



CULTURE, CREATIVE SECTORS AND LOCAL DEVELOPMENT IN EMILIA ROMAGNA: EMERGING FINDINGS FROM OECD REVIEW

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Culture, Creative Sectors and Local Development

OECD strives to support governments to:

- ➡ **Mainstream** culture beyond cultural policies and as an integral part of wider policy agendas, such as employment, social cohesion, innovation, well-being, the environment and sustainable local development.
- ➡ **Adapt** policies on employment, social protection, innovation and entrepreneurship to the needs of CCS.
- ➡ **Improve internationally comparable statistics** and the evidence base on the scale, scope and impacts of CCS.
- ➡ **Build the capacity** of national and local governments to integrate culture into broader economic and social development strategies.





Culture, Creative Sectors and Local Development in Emilia Romagna: In a snapshot

☞ **Vibrant creative economy**

- ☞ Growing steadily before the crisis
- ☞ Strong, diverse and accessible cultural offer across the region
- ☞ Strong and growing demand for cultural goods and services

☞ **Robust policies**

- ☞ Long tradition of cultural policies
- ☞ From cultural policies to culture-led development strategies
 - ☞ Culture mainstreamed across other policies
 - ☞ Strong focus on cultural welfare and inclusion through culture
 - ☞ Innovation: Regional Smart Specialization Strategy
- ☞ Diversified financial support: public, philanthropy and private

What next

- ☞ Bringing CCS funding strategy to the next level: region as “orchestrator” of public, private and philanthropy funding
- ☞ Consolidating cultural welfare policies
- ☞ Consolidating the role of museums as cultural hubs for local development
- ☞ Further adapting employment and business support measures to address the precariousness of CCS employment, gender and digital gaps



Cultural employment grew faster than overall employment on average over the past decade

Emilia Romagna

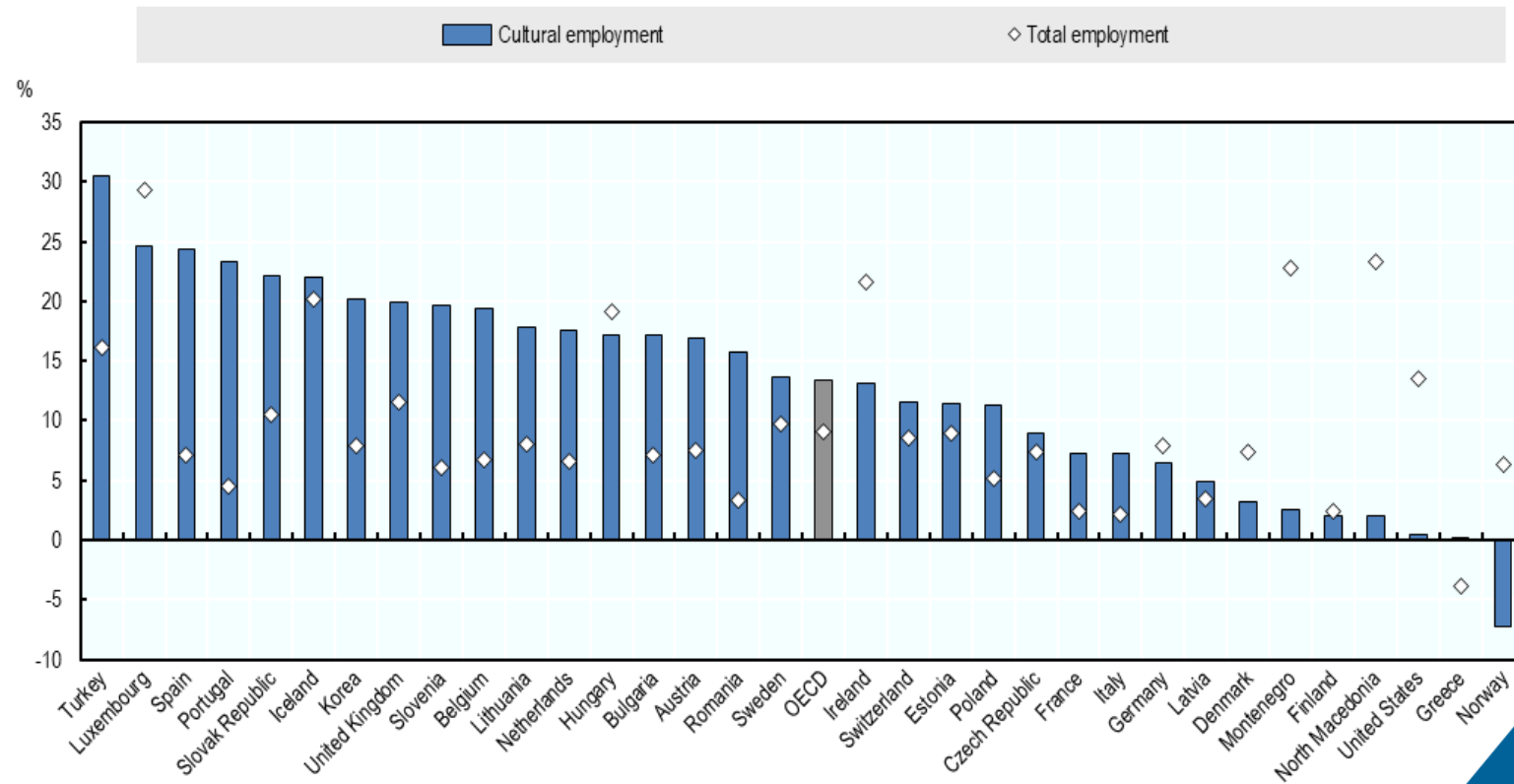
CCS bounced back better and grew faster than the overall economy after the 2008 economic crisis.

