

Emilia-Romagna, Italy

About the area

Emilia-Romagna is one of the 20 administrative regions of Italy, situated in the northeast area of the country. 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. It has the third-highest gross domestic product (GDP) per capita in Italy (after Lombardy and Trentino-Alto Adige) and the percentage of the population with a tertiary education degree was 23.3% in 2021, above the national average of 20% (Eurostat). It also has high employment rates and low unemployment rates.

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 ones 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.

History of CCS policy in the region

Since the establishment of Emilia-Romagna as a regional entity in 1970, regional authorities have been active in supporting CCS. Up to the end of the Nineties, regional policies were mainly characterised by a traditional approach, cantered on the funding and management of cultural institutions, such as museums, libraries, and theatres with a strong focus on social inclusion and access to culture throughout the territory. Since the 2000s however, regional policies have become more focused on the strategic role of CCS in developing the overall regional economy. This policy agenda has seen increasing dialogue and collaboration between regional authorities and local municipalities, and with foundations, associations, and other actors.

The policy landscape for CCS in the region now takes a markedly integrated approach based on both direct intervention (public funding, management of cultural institutions), and sustaining bottom-up initiatives and collaborations among different actors. Such an integrated approach is pursued also by public policies implemented in other areas (e.g., tourism, welfare, employment), which consider potential synergies with CCS. This approach has been characterised recently by an increasingly tight relationship between CCS and other sectors, including the region's large, sophisticated manufacturing economy, and a progressive integration of CCS within the Smart Specialization Strategy devised at the regional level.

Continued policy support for CCS since the region's inception has led the sector to no longer be regarded as an appendix of the tourism industry, but rather as an important pillar for regional development.

Cultural participation

Unlike some regions, where cultural amenities (e.g. movie theatres, museums etc.) are concentrated in a few urban areas, in the Emilia-Romania region, they are well spread across the different provinces, due to a sustained public effort over the past few decades. Alongside hosting a large number of museums, Emilia-

Romagna has the third-highest attendance rates for live performances across Italian regions. These attendance rates have been increasing by 4.7% between 2017 and 2019, with visitor numbers for opera, theatre and dance in particular seeing attendance rate increases above the national average. The region also offers a wide and growing variety of festivals across its provinces, with regional authorities supporting the emergence of a vast number of festivals in different artistic fields (e.g., photography, film, music).

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. While household spending on recreation and culture had dropped slightly in the region between 2011 and 2018, this in line with national trends.

The region has developed a strong focus on cultural 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 and promotion of health and well-being. Regional and local authorities have supported collaboration between the cultural sphere and specific social impacts, such as public health, well-being, and social cohesion.

Jobs and skills

In 2019, 3.4% of employment in Emilia-Romagna was in cultural and creative employment. This proportion is slightly lower than the average across Italy (3.6%) and across the EU27 (3.7%). Moreover, cultural and creative employment has fallen between 2014 and 2019 in both absolute and relative terms. Although on average across Italy cultural and creative 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 and creative employment shares from 2014 to 2019. However, employment trends have been uneven across sub-sectors in the region. For example, there has been growth in the number of people employed in the creative, arts and entertainment sub-sectors in the three years prior to the pandemic.

Much like other regions, cultural and creative employment in Emilia-Romagna 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. Analysis also suggests that there is a pronounced gender imbalance in CCS employment in the region. Work using a slightly broader definition of CCS than the one used in this report found that only 36% of those working in creative and cultural sectors in 2017 were women (ERVET, 2018^[1]). This is however broadly in line with more general trends characterizing the Italian socio-economic context, which has a larger gender imbalance across all industries than many other OECD countries.

Emilia Romagna has invested significant resources in CCS education and training programmes over the last seven years. Regional authorities have dedicated around EUR 35 million in the last seven years to finance a wide array of educational activities in CCS areas, including 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.

Entrepreneurship and business support

In 2019, around 8% of all CCS enterprises in Italy were based in Emilia Romagna. In 2018 the share of CCS local enterprises in the region was 5.4%. This is higher than the EU27 average of 5.2%, but slightly lower than the average across Italy of 5.8%. Emilia Romagna shows particular strength 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 retail trade in cultural goods, as much of this activity has moved online.

Public support for CCS businesses and entrepreneurs in the region has primarily focused on stimulating networks and opportunities for collaboration. For example, 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 high education, and other sectors of the local economy. Business and entrepreneurship support is also offered through the 10 Laboratori Aperti which provide physical spaces, workshops and training to support cultural entrepreneurs to test pilot projects that could be eventually scaled up to economically viable ventures, as well as the INCREDIBOL! project which is led by the city of Bologna and 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 (see Chapter 4 for further details on the project).

Accesses to finance

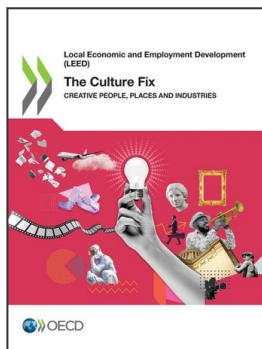
In Italy, the institutional framework for funding CCS consists of three levels of public funding: national, regional, and local. For example, cultural organisations in Emilia-Romagna receive public funding from the national level (government/ministries), the regional level, the provincial level, and the municipality level. While national public support for CCS has decreased since 2011, regional public support has considerably increased, with regional government investment growing by almost EUR 6 million between 2011 and 2017.

CCS benefit from laws introduced at the national level in recent years. A notable example is “Art Bonus” (a tax credit/tax shelter measure introduced in 2014) thanks to which, in 2018, the CCS in the region were able to dispose of about EUR 28 million for maintenance, shelter or restoration of public cultural heritage goods, and for support to CCS their activities (ERVET, 2018^[21]).

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. This includes public and private sector support for philanthropy, patronage, sponsorship, social impact investment and cross-sector collaboration projects.

Bank foundations also play an important role in the funding landscape for CCS in the region. The last available data shows that bank foundations contributed approximately EUR 100 million to regional CCS across Italy between 2014 and 2016, distributed through almost 3,000 interventions. The role of bank foundations in contributing to CCS has been rising in recent years. For example, the amount of economic resources allocated to interventions supporting CCS was about EUR 30 million in 2014, while it has reached around EUR 34 million in 2016.

While some Italian regions (e.g., Lombardy and Piedmont) have a single large-sized foundation operating on the whole regional territory, in Emilia-Romagna the landscape is more articulated and fragmented. Overall, there are 19 bank foundations: nine 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.



From:

The Culture Fix

Creative People, Places and Industries

Access the complete publication at:

<https://doi.org/10.1787/991bb520-en>

Please cite this chapter as:

OECD (2022), “Emilia-Romagna, Italy”, in *The Culture Fix: Creative People, Places and Industries*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/32c3830e-en>

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