



INNOVATIVE CULTURAL
AND CREATIVE CLUSTERS
IN THE MEDITERRANEAN AREA

COMPARATIVE ANALYSIS

Partner name

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Please write down a brief introduction about ChIMERA regional capacity building, in order to contextualize the creation of this document.

Information to be included: Title of the workshop; Date; Number of Participants – mentioning generically the profile of the participants, e.g., companies, CC professionals, public institutions, etc.

200-400 characters maximum

CONTEXT

In the framework of the CHIMERA Project (Innovative Cultural and Creative Clusters in the Mediterranean Area), the workshop "Cluster Building for the Audiovisual Sector in Friuli Venezia Giulia Autonomous Region: what to focus on " was held on 20 September in Trieste.

The workshop was intended as a Regional Working Meeting with the representative of the screen.brussels cluster. Its main purpose was to deepen the knowledge about the experience of Screen Brussels as with a view to create a regional cluster in the framework of a regional audiovisual ecosystem.

The workshop was structured, according to the indications of the WP Algarve University leader, about finding a series of Gaps and Related Recommendations with the Stakeholders' Regional Working Group.

The workshop attendees were 30 representing the following association, companies and institutions:

ALA-FVG "Audio-Visual Workers Association of FVG". The Association brings together independent producers, directors, writers, actors, technicians, who work and operate in Friuli Venezia Giulia. The Association has helped to create in the region the conditions for the growth of the audio-visual sector, sharing and developing best practices with the rest of Europe.

Alpe Adria Cinema - The Association Alpe Adria Cinema has officially founded in 1990. Its mission is to promote and boost all initiatives in the field of cinema, experimental and video, which are of cultural growth factor specific study in the field of European countries central-Eastern, central Asia and the countries bordering the Mediterranean. Alpe Adria Cinema activities found their ideal focus in what the main project of the association, the TRIESTE FILM FESTIVA, the only Italian festival specifically dedicated to Central and Eastern European cinema. In 2017 the event celebrated its 28th edition.

Audiovisual Fund of Friuli Venezia Giulia - The Audiovisual Fund of Friuli-Venezia Giulia operates in three main sectors: training, development, (activities between the idea and the production phase, from the script writing and the research, to the casting, the fund raising and the presentation of a teaser), distribution along with promotion. The Audiovisual Fund organized several events aimed at creating platforms for cinema professionals from all around the world and developing the local audiovisual industry. The main purpose is to offer new training possibilities and set up new market places, where professionals can meet up, share experiences and start to collaborate.

Cineteca del Friuli - The Association "Cineteca del Friuli" ("Movie library of Friuli") is the regional referral center for the research, collection, cataloging, study, conservation, enhancement and legal deposit of documents for public use of cultural interest and the film and audiovisual heritage of Friuli Venezia Giulia.

Confartigianato Imprese FVG - Confartigianato FVG is the regional association representing more than 12.000 small craft businesses in Friuli Venezia Giulia region, divided among the various economic activities ranging from building to mechanical engineering, transportation, plant engineering, wood, personal services, communication, etc. Confartigianato FVG is the political organ representing trade union interests and instances of crafts, small and medium-sized enterprises and self-employed workers and is the coordinating body of a network of 39 offices and business services spread across the whole regional territory, where all the services that companies need are delivered, traditional and innovative.

Cultural Association Mattador Award - MATTADOR Cultural Association was founded in Trieste in July 2009. The object of the Association is to institute the MATTADOR International Screenwriting Award to support young talents who choose movie screenwriting as their professional and artistic path. A further object is fostering and promoting cinema, music, arts, literature, and theater works with a strictly contemporary orientation.

Friuli Innovazione - Friuli Innovazione is a research and technology transfer centre. It rules an enterprises incubator (Techno Seed) and a Science and Technology Park.

FVG Film Commission - The Association FVG Film Commission acts as technical support to production companies that choose to shoot in AR FVG. Since 2001 is part of the national coordination of the Italian Film Commission and since 2007 FVG Film Commission is a founding member of the EuFCN (European Film Commissions Network).

FVG AR Department for Culture, Sports and Solidarity is in charge of cultural policies, legislation, funding and the main initiatives focused on culture and cultural and creatives industries.

FVG AR - Department for Productive Activities, Tourism and Cooperation of the Autonomous Region Friuli Venezia Giulia. This Direction is the managing authority for the ERDF ROP. The Audiovisual Fund of Friuli-Venezia Giulia is fully funded 100% by the Department.