CCS employment increased by **4.9%** from 2008 to 2019, outperforming the rest of the overall regional economy for the same period (+0.5%).

Growth uneven across CCS.

- Artistic handicraft ↓
- Media ↓
- Cultural, artistic, entertainment activities ↑
- Creative services ↑

Cultural and total employment growth rate, 2011 to 2019, OECD





Cultural workers were much likely to be **self-employed** than on average, 2018

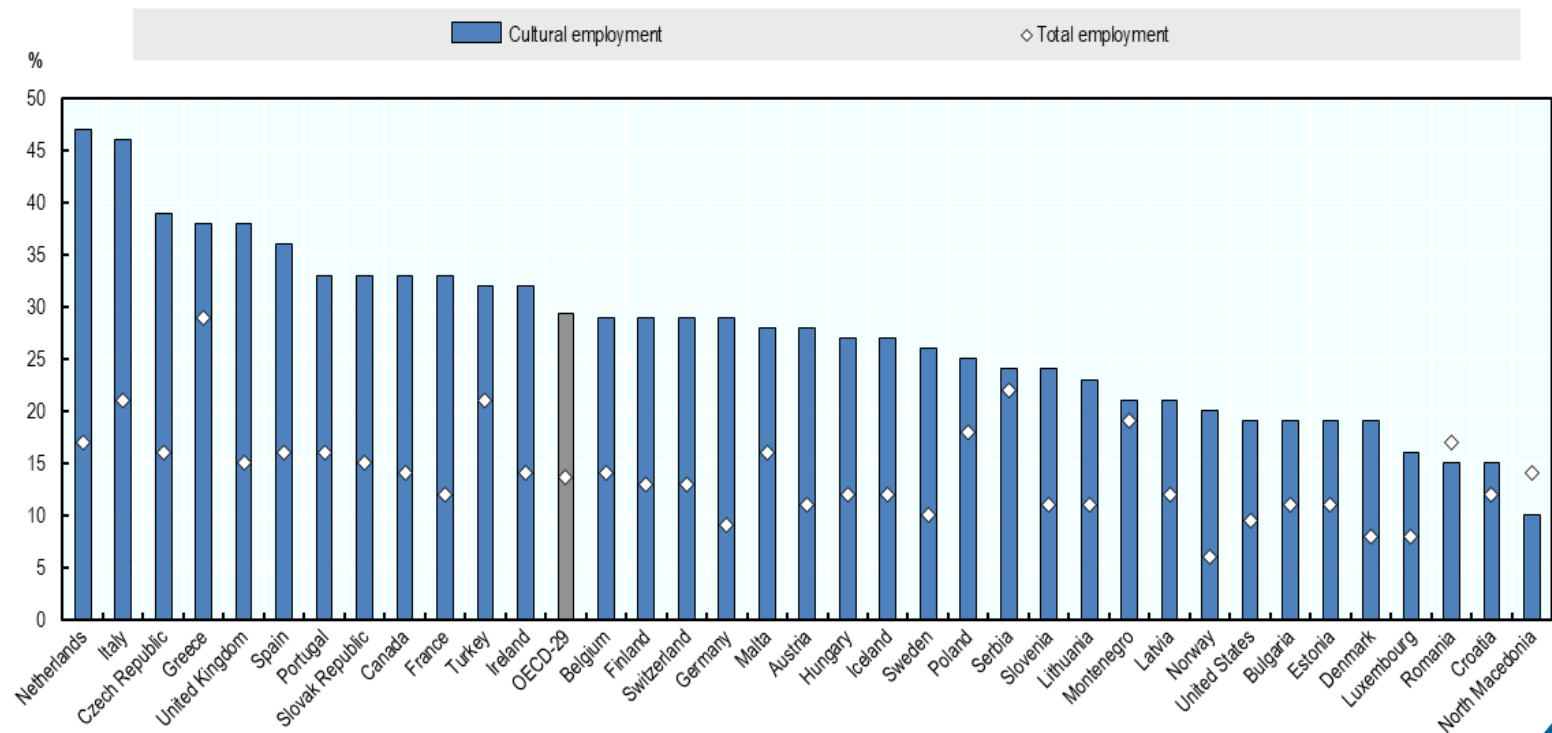
33% of cultural workers were self-employed compared to **14%** on average across the **EU**

