seasonal contracts, with those employed under permanent contracts representing only 23% of the overall workforce.

Table 1.2. Workers in the entertainment sector in Emilia-Romagna by type of occupation

2015-2019

	2015	2016	2017	2018	2019
Artists	6 045	6 195	6 298	7 013	7 659
Technical staff and service personnel	2 559	2 665	2 822	2 926	2 970
Administrative roles	980	1 112	1 190	1 230	1 211
Total entertainment sector	9 584	9 972	10 310	11 169	11 840

Source: Osservatorio Spettacolo Emilia-Romagna on INPS data

Table 1.3. Workers in the entertainment sector in Emilia-Romagna by type of contract

2015-2019

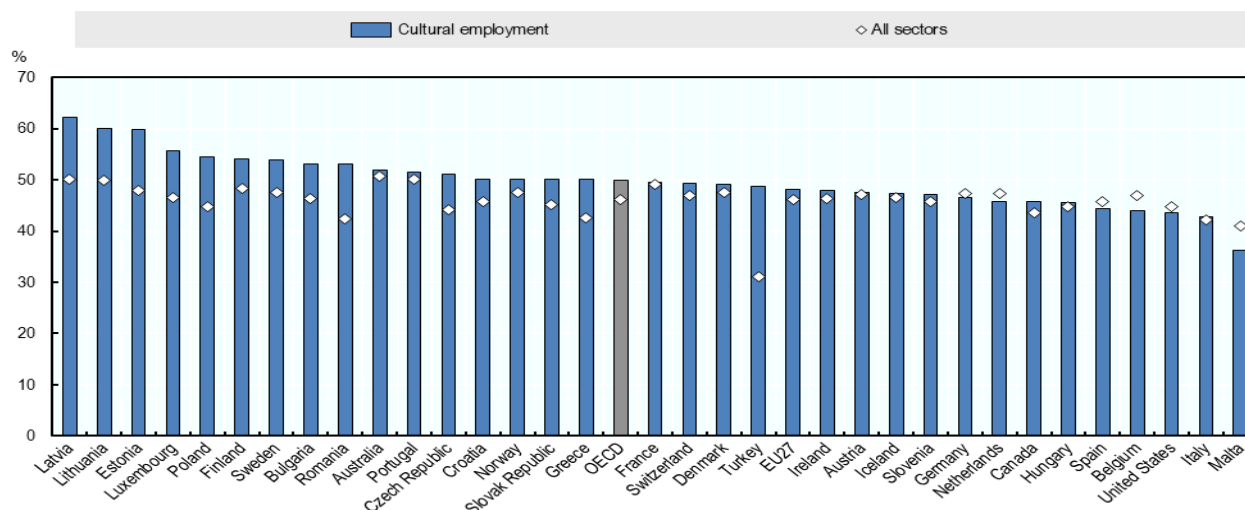
	2015	2016	2017	2018	2019
Permanent workers	2 712	2 723	2 619	2 749	2 731
Temporary workers	5 318	5 840	6 176	6 568	6 989
Seasonal Workers	1 554	1 409	1 515	1 852	2 120
Total entertainment sector	9 584	9 972	10 310	11 169	11 840

Source: Osservatorio Spettacolo Emilia-Romagna on INPS data

Women are underrepresented in cultural employment in Italy, but do have slightly higher representation levels than the average across all sectors. Looking at full-time employment only, 43% of those in cultural employment in Italy in 2020 were women, compared to an EU27 average of 48% and an OECD average of 50% (Figure 1.5). This is the second lowest rate of female cultural employment across all OECD countries with available data. However, women do make up a slightly larger share of cultural employment than other sectors of the economy, where they account for 42% of all full time employment. In Emilia-Romagna, only 36% of those working in creative and cultural sectors (using the ERVET definition) in 2017 were women (ERVET, 2018^[7]). Such an uneven gender balance in cultural employment is in line

with more general trends characterising the Italian socio-economic context. In Italy in 2020, only 54.7% of women between 15 and 64 years old are employed versus an OECD average of 63.8% (OECD, 2022^[8]). This situation is likely to have been exacerbated by the COVID-19 crisis, since the majority of individuals who lost their job in Italy over the crisis period were women (Istituto Nazionale di Statistica, 2020^[9]).

Figure 1.5. Share of full-time female employment in cultural employment, 2020



Note: Data for Canada and United States are from 2019. Data for Australia is for 2016 and includes both full-time and part-time workers.

Source: Cultural Employment by Sex, Eurostat; Employment and Activity by Sex and Age – Annual Data (15-64 year olds), Eurostat; OECD calculations on American Community Survey, 2019, Canadian Labour Force Survey, March 2019, and Australian census, 2016.

Given the high levels of CCS inter-organisational mobility, creative workers have a strong need for developing their skills and competences through continuous learning. Indeed, interviews highlight how professional development permits workers to update and extend their skills, thus allowing them to move across organisations (and often across sectors) to seek job opportunities as well as satisfy their desire for non-routine tasks and self-improvement.

Creative entrepreneurs face challenges in ensuring long-term economic viability along with other “returns” to their efforts. One of the main challenges that cultural entrepreneurs face in developing their activities regards the multi-faceted nature of CCS. Indeed, cultural entrepreneurs usually pursue multiple goals in the deployment of their activities (Lee, Fraser and Fillis, 2018^[10]; Montanari, Mizzau and Razzoli, 2021^[11]). Support in the development of entrepreneurs’ technical (e.g. managerial) and behavioural (e.g. resilience) competences helps to make an entrepreneurial activity viable. Stakeholders’ interviews for this report highlighted how economic goals as well as the social impact and intrinsic value of culture and creativity represent fundamental tenets for cultural entrepreneurs. Thus, the sustainability of cultural and creativity activities has both economic, creative and social dimensions. There are examples of programmes in the region to support this, such as case of Reggio Emilia (Box 1.2).

Box 1.2. Cultural entrepreneurs and long-term viability: the case of Reggio Emilia

Recent research drawing on evidence from 120 cultural entrepreneurs working in Reggio Emilia (a province of the Emilia-Romagna region) found that individuals operating in an early stage of their entrepreneurial activity (less than 4 years) had three specific needs to make their activity sustainable:

1. **The sense of purpose**, which refers to individuals' desire to develop a venture which can generate stable income as well a dedication to their vocation. For the latter, cultural entrepreneurs conceive the creation of professional outcomes (artworks, products, services, etc.) as a true expression of their creative self and as a means by which to construct their creative identity.
2. **The quest to be embedded in a large network of relations** with other actors (individuals, organisations) operating in CCS. Such relations represent important informal channels for job opportunities as well as collaborative mechanisms through which to engage in creative interactions.
3. **The quest for a continuous professional development**, which helps to keep up with constant changes in technology, competition, and customer tastes.

Results showed that cultural entrepreneurs looked at the resources (economic, creative and social) provided by their city context to satisfy their needs.

1. **Economic:** cultural and creative ventures need to generate stable streams of revenues that allow individuals to overcome the difficulties and uncertainty characterising CCS, eventually providing the possibility to achieve sustainability;
2. **Creative:** cultural and creative ventures need to continuously develop new creative ideas that translate into new products and services, which also represent a true expression of cultural entrepreneurs' creative selves;
3. **Social:** cultural and creative ventures aim at generating a social impact in terms of "giving back" to the local community (workshops for children, informal exhibitions for the neighborhood, intercultural workshops for migrants, etc.), which also provide cultural entrepreneurs with a sense of purpose.

In this sense, creative entrepreneurs seek to operate in a context characterised by a high concentration of cultural activities and institutions, which could provide business and learning opportunities. Similarly, creative entrepreneurs appreciate the presence of cultural and creative hubs (co-working spaces, makerspaces, etc.), which offer occasions for meeting other professionals. Finally, cultural entrepreneurs acknowledge the importance of a strong local entrepreneurial culture that accepts and sustains entrepreneurial initiative. This is key to the social and psychological support required to operate in extremely uncertain contexts such as CCS.

Source: Montanari, Mizzau and Razzoli (2021^[11])

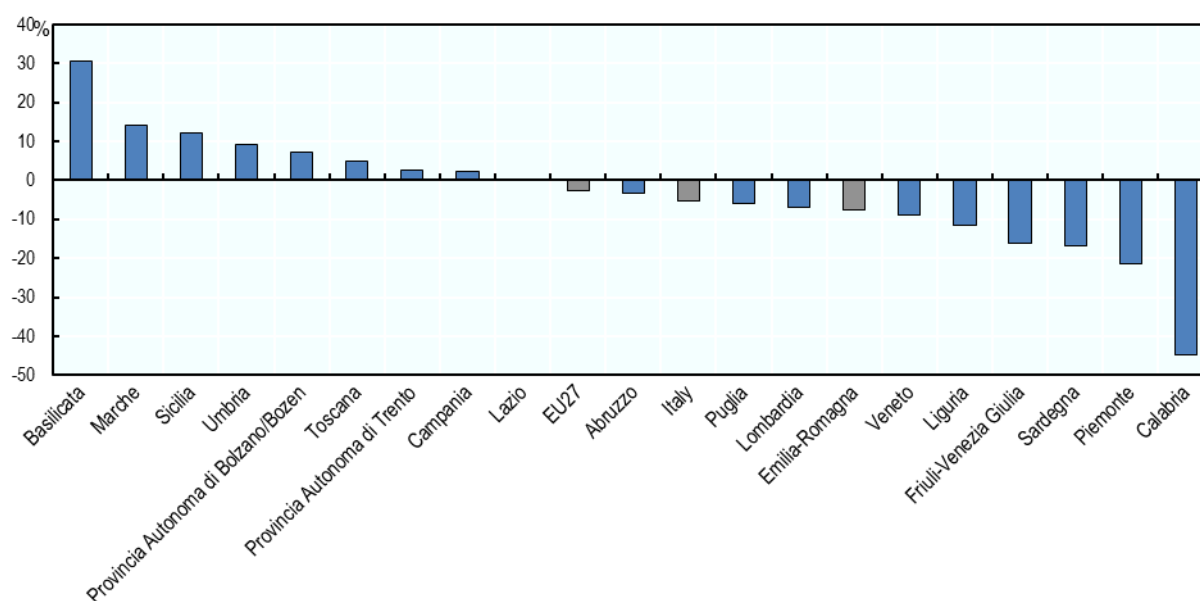
COVID-19 has hit some parts of cultural and creative sectors in the region hard

The lock-down measures had a dramatic impact on the venue-based sectors (e.g. performing arts, live music, festivals, museums, cinema, etc.), although other sub-sectors were less affected. Estimates suggest that CCS in Emilia-Romagna experienced a loss of EUR 58 million in revenues in the March–June 2020 period alone (Monitoraggio degli effetti del COVID-19 nei comparti cultura in Emilia-Romagna, 2020^[12]). A large proportion of this loss was seen in the live performance and events sector, which experienced estimated losses of around EUR 27 million. In terms of employment, with an average decline in employment of 2.9 % in the service sector in Italy, the arts, sports, leisure and entertainment

activities³ lost 10.5 % of jobs (third quarter 2020 compared to third quarter 2019). Hours worked decreased by 14.9 % against 8.9 % in services (Cicerchia and Montalto, 2021_[13]). This is the worst decline recorded, behind that of the tourism sector. However, these data refer only to dependent work. The impact on employment would certainly be greater if the high shares of self-employed workers present in the cultural sector are considered and who were more affected than those on dependent work (also as a result of the ban on dismissal introduced by the government), and who are often deprived of protection, such as layoffs or unemployment or sickness benefits. However, more market-driven sub-sectors such as design, advertising or fashion managed to better absorb the economic impact of the pandemic, taking advantage of the opportunities offered by digitalisation processes. Local stakeholders confirm these trends, with some actors very concerned about financial sustainability during the crisis and in the recovery, while others show great resilience.

Cultural employment dropped significantly in the first year of the pandemic in Emilia-Romagna. In Emilia-Romagna, cultural employment declined by 7.5% between 2019 and 2020 (Eurostat definition). This compares to an average decline of 2.6% across the EU27 and an average decline of 5.2% across Italy (Figure 1.6). Moreover, these figures are likely to underestimate the scale of cultural job losses, as these data include only those whose main job is in cultural employment, and not those engaged in cultural work as a second job. Analysis of online job vacancies⁴ in cultural employment shows that by March 2021, vacancies for cultural work in the region were still well below 2019 levels (Figure 1.7).

Figure 1.6. Decline in cultural employment between 2019 and 2020



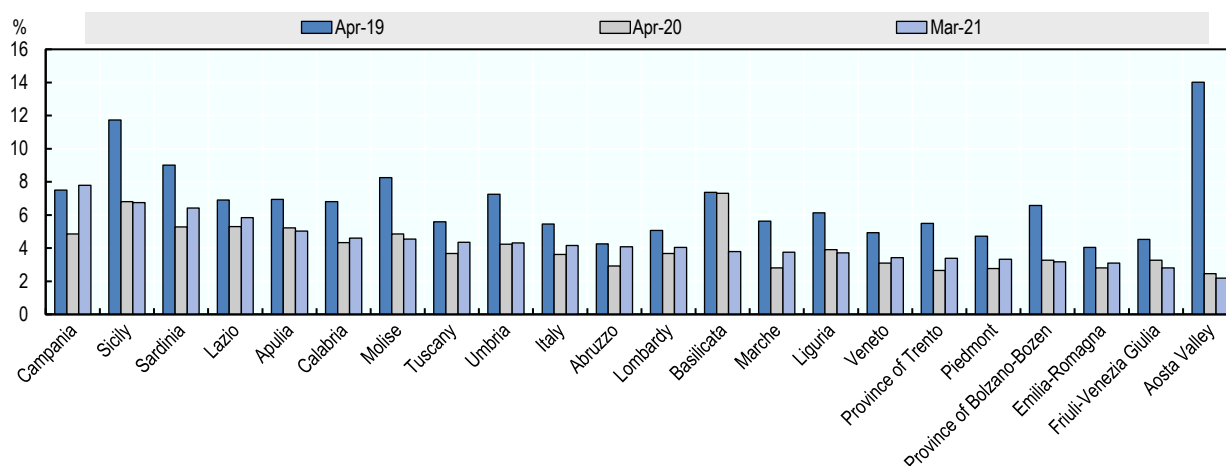
Note: Cultural employment uses the Eurostat definition which includes all employment in CCS and cultural employment outside of CCS

Source: OECD analysis on Eurostat data

³ Arts, sports, leisure and entertainment activities (V90-93) include: Creative, artistic and entertainment activities (V90); activities of libraries, archives, museums and other cultural activities (V91); activities related to lotteries, betting, casinos (V92); sports, entertainment and leisure activities (V93).

⁴ Web-scraping techniques can provide useful information offering real-time, georeferenced data. However, these data should be taken with caution because of a number of concerns: (1) exclusion of self-employment data (as it is not advertised); which is a major concern in CCS analysis as a large number of jobs in those sectors tend to be entrepreneurial or freelance; (2) underestimation noting that for example many cultural occupations are promoted through traditional job adverts; (3) a possible false-positive pattern may appear as for instance what could appear as a rise in the number of employment opportunities would in reality only be an increase in the number of online job postings.

Figure 1.7. Cultural and creative job vacancies as a share of online job postings across Italy



Source: Burning Glass Technologies

Exporting activities of CCS business have been greatly affected. In 2019, around 3% of national creative exports came from the Emilia-Romagna region. The largest area of exports came from books, periodicals and other publishing activities (65% of total creative exports), with film, video and television activities comprising the second largest area of exports (25%). The region generated EUR 239 million in creative exports (14.1% of total exports), with a net value (i.e. total exports minus total imports) of EUR 53 million. However, COVID-19 severely impacted the regions exporting activities, with creative exports for the region in 2020 only amounting to around EUR 178 million (L'Osservatorio Cultura e Creatività, 2021^[14]).