Kineo Film - KineoFilm s.r.l. was founded in 1995 by Cinema Hypothesis as the European Research Center for Audiovisual Communication. Over 30 years of experimentation in audio-visual languages have led to the coding of methodologies such as the "memory location" and the "shared listening technique". The last outpost of the Association is the VAM as "Video Multisensory Literacy" for which KineoFilm s.r.l. has received UNESCO patronage for its expertise in combating video-illiteracy and enhancing the Charter of Rights for International Communication. KineoFilm has created a network of similar groups in the cities of: Padua, Ferrara, Bologna, Naples, Munster, Strasbourg, Vienna, Bristol, Athens. With these partners, innovative multimedia projects were realized by expanding the "Memorization Station" laboratory and working on the shared listening technique. Kineo won 2 European projects calls: "Memory2000" and "The Art Of Memory" are promoters of a new cinematic approach using the concept of "Project

Show", which tips the way of communication, using the territory not as a support but as a resource.

ShorTS/Maremetraggio – This International Short Film Festival and Prime Works is a film festival that takes place annually in July for about a week in the city of Trieste. The first edition took place in 2000. In 2017, the registrations were 4,318 short films, coming from 122 countries.

The Underground Chapel – Formerly an art gallery (founded in 1968), since in 1993 it is a recognised association. Since 1998 it is part of the regional Culture Department's list of "regional interest organizations". Since 1995, in the Convention with the Trieste municipality, Underground Chapel runs a public video archive. Today, the association has a media center, a provincial reference center, and an archive (about 20,000 titles). The archive remains an important reference for cinemas, national and international universities, institutions, schools, associations. Among its main activities, the Underground Chapel organize video reviews, as well as meetings, events and other initiatives giving space to everything relating to the world of cinema and audiovisual..The association each year in November organizes "Trieste Science + Fiction" festival.

Udine Far East Film Festival - Far East Film Festival (19 editions) is organised by Centro Espressioni Cinematografiche (C.E.C.), a Cultural Association financed by the Italian Government, the FVG Region, and Udine municipality. C.E.C. is dedicated to the public exhibition of quality cinema, by programming and managing five screens in three different venues across the city of Udine throughout the year. The Festival is a non-profit cultural event. Cineteca del Friuli (Gemona Film Archive, FIAF member since 1989) is official partner of Far East Film.



In both sections, please list the GAPS and RECOMMENDATIONS that were identified in your ChIMERA regional capacity building. Do not forget to explain deeply each point to have a wide understanding and knowledge of it. It is extremely important to get a precise and complete information.

There are no limited number of characters or pages for both sections.

GAPS

G1: The relationships between the different actual components of the future regional audiovisual ecosystem are poorly structured (primarily with regard to audiovisual industry businesses) or mainly informal.

G2: Insufficient knowledge of audiovisual businesses (associations and free-lancers) needs.

G3: Insufficient knowledge about needed and available professional profiles and/or skills. VET activities are not focused and calibrated on needed professional profiles and skills.

G4: Insufficient knowledge about the actual and potential sub-sectorial ecosystem in FVG (e.g.: VFX, Webseries, Transmedia, Gamig, VR, etcetera).

G5: Poorly structured relationship between audiovisual companies and other cultural sectors (in particular theatres, museums, etc.), mainly due to the absence of appropriate business models in cultural sectors, particularly performing arts.

One of the major obstacles to collaboration between the audiovisual sector and other purely cultural realities but not belonging to the so-called cultural industries (theater, ballet, cultural heritage, archives and libraries), is the lack of business models reference in these second realities.

G6: The lack of information and knowledge of the audiovisual sector results in little confidence from the rest of the production system. This lack of confidence translates into a few initiatives of economic cooperation and investment.

There is low confidence from “traditional” business on audio-visual CC firms’ ability to bring economic benefits in common projects. This stance compounds with poor information on the audiovisual industry and the reference market. The various incentive instruments for financing, from tax-credit to sponsorship (see the “Art Bonus”) are also unclear and not well-known due also to the insufficient institutional promotion of such instruments at various trade associations.

G7: Lack of a medium term strategy of public intervention related to the various development phases of the audiovisual ecosystem and related to needs and demands from businesses.

RECOMMENDATIONS

R1: In the process of establishing the audiovisual regional ecosystem, the communication and co-ordination capacity of the various components should be optimized in order to avoid future conflicts of competences and facilitate the participatory management of the ecosystem.

Factors that can trigger communication and / or coordination difficulties are mainly two: a) geographical dispersion of the various components of the ecosystem; b) the managerial and /or financial dependence of audiovisual supporting measures from different regional departments; c) competing competences and roles of the various components of the ecosystem. In the case of the FVG region, the element of geographic dispersion is difficult to remedy. Polycentricism, on the contrary, should be appropriately valued in this perspective. The issue represented by competing competences can be avoided, especially during the construction of the ecosystem, by a clear assignment of roles as complementary as possible.

R2: As a preparatory action for the creation of a cluster, a survey of enterprises and their needs (not just strictly entrepreneurial) in the sectors and sub-sectors of interest should be implemented.