Italy has one of the highest shares of self-employed cultural workers (**46%**)

Emilia Romagna: 34%

- television programming and broadcasting activities (**74%**),
- architecture and engineering (**66%**)

Share of self-employed workers in cultural employment and total employment, 2020 or latest available data





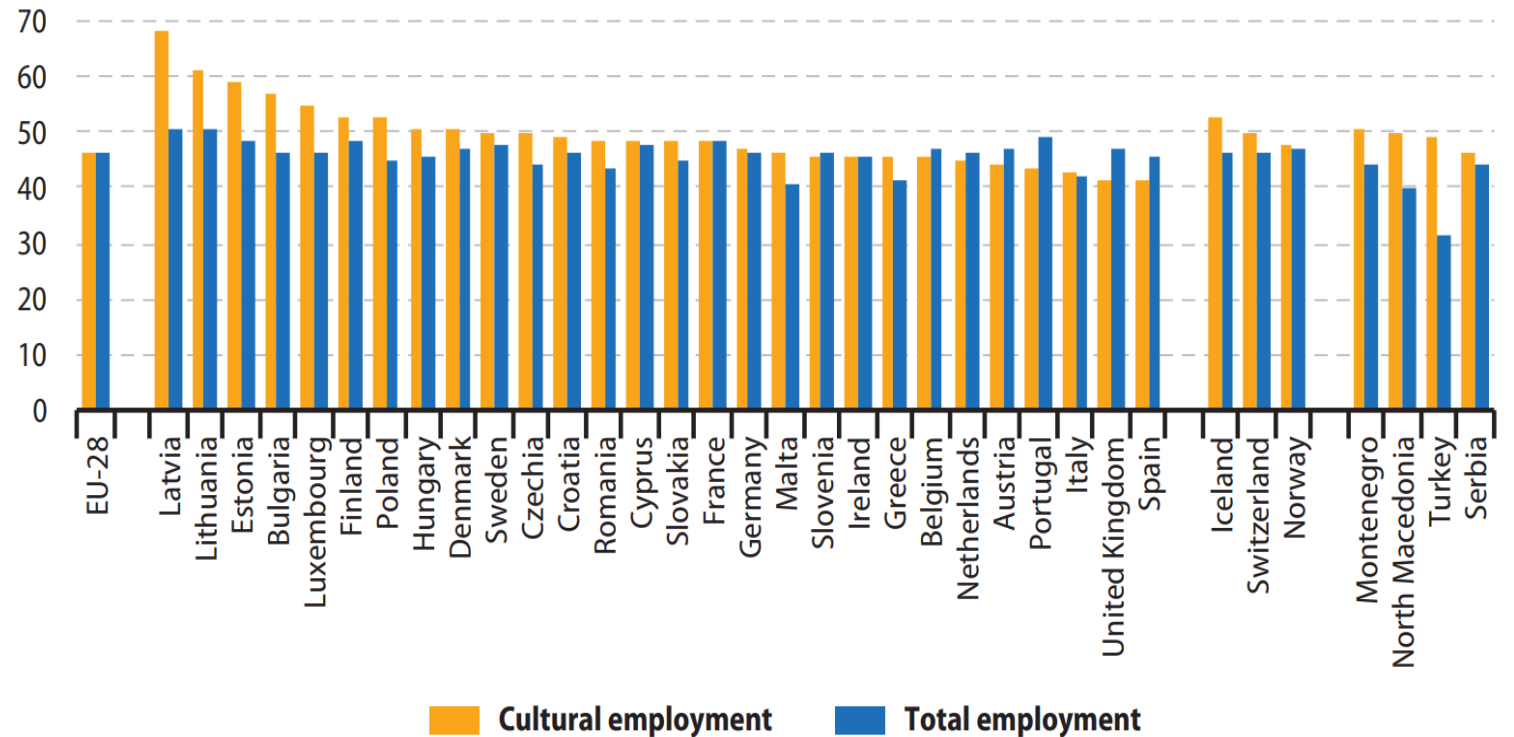
Women are underrepresented in cultural employment in Emilia Romagna

In EU 27 the share of women employed in CCS is slightly higher than in total employment EU average: 47% vs 46%

