



INNOVATIVE CULTURAL
AND CREATIVE CLUSTERS
IN THE MEDITERRANEAN AREA

STATE OF THE ART ANALYSIS

Friuli Venezia Giulia AR
*Department for Culture, Sports
and Solidarity*

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The State of the Art Analysis for the Autonomous Region Friuli Venezia Giulia has been conducted primarily at regional level; RA FVG is a NUTS-2 region. An in-depth analysis on NUTS-3 level has been made only when considered significant. This choice was also made in view of the introduction in December 2014 of the Reorganization Act of the Region-Local Autonomies System in Friuli Venezia Giulia, including the establishment and the ordering of 18 inter-municipal Unions and the cessation of the previous four provinces (Gorizia, Pordenone, Trieste, Udine). However, the ceased provinces, being territorial units of the NUTS-3 level, are the statistical obligatory reference. The first data on the level of UTI (age and structure of the resident population) were published for the year 2016 and there are no previous official figures.

1. REGION PRESENTATION

1.1 Territorial framework



Geographical location, surface, etc.

Friuli Venezia Giulia Autonomous Region is the easternmost region of Italy, bordering to the west with the Veneto region, with Austria to the north and to the east with Slovenia. The territory by altitude surface is so composed: 42.6% from mountain area; 38.1% hilly areas; 19,3% plain. Friuli Venezia Giulia Autonomous Region region (FVG AR), with an area of 7,862.3 km², representing 2.6% of national total area, is the fourth from last of the twenty Italian regions.

1.2 Demographic data



Population data.

In the last 15 years, FVG population has remained stable also due to positive net migration flows; although its structure has undergone major changes, the consistency of the age brackets most involved has remained fairly stable over time. As of 31.12.2015, the residents amounted to 1.221.218 inhabitants, representing 2.01% of the Italian population. The aging process - understood as increase in the elderly component in relation to overall population - it is a phenomenon characterizing EU. However if we consider the percentage of elderly population over 65 Italy is first among the EU-28 countries (21.4%; 20.8% in Germany and 20.5% in Greece), while the FVG reaches 24.7% and is the second Italian region after the Liguria and the fourth aging region in Europe. The province of Trieste ranks in the fourteenth among territorial units NUTS 3.

Table 1a – Population and Density

	2010	2011	2012	2013	2014	2015
FVG Population	1.235.808	1.236.103	1.221.860	1.229.363	1.227.122	1.221.218
FVG Density	157,3	157,3	155,5	156,4	156,1	155,3
Italy Density	201,2	201,8	198,1	201,2	201,3	200,8

Source: ISTAT

Between 2013 and 2015 the population decreased, trend confirmed between 2015 and 2016. The population decline can be attributed to three concurrent causes, though not necessarily interconnected: increased mortality; decline in the birth rate due to the decrease of women of childbearing age; decrease in municipal register office inscriptions (1 January 2015, for the first time since 2002 the data of foreign residents was lower than the previous year). Regarding long-term forecasts, the population aged

20-64 is set to decrease in all scenarios. In all scenarios the generation of baby boomers will be the largest part of the population still in almost a quarter century. The strong decline in the birth rate (from 8,6 per a thousand inhabitants in 2006 to 7,0 in 2015) observed in recent years will mark deeply the structure of the population.

1.3 Economic framework

FVG has a low weight in demographic and economic terms, in 2013-2015 period regional GDP quota of national GDP was 2,2%, while north-east area showed a minimal increase from 22,8% to 22,9%. A small regional economy does not mean a marginal economy. FVG is a reality today backed by major industrial activities, with some renowned manufacturing excellence throughout the world, and a significant growth in the tertiary sector, especially tied to a cultural and nature tourism.

Table 1 – GDP

Mln. Euro	2010	2011	2012	2013	2014	2015
FVG	35,0	35,7	34,6	35,1	35,5	35,7
Italy North East *	355,5	367,3	362,9	365,4	371,6	376,8
Italy	1.604,5	1.637,5	1.613,3	1.604,6	1.620,4	1.642,4
% Italy N.E.	22,2%	22,4%	22,5%	22,8%	22,9%	22,9%
% FVG	2,2%	2,2%	2,1%	2,2%	2,2%	2,2%

(*) North East = Friuli Venezia Giulia; Veneto; Trentino – Alto Adige; Emilia Romagna.

Source: ISTAT

From 2008 to 2014 (most recent available regional data), Italy's GDP per capita fell by 10.4%, from 28.194 to 25.257 Euros (-2.937). FVG's GDP per capita fell by 11.9%, from 29,999 to 26,429 euros (-3.570), the only one region in the Italy's Northeast to record a negative trend.

2. LEGAL FRAMEWORK

2.1 Description of the legal framework on CCI

The regional regulatory framework and policy framework reforms for CCIs is quite recent even at national level. In AR FVG in 2014-2015 were introduced a new regional law to reform the financing of cultural activities, including the field of cinematographic and audio-visual work and a new regional law governing museums (regional museums system) and heritage. There is no legislative activity at sub-regional levels.

National Normative Acts, Strategies, Action Plans

Decree of the Ministry of Heritage and Culture and Tourism "New criteria and procedures for the provision, the anticipation and liquidation of contributions to the performing arts, out of the Single Fund for the Performing Arts of Law 163/85", approved July 1, 2014 (OJ 191 of 19.8.2014 - Suppl. Ordinary 71). The decree draws a new geography of the performing arts, based on six areas: Theatre, Music, Dance, Circus and traveling shows, multidisciplinary projects and cross-cutting actions. The decree recognized as multidisciplinary projects 11 regional multidisciplinary circuits, which have the opportunity to program, within a single project, plays, music and dance. One of them belongs to the Friuli - Venezia Giulia (Regional Entity Theatre of FVG - Udine).