As a preliminary stage, it is necessary to have an analytical representation of the reference sector and its sub-sectors, potential sub-ecosystems, in terms of resources (dependent employment and self-employed workers, companies, estimated revenues), value chains (vertical links), cross-sectoral (horizontal) links, needs. In addition, the specific regulatory reference framework must be associated with each reality. This analytic mapping is a necessary reference not only for subsequent cluster setup but also for each policy initiative, to facilitate co-ordination between actors, as demonstrated by screen.brussels cluster experience.

R3: The training activities should be proportionate to the absorption capacity of the audiovisual sector and its sub-sectors. In this perspective, a preparatory action should consist in an audit between professional and companies about the perceived gaps in professional profiles.

The absorption capacity of a technical figure, of a professional profile, depends in the first place on two variables: a) the demand of the reference sector and its operating modes (the production cycle); b) the level of adequacy of the professional profile in terms of general and specific skills. Sectoral job demand in the sector is discontinuous, fragmented and subject to very variable cycles (from a few days to one or more semesters). Therefore, a specific audit needs to be carried out, taking into account as far as possible the sectoral context and the various sub-sector specificities. This approach is a prerequisite to distinguish seasonal and/or contingent peaks in demand from structural gaps.

R4: In this perspective, the various training paths, particularly from short-term to medium-long term, should be clearly identified according to the needs of the reference market. A dedicated employment service should be developed, able to identify and utilize more flexible employment solutions.

Technical skills can be more or less complex and, therefore, require training times significantly different. Furthermore, technical skills must be combined with the so-called work-related basic skills, first of all linguistic and digital skills, enabling AV workers to be involved in transnational teams and hence contributing to a wider mobility of the sector's players, who can become themselves "ambassadors" of the regional ecosystem and active elements of the internationalization process. A dedicated employment service would be very useful as it could help to shrink a very fragmented job market, while helping to identify ad hoc employment and social security solutions for these professional categories.

R5: The development of appropriate business models in some cultural sub-sectors, particularly performing arts and cultural heritage, should be linked to a (media) strategy connecting audiovisual and other sectors (e.g.: a "new media" strategy for the promotion of a number of sites). Business-planning models of audience development could be developed in the framework of this strategy.

Because of the variable and heterogeneous variables, a business model cannot be attributed to one or more general rules, but must refer to concrete and well-defined situations. A promising methodology, also in the light of the screen.brussels experience, is to anchor cross-sectoral business collaboration to strategies not related to the single product / service dimension but for example, to territorial promotion / marketing. Within these strategies, business models could be developed, both in the development of audiences and in the management of peripheral services (in particular cultural heritage).

R6: The audio-visual cluster, as part of an ecosystem, should be endowed with a clear vision of its role. The definition of the vision should allow the identification of the services the cluster will provide for; cluster members (so-called Partners) should integrate these services.

The FVG audiovisual cluster should developed together with the regional audiovisual ecosystem. In the experience of the Brussels Capital Region, the formation of the cluster preceded the "putting in place" of the other components of the audiovisual ecosystem, however, expression of previously established regional agencies. In the case of the FVG region, the roles and modes of communication of the various components of the regional audiovisual ecosystem

(Regional Agencies and Departments; Science Parks, Tech Parks; Industry and Crafts Organizations; Universities; Vocational Education and Training Institutes; Audio-Visual Organizations; Chambers of Commerce, Industries, Crafts and Agriculture, Universities) should be defined, preferably around a coordination table. Within this context, the cluster will define its role, its strategies, its organization and its services.

R7: The audio-visual cluster should be managed by dedicated and independent professionals (mainly sector workers) connected with sector needs and operational modalities.

The Cluster Management Team should be a direct expression of the audiovisual cluster. The director and the advisors should come from the audiovisual sector, responsive to the demands and modus operandi of the audiovisual sector. The Management Team will act as a broker in response to requests and expressions of interest to economic and institutional actors outside the cluster and the audiovisual ecosystem by assessing and selecting opportunities and risks for the Cluster and its members.

R8: The cluster, or its board, should include regional Chamber of Commerce, Association of Crafts and Industries in order to promote and facilitate cross-sectoral cooperation, sponsorship, and trigger a change of attitude towards audiovisual sector.

There are manufacturing sectors (fashion and craft tailoring; interiors; design and heritage (including landscape) linked and indirectly affected by film pre-production and production (the value chain segments/parts operated by FVG Film Commission). Taking account of these manufacturing sectors allows the increase of the cooperation opportunities and the number of interlocutors of the audiovisual cluster, in the perspective of an “extension” of the audiovisual value chain. The audiovisual sector indeed, as other cultural and creative industries, can act as a crosscutting sector, affecting value added chains both horizontally and vertically as supplier and customer.