Italy: **42.7%** of women in cultural employment vs **46%** in total employment

Emilia Romagna: Women represent **36%** of cultural workers

Share of women in cultural employment and in total employment, 2018



Source: Eurostat, 2018



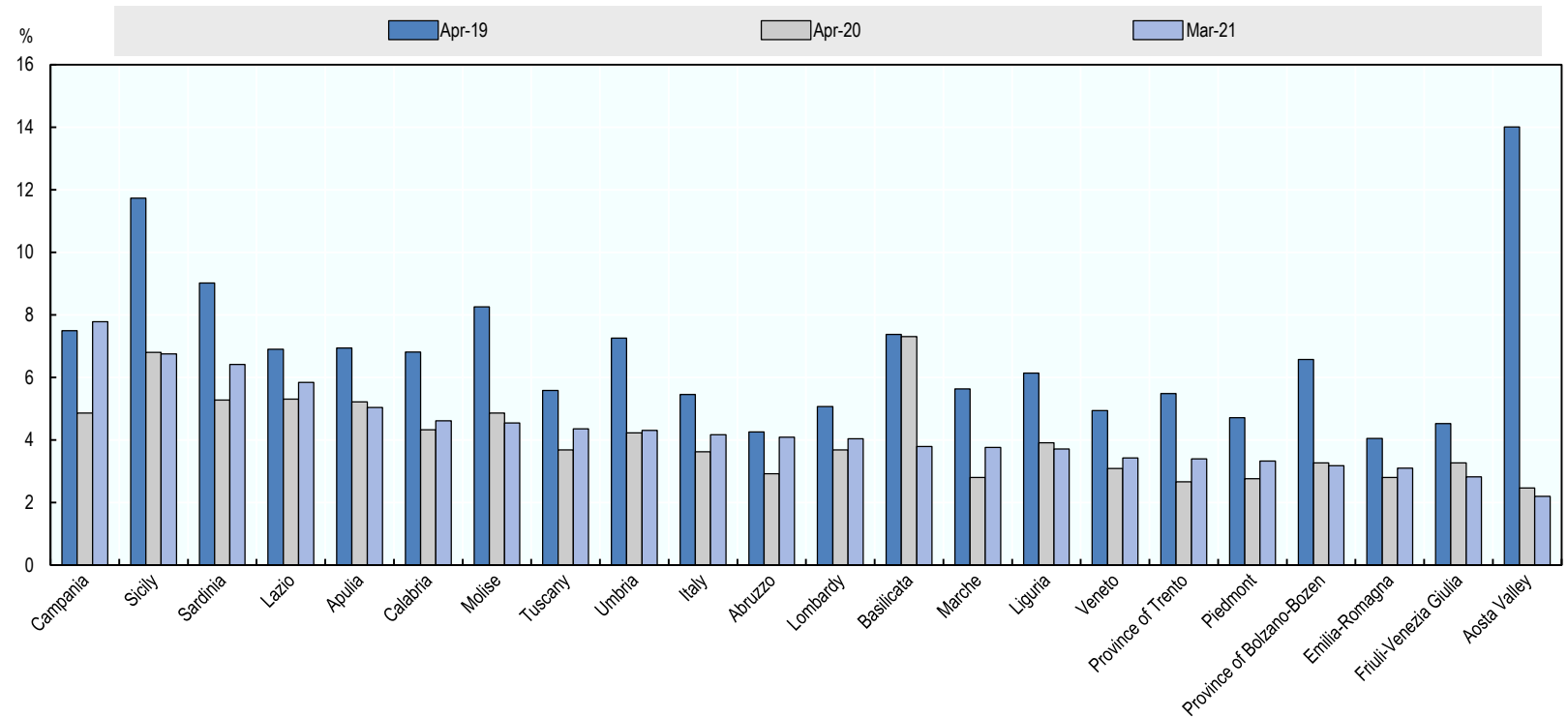
Cultural and creative sectors are among the most affected by the current crisis

- 👉 **Venue based sectors most affected** (performing arts, live music, festivals, cinema, etc.)
 - 👉 Workers in the performing arts have endured the greatest decrease of working hours among CCS in the third trimester of 2020 (–14.9% of working hours, only behind the tourist sector).
- 👉 **More market-driven sub-sectors** (design, advertising or fashion) have **managed to better absorb the impact** of the crisis



Employers' demand for creative professionals dropped during the pandemic and has not been restored (March 2021)

In Italy, as in many other OECD countries, the number of job postings for cultural and creative professionals has dropped in spring 2020 compared to the same period in 2019 and had not picked up to pre-crisis levels as of March 2021.