Strategic plan "Major Cultural Heritage Projects", [Article 7, para. 1 of Decree Law 83/2014 (Law 106/2014), as amended by art. 1, co. 337 of Law 208/2015. To be adopted by December 31 of each year, in order to identify goods or outstanding cultural interest and national importance for the urgent creation of organic protection interventions, rehabilitation, development and cultural promotion for tourism.

Program (year 2016) of urgent measures for urban regeneration and safety of the suburbs of metropolitan cities and municipalities capital of the provinces. The programs aims to regenerate urban areas to promote social inclusion and cultural and educational activities promoted by public and private entities, and adapt infrastructure for social and cultural services, educational and teaching.

"Program Italy 2019" (Article 7, para. 3-quater of Decree Law 83/2014 (Law 106/2014)). Program Italy 2019 encourage projects, initiatives and activities focused on the use and enhancement of Italian material of immaterial cultural heritage. It was established as a toll by which the state, regions and municipalities define a plan not to disperse the design heritage of the dossier of the cities nomination "European Capital of culture 2019".

Regional Normative Acts, Strategies, Action Plans

Regional Law 11 August 2014, n. 16 Regional Standards in the field of cultural activities, Article 31 (Cultural District), amended by Law 23/2015. The Region, in order to make AR FVG a more attractive and competitive region, realizes direct structural conditions to the strengthening of cultural organizations and of the entertainment industry and improving the use of cultural heritage, through collaboration between the same parties, the involvement of local authorities, acknowledging and supporting the set-up of formation training cultural districts.

Cultural districts integrated thematic territorial areas for the coordinated supply of a range of services and activities relating to culture (entertainment, tourism and the environment) based on specific agreements between the FVG region with a range of subjects¹.

¹ Local authorities, cultural and local entertainment organizations, professional associations, businesses and productive associations, entities managing public services, high art and music education institutions, universities, banking foundations and CCIHAs.

Regional Law 20 February 2015, n. Rilanciapresa FVG 3 - Reform of industrial policies, provides in Article 23: a) support for the creation of new innovative start-ups through the partial financing of start-up phase costs (building, first plant set-up access to credit); b) supporting potential entrepreneurs, also in the framework of regional certified incubators²; c) creation of a venture capital fund for the acquisition of equity investments in innovative companies to support their growth and increase the survival rate of the same; d) stimulus measures and support for crowdfunding initiatives. Art. 25 provides for a competition of ideas to identify new instruments to stimulate and support the creation of innovative start-ups, the spread of co-working services, youth business start-ups and new forms of entrepreneurship. Art. 24 supports co-working facilities and the promotion of Fab-labs.

ROP ERDF 2014-2020 Region Friuli Venezia Giulia - Action 2.1.b Interventions dedicated to the cultural and creative enterprises. The action aims to promote interventions for the creation and incubation of cultural and creative enterprises, through pre-incubation path, following which 20 cultural and creative start-up will target the incubation program. The action foresees the selection of business ideas to start the accompanying path and of start-ups that benefit from the services of pre-incubation, incubation and acceleration / consolidation provided by certified incubators.

2.2 Regional innovation strategies for smart specialisation (RIS3)

In Friuli Venezia Giulia, CCIs are linked to the regional innovation strategy for smart specialisation (RIS3) by a technological development trajectory related to the Technologies for the conservation and enhancement of goods and products. These are technologies required to carry out actions to assess the state of conservation of cultural heritage and to analyse the morphological-structural features and properties of materials that make up the cultural heritage item. We refer to, for example, the technologies to realize interventions in the areas of: detection of the cultural goods; the risk assessment; the definition of projects of intervention and diagnostic targeted to arrest processes of degradation and instability; the restoration of the media information physical support (e.g. cellulose coils, matrices, daguerreotypes) and the related information content.

Tab. 2 – FVG CCIs and RIS3

Conservation and enhancement of goods and products	Management of historical and artistic heritage; Film, Video, Radio and Television;
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Source: Author

The described technologies have great importance in the preservation of historical, artistic and archaeological that are part of the location of interest to movie sets.

² business idea conception, pre-start-up phases of training, co-working, operational and managerial support, provision of tools and workplaces, prediction moments of contact with potential investors

2.3 Other strategic documents

The Strategic Plan 2014-2018, relative to the Policies for Culture, has as its purpose the support for CCI for social development as well as employment of FVG, with particular attention to activities carried out by young people. Enhance the value of local knowledge, creativity and art, promote excellence in theater, film, museums, archaeological, also from a tourism perspective. Greater certainty in funding for cultural activities. A number of strategic actions were closed during 2014-2016 period and others are in progress, the following relate directly or indirectly to the CCIs.