The COVID-19 crisis has propelled digitalisation across all sectors, including CCS (Politecnico di Milano, 2021^[15]). Local stakeholders highlighted the ability to increase activities online as a significant factor in the level of impact that CCS have felt from the pandemic. For example, more market-oriented sub-sectors have proved to be more resilient and effective in this digital transition. Namely, actors operating in sub-sectors such as fashion, media and design managed to find new streams of revenue by grasping previously untapped market opportunities thanks to their renewed (and sometimes more structured) online presence. However, cultural institutions such as museums, theatres or art galleries are still in the middle of the evolution toward the adoption of digitalisation processes.

On-going digitalisation could open new opportunities in terms of employment, but many cultural workers require new skills. Stakeholders highlight the importance of sustaining a collaborative framework between actors operating in CCS and universities in the region to create multidisciplinary training and educational programmes that could address the present gap in digital skills characterising the majority of regional actors in CCS.

Emilia-Romagna has introduced many policy interventions to support education, entrepreneurship, business development and innovation in CCS

The regional government has adopted over the years a set of policies aimed at mainstreaming the contribution of CCS to local development. Accordingly, CCS are no longer regarded as an offshoot of the tourism industry and/or a mere amenity factor. On the contrary, they play a key role in the Smart Specialisation Strategy of the region, which includes “Cultural & Creative Industries” as one of the five regional core businesses. Furthermore, the region has established a dedicated institutional platform (Clust-

ER Create) to create formal and informal opportunities for collaboration and co-production among actors operating in CCS, research and higher education, and other sectors of the local economy.

Regional authorities have made a clear effort to adapt their approach to local conditions. Policy makers have addressed the specific features of the local context in terms of cultural production and participation practices. Indeed, Emilia-Romagna is characterised by a strong tradition of social participation in policy making. Thus, engaging local actors (organisations, creative workers, civic society, etc.) in the design and implementation of policies represents a pillar of regional policy intervention. This also applies to policies aimed at unlocking the potential of cultural entrepreneurship in contributing to local development.

The *Laboratori Aperti* project represents an interesting example of a policy deeply ingrained into the fabric of the local civil society to yield stable impacts and support entrepreneurial and networking dynamics in CCS. The project aims at supporting the development of laboratories for accelerating creativity and open innovation, also providing physical spaces where cultural entrepreneurs can experience social encounters, cross-fertilisation of ideas, and test pilot projects that could be eventually scaled-up to economically viable ventures. The *Laboratori Aperti* focuses on different subject areas (health and well-being, social innovation, environmental sustainability, etc.) that are consistent with the main vocations of each city involved in the project. The project is an interesting example of a policy intervention aimed at helping cultural entrepreneurs to deal with the difficulties typically associated with a fragmented economic context (e.g. high uncertainty, lack of economies of scale) without losing the potential advantages related to small scale organisations (e.g., flexibility, dynamism).

Box 1.3. The “Carmine Experience” project



The *Laboratorio Aperto Piacenza* is one of the ten *Laboratori Aperti* financed by Emilia-Romagna. It is an innovation hub open to citizens, students, and companies. It promotes and hosts lectures, workshops, training courses, and cultural events open to the local community. It also offers workspaces that are equipped with shared facilities and technologies. The *Laboratorio Aperto Piacenza* is

located in the church of Santa Maria del Carmine, a historical building that dates to 1334. The laboratory represented the opportunity to requalify this important cultural heritage site after it had been abandoned for more than 20 years.

In 2020 the *Laboratorio Aperto Piacenza* launched the “Carmine Experience” project, which is an immersive storytelling installation in which visitors can relive the history of the church of Santa Maria del Carmine and its relationship with the city of Piacenza. The main goal of this project is to use digital technologies to foster cultural participation and allow the discovery of Santa Maria del Carmine and its role for the city’s history.

Source: Laboratorio Aperto Piacenza (2019_[16])

Public policies aimed at unleashing the potential of cultural entrepreneurship are central to recent public intervention. These policies are focused on facilitating access to finance, sustaining continuous education and professional development, and providing institutional support. Regarding the latter, the policy intervention aims to support the creation of strong local agglomeration dynamics by facilitating the development of networks and interactions among CCS and with different sectors. Indeed, the presence of dense networks could mitigate the entrepreneurial risk related to cultural ventures, as well as being conducive to opportunities for developing new projects (see the example of INCREDIBOL! Start-up support programme Box 1.4).

Box 1.4. Public interventions for cultural entrepreneurship: the case of INCREDIBOL!

INCREDIBOL! programme provides support to creative start-ups, small businesses, and citizen-led organisations through funding, consulting and training activities, networking initiatives, and the rent-free use of public buildings and spaces by means of public tenders. INCREDIBOL! was launched in 2010 and is coordinated by the Municipality of Bologna and co-funded by the Emilia-Romagna region. Over the years, it has also mobilised private-public partnerships among private foundations, trade associations, cultural associations, and research bodies. Since 2010, the Municipality of Bologna has collected approximately 630 submissions and selected over 100 recipients. INCREDIBOL! has also helped renovate over 40 previously vacant city-owned spaces in the Bologna area, turning them into sites where young entrepreneurs and freelancers can kick-start new businesses. Namely, recipients have turned a vacant historical building into a self-sustaining bike rental business and community hub (i.e., “*Dynamo Velostazione*”), a vacant food market into a concert hall and cultural space for young local artists (i.e., “*Mercato Sonato*”), and vacant greenhouses into a social incubator and co-working space (i.e., “*Kilowatt – Serre dei Giardini Margherita*”).

The programme has helped attract and retain young entrepreneurs, freelancers, artists, and small businesses in specific neighbourhoods to increase their vibrancy, while also scaling up new cultural institutions and start-ups. In doing so, it has contributed to combining cultural entrepreneurship endeavours with urban regeneration efforts in the city of Bologna, as well as fostering social impact for different communities within the city.

INCREDIBOL! relies on a few core tenets that have been replicated throughout the years and have helped set the programme as a best practice for other Italian and European cities. Namely, the focus of the program is changed periodically based on the specific social and CCS-related issues that are perceived as most pressing. Drawing on this, the scope of the related public tender is defined, mostly pertaining to newly established businesses, freelancers, and artists under the age of 40, and associations and co-operatives less than 4 years old.

INCREDIBOL! provides recipients with different benefits depending on their specific needs. First, it provides them with spaces to be repurposed as storefronts, offices, and/or spaces open to the local community. Second, it provides them with one-time grants of EUR 10,000 (grants have been increased to up to EUR 20,000 for 2020 to help recipients better cope with COVID-19 related measures). Third, consulting and training activities are offered to help recipients scale up and reach sustainability. Over the years, most activities have been aimed at fostering recipients’ skills relating to marketing, communication and audience engagement, legal matters, fundraising, business development, and day-to-day managerial practices.

City authorities also accord great emphasis to projects that mix viable and sustainable business plans with a focus on generating social impact. Selected projects usually combine commercial/economic activities with initiatives oriented toward the neighbourhood where they are located or the communities they aim to address. INCREDIBOL! also offers recipients the opportunity to connect with its network of public and private partners (e.g., associations, research bodies, foundations). In turn, these partners offer workshops, one-to-one meetings, acceleration programmes, tailored consultancy, or customised outreach activities depending on the needs of recipients. Finally, city authorities have devoted increasing attention to measuring the overall impact of INCREDIBOL! not only for its recipients but also for the city and regional creative ecosystem. Results are reported and discussed periodically with both partners and the local community.

Source: INCREDIBOL! (2021^[17])

Emilia-Romagna has invested significant resources in CCS education and training programmes over the last seven years. Educational activities are devised to address the skills gaps which otherwise may pose constraints to the sustainability of CCS activities. Indeed, cultural entrepreneurs often lack adequate training in managerial competencies such as marketing (especially management of social media), business plans or people management. The region has dedicated around EUR 35 million in the last seven years to finance a wide array of educational activities ranging from high school to Ph.D. This includes high school initiatives which integrate internship placements with classroom learning, and continuous learning projects which aim to upskill employees and retrain those out of work.

Further steps can help enhance the contribution of CCS to the transition to a greener economy. In addition to action to protect heritage from adverse effects of climate change, policies can support CCS contribution to green transition (see Box 1.5). CCS can support the green transition in three key ways. Firstly, the sectors themselves can address the impact that their activities have on the environment, for example by addressing sustainability issues in the fast fashion industry, or the use of plastics at live events, promoting the adaptive reuse and sensitive retrofitting of historical buildings to help lowering the carbon footprint of cultural institutions. Secondly, CCS can contribute to the green transition in other areas of the economy, for example through design services which incorporate more sustainable materials. Thirdly, CCS have an important role to play in raising citizens' awareness through the work they produce, such as documentaries, music, novels, etc. Indeed, CCS are increasingly feeding into wider policy initiatives, such as tackling climate change and creating more sustainable environments. For example, the [New European Agenda for Culture](#) highlights the “cross-overs” between cultural and non-cultural spheres generate new forms of social and economic value. For example, the recently launched [New European Bauhaus](#) initiative connects the European Green Deal with CCS to promote sustainability agendas. It aims to connect science and technology sectors to art and culture through knowledge sharing and idea generation in order to produce innovative solutions for sustainable living.

Box 1.5. The role of CCS in contributing to net zero goals: Creative Carbon Scotland

Launched in 2011, Creative Carbon Scotland works with individuals, organisations and strategic bodies from CCS, sustainability and policy spheres with an aim to harness the cultural and creative sector in addressing sustainability needs in Scotland. Alongside working directly with artists and individuals on sustainability projects, Creative Carbon provides arts organisations with training in carbon measurement, reporting and reduction, and has supported around 120 organisations in mandatory carbon reporting. Creative Carbon has also worked in partnership with the sector body Creative Scotland in developing an environmental sustainability policy for arts organisations across Scotland and offers a wide range of both general and sub-sector specific guidance documents on sustainability in CCS through its website. Ahead of the COP26 summit in Edinburgh in 2021, Creative Carbon led the Climate Beacons project, which aimed to stimulate long-term public engagement in sustainability through a collaborative programme of work between climate change and environmental organisations, and arts, heritage and cultural organisations. The Climate Beacons project launched seven hubs across Scotland where artists and cultural sector professionals, environmental NGOs, scientists and policymakers and members of the local community could meet physically or virtually to discuss and debate COP26 themes and climate action specific to each local area.

Source: Source: Creative Carbon Scotland (2022^[18])

Policy options

Before the pandemic, the business and employment landscape for CCS in Emilia-Romagna was strong and the region has an opportunity to capitalise on these strengths in the recovery. CCS are

increasingly incorporated into regional policy making in Emilia-Romagna, but in light of the challenges to the sector in the wake of COVID-19 there are a number of further measures which policy makers could consider to help support CCS recover from the pandemic and continue to develop:

- **Support educational activities aimed at enhancing entrepreneurial competencies of creative workers who wish to start up their own ventures.** Given that high schools and universities (especially in humanities subjects) still lack a focus on developing entrepreneurial skills for those who wish to follow this path, regional authorities could support collaborations between high schools and universities with cultural and creative actors to develop courses, workshops and internships that could foster an entrepreneurial mindset among young creatives.
- **Consolidate regional funding for training activities aimed at improving digital skills of creative professionals at all levels and career stages.** Many cultural and creative workers need to reinvent themselves in the face of the unprecedented challenges presented by the pandemic and the shifts in digital modes of production and consumption. Similar actions could also be deployed to target employees of cultural institutions that lack the required skills and knowledge to fully exploit the potential opportunities implied by the current digital transformation.
- **Support the formation of new networking and learning opportunities for creative entrepreneurs.** Regional authorities could also help those who wish to develop new creative ventures in building networks and collaborations, in providing business and management feedback (e.g., on the viability of imagined ventures) and give financial support by partnering with supra-regional funds and opportunities.
- **Providing support to small-scale, innovative CCS start-ups, focusing on business development and growth and the opportunities to reach new potential markets and create international collaborations.** Besides the provision of direct financial support to innovative start-ups, regional authorities could mobilise cultural and creative spaces, acceleration programmes, and cultural associations and institutions in providing training to local start-ups and small-scale ventures. This could boost their capacity to build cross-sectoral links with actors operating either inside or outside CCS, while also favouring the cross-fertilisation of ideas and managerial practices. Further support could also be given to the drafting of projects to participate in EU tenders and calls, as well as fostering digital skills, gender equality, and inclusion in regional CCS networks.
- **Consider how best to support those in precarious forms of employment in CCS.** Freelance and self-employed creative workers have limited access to pensions and other social benefits. Local actors could look to collaborate with national government in considering how social assistance schemes could be adapted to best support creative workers and strengthen the resilience of the sector.
- **Consolidate the contribution of CCS to the transition to a greener economy.** Consider further actions to protect heritage against the adverse effects of climate change while also supporting the sector's transition to more sustainable modes of production and activity. Cultural participation policies could also further contribute to the sustainability agenda through awareness raising.
- **Build on relationships between policy makers and key CCS stakeholders to strengthen participation from the sector in the policy making process.** Collaborating with CCS stakeholders is an important part of ensuring that public policies best address the specific needs of the sector. In this sense, regional authorities could leverage mapping exercises and research on the economic and work conditions within regional CCS that have been produced over time by regional departments in collaboration with universities, research bodies, and other local actors (e.g., cultural and creative spaces, cultural associations, consultants operating in CCS). Given the centrality of CCS for economic sustainability in the region post-pandemic, engaging CCS stakeholders in broader recovery planning could be a fruitful way to capitalise on the region's strengths.

2 Cultural participation trends



Emilia-Romagna has a rich set of cultural amenities to promote cultural participation

Emilia-Romagna is one of the most vibrant Italian regions in terms of population access to cultural amenities and cultural participation (attendance) rates. The regional cultural offer is outstanding in terms of numbers of museums (Emilia-Romagna is second in Italy after Tuscany), as well as of libraries (third in Italy after Lombardy and Lazio). Emilia-Romagna accounts for about 10% of live performances that are held in Italy annually, and has on average 9.2 movie screens per 100,000 inhabitants (vs. a national average of 6.6 per 100,000 inhabitants). Emilia-Romagna is the third Italian region in terms of the share of people attending live performances, and these attendance rates have increased by 4.7% between 2017 and 2019 (the years before the COVID-19 outbreak). In particular, visitor numbers for opera, theatre and dance saw attendance rate increases above the national average between 2015 and 2019.

Table 2.1. Music, opera, theatre and dance attendance rates in Emilia-Romagna and Italy

Absolute values and % variations; 2015–2019

	2015	2016	2017	2018	2019	% variation 2015/2019
Music concerts (E-R)	1 317 778	1 046 412	1 389 519	1 370 096	1 429 229	+8.5%
Music concerts (Italy)	13 340 9930	13 160 928	13 356 929	14 569 453	15 320 690	+14.8%
Opera (E-R)	158 904	157 101	147 469	162 158	176 960	+11.4%
Opera (Italy)	2 228 181	2 192 308	2 319 252	2 395 429	2 476 748	+11.2%
Theater (E-R)	1 518 981	1 574 550	1 576 276	1 615 281	1 650 688	+8.7%
Theater (Italy)	16 589 574	17 696 317	17 211 360	17 451 654	17 992 928	+8.5%
Dance (E-R)	223 055	248 633	224 031	218 016	236 841	+6.2%
Dance (Italy)	2 094 667	2 108 822	2 167 511	2 023 138	2 209 272	+5.5%

Source: Osservatorio Spettacolo Emilia-Romagna

Access to cultural amenities and creative spaces is rather uniform across the region. Cultural amenities (e.g. movie theaters, museums etc.) are well spread across different provinces within the region, due to a sustained public effort over past decades. This is similar to the overall geographic distribution of cultural and creative activities in the region, especially in comparison to other Northern regions such as Lombardy and Piedmont where the two regional capitals host the majority of actors operating in CCS in their respective region.

Box 2.1. The “OperaStreaming” project

The “OperaStreaming” project launched in 2019 by Emilia-Romagna region is an example of the digitalisation trends that were already undergoing in the regional CCS ahead of the COVID-19 outbreak. OperaStreaming has two main objectives:

- To enlarge the traditional audience of opera produced by local theatres;
- To improve access for more vulnerable people by making opera productions directly accessible from their homes.