CCS employment and entrepreneurship: policy options

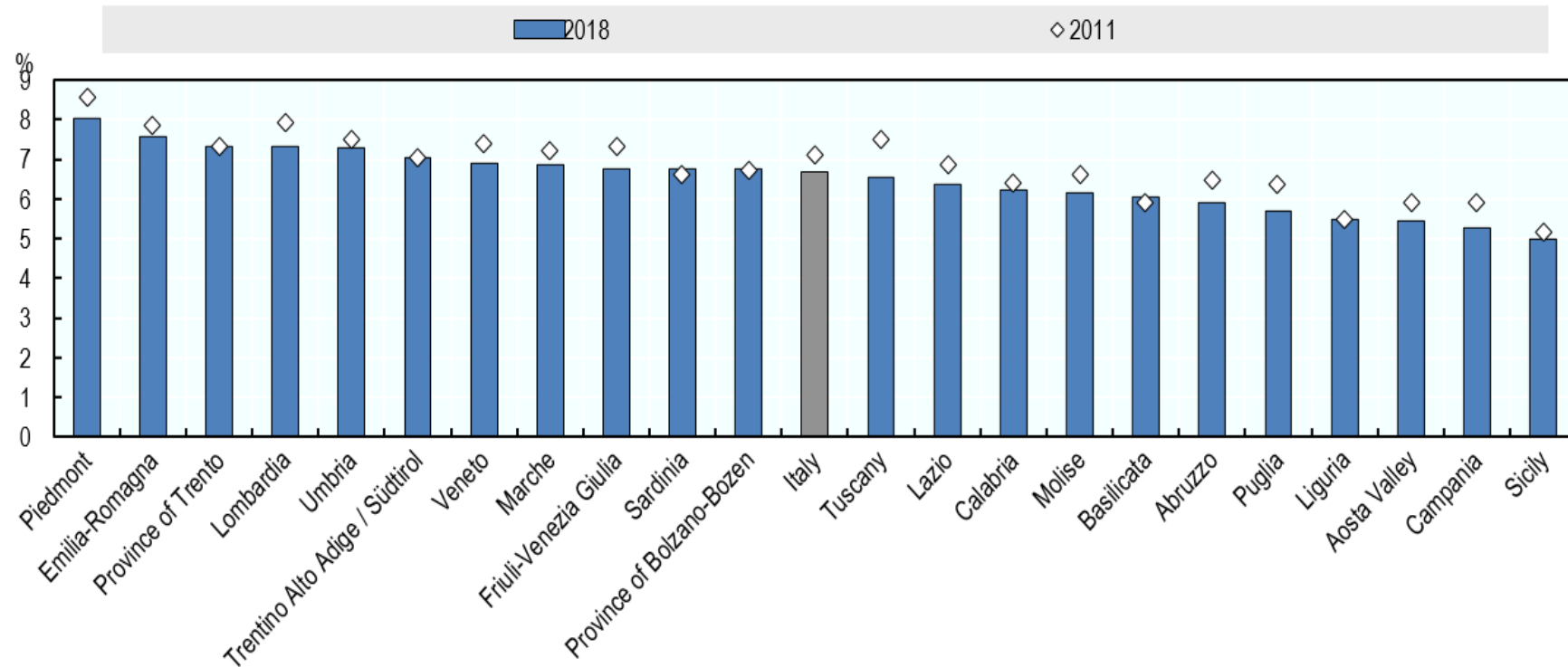
- Collaborate with national government to further **improve access of freelancers and self-employed to social benefits.**
- **Provide support to small-scale, innovative start-ups**
 - direct financial support to innovative start-ups,
 - Support cultural and creative spaces
 - Cross-sectorial links with other sectors
- ☞ **Sustain forms of participatory governance of CCS**
- ☞ **Consolidate regional funding** aimed at improving digital skills of creative professionals and cultural institutions
- ☞ **Enhance entrepreneurial learning in arts and humanities faculties** and business start up support



Cultural participation: Household spending on recreation and culture

Household spending on recreation and culture in Emilia Romagna is **one of the highest in Italy and above OECD average** but decreasing since 2011

Household spending on recreation and culture across Italian regions, %



Source: Final Consumption Expenditure of Households, ISTAT



Cultural participation

- ➡ The demand for cultural goods, services and experiences is high in the region. Emilia Romagna is one of the most vibrant Italian regions in terms of population access to cultural amenities and cultural participation (attendance) rates.
- ➡ Access to cultural amenities and creative spaces is uniform across the region.
- ➡ Importance of independent cultural and creative spaces (art hubs, cultural centers, and co-working spaces) - a distinctive trait of the region's cultural supply model.
- ➡ Strong policy focus on cultural welfare and inclusion through culture.