Tab. 3 – Strategic Plan 2014-2018 Main Action and Implementation phase

Action	Implementation phase
To Complete the implementation of the special company reorganization process Villa Manin	Completed
Activation of a regional incubator for cultural and creative industries	Start-up phase
Preparation of a new regional law to reform the financing of cultural activities, including the field of cinematographic and audio-visual works.	Completed
To prepare a new regional law governing museums and heritage	Completed
Reorganization of the delivery processes of public contributions in the field of culture	Completed
Prepare a Memorandum of Understanding pursuant to art. 121 of the Code for Cultural Heritage and Landscape for the recovery and development of some regional Cultural Attractors	In progress
Implement the regional law of the funding of cultural activities Reform - Regional Law 16/2014	In progress
Promote the activities of Museums of regional interest in Friuli Venezia Giulia	In progress
Enhance the regional cultural heritage in collaboration with other regional and international institutions	In progress
Implement the regional law reform in the field of cultural heritage - L.R. 23/2015	In progress
Promote training in the conservation and restoration of cultural heritage	In progress

Source: FVG Strategic Plan 2014-2018

3. STRATEGIC CHALLENGES FOR CCI SECTOR

3.1 Importance

Local offer in creative and cultural area is wide and varied. Local offer in cultural area (Cinema, Audiovisual as well Performing Arts and Visual Arts) is intensely supported by the regional government. The total final transfer in the period 2013-2015 amounted to 94 million euro, while in 2016 total final transfers were 42,2 million euro. Creative sectors are mainly dealing with Promotional Events of businesses, talents and

products, also managed by cultural associations, supported by private funders (fund-raising).

AR FVG government promotes and finances projects of international, national or regional importance; in particular regional government is funding Performing Arts event and other cultural events (year average) as 15 Theatrical programmes and seasons of prose; 38 Music, dance and Drama events and festivals³; 18 Triennial events (5 Live Entertainment Festivals; 9 music festivals or concert activities; 2 Reviews of live performance; the multidisciplinary festival “Mittelfest”; 2 Competitions); 11 Concerts seasons and Music Festivals of the orchestras of the region⁴; 7 Film events plus the international events “Latin American Films Festival” and “ShorTS International Film Festival”; 9 exhibitions.

Cinema and Audiovisual sector, besides the events quoted, sees manifestations of exploitation of cinematographic and audiovisual culture, film festivals of international character (“Alpe Adria Cinema”; “Far East Cinema”; “Silent Film Festival”, “Trieste Science+Fiction Festival”) and other manifestations as “Ties That Bind” Asia/Europe Co-Production Workshop (since 2008); “When East Meets West” – Trieste Co-production Forum. FilmForum Festival (since 2003) & MAGIS Spring School is an event coupling academic conference and film festival⁵.

Cultural and Creative events managed by associations include: multimedia exhibitions as “In\Visible Cities 2015 - International Festival of urban multimedia”, the first international festival of urban multimedia art where performance and interactive installations, computer Apps allow exploring and acting on the city through digital and multimedia arts; “Business Meets Art (2011-2016)” event supporting emerging artists and offering quality content, collaborating with professionals and aiming at sustainable projects wanting to dialogue with involved communities; “Mittelmöda”, one of the most sought-after and well-known fashion competitions at an international level. Created in 1993, the project has been developing an international network of contacts with over 600 schools of fashion design in 66 countries, thus becoming a concrete chance of exchange and comparison for the young designers’ creativity. A relevant event is the “Pordenone Design Week”, week of design⁶ organized by ISIA Roma Design (branch of Pordenone) and the University Consortium of Pordenone. This event is also supported by regional and national businesses.

³ Among them should be mentioned: “Piano FVG International piano competition”; “Blue Night Gorizia Festival”; “Festival Wunderkammer”; “25th Pordenone Blues Festival”; “26th International Festival of Gorizia Castle - Award Macedonio – “Main Streets and New Trails”; “Across The Border”; “Marionettes and puppets in the Natisone Valleys // Lutkovni Festival v Nadiskih Dolinah – 23th edition”; “TRISKELL International Music Festival and Celtic culture of Trieste – 17th edition”; “Jazz & Wine of Peace – 20th edition”.

⁴ Among them should be mentioned: European Spirit Of Youth Orchestra (ESYO) FVG.

⁵ Inaugurated in 2003, FilmForum has now become one of the most important events in the field of film and media studies, also being considered highly influential across several other disciplines. The School is in fact internationally renowned for its interdisciplinary flair, for the originality of its approaches, and for its cutting edge topics. The Spring School is organized by the University of Udine (Italy) in collaboration with: Concordia University, Montreal; Fachhochschule Potsdam; Goethe-Universität, Frankfurt am Main; Université de Lausanne; Université de Montréal; Université du Québec à Montréal; Université Sorbonne Nouvelle – Paris 3; University of Malta.

⁶ Divided into working groups, students, teachers, tutors and professional designers work together on design projects proposed by companies and institutions.

4. THE CREATIVE SYSTEM IN THE REGION

4.1 Private sector



Describe the specialized companies, private institutions, associations, foundations, cooperatives, etc., which have an active role in your region.

The growth of the weight of the Cultural and Creative Productive System on the whole Friuli Venezia Giulia's economic system in the period 2010-2015 was 0.2 percentage points both in terms of the added value and employment. This performance was not significant in absolute terms, but it should be read in light of a contraction of -1.8% of the total regional Added Value and a contraction of -2,4% of FVG's employment. There were, following author estimates on National Statistical Institute and Symbola Foundation-Union of Chambers data (see Annex) 8.723 SMEs in 2015 and the average SMEs in 2013-2015 were 8.607 (8,1% of total FVG SMEs; 7,1% Italy). The average employed in 2013-2015 were 34.552 (6,4% of total FVG employed; 5,9% Italy). The average Added Value produced by the Cultural and Creative Productive System was 1,74 bn € in 2013-2015 (5,7% of total FVG Added Value; 5,7% Italy). Regarding the state of internationalization of CCI SMEs in FVG AR, the percentage ratio between the regional ICCs exports and total regional exports, it is quite high (average of 17,5% on the period 2013-2015) and stably puts the region among the top five Italian regions after Toscana and Veneto.