Emilia-Romagna has a great opera tradition as some of its most important historical theatres are related to composers and performers such as Giuseppe Verdi and Luciano Pavarotti. OperaStreaming offers a seasonal programme of opera productions that is broadcasted through video platforms such as YouTube (both recorded and in live streaming) in partnership with Edunova, a consulting and event management agency specialised in live streaming and video production, and the University of Modena and Reggio Emilia. OperaStreaming is the result of the collaboration of several theatres in the region: the Regio Theatre of Parma, the Teatro Municipale Romolo Valli of Reggio Emilia, the Pavarotti Theatre of Modena, the Teatro Comunale of Bologna, the Teatro Comunale of Ferrara, the Teatro Municipale of Piacenza, the Alighieri Theatre of Ravenna, and the Amintore Galli Theatre of Rimini.

OperaStreaming is promoted by the Department of Culture of the Emilia-Romagna region and represents the continuation of the previous “TeatroNet” project – i.e., a streaming initiative launched in 2012, which provided theatres with a first set of infrastructures, technologies, and knowledge to facilitate the online broadcasting of opera productions. TeatroNet stood as a pioneering digitalisation project for local theatres – both smaller and larger – in the region. As a result, many theatres continued advancing the live streaming and recording of their productions as well as intersecting them with a greater focus on social media communication strategies over the years.

Source: [Opera Streaming](#)

In addition, there has been a proliferation of independent cultural and creative spaces (art hubs, cultural centers, and co-working spaces) which is a distinctive trait of the region's cultural supply model. While these spaces serve as breeding grounds for the overall creative ecosystem, they also provide platforms for more active forms of cultural participation.

The region also offers a wide and growing variety of festivals across its provinces (pre-pandemic). Festivals play an important role in terms of cultural participation. Like in other European regions, festivals have proliferated in Emilia-Romagna in the last decades, with the support of the region, including a vast number of festivals that are specialised in different artistic fields (e.g., photography, film, music) according to the main vocations of the specific territories in which they are held. The presence of a festival has contributed to renewing local cultural offerings, including in remote areas, attracting both citizens and tourists with positive economic returns (Mizzau, Montanari and Massi, 2019_[19]).⁵

⁵ See Mizzau, Massi, and Montanari (2019) for the case of Fotografia Europea, which is held in Reggio Emilia since 2006.

Box 2.2. Cultural participation: the case of film festivals in Emilia-Romagna

In pre-pandemic years, 49 film festivals were held annually in Emilia-Romagna in large cities, but also in small and medium-sized ones as well in more peripheral areas (e.g., little towns in inner and mountain areas such as Bobbio in the province of Piacenza). Attendees of film festivals reflect socio-demographic characteristics shown also by participants to other cultural activities in the region. Most visitors are highly educated (64% have a degree) and aged between 25 and 44 (43% of total attendees) even though older age groups are still fairly well represented (e.g., attendees aged 45–65 are 34% of the total, whereas attendees aged 18–25 are 13%).

COVID-19 pandemic posed several major challenges to the organisers of film festivals, also accelerating the digitalisation of activities. The hurdles and opportunities implied by this challenging situation are well encompassed in the case of the nine short film festivals that are held in the region annually: Amarcort Film Festival (Rimini); Concorso Film Festival (Pontenure); Corti da Sogni (Ravenna); Ennesimo Film Festival (Fiorano Modenese); Ferrara Film Corto (Ferrara); Reggio Film Festival (Reggio Emilia); Sedicicorto International Film Festival (Forlì); Visioni Italiane (Bologna); Zerotrenta Corto Film Festival (Argenta). Short film festivals are generally small-sized cultural events, which target a well-defined, niche audience. These festivals also generate a relevant impact on the local community as they represent an important occasion to nurture a sense of belonging to the local community and attract visitors from other (surrounding) geographical areas.

Constrained by the impossibility to reschedule the festival activities for the following year, these short film festivals decided to organise a digital 2020 edition. More specifically, they deployed the following initiatives:

- Films and events were streamed on specific platforms such as Festhome TV and MyMovies;
- Screenings of movies in theatres were also streamed online;
- Lectures, seminars and workshops were held online, sometimes also blending them with events that were still held onsite whenever possible;
- Organisers increased activities on social media by sharing contests, teasers, and film-related contents. Such an increase in online activities contributed to engaging audience as well as retaining some “buzz” about festivals, despite onsite events being greatly restricted.

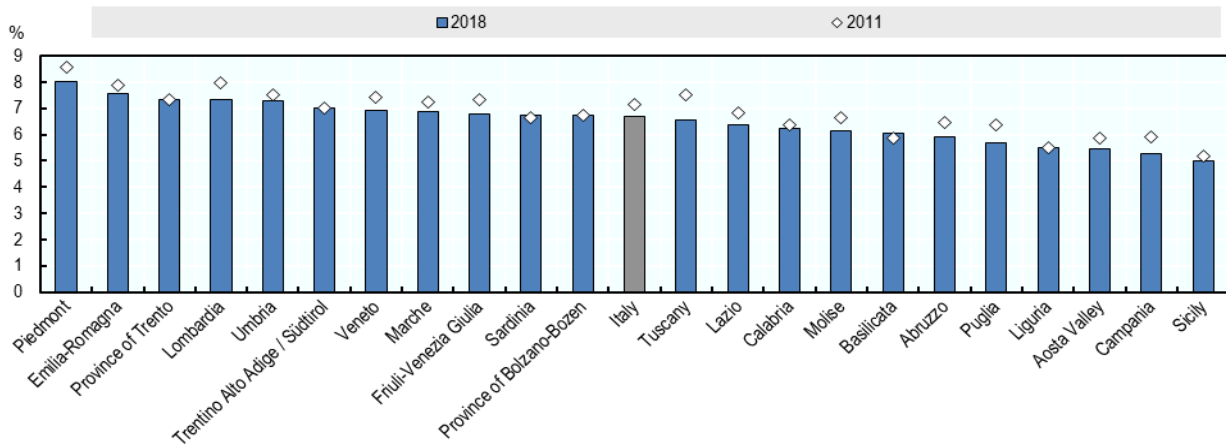
The digital activities adopted in response to the COVID-19 crisis provide opportunities that can be exploited in future years by blending online initiatives with onsite activities. This initiative offered the opportunity to broaden audiences and engage people that would not have otherwise travelled to onsite screenings. Online activities also enabled festivals to engage with their audience beyond the duration of the festival, thereby triggering a more long-term oriented approach to online activities that go on throughout the year.

Household spending on culture and recreation is high in the region in the Italian context

Household spending on recreation and culture in Emilia-Romagna is one of the highest in Italy, but clearly COVID-19 left a mark. Household spending on recreation and culture in Emilia-Romagna was the second highest among Italian regions (after Piedmont) in 2018, with a little under 8% of all household spending falling into this category (Figure 2.1). While household spending on recreation and culture had dropped slightly in the region since 2011, this in line with national trends. However, COVID-19 has led to a significant drop of household expenditure on these items in Italy, with a decrease of more than 20% in

2020 compared to 2019 (Figure 2.2). While more information is needed to understand the underlying causes (e.g. whether this is driven more by reduction of spending on the recreation component rather than culture), the social distancing measures limiting access to cultural venues and social gatherings, as well as by the drop in disposable incomes due to the loss of employment during the pandemic, are likely part of the explanation. As the sector recovers from the effects of the pandemic, the emerging cost of living crisis across much of Europe (OECD, 2022^[20]), is putting further pressure on household budgets making it likely that household spending on culture will not bounce back as quickly as once hoped.

Figure 2.1. Recreation and culture as a share of household spending across Italy

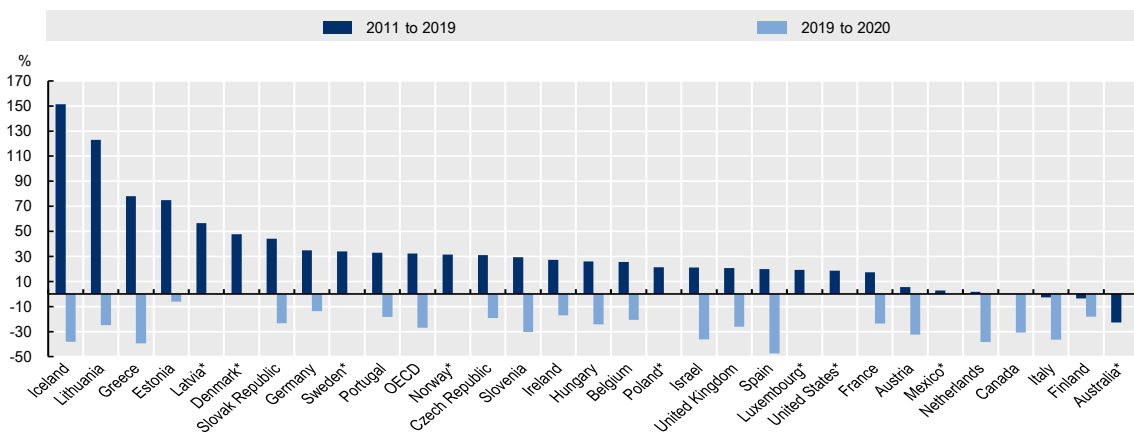


Note: the category recreation and culture includes both recreation and cultural services (such as cinema, theatre, museums, cable and satellite subscriptions and other entertainment activities, photographic services, as well as sports and gambling payments) and the purchase of recreation and cultural goods (such as TV, computer, and audio equipment purchases, sporting equipment, newspapers, books, pets, gardening, and package holidays). As such, some of the expenditure included relates to areas outside of CCS, such as gambling, pets, holidays and computer equipment.

Source: Final Consumption Expenditure of Households, ISTAT

Figure 2.2. Growth of household expenditure on recreation and culture in OECD countries, 2011-2019 and 2019-2020 for selected countries

Real per capita household spending growth on recreational and cultural services



Note: Latest data for Norway is from 2018. * indicates countries for which 2020 data were not available.

Source: OECD (2022^[21]), National Accounts Statistics - Final consumption expenditure of households, <http://dx.doi.org/10.1787/na-data-en>.

Culture is used as a tool for social inclusion and welfare experimenting with different forms of digital participation

Over the past decades, the region has developed a strong focus on welfare and inclusion through culture. In addition to supporting cultural infrastructure to provide access to culture across regional provinces and population groups, the region has developed several initiatives and projects leveraging culture as a driver of social inclusion to help mitigate factors leading to social and economic marginalisation as well as to use as a policy tool to sustaining health and well-being. Regional authorities have supported the “contamination” between the cultural sphere and specific social impact spheres, such as public health, well-being, and social cohesion. Over the past decades, resources were devoted to improving possibilities for access to cultural activities and to financing cultural initiatives with socially oriented goals. The activities were aligned with the specific features of different territories and span across sectors (see, for example, the activities of two museums discussed in this report). An example of a well-anchored activity relates to theatres where the region has been supporting collaborations across different local stakeholders linking theater to the improvement of the mental health conditions of different target groups (see Box 2.3).

Box 2.3. Theaters and well-being in Emilia-Romagna

In Emilia-Romagna, regional authorities have promoted over recent decades several initiatives and projects that envision cultural participation as a key policy tool to sustain health and well-being as well as social cohesion. The region has played a pioneering role in promoting theatrical production as a means to do so. Since the late 1990s, regional authorities have supported the development of a vast network of collaborations among universities, health institutions, cultural associations and independent theater companies. Regional authorities promoted projects aimed at linking theater to the improvement of the mental health conditions of different segments of the population (e.g., young people, the elderly, and the incarcerated).

“Emilia-Romagna Prison Theater Coordination” is an example of this kind of collaboration. Created in 2011, it is funded by the region as part of its social integration policy. The project involves several experienced actors operating in theatrical production for promoting the well-being of the incarcerated (men, women, juveniles). The project is supported by seven organisations (theater associations and social cooperatives) that coordinate different activities and projects: MaMiMò (Reggio Emilia), Lady Godiva Theater (Ravenna), Teatro del Pratello (Bologna), Teatro dei Venti (Modena), Le Mani Parlanti (Parma), Teatro Nucleo (Ferrara), and Con...Tatto (Forlì). These organisations have a long-established tradition in theatrical production with a social mission. They collaborate with local municipalities, regional authorities, schools and universities, and other actors in the field of theater for projects related to social cohesion, inclusion, and well-being.

The regional Entertainment Observatory (*Osservatorio dello Spettacolo*) conducted in 2016 a study on the impact of the theatrical projects implemented in the region to sustain citizen well-being. The study highlights the continuity characterising the financed initiatives aimed at ameliorating well-being and health conditions of participants. It also attests to the willingness of regional authorities to monitor the effects of the financed initiatives within the policy framework of cultural welfare.

Source: [Projects - Teatro dei Venti - English Website](#)

The acceleration in digital-offers during periods of social distancing had provided new opportunities to further broaden cultural access and participation if digital divides are addressed and the digitalisation of the sector is supported. The massive digitalisation in recent months in the cultural and creative sectors is clearly not temporary (see Box 2.4 for one example out of many) and could

create new forms of cultural engagement and co-production. There is an opportunity for an innovation breakthrough in terms of the deployment of state-of-the-art technologies that allow “presence at a distance” (artificial intelligence, virtual and enriched reality, Internet of Things, etc.) to build a new “experience economy”. New forms of digitally mediated, decentralised creative production allow for engagement with larger and wider communities, not only at the receiving end but also in terms of content production. This trend could lead to more inclusive and innovative forms of collective production of creative content (OECD, 2020^[22]).

Box 2.4. SIPARO project - new technologies to enhance audience experience and engagement

The SIPARO project uses cutting edge technology to create immersive listening environments based on reproductions of live opera performances in Emilia-Romagna opera houses. Funded through the European Regional Development Fund, this project takes data and recordings from opera houses in Emilia-Romagna, and uses technology developed in videogames design to create virtual environments where audiences can experience opera remotely. By engaging with this project, the region is able to extend its audience engagement for Opera to those living outside the region.

Source: (Sipario, 2021^[23]).

However, efforts are needed to address the digitalisation needs of the sector at institutional (e.g. cultural institutions) and firm levels. Access to high speed broadband is very uneven across Italian regions, with only 43% of rural households having access to such services (OECD, 2020^[24]). Across Italy, only 61% of households subscribe to fixed broadband, compared to an EU27 average of 77% and only 42% of people aged 16-74 years have at least basic digital skills, well under the EU27 average of 56% (Shaping Europe’s Digital Future, 2022^[25]).

The region is active in alleviating the impacts of the crisis on disadvantaged population groups while also stimulating cultural production and supporting young creative professionals. In May 2021, the Emilia-Romagna region launched a public call for young artists, entrepreneurs, and freelancers operating in the CCS (Regione Emilia-Romagna, 2021^[26]) with a total budget of EUR 1.1 million for the repurposing of cultural heritage and creative and cultural spaces to house projects that foster the cultural participation of different population groups, as well as future cultural activities that can foster social inclusion. In doing so, the public call also aims at promoting the active participation of younger people in the design of future policies and interventions.

Policy options

The demand for cultural goods, services and experiences is high in the region. This provides a strong basis for continued support and investment in cultural infrastructure and cultural production to provide a quality and diverse offer to the resident population and visitors. The push for digital presence during the pandemic is likely to continue offering new opportunities for cultural engagement, co-production and widening access to culture if the digital needs of the sectors are addressed. However, the cost of living crisis is likely to put greater strain on household budgets, which is likely to affect cultural participation rates.

To bring its policies to the next level, the region could consider the following actions:

- **Enhance the longstanding focus on cultural welfare and broaden the scope of the policy rationale for public spending to develop cultural participation where it has notable positive benefits.** This includes considering the impact of CCS on health and well-being, societal changes, research and innovation, environment and climate, education, etc. Encouraging the development

of research to strengthen the evidence base around the broader impacts of cultural participation could help to support such goals.