Emilia Romagna film festivals

Cultural welfare: Theatres and well-being



Cultural participation: Policy considerations

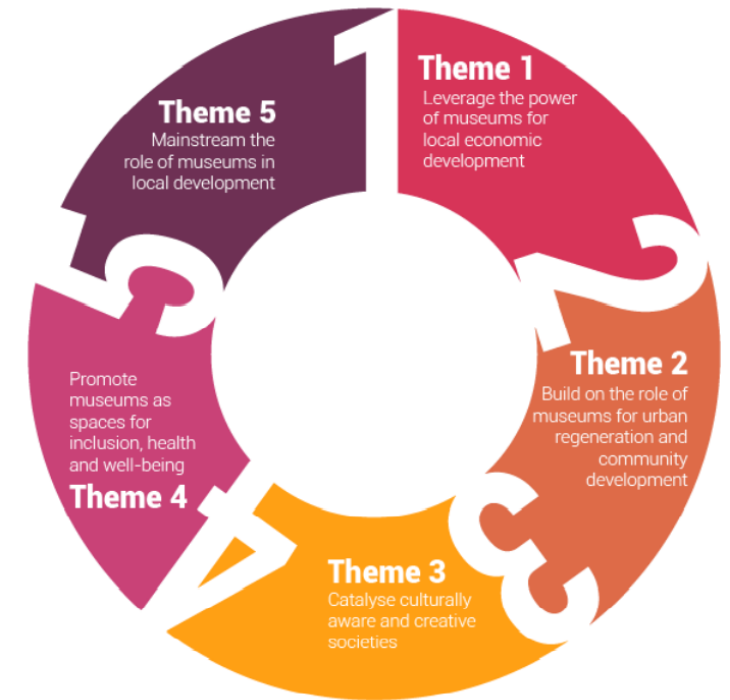
- ➡ **Further mainstream culture across policies:** Broaden the scope of the policy rationale for public spending to develop cultural participation where it has notable positive benefits: health and well-being, societal changes, research and innovation, environment and climate, education, etc.
- ➡ **Consolidating cultural welfare policies**
 - ➡ Develop **cultural well-being guidelines** at both the urban and regional levels, as part of a societal strategy to improve resilience and people's well-being, in order to mobilize local stakeholders to facilitate and support social change;
 - ➡ Launch **cultural well-being education** programs in schools and universities to enhance the resilience of young people,
 - ➡ 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.



Maximising the impact of museums on local development

MIC International Museum of Ceramic in Faenza

Themes	Sets of activities
Supporting local economic development	Workshops and outreach initiatives with research institutions, universities, and companies to foster new business ideas, employability skills and funding opportunities Definition of a coworking space and acceleration programs for craftsmen and entrepreneurs in the ceramics field Support to the internationalization of Faenza's ceramics craftsmanship and entrepreneurship (e.g., CER-DEE)
Fostering urban regeneration and community development	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 Workshops, laboratories and courses for Faenza's middle and high school students
Catalyzing culturally aware and creative societies	Attraction of creative talent through partnerships with other museums and cultural institutions (e.g., the Faenza Prize) Digitalization of MIC's cultural and educational offering during the COVID-19 pandemic (e.g., webinars for students, blended activities for families)
Promoting social inclusion, health, and wellbeing	Workshops for students with disabilities Professionalizing activities for younger people, and life-learning activities for ageing populations





Maximising the impact of museums on local development

MAMbo - Museum of Modern Art of Bologna

Themes	Sets of activities
Supporting local economic development	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 programs, exhibitions within the Art City Bologna project, cultural events)
Fostering urban regeneration and community development	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	Workshops, laboratories and courses for local middle and high school students (e.g., through personalized teaching "kits" for schools) Workshops and internships for university students Definition of a hub for artistic production, artistic residency, curatorship, and acceleration programs for young artists (i.e., Nuovo Forno del Pane project)
Promoting social inclusion, health, and wellbeing	Workshops for children attending kindergartens and their families Professionalizing activities for younger people, and life-learning activities for ageing populations Definition of 'remote' cultural fruition initiatives to ease social distancing pitfalls in terms of social inclusion and well-being (e.g., 'remote' exhibitions)



Maximising the impact of museums on local development: action options for museums

Legacy Actualization

- Design activities to update the material and immaterial heritage that is expressed by their collection;
- Engage new audiences also as means to mobilize new partnerships and funding channels with local stakeholders;
- Develop artistic and cultural projects to favour the involvement of local communities

Ecosystem Embeddedness

- Design activities to 'socialize' museums functions and impacts;
- Organize activities and events that promote cooperation, pooling of resources and co-planning of new projects with local stakeholders;
- Strengthen ties with local community (e.g. mobilization of volunteers, projects to be co-designed with the third sector)

Capacity Building:

- Invest in educational activities aimed at integrating traditional and new competences of museum staff (e.g., management of online platforms for cultural participation and artistic production);
- Contribute to enhancing creativity, wellbeing, and participation in local community, to sustain new cultural ventures.