The tourism expenditure of cultural nature on the one hand and the dynamic of the creative-driven productive sectors and services are certainly two of the most important factors in developing AR FVG's CCIs. Immediately after the Marche Region, the Friuli Venezia Giulia region with a share of tourist spending attributable to cultural activation of 51% (51.1% in 2014; 49,7% in 2013) confirms the second position in the Italian regions ranking. The regional economic model from 2010 onwards sees the role of productions based on artisan excellence. In the furniture industry - traditionally one of the more design-oriented sectors, mainly related to areas of the Friuli and Brianza (Lombardy) - has been increasingly a sustainable design approach. Thus in Friuli Venezia Giulia is relevant the traction exerted by the creative-driven activities, the cultural and creative contamination of enterprises operating in other sectors, particularly those related to the made in Italy (home-, fashion- and food- systems involving a number of productive chains).

The relevant regional private stakeholders are represented by four Incubators, three Banking foundations⁷, Business support associations and three Chambers of

⁷ Banking foundations are private law's non-profit purpose subjects involved exclusively in public interest and/or social utility activities.

Commerce, Industry and Crafts, Associations and Businesses representing Performing Arts and Creative Industries.

Incubators. POLO YOUNG, managed by the Consortium of Pordenone for higher education, graduate studies and research, is a cultural incubator dedicated to young start-ups and cultural and creative enterprises of the region. INNOVATION FACTORY, in-house company of AREA Science Park, is an incubator that has created an integrated model of development of business ideas. The PORDENONE'S TECHNOLOGICAL POLE "Andrea Galvani" focus on co-working spaces, Innovative materials, Internationalization of innovative start-ups. FRIULI INNOVATION is a centre for research and technology transfer that is placed in the Digital Technology District, DI.TE.DI. Friuli Innovation manages the business incubator Techno Seed.

Banking Foundations. The Foundation CRUP is a foundation member of Funder35, the multi-year project sponsored by ACRI (Association of Foundations and Savings Banks) to support and accompany the cultural and creative young enterprises. CARIGO Foundation and CRT Foundation are active in the financing of initiatives and cultural events, as well as in the preservation and promotion of cultural heritage.

Business support organizations selected as stakeholders likely to involve in the project were: a) CONFAPI FVG, SME association of FVG represent more than a thousand of SME operating also in creativity-driven industries; b) Confindustria F.V.G. - Small Industry is a section of the regional Association of Industrialists dealing with SMEs; c) Confartigianato FVG is the regional association representing small craft businesses in the region.

Chambers of Commerce, Industry and Crafts (Udine, Pordenone, Venezia Giulia) and Uniocamere FVG as they organize the Days of Economy and the 14th edition in 2016 was dedicated to the start-ups in the CCI. CCICs regional system is managing tools and financial incentives aimed to improve entrepreneurship and internationalization skills and capacities among SMEs.

Cultural Association QUARANTASETTEZEROQUATTRO conceived and organized In\Visible Cities 2015, the first international festival of urban multimedia art. Performance and interactive installations, computer Apps allow exploring and acting on the city through digital and multimedia arts. ETRARTE organized Business Meets Art (2011-2016). The association's objective is to support emerging artists and offering quality content, collaborating with professionals and aiming at sustainable projects that really want to dialogue with the communities involved. Cultural Association MODO organized Young people's business - tools for creative business. Cultural Association Mode, in a partnership between associations and schools from eight EU and non-EU countries (Italy, Germany, Poland, Slovenia, Argentina, the Philippines, Brazil and Kenya) organizes the project Young People's Business. The project aims to involve young people in a creative process that leads them to develop their own business idea with a positive social impact.. EVE Srl has organized 2002-2016 editions of "ITS

International Talent Support”. ITS is an international web platform for fashion, accessories and jewellery designers providing support, visibility/networking and showcasing the most interesting young talents.

The region with regard to amateur theater, folklore, choirs and bands recognized by law regional importance to certain subjects with which it has concluded agreements: a) the Regional Association of FITA (Italian Federation of Amateur Theatre) -UILT (Italian Union of Free Theatre) Friuli Venezia Giulia; b) the Union of Folk Groups of Friuli Venezia Giulia (FVG UGF); c) the Union of Choral Societies of Friuli Venezia Giulia (USCI); d) the National Association of Autonomous Italian Musical Bands Friuli-Venezia Giulia (FVG ANBIMA).

Audiovisual sub-sector's private stakeholders

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).

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.

The Audiovisual Fund of Friuli-Venezia Giulia (funded 100% by the Department for Productive Activities of the Region Friuli Venezia Giulia), The Fund 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 cultural association “Anno uno” (“Year One”) since 2002 produce “The thousand eyes - International Film and Arts Festival (www.imilleocchi.com). Other activities include “Cinema con i Giovani” (Cinema with young people) and the management of an archive destined to be included in the larger archive of the Media Library at the House of Cinema of Trieste.

The Association Alpe Adria Cinema has officially founded in 1990. Its mission was 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.

Audio-Visual Workers Association of FVG - “ALA-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.

Cultural association Mattador manages Mattador International Screenwriting Award (dedicated to Matteo Caenazzo). The Mattador Award is directed to screenwriters and more generally to anybody who wishes to write screenplays. The award is aimed at promoting young writers under 30 years of age.

4.2 Public sector



Governmental bodies, institutions, etc.

The relevant regional public stakeholders are composed by regional government line central departments, the CCIAs regional system,⁸ sectorial regional bodies (theatre; cinema; cultural heritage; etc.).

The responsible regional institutions are: a) the Central Department for Productive Activities, Tourism and Cooperation of the Autonomous Region Friuli Venezia Giulia, as this Direction is the managing authority for the ROP ERDF; b) the 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.