- **Involve, encourage, and support artists and cultural institutions to consider their activities in terms of promotion of health and well-being**, and their projects as part of the regional cultural welfare system. In this sense, regional authorities – and municipal ones – could strengthen the existing collaborations between cultural associations, cultural and creative spaces, cultural institutions (e.g., museums and libraries), and health authorities that are aimed at involving people from more vulnerable segments of society in cultural production and participation. For instance, projects across the region that involve people with disabilities in handicraft and artistic production workshops could work as best practices as they involve collaboration between public authorities, cultural and creative spaces, local artists, and health authorities in the promotion of culture as a driver for inclusion and well-being. These types of projects could also involve museums, in line with their new role as cultural hubs within their local communities.
- **Engage in national and international joint research projects** and activities with other regions in Italy and Europe to comprehend factors sustaining the effectiveness of regional cultural welfare systems, share knowledge on indicators, and promote exchange on both best practices and difficulties related to its implementation.
- **Launch cultural well-being education programmes in schools and universities to enhance the resilience of young people**, especially to help tackle the effects of the pandemic on psychological well-being. Regional authorities could leverage on cultural institutions and associations to further develop projects with schools and universities. For example, educational activities that museums and other cultural institutions have been carrying out online since the onset of COVID-19 could be further developed and blended with on-site activities to tackle the limitations brought about by social and physical distancing. By strengthening cultural well-being programmes, regional authorities could also contribute to the inclusion agendas, by actively encouraging participation from underrepresented groups.
- **Address the digitalisation needs of the sector** at institutional (e.g. cultural institutions) and firm levels to broaden cultural access and participation and support the emergence of new forms of cultural engagement and co-production.



3 Case study:
museums as levers
of local development

Museums and cultural heritage sites are powerful assets for local development

The [OECD-ICOM Guide for Local Governments, Communities and Museums](#) provides a useful framework to understand how museums contribute to local development and the actions needed from local governments and museums to maximise these impacts (Box 3.1). The OECD-ICOM assessment framework was applied to two museums in Emilia-Romagna - MAMbo (Museum of Modern Art of Bologna) and MIC (International Museum of Ceramics of Faenza) - to assess their interaction with the territory and draw broader conclusions on way regional and local authorities could maximise the impact of museums on local development. These two museums have recently implemented enhancement projects consisting of a wide set of actions of community engagement activities aimed not only at cultural and social inclusion, but also at nurturing the creative capabilities of local creative workers and organisations.

Understanding the contribution of museums to the different facets of local development is particularly important in the wake of COVID-19 pandemic. As many other venue-based cultural institutions, Italian museums have been greatly impacted by social distancing measures and temporary closures. This has resulted in an estimated loss in revenues of EUR 6.4 million for museums in the Emilia-Romagna region, with the greatest impact being produced by the postponing of temporary exhibitions as they represent the most important revenue stream for most institutions (ATER, 2020^[27]). The pandemic also had a negative impact on employment as museums stopped hiring and workers had to apply for economic support provided by national and regional authorities. Museums re-opened in May–June 2021, albeit with limitations in the number of visitors. The COVID-19 crisis has also propelled digitalisation trends in many museums in the region. Several online activities (e.g., workshops, lectures, activities with schools) started to be organised since March 2020. Such a “forced” change has accelerated digitalisation processes of museums that have started to be more aware of the opportunities (particularly regarding activities for students and more vulnerable people). Despite the fact that the digital experiences of museums are still limited (particularly due to a lack of digital skills among museum personnel), the digitalisation processes propelled by COVID-19, which are foreseen to be enhanced through support from the National Recovery and Resilience Plan, could provide museums new opportunities to foster their contribution to the development of local communities.



Box 3.1. Museums and local development: overview of potential impacts

- **Supporting local economic development.** In addition to preserving and creating cultural value, museums contribute to the attractiveness of places and hence to local economic development through job creation and revenue generation related to the visitor economy; supporting local hotels, restaurants, shops and their wider suppliers. More long-term benefits can arise from partnerships between museums, local entrepreneurs, businesses and higher education or research institutions that support the dissemination of new technologies and the creation of new products.
- **Fostering urban regeneration and community development.** Museums contribute to both the physical and social design of many cities. Their renovation or construction can stimulate urban regeneration and bring new life into areas losing their social dynamism and traditional economic base. Museums appear to be places where social capital can be built between people of different communities when many traditional meeting places are disappearing.
- **Catalyzing culturally aware and creative societies.** Museums have mainly been created to increase cultural awareness and education. With time, this objective has become more complex to also encompass training and life-long learning, and not only for native-born populations but also immigrants and other marginalised communities. A museum's mission is also to promote reflection and self-awareness by providing opportunities to audiences to learn more about their environment and themselves through museum collections. They can change the way people think about many past and contemporary issues and can challenge misperceptions and rigid modes of thinking. By displaying an inventory of past creativity, museums help promote an understanding of why and how things have been created. In that very sense, they may promote a broader culture of creativity.
- **Promoting social inclusion, health, and well-being.** Museums increasingly contribute to individual and collective well-being. Their contributions to health and well-being are particularly important. Other initiatives relating to school drop-outs or the rehabilitation of ex-offenders and the improvement of self-confidence are also significant, but are sometimes neglected since their effects are difficult to evaluate and are only evident in the long term. Local governments could consider museums as resources for both building social capital and promoting social welfare and support the links with social institutions that intervene at the local level. In turn, museums need to build their internal capacities to be more pro-active in this field.

Source: OECD and ICOM (2019)^[28]

Overview of museums in Emilia-Romagna

Emilia-Romagna has the second highest number of museums and heritage sites in Italy. In 2018, 454 institutions operated in the regional territory, making it the second region after Tuscany (553 museums) and before Lombardy (433), Piedmont (411), Lazio (357) and Veneto (304). At the city level, Bologna ranked fourth with its 46 museums, after Rome (121), Florence (69) and Milan (47), and before Naples (38) and Venice (34). The majority of museums in the Emilia-Romagna region (as well as in Italy) are small, local museums with 90% attracting fewer than 50 000 visitors (see Table 3.1).

The vast majority of museums are governed at the regional level. In Emilia-Romagna, only 7% of museums are state owned institutions, while the majority are owned by municipal and regional authorities.

They are governed at the regional level by the *Servizio Patrimonio Culturale*, a governing body recently created (January 2021) which operates as part of the Regional Office for Heritage and Landscape.

Table 3.1. Attendance and distribution of museums⁶ across different provinces of Emilia-Romagna

Cities	N. of museums	< 1 000 of visitors	1 000–5 000	5 001–20 000	20 001–50 000	50 001–100 000	> 100 000	N/A ⁷
Piacenza	31	13	8	6	0	0	0	4
Parma	66	19	15	13	4	2	1	1
Reggio Emilia	28	8	11	5	3	1	0	0
Modena	42	6	18	12	2	1	2	1
Bologna	89	30	23	17	10	5	2	2
Ferrara	28	8	6	9	4	1	0	0
Ravenna	41	12	13	8	5	2	1	0
Forlì-Cesena	45	15	17	9	3	1	0	0
Rimini	34	12	12	7	1	0	1	1
Total	404	123	123	86	32	13	7	9

Source: own elaboration on ISTAT data (2019)

The case of the International Museum of Ceramics (MIC)

Since its establishment, the International Museum of Ceramics (MIC) has been characterised by an open and proactive approach toward the local community. For example, it has been one of the first museums to carry out educational activities oriented toward young local craftsmen and artists. In recent years, MIC has strengthened its contribution to local development by reshaping its core mission and activities. In line with its new goals, MIC has implemented a strategy oriented toward the development of a participatory and community-based approach to position itself as a hub for competences and connections in the local ecosystem.

The implementation of the new strategy implies the adoption of an outward looking perspective. The museum, could further integrate typical museum activities such as preservation and exhibition with activities aimed at engaging actors operating in the local ecosystem. In doing so, interviewees highlighted the importance of overseeing the dimensions underlying the functioning of a local creative ecosystem (i.e., innovation, entrepreneurship, welfare, social cohesion, education and learning, attractiveness). As a result, MIC is evolving toward a participative and empowering cultural hub that allows for various forms of engagement and co-creation. More specifically, the museum has increasingly committed itself to the following objectives:

- Working with local economic actors to mobilise new partnerships and funding channels;
- Defining multidisciplinary and experience-based educational activities that foster learning capabilities, inclusion, and the well-being of young people and adults;
- Defining and coordinating outreach activities aimed at sustaining the relationships between research institutions/universities and local companies;
- Providing physical spaces for collaboration, networking and knowledge exchange opportunities;

⁶ Data in this table refer only to museums and collections, and thus do not include archaeological sites and historical monuments.

⁷ Number of museums for which data about visitors were not available.

- Integrating the preservation of Faenza's heritage with its promotion to both local citizens and tourists within broader urban regeneration processes;
- Fostering the cultural participation and awareness of the local community and the attraction of tourists and creative talent.

Box 3.2. International Museum of Ceramics (MIC), Faenza, Italy

The International Museum of Ceramics (MIC) has garnered a reputation as one of most prominent cultural institutions in the field of ceramics worldwide. It was founded in 1908 in Faenza, a city of roughly 60,000 inhabitants famous for its industrial district specialised in the ceramics and majolica production. The institutional mission of MIC relates to the acquisition, preservation, and promotion of Faenza's ceramics heritage. Over the years, the permanent collections of MIC have been expanded to encompass different types of artistic production from a variety of periods, genres, and geographical areas. Its permanent collections include artworks ranging from ancient periods to contemporary artists such as Pablo Picasso, Henri Matisse, Marc Chagall, and Alberto Burri. In doing so, the museum has contributed to drawing linkages between Faenza and other ceramics districts, as well as placing the cultural value of Faenza's heritage in the spotlight.

The museum has shifted its governance from a fully public one to a mixed, public-private structure over the years. This public-private structure is conveyed by the Faenza Foundation, which was founded in 2002 with the aim to engage private funders and partners in designing and managing MIC's activities. In doing so, both the museum and the local municipality aimed at maximising the embeddedness of MIC within its territory by fostering connections with local economic actors. Among the partners of the Faenza Foundation, there are local bank foundations, the chamber of commerce of the city, leading ceramics companies, and cooperatives operating in the CCS, along with the local municipality and provincial bodies.

Namely, these sets of activities can be framed into four overarching themes that characterise the new role pursued by MIC as summarised in Table 3.2:

Table 3.2. Themes and activities of MIC as a cultural hub

Themes	Sets of activities
Supporting local economic development	<ul style="list-style-type: none"> • Workshops, outreach initiatives with universities and companies to foster new business ideas, employability skills and funding opportunities • Co-working space and acceleration programmes for craftsmen/entrepreneurs in the ceramics field • Support to the internationalisation of Faenza's ceramics craftsmanship and entrepreneurship (e.g., CER-DEE)
Fostering urban regeneration and community development	<ul style="list-style-type: none"> • Preservation and promotion of Faenza's open-air ceramics production • Preservation and promotion of MIC's permanent ceramics collections • Guest-curated exhibitions, competitions, and dissemination activities for the local community and tourists
Catalyzing culturally aware and creative societies	<ul style="list-style-type: none"> • Workshops and laboratories for Faenza's middle/ high school students • Attraction of creative talent through partnerships with other museums and cultural institutions (e.g., the Faenza Prize) • Digitalisation of cultural and educational offering during the COVID-19 pandemic (e.g., webinars for students, blended activities for families)
Promoting social inclusion, health, and well-being	<ul style="list-style-type: none"> • Workshops for students with disabilities • Professionalising activities for youth; life-learning for ageing populations

Leveraging the power of museums for local economic development

The first theme includes all those activities that aim at leveraging the role of the museum for sustaining the local economy. In doing so, MIC has attempted to foster new business ideas, enhancing young people's employability skills, and improving the overall innovative potential of the Faenza district. MIC has developed a growing agenda of workshop and outreach activities in partnership with private and public cultural associations, companies, research institutions, and universities. For example, the museum has partnered with the University of Bologna in devising internship programmes that integrate the courses offered by the university with restoration-focused professionalising workshops and internships and cultural entrepreneurship activities. Furthermore, the museum coordinates with research institutions and universities in engaging local companies in research and dissemination activities, acting as a touchpoint between researchers and practitioners.

One interesting attempt to leverage MIC's role for local economic development relates to the design of a co-working space in the museum's premises. This co-working space is intended for Faenza-based young craftsmen and entrepreneurs. The museum launched a public tender for the selection of 16 tenants in Spring 2021, and operations were expected to start shortly thereafter. The co-working space is intended to host acceleration and mentoring programmes, as well as development and innovation support services according to the needs of the tenants. MIC expects to replicate and scale up this initiative, aiming at providing young entrepreneurs, start-ups, and SMEs in the ceramics field with a physical space for interacting and developing new business ideas and opportunities.

Another action relates to MIC's support to the internationalisation of both SMEs and individual entrepreneurs operating in the Faenza district. These actions operate within broader EU-related frameworks and funding schemes. One example relates to the "CER-DEE - Creative Entrepreneurship in Ceramic Regions" European network, which was established in 2019 as an EU – INTERREG project. Namely, CER-DEE is a cooperation network that involves the most prominent European ceramics districts. It aims at supporting the circulation of knowledge and best practices across different museums and companies at the European level. Within this network, MIC mostly organises activities in education supporting the design and deployment of training protocols that aim at developing professional skills consistent with employability needs of individuals and innovation needs of companies operating in the local ecosystem.

Fostering urban regeneration and community development

This theme includes activities that aim not only at preserving Faenza's heritage but also at promoting it as a tool for the development of the local community. Within this area of activities, MIC devotes a major focus to the regeneration and promotion of Faenza's open-air ceramics. Open-air ceramics are heralded as holding an important historical, identity, and artistic character that is entrenched with that of the Faenza district. However, many of these ceramics have witnessed increasingly greater levels of deterioration in recent years, making preservation and restoration interventions ever more necessary. MIC conceives such interventions as an opportunity for carrying out novel promotional and awareness activities. Accordingly, new permanent and temporary installations have been placed around the city. Furthermore, all open-air ceramics requiring preservation and restoration have been mapped and turned into a diffused open-air museum that now spreads across all Faenza's municipal territory.

These initiatives are intended to increase awareness of the local community of the importance of the ceramic district, as well as contributing to the tourist attractiveness of Faenza. In doing so, these activities have also contributed to embedding the museum in broader urban planning and design initiatives deployed by the local municipality, thus contributing to the role of MIC as an anchor in Faenza's urban regeneration. MIC has established itself as a safe and open place for the local community to engage in cultural activities. Every year, MIC partners with other museums – both national and international – to develop several guest-curated exhibitions that represent an opportunity for local citizens to engage in

stimulating cultural activities, as well as to attract both national and international curators and artists to Faenza. Furthermore, the hosting of public debates, cultural events, and community meetings, further reinforcing its role as a cultural hub for community development.

Catalyzing culturally aware and creative societies

This theme includes all activities aimed at fostering creative talent and cultural awareness at the local level and at placing the Faenza district as an attractive destination for tourists and creative workers. MIC has developed education and research activities to define a structured educational agenda aimed at nurturing the knowledge of ceramics in both young people and adults. For example, MIC organises several workshops, laboratories, and courses for local students. These activities are mostly aimed at fostering students' artistic awareness and handicraft abilities. MIC provides students with a multidisciplinary and experience-based learning approach that embeds the study of ceramics within other disciplines included in their school programmes (e.g., chemistry, history, geography). One example of such activities relates to the "Playing with ceramics" workshops developed in partnership with local schools. These workshops engage students in experimenting with different techniques and approaches to ceramics production, as well as learning about the history of MIC's collections and Faenza's heritage.