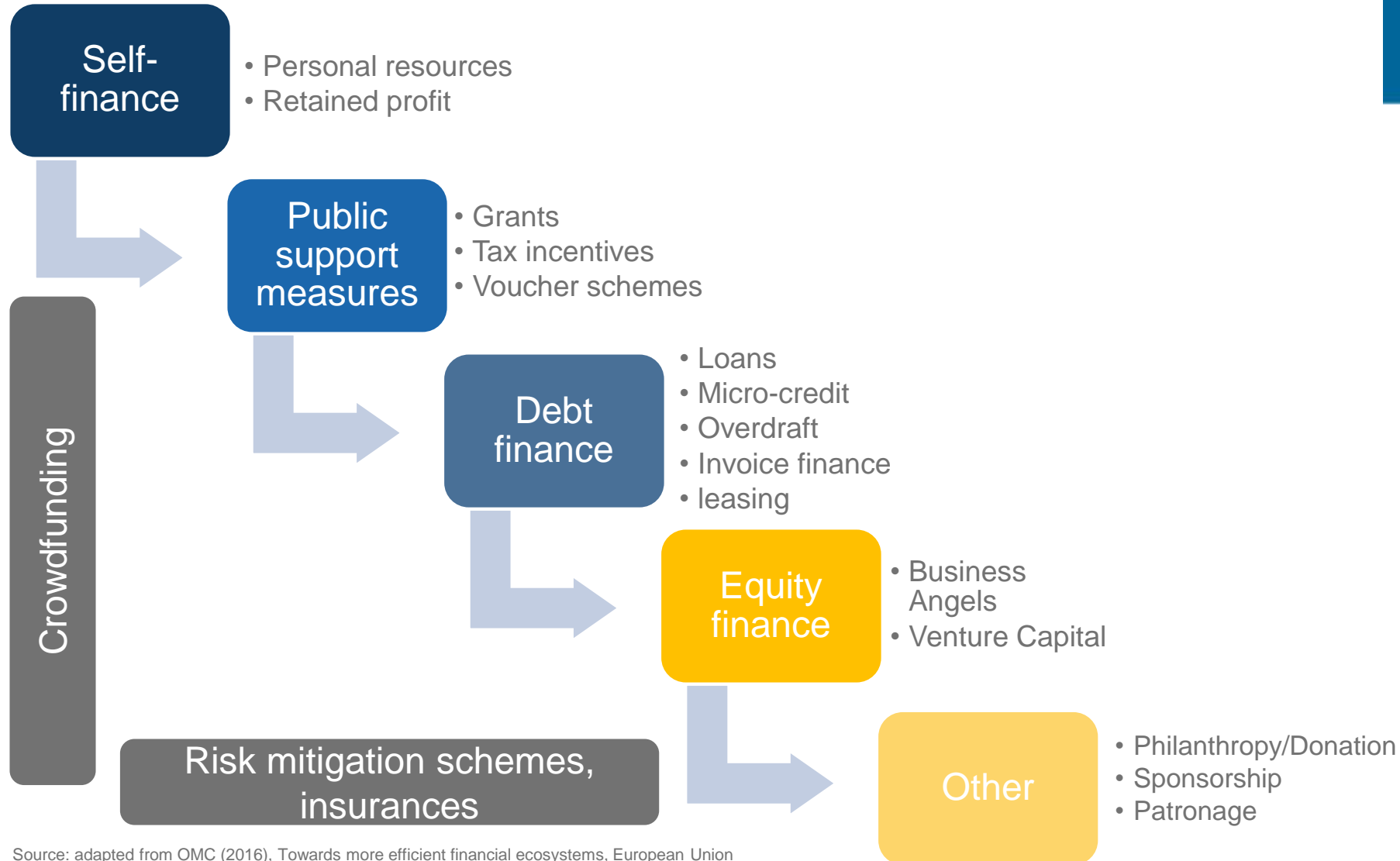
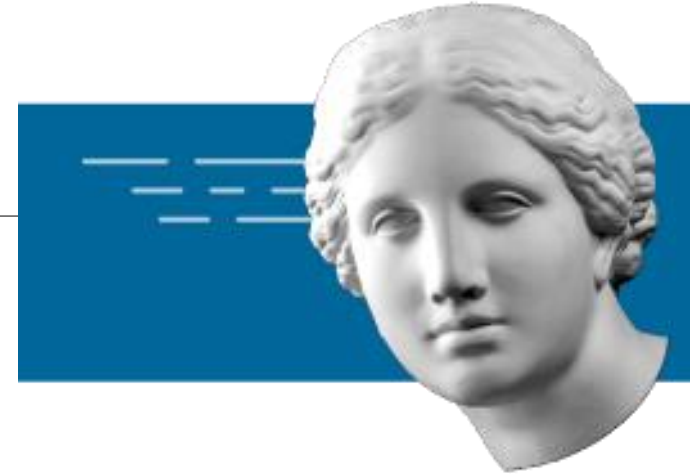


Maximising the impact of museums on local development: policy options for local governments

- Develop a longer-term vision through multi-stakeholder collaborations
- Strengthen museums' links with universities
- Stimulate the participation and inclusion of new audiences
- Scale-up museums' capacities
- Couple financial support with other forms of public support
- Address the digitalisation needs of the sector