ERPAC - Regional Agency for Cultural Heritage In addition to the promotion of cultural heritage, manages the residences of performing arts at Villa Manin. The "Service for the promotion, enhancement and development of the territory" manage the promotion of cultural and hospitality residences and the promotion or direct participation in special initiatives of culture and tourism regional development.

Private law institutions in public control

Informest is an Agency for Development and International Economic Cooperation that on behalf of AR FVG is performing, in the framework of recently established Regional Observatory of Culture, survey and analysis regarding regional CCIs.

FOUNDATION AQUILEIA focus on the enhancement of Aquileia's archaeological site. For a variety of maintenance and enhancement activities, Contest for Ideas have been organized. Technologies for the preservation and promotion of cultural heritage is one of the development trajectories identified by the Smart Specialisation Strategy.

REGIONAL THEATRE BODY OF FRIULI VENEZIA GIULIA – This body represent one of 11 regional Multidisciplinary Circuits established in 2014 by the Ministry of Heritage and Culture and Tourism. To these circuits has been given the opportunity to program, within a single project, plays, music and dance.

THEATRE COMPANY of FRIULI VENEZIA GIULIA – This permanent production theater of public initiative, pursues the aims to cure any direct initiative on the dissemination, development and support of culture in the theater sector, with particular reference to the playhouse.

FOUNDATION of OPERA HOUSE "GIUSEPPE VERDI" - The Foundation has as its goal the dissemination of musical art and, to the extent applicable, the professional training of artists and technicians and the musical education of the community.

⁸ Chambers of Commerce, Industry, Crafts and Agriculture (CCICA, commonly known as chambers of commerce), in Italian law, are local public bodies with functional autonomy.

ASSOCIATION PORDENONE THEATER - The association has as its primary goal to contribute to the social and cultural education of the community, through the spread of theatrical culture, music and entertainment in general.

SLOVENIAN THEATRE COMPANY - SLOVENSKO STALNO GLEDALIŠČE - The association aims to continue the tradition of the Slovenian Theater in Trieste for the growth and development of the Slovenian national minority through the production of shows, prose and artistic events of high cultural level in Slovenian language.

FOUNDATION TEATRO NUOVO GIOVANNI DA UDINE - The foundation pursues the theatrical and musical art also to the purpose of community education. In addition, it promotes, encourages, designs and implements initiatives and cultural events, concerts, shows and performances.

MITTELFEST ASSOCIATION -The Association aims to contribute to the development of knowledge and exchange of experiences in the fields of entertainment, music and theater, between the Friuli Venezia Giulia and the countries of Central Europe, with particular attention to member countries of the Central European Initiative. For this purpose annually organizes the festival "Mittelfest" in Cividale del Friuli.

INTERNATIONAL ASSOCIATION OF OPERETTA FRIULI VENEZIA GIULIA - The association is non-profit and pursues the aim of: a) spread the theatrical culture, music and the arts relevant to understanding of operetta, musical comedy, entertainment with music and musicals; b) promote, organize and help achieve cultural, theatrical events, shows and concerts, even in tourist value, emphasizing activities in the region; c) supervising the awarding of the International Operetta Prize.



4.3 Professionals involved

In the AR FVG, CCIs belonging to the core⁹ of the cultural and creative regional system see a rather variable weight of the presence of freelancers and self-employed in the total active businesses. It is predominant in the Architecture sub-sector, where the freelancers and self-employed account for over 90% of active business activities and represent 49.5% of all professionals within the region in the core activities of the cultural and creative system. At the second and third place, with a similar percentage composition and more than 40% of freelancers and self-employed, there are the Performing Arts and Visual Arts and Design, respectively, with 45.6% and 45.2% of active businesses. Out of the total number of professionals present in the core activities of the cultural and creative regional system, these two sub-sectors represent respectively a share of 11.0% and 14.7%. Above the 25% threshold, there are the two sub-sectors of Video Games and Software and Heritage Historical and Artistic Management. It should be noted that, while in the case of the first sub-sector, the figure is significant given that the self-employed and freelancers account for 11.9% all the professionals present in the core activities of the cultural and creative regional system,

⁹ There is no presence of freelancers and self-employed in the sub-sector of Production of Goods and creative-driven services.

in the Heritage Management Historical and Artistic subsector they represent a 0.2% share.

Tab. 4 – Freelancers and self-employed percentage by core CCI (active businesses)

CULTURAL SECTORS	Independent Professionals	Other Legal Forms
Architecture	91,5%	8,5%
Communication and Branding	21,9%	78,1%
Design	45,2%	54,8%
Creative Industries	58,4%	41,6%
Film, video, radio-tv	12,3%	87,7%
Books and Press	18,6%	81,4%
Music	0,0%	100,0%
Videogames and Software	28,9%	71,1%
Cultural Industries	22,8%	77,2%
Performing arts and Visual arts	45,6%	54,4%
Cultural and Historical Heritage Management	28,6%	71,4%
TOTAL	54,6%	45,4%

Source: Author Estimate on Statistical Archive of Active Businesses ASIA-ISTAT (2013)

In terms of the presence freelancers and self-employed in the sub-sector of interest, the sub-sectors of Communication and Branding and Books and Press are located around the 20% threshold, while their share in terms of total self-employed and freelancers in the core of the cultural and creative regional system is less than 8 percentage points. The other sub-sectors have both a share of the business activities of self-employed and professionals, is a burden on the regional total, negligible. The other sub-sectors have negligible shares both as a business operated by freelancers or self-employed and as weight of freelancers or self-employed workers on the regional total.