Another relevant activity is the "Faenza Prize. International Biennale of Contemporary Ceramic Art". This international competition was established in 1932 and was inspired by the founder of the museum, Gaetano Ballardini. Since its inception, it has stimulated research and dissemination activities pertaining to all those ceramic techniques and materials that have nurtured Faenza's heritage. After the onset of the COVID-19 pandemic, the 61st Faenza Prize exhibition was cancelled, and MIC organised alternatively 10 weeks of online talks and seminars with selected artists. Such a digital initiative contributed to nurturing an international community of artists and achieved more than 147 000 views in three months. This is also consistent with MIC's efforts to strengthen its online presence.

Indeed, the museum is currently placing a greater emphasis on blending its onsite activities and communication strategies with online ones. The museum has started offering webinars on ceramics-related topics, online workshops, and virtual tours to its collections. For example, MIC has integrated its educational activities with online laboratories for high school students aimed at envisioning a multi-channel and multi-audience strategy for fostering cultural participation and awareness around ceramics. Similarly, the museum has also intensified its communication and editorial efforts integrating its publishing activities (e.g., catalogues of its collections) with social media engagement strategies.

Museums as spaces for inclusion, health and well-being

The fourth theme includes activities aimed at addressing social needs of the local community, with a focus on vulnerable populations. For example, MIC offers several educational activities aiming at contributing to the inclusion and psychological and physical well-being of students with disabilities. The museum has devised the "MIC for everyone" workshops to help students with disabilities engage in sensorial arts practices, to enhance their handicraft and tactile skills and design a more inclusive and richer cultural experience. In this sense, MIC also acts as a bridge between the local municipality and third sector organisations in promoting social welfare initiatives. Furthermore, by providing professionalizing internships and workshops to university students, MIC integrates local public policies in providing pathways to employment. The museum also contributes to health and well-being for adults and ageing populations through life-long learning and by supporting the accessibility to cultural activities and events.

The case of the Museum of Modern Art of Bologna (MAMbo)

The Museum of Modern Art of Bologna (MAMbo) is one of the most prominent museums of the regional capital of Emilia-Romagna. Its institutional mission relates to the acquisition, preservation, and promotion of modern and contemporary artworks, mostly featuring Italian artists from the post-WWII period to the present time.

Box 3.3. Museum of Modern Art of Bologna (MAMbo), Bologna, Italy

MAMbo was founded in 2007 and originated from the former Galleria d'Arte Moderna (GAM). GAM was founded in 1975 with the objective to provide an institutional space for individual actors, events, and initiatives that were then dispersed within the Bologna area. MAMbo aims at promoting and enhancing the outcomes and legacy of the GAM for Bologna's creative ecosystem, while also carrying out a greater focus on contemporary artworks and young artists. Along with preserving and exhibiting its collections, MAMbo also engages in educational and documentation activities aimed at raising awareness of the artistic production of post-war Italy.

From a governance perspective, MAMbo is owned and managed by the local municipality. MAMbo is the leading partner of the Bologna Musei network, which includes the municipal museums, art galleries, and library collections. Within Bologna Musei, MAMbo acts as a touchpoint between the local municipality and all the other partnering cultural institutions. Furthermore, MAMbo manages the collections of the local Morandi Museum dedicated to Bologna-native, contemporary artist Giorgio Morandi, and the Museum for the Memory of Ustica dedicated to the victims of the Ustica flight events. It hosts permanent collections commemorating the airline flight which crashed on route from Bologna to Palermo in 1980. MAMbo also oversees the historical Villa delle Rose.

Since its establishment, the museum has been characterised by an open and proactive approach toward the local community. This is consistent not only with the legacy of the GAM but also with the very own origins of the requalified site where MAMbo is located. Indeed, the site was established in 1914 as a municipal bakery and helped many people in the Bologna area endure WWI. For these reasons, MAMbo has always tried to mobilise and embed this legacy in its own activities, thus recognising its importance in constructing a strong sense of community and purpose within its neighborhood. This is ever more relevant considering that the neighborhood is a highly vibrant one in which many artists, craftsmen, cafés, clubs, and cultural institutions are located. Namely, the neighborhood also hosts the *Manifattura delle Arti* (Arts Factory), an artistic complex that hosts courses and artistic production projects of the local Faculty of Music, Arts and Drama of the University of Bologna, the National Film Archives (*Cineteca*), a cultural center for the local LGBT community (*Cassero*), as well as cultural events, festivals, and street art works.

As is the case for MIC, MAMbo has strengthened its contribution at the local level by reshaping its core mission and activities. MAMbo has implemented a new strategy to legitimise itself as a hub for competences, connections, and artistic production in the local creative ecosystem. In doing so, stakeholders highlight how MAMbo is currently integrating its typical museum activities with those aimed at creating greater societal impact, eventually becoming a hub for the local creative community to scale up its artistic endeavors and to endure the crisis induced by COVID-19. These efforts have resulted in different forms of engagement and co-creation. Indeed, the museum has increasingly committed itself to the following objectives:

- Working with local economic actors to mobilise new partnerships and funding channels;
- Defining multidisciplinary and experience-based educational activities that foster the learning and well-being of students and adults;

- Defining workshops, courses, and internship programmes for university students and coordinating outreach and research initiatives;
- Providing physical spaces for artistic production, collaboration, networking and knowledge exchange;
- Fostering and legitimizing novel artistic expressions and embedding them within the local creative ecosystem;
- Fostering the cultural participation and awareness of the local community and the attraction of tourists and creative talent.

As for MIC, MAMbo is translating these objectives into practice by providing a diverse set of activities to be embedded within the institutional mission of the museum, as summarised in Table 3.3.

Table 3.3. Themes and activities of MAMbo as a cultural hub

Themes	Sets of activities
Supporting local economic development	<ul style="list-style-type: none"> • Workshops and outreach initiatives with research institutions, universities, and companies to foster new business ideas and employability skills • Partnerships with local cultural institutions, companies, and cultural associations (e.g., sponsorship and funding programmes, exhibitions within the Art City Bologna project, cultural events)
Fostering urban regeneration and community development	<ul style="list-style-type: none"> • Preservation and promotion of Giorgio Morandi's artworks through the Morandi Museum and commemoration of the Ustica events through the Museum for the Memory of Ustica • Preservation and promotion of MAMbo's permanent modern and contemporary art collections • Guest-curated exhibitions, festivals, and public debates for the local community and tourists
Catalyzing culturally aware and creative societies	<ul style="list-style-type: none"> • Workshops, laboratories and courses for local middle and high school students (e.g., through personalised teaching kits for schools) • Workshops and internships for university students) • Definition of a hub for artistic production, artistic residency, curatorship, and acceleration programmes for young artists (i.e., <i>Nuovo Forno del Pane</i> project)
Promoting social inclusion, health, and well-being	<ul style="list-style-type: none"> • Workshops for children attending kindergartens and their families • Professionalizing activities for younger people, and life-learning activities for ageing populations • Remote/virtual cultural initiatives to ease social distancing pitfalls in terms of social inclusion and well-being (e.g., remote exhibitions)

Leveraging the power of museums for local economic development

MAMbo fosters the artistic production of young local artists, accelerating the scaling of business ideas within the local creative ecosystem, along with the engagement of private actors in the funding and organising of exhibitions. One example of such activities relates to acceleration and professionalizing workshops and internships for university students that can integrate their university programmes and help them develop and scale their business ideas. The museum also supports research institutions and universities in engaging companies in research and dissemination activities thanks to the network of relationships and competences of its educational department, thus contributing to outreach initiatives at the local level. MAMbo has also partnered with several local cultural institutions, companies, and cultural associations in the organisation and production of exhibitions and in the sponsoring and funding cultural events in the city. For example, MAMbo partners with the Municipality of Bologna and the

local art fair (*Arte Fiera*) in promoting and producing contemporary art exhibitions in the summer months as part of the broader Art City Bologna project. In doing so, MAMbo tries to engage companies as sponsors for such exhibitions. MAMbo also engages local private actors – most often, companies and bank foundations – in creative production activities also by organising private cultural events and exhibitions at the historical Villa delle Rose. This helps trace links between Bologna’s economic actors and the cultural offering of the city, in turn improving not only the vibrancy but also the sustainability of the local creative ecosystem.

Fostering urban regeneration and community development

MAMbo boosts urban regeneration processes and is embedded in broader urban planning and design initiatives deployed by the local municipality. Two interesting examples relate to the oversight and management of the Morandi Museum and the Museum for the Memory of Ustica. The Morandi Museum hosts the largest and most valuable collections dedicated to Bologna-native, contemporary artist Giorgio Morandi. MAMbo supports the promotion of Morandi’s artworks at both national and international levels, while also includes the collections of the Morandi Museum within its sets of workshops, events, and activities for the local community. MAMbo also oversees the Museum for the Memory of Ustica. MAMbo also promotes and develops archival materials (e.g., documentaries), seminars, and dissemination activities and public debates about the Ustica events and their legacy for the local community.

MAMbo has actively contributed to the vibrancy of the neighborhood where it is located since its inception. Indeed, the museum purposefully embeds most of its exhibitions and educational and dissemination activities within the many cultural activities and events carried out by other actors in the neighborhood. The museum also hosts festivals and talks, most often in coordination with cultural associations and/or the local municipality. Furthermore, MAMbo organises several guest-curated exhibitions that represent an opportunity for community development, while also attracting international artists and curators. As for MIC, hosting such activities also helps MAMbo devise itself as an inclusive and inspiring hub that can be perceived as a safe environment for public debates, community meetings, and self-empowerment. Furthermore, the museum partners with the local Bologna Children’s Book Fair in developing workshops and tours for children and their families, as well as promoting its modern and contemporary art collections to a broader audience. After the onset of the COVID-19 pandemic, MAMbo has also supported a group of local artists in the setting of Neu Radio, a radio station that broadcasts from MAMbo’s premises. This radio station is used by young artists to promote their artworks and maintain a day-by-day connection with local art enthusiasts and actors in the artistic field. In this sense, Neu Radio contributes to developing a sense of community both inside and outside the museum, while also legitimizing the role of MAMbo – and that of the participant artists as well – within Bologna’s creative ecosystem.

Catalyzing culturally aware and creative societies

This theme includes activities aimed at fostering creative talent and cultural awareness at the local level and at fostering Bologna’s attractiveness for cultural tourism and for creative workers. MAMbo has developed a structured educational agenda aimed at nurturing attitudes, awareness, and knowledge of modern and contemporary art genres and techniques in both young people and adults. Indeed, MAMbo already had an in-house educational department that had nurtured long-standing partnerships with local cultural associations, local schools, research institutions, and universities. This has helped the museum reshape its educational offering as it benefited from an in-depth knowledge of the cultural preferences, educational needs, and participation patterns of the local community. For example, the museum organises workshops, laboratories, and courses for local students. Similarly to MIC, the educational department of MAMbo fosters a multidisciplinary and experience-based learning approach that seeks to integrate the development of students’ artistic awareness and handicraft abilities with their school

programmes. One example of such activities relates to a series of workshops that engages students in producing their own artworks by recycling scrap materials and drawing inspiration from the works of the contemporary artists within MAMbo's collections. These workshops also target teachers as MAMbo can provide them with personalised teaching kits for such activities to be replicated during arts and handicraft classes. Furthermore, MAMbo organises workshops and internships in collaboration with local and national research institutions and universities. In doing so, the museum also facilitates outreach activities of such institutions. For example, MAMbo partners with several universities in devising internship programmes for students that are defined according to the needs of both the museum and the individual students. Namely, students are engaged in the activities of the educational department of the museum, as well as in marketing and communication activities and in the organisation and production of exhibitions.

One notable example of the growing role of MAMbo as a catalyzer of creative talent relates to the recent *Nuovo Forno del Pane* project. The project is hosted in the Sala delle Ciminerie – one of the main exhibition rooms of MAMbo. The project was kick started in July 2020 amid the COVID-19 pandemic. The *Nuovo Forno del Pane* is conceived as a first important step for the museum's evolution into a hub for artistic production. More specifically, MAMbo offers 13 young artists residencies, ateliers, and mentorship. The 13 resident artists have been selected through a public tender, which MAMbo is now trying to replicate to give the opportunity to other young artists to be selected in the next years. The museum helps artists gain easier access to networking and funding opportunities to accelerate and scale up their artistic endeavors. Artists can also benefit from the competences of MAMbo's staff in terms of editorial, curatorship, and promotion activities. In early 2021, MAMbo also produced and distributed a catalogue that details the experiences of the resident artists and the evolution of their artworks, along with the main steps undertaken by MAMbo's staff in conceiving and coordinating the project.

Museums as spaces for inclusion, health and well-being

The fourth theme includes activities to address societal needs of the local community, as well as nurturing the role of cultural participation as a resource for well-being within the COVID-19 pandemic. For example, MAMbo has envisioned several educational activities directed toward kindergartens and small children and their parents. In this sense, the museum has devised the Children's Saturdays initiative, devoting workshops and tours to children and their families. In doing so, the museum seeks to introduce children to different artistic expressions and techniques, along with novel ways to apply and play with them. These workshops aim at developing children's social capital, as well as tracing links between MAMbo and other cultural and social institutions in the city. They contribute to promoting the role of culture as a social welfare tool for younger generations and their families. The museum also contributes to the development of employability skills of university students by providing professionalizing internships and workshops. Furthermore, MAMbo contributes to health and well-being in the context of adults and ageing populations by offering educational activities for life-long learning and supporting the accessibility to cultural activities and events. As emerged from the interviews, MAMbo has also developed more engaging remote forms of cultural participation as ways of fostering social inclusion and well-being amidst the COVID-19 pandemic. In this sense, one interesting example relates to the *Dear You* project, which is conceived as a mail-order exhibition where visitors can subscribe to receive six artworks in their mailbox. The six artworks range from poems and short stories to posters and scores for theatre acts to be performed at home. The exhibition is designed as love correspondence and seeks to bring back the sense of proximity and intimacy coming with onsite attendance and that many people are now lacking because of social distancing.

Action options for museums

The experiences of MIC and MAMbo show that museums can exert an important role in sustaining social, cultural, and economic development. In particular, museums could contribute to building contextual conditions that create a breeding ground for creativity in the local ecosystem.

In order to achieve such a relevant impact, museums need to reposition themselves as cultural hubs through an open, participatory approach. By serving as cultural hubs, museums can nurture connections and create opportunities for cross-fertilisation among the different actors operating in a local ecosystem. This new, emerging role of museums implies the need for integrating museums' traditional mission of preserving cultural heritage with activities and projects aimed at fostering social inclusion, cohesion, well-being, and cultural awareness. This can be coupled with the increasing role of museums as touchpoints for outreach initiatives of universities, research institutions and local companies.

Overall, museums acting as cultural hubs exert an important role as platforms of exchange, encounter, and creation of a local common ground. They bring together people differently engaged in the arts and culture, communities of creative workers, and public and private organisations operating in the local creative ecosystem. Enacting such a role implies that museums develop close relationships with local stakeholders. Indeed, a tightly-knit network of connections could sustain museums' social impact on various components of the local community (e.g., children and their families, vulnerable people, artists, organisations, and professionals in the CCS), eventually further legitimizing their role as cultural hubs.

Serving such a role of cultural hub for local development requires time and poses several difficulties. The experiences of MIC and MAMbo highlight three main areas of intervention, each suggesting some guidelines for museums, following which they can adopt adequate organisational solutions and successfully play their role as cultural hubs.

The three areas of intervention are:

1. Building on legacy
2. Contributing to the ecosystem
3. Capability building

Building on legacy

This area of intervention emphasises the importance of leveraging on the museum's history and tradition when addressing the needs and expectations of the different actors operating in the local creative ecosystem. For example, MAMbo's *Nuovo Forno del Pane* project has mobilised and updated the legacy related to the historical origin of the building that is home to MAMbo. In doing so, the museum has contributed to developing a sense of community and purpose of local artists and in the neighborhood where MAMbo is located. Similarly, MIC has leveraged on its legacy in the ceramics field integrating it with that of local companies. Actions aimed at building on the legacy of a museum could reinforce the vibrancy, cultural diversity, and creative identity of a local ecosystem.