CCS access to funding – mix of funding

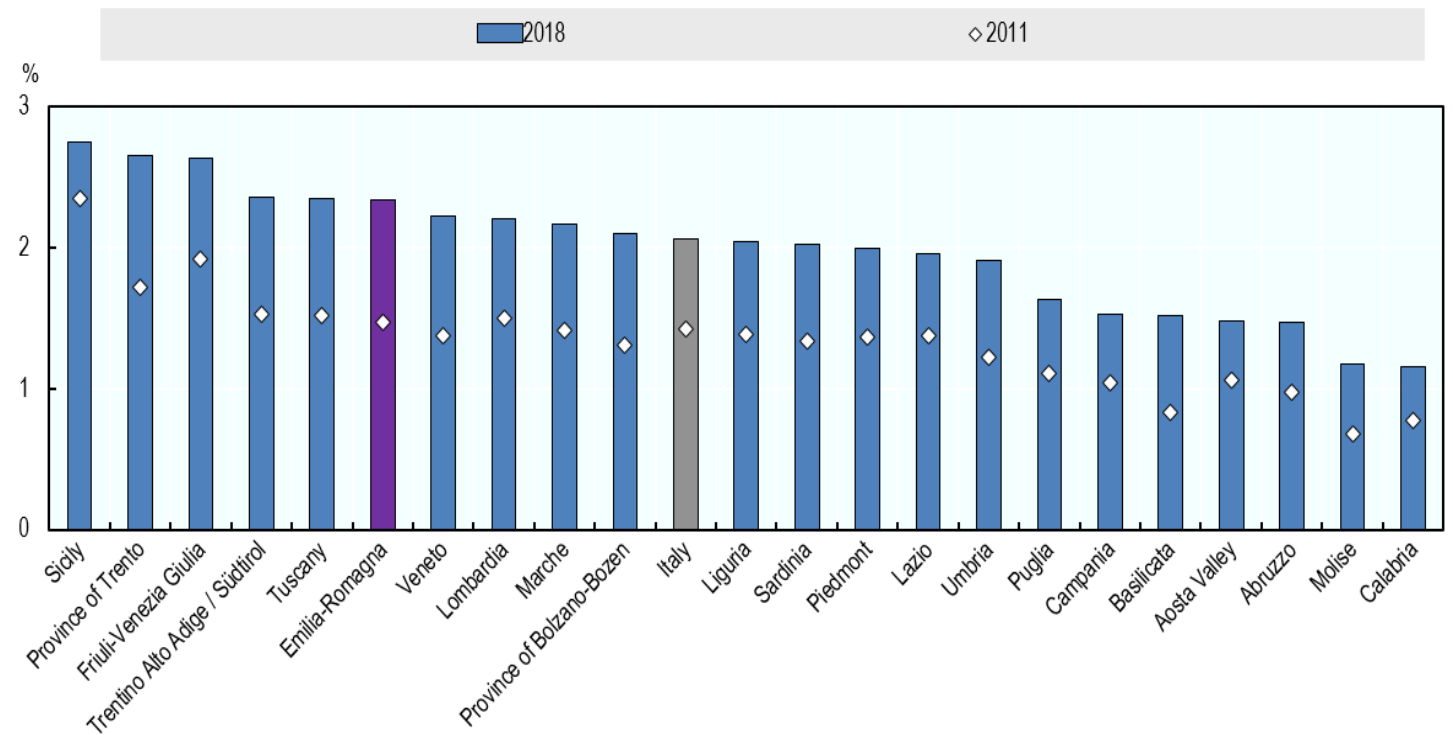




Public and private funding for CCS

While the shares of national public spending has decreased over 2011-2018, regional public support has considerably increased.

Recreation, culture and religion as a share of local government spending across Italy



Source: Final Consumption Expenditure of General Government, ISTAT



Public and private funding for CCS

Regional authorities have devised a wide range of actions to improve CCS access to funding.

The support is also channeled to **specific sectors** to increase international competitiveness as well as impacts on local development and to support the sectors through the current crisis.

National tax exemption measures have strong impact

CCS as part of Regional Smart Specialization Strategy

Regional Cluster CREATE

Digitalisation / theatres

Laboratori Aperti

Regional Law on Cinema, 2014



Private and philanthropy funding for CCS

Bank Foundations' support to CCS has been growing over the past years.

Civic crowdfunding and the Porticoes of Bologna: “Un passo per San Luca” campaign

The amount of interventions reflects the relative investments that every city has made in the CCS and often strategically complements such investments.

National tax exemption schemes to promote charitable donations to CCS have significant impact in Emilia Romagna.

Art Bonus

Public-Private partnerships have been growing.



Public and private funding for CCS: Policy options

- **Public sector as ‘orchestrator’ + regulation**
- **Further ease access to finance of market oriented CCS:**
 - Identify **barriers to access debt and equity finance** by market-oriented CCS (e.g. weak managerial skills, or the lack of awareness of lending institutions and reluctance to provide lending without tangible collaterals);
 - Design measures and instruments to address these barriers (e.g. awareness raising campaigns; managerial skills trainings; third-party guarantee have been proven to be efficient in reducing the financial risk of CCS with respect to banks).
- **Streamline regulatory obligations for cultural firms and professionals to access funding**
- **Ease access to crowdfunding** by providing enabling technological and financial environment as well as by addressing skills gaps
- **Design incentives to stimulate demand in CCS**, which has collapsed during the pandemic putting the activities of several actors in CCSs at risk;
- **Support citizen initiatives** (volunteer organizations, community associations, non-profit organizations, etc.) in the realm of CCS.