4.4 The cultural and creative synergy

The level of interaction between self-employed and freelancers, estimated according to the existence of associations between workers in the sector, it seems variable and lower in average when you consider the whole cultural and creative system. The creative sub-sectors such as Architecture, Design and Communication & Branding seem dominated by competitive logic and collaboration, beyond the initiatives of Professional Associations (Architecture) is confined to individual episodes.

In the case of the audio-visual sector in the cultural sector it is characterized by a system of free and self-employed professionals working in the different components of the supply chain. This is a recognized factor of strength. In the case of other sub-sectors it is difficult to estimate the level of collaboration and cooperation even if it seems to prevail in these sub-sectors a vertical logic / competitive also linked to the highly subsidized (public financing) nature of these cultural activities.

5. EDUCATION AND RESEARCH

5.1 Educational curricula offered

*Vocational Education Courses*¹⁰

A series of three-year courses require as a condition of access the title of the final lower secondary school study. The degree awarded is the professional qualification (EQF 3).

Artistic Works Operator

The Laboratory of the Arts intends to get to the recovery¹¹ of the arts who are "dying out" together with taste, sensibility and traditional knowledge. One of the aims of the Laboratory of the Arts is the training of qualified people for the restoration and preservation of historical and cultural heritage in our area.

Computer Graphics Operator

The Operator should process (with creativity and aesthetic taste) files of printed graphics products (newspapers, magazines, books and commercial catalogues, calendars, posters, brochures, packaging) required for different types of printing (offset, digital, screen printing) or for the web sites and media such as eBook readers.

Digital Graphics Production Operator

Development of graphic publishing products¹² and commercial¹³ to print on various media or distribute by on-line tools and digital technologies. Creating illustrations¹⁴; digital photo processing; layout of graphics with text, images and tables; preparation of papers for traditional and digital printing or for distribution over the web or multimedia.

Cook

According to industry trends and to respond to market demands, he pays great attention to the quality of raw materials and the use of organic products and tradition. Application of a healthy cuisine and adapted to particular needs of intolerant or allergic customers, without neglecting the aesthetic presentation of the dish.

3D printers and Arduino programming systems Operator

Realization of prototypes, unique pieces or limited series with materials and 3D printing technologies and intelligent automation and control devices. Utilization of computerized cards for programming electronic devices and sensors, 3D printers,

¹⁰ See Annexes.

¹¹ From drawing to computer graphics, painting, sculpture, wood notch the to the use of wood systems for carpentry works, engraving, from the creation of furnishings to the works of masonry, 3D printing design and realization of models and architectural models, from murals to graffiti, from the restoration of ancient walls and floorings to the restoration of historical artifacts.

¹² Newspapers, magazines, books

¹³ Catalogs, calendars, posters, brochures, packaging, etc..

¹⁴ Logos, trademarks, graphics.

numerical milling machines and apparatus for laser cutting; transformation project files into a concrete object¹⁵. Card Application type "Arduino" to implement programmable electronic devices to control machining tools and automation systems.

Post-secondary (non-tertiary) education and training

Post-secondary (non-tertiary) education and training is organised by the higher technical education and training system, articulated in two different training pathways offered by Higher Technical Institutes (ITS - Istituti Tecnici Superiori) and by Higher Technical Education and Training (IFTS Istruzione e Formazione Tecnica Superiore).

Higher Technical Institutes (HTIs)

Diploma in Graphic and Communication - The course provides skills in: Communication Theory; Multimedia design; Technologies of production processes; Organization and Management of Production processes. Technical Workshops. (6 HTIs provide the Diploma)

Diploma in Furnishing and Interiors – The graduated interacts in the design and execution of the proposed product, co-ordinates, within a company the different phases of production processes from the production of individual elements of furniture (in wood and other materials) to the realization of projects of interior fittings for homes, offices, hotels and business premises and the community.

Diploma in industrial and craft production - The graduated professional skills relates to networks of general industries and are developed specifically in relation to the needs expressed by the territory. The address provides the joints "Industry" and "Craft" in which the profile is oriented and declined.

Diploma in Fashion System - The graduated in "Fashion System" develops knowledge and skills in the different dimensions (conceptual-creative, design, production and marketing) of textile, clothing, fashion and accessories sectors. The area of study allows to train various professionals related to the world of fashion: designers, tissue-pattern makers, planners of corporate activities, organizers of fashion events, fashion designers messages. (5 HTIs provide the Diploma)

Higher Technical Education and Training

Higher Technica Education and Training (IFTS)¹⁶ paths aim to train professionals at post-secondary level, aimed at technical, in-depth and targeted professional training. Title acquired: higher technical specialization certificate (level 4 EQF), expendable in the national and EU level.

Multimedia production techniques: product design and 3D prototyping

The Product Designer studies new products and/or the improvement of existing ones

¹⁵ Given a three-dimensional model, verification and conversion into a G-code format, used by the 3D printer or other computer controlled machines.

¹⁶ The paths form specialized technicians able to monitor and manage the organizational and production processes of the enterprise also related to technological innovation and internationalization of markets, according to the priorities set out by Regional Economic Planning. The courses are designed and managed by four educational subjects: school, vocational training, the university and businesses formally associated, even as consortia.

on an industrial scale, to anticipate market needs with the prerogative to convey innovation in all respects: creative, aesthetic, social and technological. He will be able to use CAD software (both 2D and 3D) to achieve a first detailed design or prototype on the basis of customer requests, even with the use of 3D printers and laser cutting machines. In subsequent phases the Product Designer will be able to refine the prototype (choosing the best materials to produce it, teaming with professionals involved in the production and sale phases).