Within this area of intervention, the analysis of the two cases suggests the following recommendations for museums:

- Museums could design their activities in order to update the material and immaterial heritage that is expressed by their collection;
- Museums could envision new audiences for their activities as also a means to mobilise new partnerships and funding channels with local stakeholders;
- Museums could develop artistic and cultural projects both in their premises and in public spaces beyond the museum, in order to favour the involvement of local communities in their activities. In

this sense, museums could launch projects for the residency, curatorship, and acceleration of artistic production by young local artists.

Contributing to the ecosystem

This area emphasises the importance of developing strong connections with the different actors operating in the local ecosystem. By increasing their embeddedness, museums also reduce the risk of becoming isolated from the needs and expectations of local community. The experiences of MIC and MAMbo testify the commitment of their staff members in designing activities that can legitimise the two museums as cultural hubs bridging local artists and other actors operating in the local ecosystem, as well as engaging actors operating in other ecosystems. For instance, MIC deploys activities aimed at attracting international artists for guest-curated exhibitions and collaborations with local cultural and creative actors. The museum has also embedded its activities – and those of Faenza’s ceramics district – within global specialised circuits and networks that engage ceramics operators (both artistic and industrial). This has contributed to placing Faenza under the spotlight, while limiting the problem of lock-in and “over-embeddedness” that could arise from the relative tightness and small size of Faenza’s district. Similarly, MAMbo has tried to foster its embeddedness in the local ecosystem by coordinating with other actors in the neighborhood, as well as supporting resident artists in promoting their artworks and maintaining day-by-day connections with other local actors.

Within this area of intervention, the analysis of the two cases suggests the following recommendations for museums:

- Museums could design their activities with the aim of encouraging participation from different sections of the local ecosystem (including those from outside CCS). In doing so, the museum can offer a set of opportunities for cross-fertilisation across different sectors;
- Organise activities and events that promote the emergence of a cooperation logic where pooling, teamwork, exchange of ideas, and co-planning of new projects become not only the output of specific actions, but also (and mainly) the cornerstone of local CCS ecosystems;
- Have a strong presence in the local community, for example encouraging the mobilisation of volunteers, sharing information about potential projects to be co-designed with local associations of the third sector, and developing projects specifically intended for local schools.

Capability building

This area of intervention emphasises the importance of increasing the scope of competences of both the museum staff and the actors operating in the local ecosystem. Museums have always had an educational function, but, as highlighted by the cases of MIC and MAMbo, such a function can be enriched. However, achieving this goal is no easy feat, especially for smaller museums that often lack resources to sustain these activities. Thus, public authorities could devote greater resources to fully unlock museums’ potential as cultural hubs.

Within this area of intervention, the analysis of the two cases suggests the following recommendations for museums:

- Museums could invest in educational activities aimed at integrating traditional competences of their staff with new ones regarding areas relevant for their role of cultural hubs (e.g., management of online platforms for cultural participation and artistic production);
- Contribute to enhancing creativity, well-being, and participation in the local community, and to sustaining new cultural ventures. In so doing, museums can position themselves as enhancers of people’s cultural and social capital, thus contributing to the collective absorptive capacity of the local ecosystem.

Policy options

Local governments are critical to mainstreaming the role of museums in local development. In particular, they can help museums fully unlock their potential as hubs for local cultural, economic and social development. Mainstreaming the role of museums in local development requires first that local stakeholders fully recognise the full role that is and can be played by museums, thus supporting their transformation into hubs delivering new services and activities aimed at creating more inclusive and sustainable development.

Enabling a fuller role for museums is not in opposition to their traditional mission related to core functions such as preservation, education and research. On the contrary, museums can carry out both, and even try to leverage on potential synergies. In this sense, local governments can support museums in maintaining their core functions, while also pursuing new activities related to their role as hubs for local development.

As also emerged in the two analysed cases, the local governments' full support is important in encouraging museums to take initiative in the cultural field as well as in other socio-economic areas. To this end, local governments can envision ways for integrating their support to museums and other areas of public policy, regarding for instance employment, social welfare, and sustainability.

Further steps that local governments could take in this direction include:

- **Develop a longer-term vision through multi-stakeholder collaborations:** Support the development of medium or long-term collaborations between museums and other actors (e.g., universities, enterprises, associations, and communities of practice). These collaborations help create a solid foundation for growth among different stakeholders. To this aim, local government could deploy different actions, ranging from playing a steering role in encouraging collaborations through prioritising multi-stakeholder projects to organising networking events, workshops, etc. to develop relationships between the museums sector and local businesses, universities and communities;
- **Strengthen links with universities:** Support ongoing activities aimed at strengthening the links between museums and the universities based in the territory. Engage students by means of internships, educational activities or challenge programmes (hackathon, call for solutions programmes, etc.) and research centres on joint activities helps to exploit potential synergies and support the dissemination of the new role of museums among younger generations. Accordingly, local governments can support internships, entrepreneurial training, and acceleration programmes that involve students and young entrepreneurs and artists, while also helping museums fill potential mismatches in personnel skills that could limit the effectiveness of such initiatives;
- **Raise awareness of the full role of museums:** Invest in appropriate communication activities and events to raise awareness of the broader role of and benefits brought by museums among those targets (citizens, potential partners, etc.) that have not yet been reached. In this sense, one opportunity is to promote arts and culture projects in public spaces to favour the involvement of local communities in museums' activities. It is also important to raise awareness among local companies by underlining the economic, reputation, and embeddedness benefits that these companies could draw on as a result of contributing to museums' role for local development;
- **Scale-up museums' capacities:** There is great opportunity to further utilise museums in the role of hubs for local development. However, pursuing the extension of existing activities requires upfront costs to reorganise museums' activities, update skills of the personnel, and implement targeted programmes, such as free-access activities aimed at including more marginal segments of the population. In this regard, local authorities could look to pool resources from different policy areas (such as health and well-being, business and entrepreneurship, social inclusion, etc.) to help scale up the capacity of museums to contribute to multiple policy agendas. Local authorities could

also regularly inform the museums on the evolution of local socio-economic challenges, beyond the cultural field, and related policy actions (by engaging museums in relevant meetings, sharing strategic documents, studies and policy evaluation reports) so that museums could take informed decisions and enhance their contribution to local development goals.

- **Stimulate the participation and inclusion of new audiences:** Promote projects and activities that can stimulate extensive participation by segments of population that are not used to visiting museums. Such initiatives, besides being part of the social function of museums as detailed above, represent a necessary step for making museums' new role more salient and visible for the public opinion;
- **Couple financial support with other forms of public support:** Besides providing direct financial support, it is important to make adequate public resources (technical, human, financial) available to museums, for example allocating specialised personnel working within regions or other public administrations to support museum staff in activities of project design and preparation of applications for EU public calls required to obtain resources and develop collaborative relations at national and international levels;
- **Address the digitalisation needs of the sector:** Help support the transition towards digitisation by investing in both digital infrastructure (such as the hardware and software required to create online exhibitions) and in training for staff in using digital tools. Further promotion of the use of digital technologies could provide museums with new opportunities to foster their contribution to local and community development;
- **Evaluate and monitor museums' contribution:** Develop a system of evaluation to monitor the evolution of the results achieved by museums in line with the new role. The development of new roles for museums requires time and poses several difficulties. If a longer time frame is needed to produce meaningful impacts on local development, it is important to clearly define shared objectives and accountability in terms of the expected contribution. In this sense, it would be interesting to shift from evaluation models based on the number of visits (especially in a time characterised by the pandemic) to models for evaluating the social impact, the embeddedness in the local territory, and the enhancement of skills and competences in museums' personnel and participants to educational projects.

A photograph of a stone path with a reflection of a building in a puddle. The path is made of dark, irregularly shaped stones, some of which are wet and reflective. A large puddle on the left side of the path shows a clear reflection of a multi-story building with ornate architectural details, including arched windows and decorative moldings. The building's reflection is in shades of yellow and orange, contrasting with the dark, blue-tinted water. The overall scene is captured from a high angle, looking down at the path and the reflection.

4 Public and private funding for cultural and creative sectors

Strong financial ecosystems are required to support the diverse needs of CCS

CCS include a wide variety of sub-sectors with diverse business models, cost structures and funding needs. Public (direct and indirect) and private (philanthropy, sponsorship, debt and equity finance) funding is crucial for CCS (see Box 4.1). However, cultural and creative organisations and firms increasingly do not follow the traditional distinction between non-profit, public-funded or commercial business models, and can combine typical commercial interests with voluntary community cultural service. Thus, alliances between partners (public, private and non-for profit) to finance cultural creation and production become more sophisticated and adaptive than before. The public sector can facilitate and steer these new forms of collaborations in a local CCS financial ecosystem to channel funding and investment in accordance with its strategic policy objectives.

Box 4.1. Overview and evolution of CCS funding sources

- **Public support for CCS includes both direct (e.g. grants) and indirect financing (e.g. tax credits and other forms of indirect subsidies).** Innovative forms of public financial support are gradually emerging, including use of lottery funds, instruments to facilitate access to culture for specific target groups such as, for example, the French *pass culture* voucher. The role of the public sector is also to create conditions for private capital investment in CCS, and not just one-time donations from corporate structures and individuals.
- **The role of the private sector in supporting CCS is important.** In the form of donations, corporate sponsorships, foundation grants, patronage and philanthropic giving, the private sector complements the support extended by the public sector. Private contributions are dynamically changing. New forms of funding such as venture philanthropy and online fundraising such as crowdfunding are picking up and they need to be recognised and encouraged. At the same time, there is a need to support the smaller culture institutions to develop their fundraising capacities such that they are able to compete with more established organisations. Funding models where private and public sector complement each other's contributions (such as public-private-partnerships or matching funds) need to be better targeted to the needs of the various cultural and creative sectors and production stages.
- **More market oriented CCS are increasingly accessing debt or equity finance provided by financial institutions, business angels and government SME support schemes.** Despite a widespread misperception, CCS do not necessarily underperform in terms of profit or financial soundness when compared to other sectors. However, there are specific CCS characteristics that limit their capacity to access these forms of finance and can explain the reluctance of lending institutions. These include their incapacity to provide (tangible) collateral to guarantee the risk of the loan, the lack of managerial skills in producing convincing business plans or the project nature of their work that contribute to a higher degree of complexity in their access to traditional models of finance. The public sector can facilitate a dialogue and a common understanding between demand (CCS) and supply (financial sources), as well as strengthen business skills within CCS to attract capital investment, while also raising the awareness of banks on the specificities of CCS business models and financial needs.

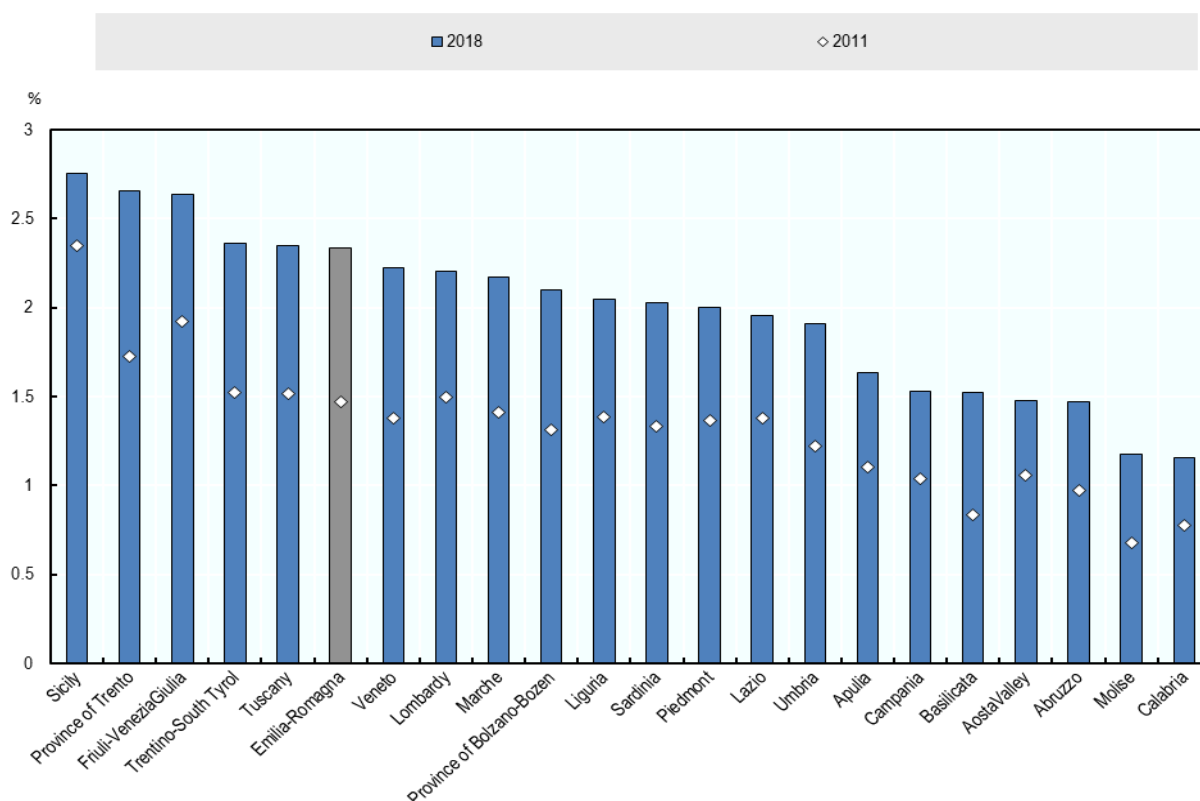
Source: (OECD, 2022^[29])

The evolution of public and private finance and investment in CCS in Emilia-Romagna

Public funding for CCS is strong in Emilia-Romagna

While national public support to CCS has decreased over 2011-2018, regional public support has considerably increased. In Italy, the institutional framework for funding CCS consists of three levels of public funding. For instance, cultural organisations in Emilia-Romagna receive public funding from the national level (government/ministries), the regional level, and the municipality level. National level support is mainly channeled through the Ministry of Culture and the Ministry of Economic Development. For example, sectors such as publishing and film production receive national-level funds both from the Ministry of Culture (e.g., the Film of National Interest contribution) and the Ministry of Economic Development, while non-profit subsectors of CCS receive most of the support by the Ministry of Culture. The regional system of performing arts receives a quota from the Ministry of Culture fund for the performing arts (FUS), to which the regional level adds important resources – which have increased in the last years, partially compensating for the decline in national funding. In the pre-pandemic decade, the region has increased its support to CCS against the background of decreasing national level support. Investments of the regional government increased by almost EUR 6 million in the 2011-2017 period.

Figure 4.1. Recreation, culture and religion as a share of sub-national government spending across Italy



Source: Final Consumption Expenditure of General Government, ISTAT

Regional authorities have devised a wide range of actions to increase the impact of regional funding to CCS. The regional CCS financing system has progressively evolved towards a multi-

stakeholder approach, where multiple sources of financing are present, and public-private partnerships are encouraged.

The support is also channeled to specific sectors with an objective of increasing their international competitiveness as well as impacts on local development and to support the sectors through the current crisis. One of the most relevant public intervention by the region in the last years regards film production to sustain the different stages of the film-making value-chain. Regions and countries across OECD typically support film production through tax incentives and other instruments (Box 4.2). In Emilia-Romagna film production support is deployed by means of different, but coordinated, actions such as the Regional Law on Cinema, which was issued in 2014. This law serves the general purpose of sustaining cinema and audiovisuals as important tools to promote local development in cultural, economic and social terms. The law and the subsequent actions cover all major aspects of the value chain: project set-up and financing, production, distribution, exhibition, and the training and development of the workforce (also with the aim of reconverting workers with experience in declining sectors, and involving unemployed people).

Box 4.2. Tax initiatives to support film and TV in selected OECD countries

Australia offers a range of tax incentives to support film and TV sectors, including a 30% tax rebate for non-feature projects and 40% rebate for feature projects for Australian productions and Official Co-productions; a 30% tax rebate for productions who undertake post, digital and visual effects in Australia; and a 16.5% tax rebate on Qualifying Australian Production Expenditure for international productions filming in Australia.