R9: To overcome the gap of confidence toward audiovisual sector from the rest of the production system, public institutions should take a proactive approach, promoting public-private projects and financing opportunities in a continuative and structured modality towards the whole regional productive system. A Web Platform should be developed, encouraging matching, cooperation and co-creation.

A Multifunctional Regional Web Platform (MRWP) could be the suitable way to satisfy the need to interact (cooperate), communicate, promote and give and receive info (funding; b2b events; promotional events; etc.) in a continuous way from/to a same virtual “space”.

R10: The audiovisual ecosystem should have a trademark, in order to develop marketing of the whole system to attract investments, companies and new stakeholders from the cross-border area.



Write an abstract conclusion about the results obtained in Gaps and Recommendations. This text should be the comparative analysis itself.

2-4 pages maximum

FINAL CONCLUSIONS

The gaps and the resulting recommendations aim at defining a path from the current situation of the regional audiovisual sector to a future set-up taking into account screen.brussels example. Therefore, Gaps and Recommendations will support the process of setting up of an audiovisual cluster in Friuli Venezia Giulia region.

The first type of Gaps concerns the informational deficit in terms of needs (professional profiles, legal, administrative and fiscal issues) and features of the actual and potential sectors (eg VFX, Webseries, Transmedia, Gamig, VR , etc.). There is no analytical mapping of the sector; this prevents to form a medium term strategy of public intervention related to the various development phases of the audiovisual ecosystem and to needs and demands from businesses.

The second type of Gaps concerns relationships between the different real components of the future regional audiovisual ecosystem that are now mostly informal. In particular, the audiovisual industry businesses are poorly related to each other and with other cultural sectors (particularly theaters, museums, etc.), mainly due to the lack of appropriate business models in the latter.

The third type of Gaps concerns the relational and networking level. Firstly, there is no coordinated approach of the audiovisual sector with the various regional (and national) institutional actors of the support system such as: Regional Departments; Chambers of Commerce, Crafts and Industry; Technological Parks; Incubators; etc. In the case of the frontrunner “screen.brussels”, the cluster (screen.brussels cluster) board performs this coordination function. It is also worth mentioning the insufficient link between the audiovisual sector and the institutions of Vocational Education and Training (VET system), as well as the university level education that will allow the identification of new training pathways and the participation of industry associations in the curricula formation.

These three Gaps translate into parallel information gaps (both inward and above all outward), that become a “confidence gap” from the rest of the production system. This lack of confidence translates in a paucity of economic cooperation and investment initiatives from other sectors.

Regarding the information deficit related to the future ecosystem, a mapping of audio-visual enterprises and their needs (not just strictly entrepreneurial) in the sectors and sub-sectors of interest should be implemented. This analytic mapping is a necessary reference not only for subsequent cluster setup but also for each policy initiative, to facilitate co-ordination among actors, as demonstrated by screen.brussels cluster experience. A further preparatory action should consist in an audit between professional and companies about the perceived gaps in professional profiles. A specific audit needs to be carried out as job demand in the sector is discontinuous, fragmented and subject to very variable cycles (from a few days to one or more semesters).

Concerning the relationships between the different components of the *core* (FVG Audiovisual Fund, FVG Film Commission, cluster, RAFVG Departments) of the future regional audiovisual ecosystem, their communication and co-ordination capacity should be optimized by a clear assignment of roles as complementary as possible. In the case of the FVG region, the

polycentricism should be appropriately valued in this perspective. The issue represented by competing competences should be avoided, especially during the construction of the ecosystem. A stable round table should be set up with all relevant public and private stakeholders to coordinate the different roles, to define the industry strategy and to raise awareness of the economic importance.

The cluster should be an independent entity, a reference office with technical staff capable of intercepting the technical requirements of the audiovisual sector and providing specific support services.

As regards the broader relational and networking level, the cluster, or its board, should also include regional Chambers of Commerce, Associations of Crafts and Industries in order to promote and facilitate cross-sectoral cooperation, sponsorship, and trigger a change of attitude towards audiovisual sector. There are manufacturing sectors (fashion and craft tailoring; interiors; design and heritage (including landscape) linked and indirectly affected by film pre-production and production (the value chain segments/parts operated by FVG Film Commission). A Multifunctional Regional Web Platform (MRWP) could be the suitable way to also satisfy the need to cooperate, promote, give and receive info from/to a same virtual "space".

These types of initiatives and structures, which are a process of projection and expansion of the regional audiovisual system, can be valued by the creation of a trademark, in order to develop marketing of the whole system to attract investments, companies and new stakeholders from the cross-border area. Always in view of maximizing the impact on the regional socio-economic system, public institutions should take a proactive approach, promoting public-private projects and financing opportunities in a continuative and structured modality towards the whole regional productive system.