Techniques for the artisan realization of the products made in Italy

The Technician for the realization of Made in Italy products has innovative skills useful to many companies in the sector of wood, both in design-construction phase and in the production and marketing phases. The skills acquired enable inclusion in companies (production, restoration and sale of furniture products) and collaboration with design studios and design.

Mosaic School of Friuli

The Mosaic School of Friuli offers the opportunity to attend a professional course lasting three years. The three-year training course prepares organic and complete way the young people to the profession of mosaics creator.

Tertiary Education

Conservation and Restoration School of Villa Manin in Passariano

Courses: In 2012 the Villa Manin School has been accredited by the line Ministry¹⁷ for the organization of Master in Conservation and Restoration of Cultural Property in accordance with the vocational training n. 5: library and archival material, paper and parchment artifacts, photographic material, film and digital.

Civic Academy of Dramatic Art Nico Pepe

Courses: Bachelor for Actors. The course can access young people to the expiry date of inclusion are aged between 18 and 27 years (exceptions to the age limit will be valued by the management). The required qualification is the high school diploma.

The Conservatory of Music “Giuseppe Tartini” in Trieste and the State Music Conservatory of Udine “Jacopo Tomadini”

Courses: The training is organized in less than 40 three-year courses (bachelor) and as many two-year specializations leading to the award of the title of Master (3 + 2 years).

University of Udine

¹⁷ The 2012 Ministerial accreditation allows students who enroll in the school courses after passing a final exam having the state examination status, to qualify for the profession of cultural heritage restorer, to get a degree equivalent to the master's degree in Conservation and restoration of cultural heritage.

Bachelor in Public Relations - Training of professionals of public relations for public and private companies, with focus on foreign language communication and cultural and institutional context of the European countries. Training of operators in the field of advertising, publishing, media. These professionals will be able to act also as intermediaries between cultural institutions and public and private services in Italy and Europe.

Master in "Integrated communication for companies and organizations" - The Master trains experts of communication and stakeholder management able to play managerial roles and high responsibility in public and private organizations.

Bachelor and Master in Preservation of Cultural Heritage - The Master aims to provide updated theoretical tools and practical skills aimed at high-level professional achievement in research, teaching, the protection, enhancement and management of historic and artistic heritage, in both the public and private sectors.

Bachelor in disciplines of the arts, music and entertainment (DAMS) - The course aims to give methodological, archival and historical-critical knowledge in the field of film, TV and new audiovisual media, in the production, post-production and multimedia distribution, conservation and restoration of the film and video and care of the visual arts.

Postgraduate Studies and Schools

International Master in Audiovisual and Cinema Studies (IMACS) - A network composed of thirteen universities organizes IMACS. The program is based on a broad range of courses, and it is developed diversifying and enhancing the scientific specialization of each partner of the network. The resulting offer is a value-added educational path, proposing a distinguished initiative in the field of cinema and audiovisual studies in Europe. The selected students (5+3 students maximum for each university) follow their classes in three different universities belonging to the network. This program focus on research and its main aim is to provide students with excellent qualifications; the participants receive a certificate issued by each university, an encouraging starting point for a possible PhD application.

Graduate School of Cultural Heritage; Inter School of Specialization in Archaeological Heritage

PhD in Artistic-Historical and Audiovisual Studies - The PhD in Historical-Artistic studies and Audiovisual aims to promote specialist research in the fields of art history (from medieval to contemporary), audiovisual (cinema, television, photography, new media) and musicology. It aims to train young scholars by providing them with a solid base of knowledge and methodological tools.

University of Trieste

Postgraduate Studies and Schools

Postgraduate School In Archaeological Heritage

PhD in Science of Antiquities (Inter University Phd with Udine and Cà Foscari Universities). The Archaeological address provides specialization in archaeological excavations of prehistoric field, proto, near the eastern Aegean, classical, medieval and post-medieval.

University Consortium of Pordenone

ISIA Product Design Degree - The Industrial Design course allows you to integrate your creativity and design with technical skills aimed at the creation of new products from concept to the actual realization.

Master Degree in Production Engineering and Management - The University Consortium started a degree in Industrial Engineering targeted at specific training for the furniture industries, with the collaboration of the two universities (University of Trieste and University of Udine) and the Development Agency (ASDI) for Furniture

Master Degree in Multimedia Communication and Information Technologies - To train experts able to carry out professional activities and / or research with theoretical and practical design responsibilities in the communication spheres mediated by the machine¹⁸ and integrated communication (wireless or cable) at research institutions, government, industry and economic organizations of various kinds.

5.2 Research centres, laboratories and research institutes



Regarding the research centres, laboratories and research institutes topic, please provide a list of the research outputs such as (number of) patents, trademarks, utility models, copyright, etc.

Following a benchmarking analysis related to NUTS-2 248 EU-28 regions, the position in terms of innovation¹⁹ of AR FVG improved in 2015. In fact, the region passed from 164th position in 2014 to 130th position out of 248 EU regions. In national comparison, the AR FVG in 2015 was the region with the highest innovation indicator (it was the fifth in 2014). FVG in 2015 was the 27th region in EU-28 concerning the number of patents relative to GDP (56th position in 2014), the 69th region in terms of employment in medium-high technology sectors (81st in 2014) and the 104th region compared to the

¹⁸ Pervasive and/or ubiquitous computing, wearable computing, sensitive and reconfigurable space, personalized service, security surveillance, etc.