California, USA, offers a 25% transferable tax credit for independent films and a 20% non-transferable tax credit for feature films and TV series that are made in California. It also uses tax credits as an incentive to move existing TV production into the region by offering a 25% non-transferable tax credit for TV series which had been filmed outside California, but relocate to the region.

France's Tax Rebate for International Production (TRIP) supports non-French projects that are completely or partly made in France. The amount allocated comprises 30% or 40% of the film eligible expenditures incurred in France, and caps at € 30 million per project. The foreign producer needs to contract with a French company to handle the shoot in France or/and the making of the animation / VFX shots via a production service agreement.

In **Germany**, the German Federal Film Fund offers a grant of up to 20% of approved costs for feature, documentary or animated films which spend at least 25% of their production budget in Germany. Germany also offers grants and incentives for TV production in Germany, or with German partners for international TV productions.

New Zealand offers a screen production grant, which covers both film and TV production. It offers a 20% rebate for international productions filming in the country and a 40% rebate on qualifying expenditure for domestic productions.

Sources: ausfilm (2021^[30]); California Film Commission (2022^[31]); German Federal Film Fund (2022^[32]); Ministry of Business, Innovation & Employment (2019^[33]); French Film Commission ((France, n.d.^[34])

During the COVID-19 pandemic, public funding for film increased to help the sector cope with potential loss in income. In order to reduce the impact of the pandemic, the Emilia-Romagna Region implemented two measures (DGR n.370/2020 and n.525/2020) to facilitate the film making of those projects financed by the Emilia-Romagna Film Commission in the previous years. The Regional Council has also increased during 2020 funding for the cinema sector by EUR 300 000. Another important

intervention of the Emilia-Romagna Film Commission relates to its collaboration with the Italian Film Commission Association to identify the beneficiaries of the fund created by Netflix for workers economically affected by the pandemic.

The region has strategically integrated CCS as part of its Smart Specialisation Strategy. An important stream of regional funding to CCS refers to the Regional Smart Specialisation Strategy (S3) and the European Regional Development Funds programme 2014-2020. Within this framework, the Emilia-Romagna region has inaugurated the Regional Cluster CREATE and carried out a wide array of initiatives aimed at supporting CCS. Examples of these initiatives include the following:

- Support to 206 exhibition theatres for the conversion from analogue to digital exhibition technology (over EUR 4 million of investment);
- Public tender for restoration of spaces (EUR 2.5 million);
- Regeneration of spaces with a potential in the sector;
- Requalification of cultural heritage sites;
- Investment in corporate museums;
- Support to the development of creative and cultural sectors incubators;
- Investment in the *Laboratori Aperti*, innovation hubs with a focus on CCS.

Bank foundations play an important role in CCS finance

Bank foundation support to CCS has been growing in recent years. The last available data shows that bank foundations contributed approximately EUR 100 million to regional CCS between 2014 and 2016, distributed through almost 3 000 interventions (Emilia-Romagna, 2018^[35]). For example, EUR 30 million were allocated to interventions supporting CSS in 2014, and it grew to around EUR 34 million in 2016. The Bologna (CARISBO) and Modena bank foundations represent the most significant actors, as they make up for around 30% of the total bank foundation investments in 2014-2016. In particular, CARISBO foundation shows a strong focus on CCS, as it presents the highest ratio of economic resources allocated to CCS in comparison to the total foundation investments. Fondazione C.R. Forlì and the Parma bank foundation are other significant actors, each accounting for about 10% of the total bank foundation investments.

While some Italian regions (e.g., Lombardy and Piedmont) have a single large-sized foundation operating on the whole regional territory, in Emilia-Romagna there are several smaller foundations.

Overall, there are 19 bank foundations: 9 are related to a specific provincial territory (for example, each provincial capital has its own bank foundation, called “Fondazione Cassa di Risparmio of [city]”), while the remaining ones refer to smaller cities or territories. Bank foundations in Emilia-Romagna are quite different in terms of asset value: more than half of the total asset value is owned by the largest actors, which consist of the bank foundations related to the three largest cities in the region (Bologna – the regional capital; Parma, and Modena). For instance, the Bologna and Modena bank foundations show an asset value of around EUR 750 million each; and that of Parma bank foundation exceeds EUR 1 billion. Most of the bank foundations (ten) have an assets value between EUR 50 000 and EUR 500 000, while the remaining five foundations are smaller.

Bank foundations often strategically complement local investments. For example, in Forlì, the bank foundation supported the restoration of some historical spaces as part of the overall city strategy of specialising in hosting temporary painting exhibitions (Montanari and Mizzau, 2015^[36]). On a similar note, besides Bologna, which is the largest city of the region and has a vast cultural heritage in terms of public spaces, squares, historical palaces and churches (tied to its medieval period), Ravenna – which receives contributions from two bank foundations (the C.R. Ravenna and Monte di Bologna and Ravenna) – hosts a heritage of utmost importance, related to the Paleo-Christian Basilica and the Byzantine mosaics around it (which together constitute a UNESCO World Heritage site).

Other financing mechanisms

National tax exemption schemes to promote charitable donations to CCS have a significant impact in Emilia-Romagna. Besides funding from actors such as bank foundations, the CCS benefit from laws introduced at the national level in recent years. For example, in 2018, thanks to the Art Bonus national measure (a tax credit/tax shelter measure introduced in 2014 to encourage charitable donations to public cultural heritage),⁸ the CCS in the region were able to dispose of about EUR 5.3 million for maintenance, shelter or restoration of public cultural heritage goods, and about EUR 22.7 million for support to their activities (ERVET, 2018^[7]).

Public-private partnerships have been growing. Another type of support relates to public-private partnerships (PPPs), which are increasingly used as arrangements between public organisations and corporations or other private organisations providing funding through philanthropy, patronage, sponsorship, match funding (see Box 4.3) or other, more sophisticated, ways of intervention – e.g., social impact investment. In Emilia-Romagna, there are different types of corporate investment which can be clustered in three kinds of interventions:

- **Donation:** support that companies provide to CCS in the form of money, products or technologies, or volunteer labor and/or business skills (i.e., donations in kind);
- **Sponsorship:** support that companies offer in terms of direct funding or provision of goods, services and/or technical and managerial know-how (i.e., technical sponsorship);
- **Cross-sector collaboration:** medium-term support that companies offer in terms of development of close collaboration projects (e.g., prototyping of new products and services, artist-led interventions in a company's activities) with the aim of favoring cross-fertilisation processes and stimulating employees' creativity.

The types of intervention adopted by private companies depend on different factors. They include expected benefits in terms of promotion and image, personal (i.e., of the entrepreneur or people within the top management) appreciation of the specific forms of arts and culture, or interest in giving back to local community.

⁸ The Art Bonus Decree was introduced in 2014 and it is a tax credit equal to 65% of charitable contributions that individuals or companies make in favour of public cultural heritage.

Box 4.3. The Culture and Business Fund Scotland, United Kingdom

The Culture and Business Fund Scotland, UK, operated by Arts and Business Scotland (ABS) provides match funding to arts and heritage organisations and businesses to support new or cement existing cross-sector partnerships. It provides matched funding of private sponsorship to cultural and heritage organisations of between GBP 1 000 and GBP 40 000, thus doubling the value of private sponsorship deals. The fund aims to:

- entice new businesses to sponsor or invest in arts or heritage activities in Scotland;
- encourage and enable businesses already sponsoring or investing in arts or heritage activities to continue to do so with existing and / or new culture sector partners;
- support existing cross-sector partnerships to enable and encourage them to continue to work together;
- attract non-Scottish based companies to sponsor arts and heritage activities in Scotland; and
- encourage and support businesses to continue to invest in or sponsor the activities of an arts or heritage organisation within Scotland over a two or three-year period.

Launched in 2017, this programme builds on the success of its predecessor, the New Arts Sponsorship Grant (NASG), which awarded over GBP 7.5 million in matched funding to arts and heritage organisations between April 2006 and April 2017, contributing to over 500 different projects.

Source: Culture & Business Fund Scotland (2017^[37])

Certain difficulties are associated with sponsorship by potential donors. Italian-based research conducted a survey on 345 companies with annual sales higher than 15 million indicated that around 50% of the interviewees were familiar with sponsorship. Among the reasons that prevented the use of sponsorship by companies was the lack of knowledge of potential fiscal benefits. In other cases, companies did not consider sponsorship an effective tool for communication, being too expensive by comparison with its benefits or the fact that cultural suppliers were unreliable partners (Severino, 2014^[38]). Although data on this issue is not available for Emilia-Romagna, there might be scope for further action by regional authorities to raise awareness of potential donors on sponsorship benefits.

Crowdfunding is gaining ground as an additional source for CCS funding. Crowdfunding can help raise funds for a specific project, and provides access to financial resources to artists and creators that otherwise would not occur, especially in early-stage finance of their careers, while also demonstrating the market potential of projects to more traditional investors (OECD, 2022^[39]). Crowdfunding can also help build civic engagement and public awareness of the value and specific needs of CCS. Local authorities can help “channel” crowdfunding to areas of social impact by providing matching funds (see Box 4.4 for an example of civic crowdfunding matched with public-private funding for heritage preservation).

Box 4.4. Civic crowdfunding and the Porticoes of Bologna: the case of the *Un passo per San Luca* campaign

In July 2021 the Porticoes of Bologna were declared a UNESCO World Heritage Site. It benefited from the participatory governance structure that was put forth by the Municipality of Bologna to manage, preserve, and devise urban policies for the porticoes throughout the years. Indeed, the Municipality proved successful in engaging both public and private actors, with a significant role played by local associations and private citizens at large. Bologna's local community have become increasingly aware of the public significance of the porticoes – also when they are privately owned – as cultural heritage.

The *Un Passo per San Luca* civic crowdfunding campaign represents one of the many initiatives that contributed to raise awareness on the porticoes, while also representing one of the few successful crowdfunding campaigns involving both public and private actors and targeting the preservation and restoration of cultural heritage in Italy. The campaign was carried out between October 2013 and October 2014 with the support of a local crowdfunding platform that helped set up a DYI website and manage the campaign. The campaign raised EUR 330 000 from over 7 000 supporters and helped finance renovation works on the San Luca Porticoes. The Municipality of Bologna contributed to the campaign with EUR 100 000 that were collected through Bologna's own tourist tax, as well as through patronage and sponsorship initiatives.

The civic crowdfunding campaign managed to engage many different actors at the local level. In doing so, it not only helped fasten the financing and kick-starting of renovation works but it also increased the accountability of the overall renovation project of the San Luca Porticoes at the eyes of the local community. The campaign also contributed to the building up of public awareness by being nested in a broader participatory governance that has been pursued by the Municipality of Bologna to target both culturally and socially relevant issues.

Source: Cini (2016^[40])

Policy options

The sustained effort by Emilia-Romagna is supporting CCS financing and mainstreaming their contribution to local economic, social and cultural development. Over recent decades, the region has expanded the scope of its funding beyond supporting the cultural institutions ensuring equal access to cultural amenities throughout the territory. It also promotes cultural welfare projects and integrates CCS in regional development and the Smart Specialisation Strategy. Regional authorities are important providers of direct investment – particularly to complement funds from the national level or supporting the sector through the COVID-19 crisis. A varied financial ecosystem is in place, which is tailored to the evolving needs of different subsectors and consistent with the important role associated with CCS for local development.

As a next step, regional authorities could strengthen their “orchestrator” role to channel public and private investment to areas of social and economic impact. Such a role is crucial in mediating between funding coming from outside the region (such as the European Union) and local requests. It can also help mediate between the opportunities provided by organisations operating in other sectors and needs of organisations and workers in CCS. It can further help make the connections between available resources and citizen needs. Regional authorities are thus central nodes of a complex network. Such a role gives them a privileged position in terms of information flows and a brokerage function. However, it also represents a responsibility, as the fate of important parts of the CCS operating in a region are

dependent on regulatory and financing frameworks, as well as on the different forms of support that the region seeks to package in a consistent way to their benefit.

Emilia-Romagna regional government can take the following further steps to strengthen local CCS financial ecosystem:

- **Follow a medium-term project-based logic in allocating public funding:** local authorities should consider focusing more on allocating available public resources to fund projects with medium-term goals (i.e., with the potential of generating recurrent and replicable activities) in order to create more sustainable cultural projects, rather than single or *una tantum* events where the returns are more short lived. The adoption of such a medium-term logic also requires considering the entire value chain (creation, production, distribution and consumption) in defining funding measures. In this way, regions can promote collaboration among different actors potentially involved in a project, thus leveraging on potential synergies;
- **Consolidate the role of “architects” of the various kinds of investments, actions and initiatives that can be taken in support of the CCS.** A lack of knowledge about where to look for finance and funding is a big barrier for CCS businesses and organisations in accessing capital. By facilitating information sharing between private sector funders and CCS enterprises, individuals and organisations, local authorities can play a key role in strengthening the financial ecosystem for CCS (see Box 4.5). By actively consolidating information around available funding sources, policy makers can facilitate matching between the demand of funding (i.e., the organisations and projects in search for financial or other resources), and the supply of investment (i.e., patrons/sponsors, bank foundations, firms, etc.);

Box 4.5. The UK’s guide to sources of funding and investment for CCS organisations

One of the largest barriers many CCS businesses and organisations face in accessing finance, is knowing what financing options are available and how to apply for them.

In the UK, the Creative Industries Council (CIC), in collaboration with The Institute of Chartered Accountants in England and Wales (ICAEW), published a comprehensive guidance document on sources of funding for CCS in 2015, with an updated version to be published in the near future.

The guidance document outlines how best to prepare for financing; where and when to seek professional assistance in compiling funding applications; how to access public investment, private philanthropic support, corporate partnerships and private capital; and covers issues such as IP rights, charitable status and business planning. This guidance document is complimented by a wide range of specific advice and links to opportunities to access funding from the organisations respective websites. For example, CIC offers advice on how CCS businesses can deal with issues arising from Brexit and the ICAEW offers advice to CCS entrepreneurs and to accountants working in CCS.

As artists and CCS organisations often work on mixed business models, with funding coming from multiple sources including both public and private investment, this type of comprehensive guidance is an important form of support. By incorporating insights from CCS enterprises, not-for-profit organisations, public sector funding bodies, private investors and the financing community the guide is able to offer CCS organisations information on the type of funding that would best suit them and how to position themselves to best take advantage of the funding available.

Source: ICAEW & Creative Industries Federation (2015)^[41]

- **Further ease access to finance of market oriented CCS businesses by:**

- Identifying the key barriers to access debt and equity finance by market-oriented CCS (these can be related to, for example, weak managerial skills to provide sound business plans, or the lack of awareness of lending institutions and reluctance to provide lending without tangible collaterals);
- Designing measures and instruments to address these barriers (e.g. awareness raising campaigns; managerial skills trainings; or, for example, third-party guarantees, that have been proven to be efficient in reducing the financial risk of CCS endeavours with respect to banks).
- **Consider easing access to crowdfunding by providing an enabling technological and financial environment as well as by addressing skills gaps.** Regional authorities (possibly jointly with national level) may consider actions to provide an enabling technological and financial environment. Crowdfunding platforms need internet access, bank accounts and online payment systems. There is also a need to ensure cyber-security, design prevention mechanism, and dispute and resolution mechanisms. There might also be a need to increase the financial literacy of entrepreneurs and citizens (OECD, 2015^[42]);
- **Continue to explore new forms of Public-Private Partnerships (PPPs)**, particularly those related to cross-sector collaborations that could co-create significant economic, social, and environmental value for society, organisations, and individuals. PPPs are an increasing source of financing for CCS projects in Emilia-Romagna. Local authorities could look to develop institutional frameworks to for entering into such arrangements with the private sector, drawing on local, national and international best practices;
- **Streamline regulatory obligations to access funding:** regulatory obligations are often complex and actors in CCS often experience difficulties in understanding the required steps to have access to grants, subsidies or tax reductions. Interviews suggest that these hurdles may be preventing many CCS actors from applying for such financing, despite being eligible for it. Streamlining regulatory obligations to access grants, subsidies and tax reductions, alongside the provision of information resources, could encourage uptake of existing financing mechanism.
- **Consider strengthening support for citizen initiatives (volunteer organisations, community associations, non-profit organisations, etc.) in the realm of CCS.** This could be particularly applicable to those initiatives aimed at renovating, operating and managing informal cultural and creative spaces. As also represented by the case of *Laboratori Aperti*, such initiatives could have a significant impact in terms of regeneration of a decayed city area, support to creative occupations and cultural entrepreneurship, and experimentation of new forms of working, learning and collective exchange;
- **Develop a system of evaluation to monitor the results achieved by the funded organisations and activities.** If a long-time frame is usually needed to produce meaningful impacts on local development, it is important to clearly define objectives of public intervention and clarify the accountability of financed actors in terms of cultural, social and economic impact. In this sense, the regional government could shift from traditional evaluation models of economic impact (Leontief, 1986^[43]; Stynes et al., 2000^[44]) to new metrics for evaluating issues such as social impact, embeddedness in the local territory, and contribution to the local creative ecosystem.

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Annex A. Data and definitions

Defining cultural and creative sectors (CCS)

There is no internationally agreed upon definition of cultural and creative sectors (CCS). Each country uses its own definition in analysis, which includes slightly different sectors of the economy. However, Eurostat has been compiling statistics on CCS which are drawn from countries' national accounts and can therefore be used to make international comparisons. This report primarily uses the Eurostat definition of CCS to enable international comparisons between Emilia-Romagna and other regions and countries. However, as some data are not available at the level of detail required to conduct analysis of the Emilia-Romagna region specifically, some data is also drawn from work conducted by ERVET, which uses a slightly different definition of CCS.

Eurostat definition of CCS

The following table shows the list of NACE Rev.2 codes which are included in CCS using the Eurostat definition. It is these sectors which are included in the majority of the analysis for this report.

Table A.1. List of NACE Rev.2 codes used in the Eurostat definition of CCS

NACE code and title
18 Printing and reproduction of recorded media
18.1 Printing and service activities related to printing
18.2 Reproduction of recorded media
32 Other manufacturing x
32.2 Manufacture of musical instruments
47 Retail trade, except of motor vehicles and motorcycles
47.61 Retail sale of books in specialised stores
47.62 Retail sale of newspapers and stationery in specialised stores
47.63 Retail sale of music and video recordings in specialised stores
58 Publishing activities
58.1 Publishing of books, periodicals and other publishing activities
58.11 Book publishing
58.12 Publishing of directories and mailing lists
58.13 Publishing of newspapers
58.14 Publishing of journals and periodicals
58.19 Other publishing activities
58.21 Publishing of computer games
59 Motion picture, video and television programme production, sound recording and music publishing activities
59.1 Motion picture, video and television programme activities
59.11 Motion picture, video and television programme production activities
59.12 Motion picture, video and television programme post-production activities
59.13 Motion picture, video and television programme distribution activities
59.14 Motion picture projection activities
59.2 Sound recording and music publishing activities
60 Programming and broadcasting activities

60.1 Radio broadcasting
60.2 Television programming and broadcasting activities
63 Information service activities
63.91 News agency activities
71 Architectural and engineering activities; technical testing and analysis
71.11 Architectural activities
74 Other professional, scientific and technical activities
74.1 Specialised design activities
74.2 Photographic activities
74.3 Translation and interpretation activities
77 Rental and leasing activities
77.22 Renting of video tapes and disks
85 Education
85.52 Cultural education
90 Creative, arts and entertainment activities
90.01 Performing arts
90.02 Support activities to performing arts
90.03 Artistic creation
90.04 Operation of arts facilities
91 Libraries, archives, museums and other cultural activities

ERVET definition

The ERVET definition used in some parts of this report draws on two in-depth studies in 2012 and in 2018 which details data, trends, and comparisons for the presence of CCSs in Emilia-Romagna.⁹ These reports classifies CCS as including:

- Cultural, artistic and entertainment activities (live performing arts and other creative and artistic activities; leisure time activities; conservation and valorisation/use of historic, artistic and cultural heritage);
- Media and cultural industries (audiovisual and cinema; printing and publishing and related production; music, radio and TV);
- Creative services (architectural and design services, photography, software development and consulting, advertising and communication);
- Distribution of cultural industries' products;
- Artistic handicraft (artistic and handicraft production, artistic products and handicraft trade);
- Material culture (furniture and home products, fashion, food).

This definition is broadly in line with many other national definitions of CCS, in that it includes sectors in which creativity is key to defines products and services. However, there are a number of key differences between this definition and the definition from Eurostat used in the rest of this report.

Most notably, the ERVET definition includes advertising and marketing, which is excluded from the Eurostat definition, and it also includes software development and consulting, whereas the Eurostat definition includes only publishing of computer games (a sub-set of software publishing).

⁹ <https://www.ervet.it/?p=13363>

Comparisons

As the Eurostat definition is narrower than the ERVET definition, the statistics presented in this report will show a smaller presence of CCS than statistics calculated by ERVET. The table below shows comparison of local active enterprises in the Emilia-Romagna region, using data from ERVET and using data taken from ISTAT with the Eurostat classification of CCS applied.

Table A.2. Comparison of ERVET and Eurostat classifications of CCS

Number of local units in Emilia-Romagna in 2019 using the ERVET and Eurostat definitions

ERVET cultural and creative sectors	Local units
Cultural, artistic, and entertainment activities	3 309
Media and cultural industries	3 794
Creative services	22 182
Artistic handicraft	580
Distribution of artistic handicraft	2 821
Distribution of cultural products	2 419
Total	35 105
Eurostat CCS	
Printing and reproduction of recorded media	1 193
Manufacture of musical instruments	57
Retail trade	2 119
Publishing activities	387
Motion picture, video and television programme production, sound recording and music publishing activities	676
Programming and broadcasting activities	99
News agency activities	31
Architectural activities	3 936
Specialised design activities	3 689
Photographic activities	1 166
Translation and interpretation activities	1 002
Renting of video tapes and disks	34
Cultural education	342
Creative, arts and entertainment activities	2 529
Libraries, archives, museums and other cultural activities	82
Total	17 342

Source: ERVET; ISTAT

Defining cultural employment

Unless stated otherwise, the report follows the “creative trident” approach of cultural employment which includes all individuals working in cultural and creative sectors (CCS) as well as all individuals with cultural occupations outside cultural and creative sectors.

Table A.3. The creative trident approach to measuring cultural employment

	Main sector of employment is a cultural and creative sector	Main sector of employment is not a cultural and creative sector
Main job is a cultural occupation	X	X
Main job is not have a cultural occupation	X	

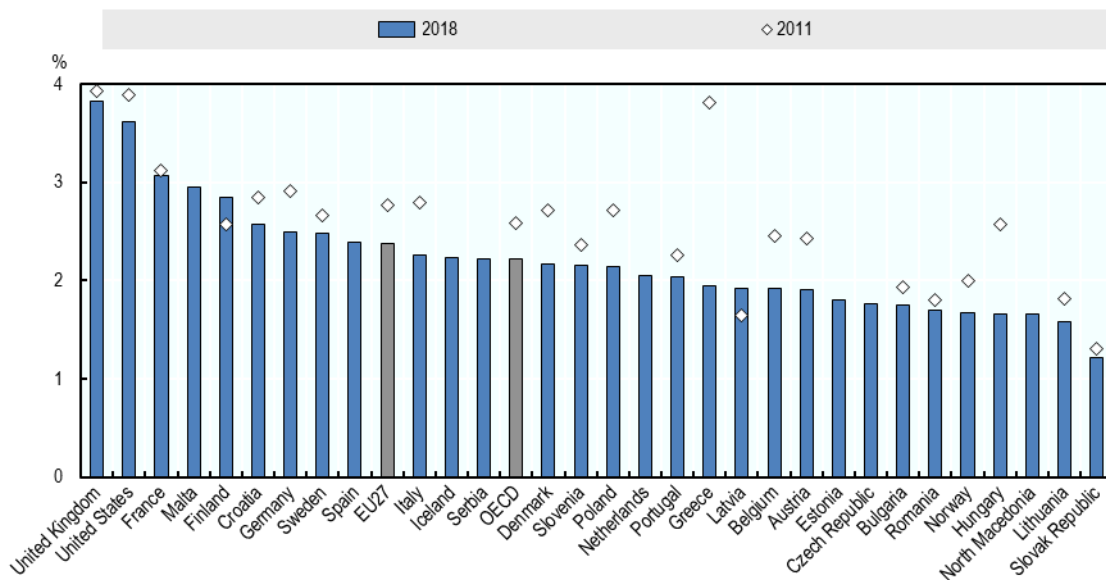
Note: Only workers in cells with a checkmark are counted in cultural employment statistics.

Source: Adapted from Eurostat.

Annex B. Additional data on CCS firm and employment dynamics

Figure A B.1. CCS value added at factor cost as a share of total business economy, selected OECD and EU countries

2011 and 2018

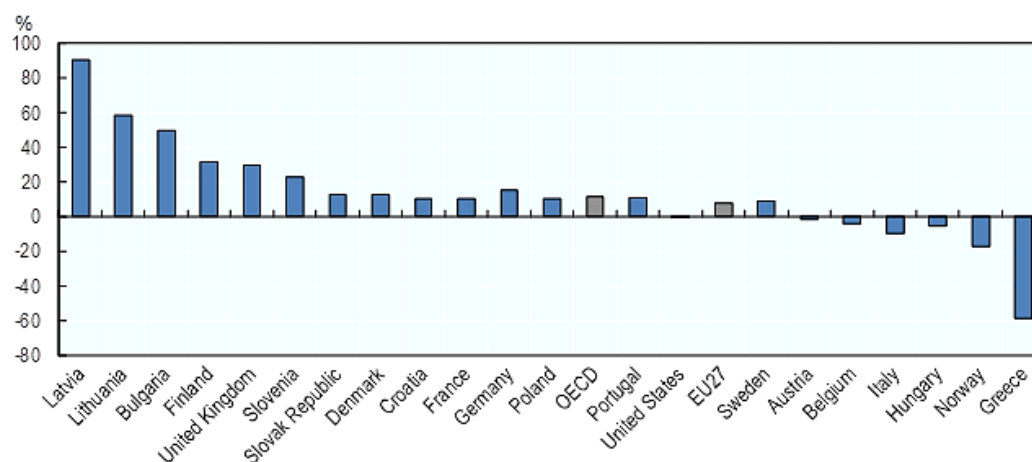


Note: Business economy here includes NACE Rev. 2 sectors B to J, L to N, and S95. Cultural and creative sectors include C18, C3212, C322, G4761, G4762, G4763, J5811, J5813, J5814, J5821, J59, J60, J6391, M7111, M741, M742, M743, and N7722.

Source: Value added and turnover of enterprises in the cultural sectors by NACE Rev. 2 activity, Eurostat; Industry Economic Accounts, United States Bureau of Economic Analysis.

Figure A B.2. Growth rate of CCS real value added in selected OECD countries

2011 to 2018



Note: Cultural and creative sectors include C18, C3212, C322, G4761, G4762, G4763, J5811, J5813, J5814, J5821, J59, J60, J6391, M7111, M741, M742, M743, and N7722.

Source: Value added and turnover of enterprises in the cultural sectors by NACE Rev. 2 activity, Eurostat; Industry Economic Accounts, United States Bureau of Economic Analysis

Table A B.1. Added value of creative sectors in Emilia-Romagna and Italy, 2013

	Economic activities	Italy (EUR millions)	Emilia-Romagna (EUR millions)	Share of overall Italian added value	Specialisation index
V18	Printing and reproduction of recorded media	4,359	405	9.3%	103.8%
V58	Publishing services	3,124	297	9.5%	106.2%
V59_60	Motion picture, video and television programme production, sound and music recording activities; programming and broadcasting activities	5,820	84	1.4%	16.1%
V62_63	Programming, ICT consulting, and related activities; information service activities	26,146	2,070	7.9%	88.4%
V71	Architectural and engineering activities; technical testing and analysis	19,533	1,523	7.8%	87.0%
V73	Advertising and market research	3,717	223	6.0%	67.0%
V74_75	Other professional, scientific and technical activities	13,546	1,449	10.7%	119.4%
V90_92	Creative, arts and entertainment activities	10,032	447	4.5%	49.7%
V93	Sports, entertainment and leisure activities	5,771	682	11.8%	131.8%
Total Creative sectors		92,047	7,180	7.8%	87.0%
Total economy		1,444,106	129,413	9.0%	100.0%

Source: Prometeia, TIO Emilia-Romagna

Table A B.2. Sectoral distribution of cultural and creative enterprises in Emilia-Romagna by size, 2017

ART-ER/ERVET definition

Size class	1 worker	2-9 workers	10-49 workers	40-249 workers	250+ workers	Total
Cultural, artistic, and entertainment activities	63.9%	28.1%	6.5%	1.3%	0.2%	100%
Media and cultural industries	47.6%	40.5%	10.7%	1.1%	0.1%	100%
Creative services	62.8%	30.2%	6.0%	0.9%	0.0%	100%
Artistic handicraft	60.1%	36.6%	2.7%	0.4%	0.0%	100%
Distribution of cultural products	70.1%	28.3%	1.4%	0.2%	0.0%	100%
All creative and cultural sectors	61.1%	32.2%	5.8%	0.8%	0.1%	100%

Source: ERVET on SMAIL data

Annex C. List of interviewed stakeholders

Table A C.1. List of regional stakeholders interviewed for the review

Name	Organisation	Location
Alessandro Catellani	Officine On/Off	Parma
Alfonso Noviello	Multiplo Cultural Center	Cavriago (Reggio Emilia)
Andrea Romeo	I Wonder Pictures	Bologna
Annalisa Rabitti	Municipality	Reggio Emilia
Daniele Del Pozzo	Gender Bender Festival	Bologna
Dario Ambroggi	BnBiz Coworking	Fiorenzuola d'Arda (Piacenza)
Davide Zanichelli	Foundation Palazzo Magnani	Reggio Emilia
Demetrio Chiappa	DocServizi	Bologna, Rimini, Ferrara, Piacenza
Eugenia Ferrara	Foundation Golinelli	Bologna
Fabio Sgaragli	Laboratori Aperti	Ferrara, Forlì, Modena, Piacenza, Ravenna
Federica Pasini	CNA Emilia-Romagna	Bologna
Flaviano Celaschi	Clust-ER CREATE – Region Emilia-Romagna	Bologna
Giacomo Manzoli	CRICC – University of Bologna	Bologna
Gianni Cottafavi	Region Emilia-Romagna – Culture & Youth Department	Bologna
Gigi Cristoforetti	National Dance Foundation – Aterballetto	Reggio Emilia
Giorgia Boldrini	Municipality of Bologna	Bologna
Giuseppe Gagliano	HERA Group	Bologna
Giuseppe Leoni	E:Lab Consulting	Modena
Luigi Benedetti	Foundation Cassa Risparmio di Modena	Modena
Maria Giovanna Govoni	Consorzio Wunderkammer	Ferrara
Massimo Gottifredi	CulturMedia – Legacoop	Bologna
Massimo Maisto	Arci Emilia-Romagna	Bologna
Matteo Al Kalak	DHMore – University of Modena & Reggio Emilia	Modena
Mattia Visani	CuePress	Imola (Bologna)
Morena Diazzi	Region Emilia-Romagna – Work and Economics Department	Bologna
Nereo Landini	Marchesini Group	Bologna
Paolo Cantù	Foundation I Teatri	Reggio Emilia
Paolo De Lorenzi	Centro Diego Fabbri	Forlì
Roberto Naccari	Santarcangelo Festival	Rimini
Sara Piccinini	Maramotti Collection	Reggio Emilia
Sergio Duretti	Lepida	Bologna
Tiziana Libè	Foundation Cassa di Risparmio di Piacenza e Vigevano	Piacenza

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