¹⁹ The index of innovativeness. Measures the degree of innovativeness of European regions. It is composed of the following indicators, all extracts from the Eurostat database at the geographical level NUTS 2: R&D expenditure on private sector (% of GDP); R&D spending in public sector (% of GDP); Population with tertiary education degree (% of total population); Employment in medium-high technology industries (% of total employment); Patent applications (per million € of GDP); active population by educational level (% of graduates among active); Rate of participation in training or educational activities (25-64 years on totale population).

incidence of R&D private spending on GDP (117th in 2014). To determine AR FVG satisfactory performance is a good degree of innovativeness of production system: compared to this compounded indicator, the region moved in 2015 from 79th to 58th position (248 EU regions). Far more limited the contribution of human capital innovativeness to regional development as FVG ranks in 209th position out of 248 EU regions, a rather disappointing result though in improvement compared to 2014 (225th position). In particular, AR FVG in 2015 was the 240th region in order to the proportion of population with Tertiary Education (250th in 2014), the 242th region per share of college graduates between active population (264th in 2014) and the 105th region in order to the rate of attendance to training or educational activities (175th in 2014).

CER - Coordination of FVG AR's national research and international centres - Established in 2004, CER is the network of more than 40 national and international research institutions with headquarters or operational structures in Friuli Venezia Giulia. AREA Science Park has the task of coordinating the activities. The main objectives of the Network are researchers international mobility, enhance human capital, supporting new projects and strengthen the link between the socio-economic realities, local scientific and industrial.

CSS Teatro Stabile of innovation of FVG, member of CER, dedicates since the seventies, with its artistic and cultural activity to the research of new languages and technologies for the contamination between the arts.

“Cluster Arredo” ("Cluster Furniture"), based in San Giovanni al Natisone (Udine), is an Innovation Pole for the Cluster Home System, as identified by the Regional Law 3/2015. It carries out initiatives for the development and management of clusters designed to stimulate innovative activity by promoting the sharing of facilities, the exchange and transfer of knowledge and skills, contributing effectively to the creation of networking, dissemination of information and cooperation between businesses and other organizations that make up the cluster. In FVG AR, the chain of Wood-Furniture sector constitutes 90% of the entire house system and also includes (in addition to wood processing, parquet flooring, doors and windows, wooden packaging, furniture, furniture, mattresses, carpets, sanitary ware, tiles) fashion and industrial design.

CATAS, based in San Giovanni al Natisone (Udine), is currently the largest Italian institute of research, development and testing laboratory for the wood-furniture sector.

“Friuli Innovazione” was created in 1999 to encourage the collaboration between the University of Udine and Friuli's economic system, through the exchange of skills among researchers and businesses, and the industrial exploitation of the scientific and technological results developed by the University of Udine.

The Computer Laboratory for Historical & Artistic Documentation (LIDA), University of Udine

National Interuniversity Consortium for Science and Technology of Materials.

The Universities of Trieste and Udine are part of Consorzio INSTM. 48 Italian universities conduct research on advanced materials and related technologies²⁰.

Research Outputs

EUROSTAT Patents data at NUTS-2 and NUTS-3 level are updated to 2012. The national database of the Italian Patent and Trademark Office (UIBM) collects all information related to the applications filed for patents, trademarks and other industrial property titles.

Table 5 – Patents applications by NUTS 3 regions

	2012	2013	2014	2015*
Pordenone	78	76	68	10
Udine	223	177	198	60
Gorizia	11	6	10	1
Trieste	6	6	10	1
AR FVG	318	265	286	72

(*)Cumulative figure from 1/1/2015 to 04/30/2015.

Source: Italian Patent and Trademark Office (UIBM)

Table 6 – Patents registrations by NUTS 3 regions

	2012	2013	2014	2015*
Pordenone	51	61	60	29
Udine	149	225	172	58
Gorizia	7	7	5	7
Trieste	0	2	2	0
AR FVG	207	295	239	94

(*)Cumulative figure from 1/1/2015 to 04/30/2015.

Source: Italian Patent and Trademark Office (UIBM)

The design is relevant to a wide range of industrial products, fashion and handicrafts from technical and medical instruments to watches, jewellery and other luxury items; by home accessories, toys, furniture and electrical appliances to cars and architectural structures; from textile designs to sports equipment. However, the designs are also important in the field of packaging and launch of a product on the market. From the point of view of industrial property rights, on the other hand, the expression drawing or model refers only to the ornamental or aesthetic aspects of a product (in the example of the chair, only to its appearance) and not from any technical or functional characters.

Table 7 - Community design (CD) applications by NUTS 3 regions

	2012	2013	2014	2015	2016
Pordenone	38	29	37	28	29
Udine	60	53	58	64	60
Gorizia	4	7	4	1	5

²⁰ The number of afferent, over 2000 professors, university researchers, holders of research grants and fellowships and doctoral students, is constantly increasing. INSTM promotes research which is carried out in the partner universities in the field of Materials Science and Technology by providing them organizational support, technical and adequate financial.

Trieste	7	8	7	3	7
AR FVG	109	97	106	96	101
Nord-Est	679	690	749	676	749

Source: Eurostat (online data codes: ipr_da_reg)

The region NUTS-3 of Udine in the period 2013-2015 is certainly the most creative-driven, accounting for 58.5 of the regional Community designs (CD) applications, thus differing from Pordenone, more related to the engineering and electronics.

Table 8 - Community designs (CD) registrations by NUTS 3 regions

	2012	2013	2014	2015	2016
Pordenone	133	81	116	89	69
Udine	471	379	599	701	647
Gorizia	16	23	28	3	23
Trieste	38	30	11	31	17
AR FVG	658	513	754	824	756
Nord-Est	3.305	3.257	3.575	4.140	3.830

Source: Eurostat (online data codes: ipr_dfa_reg)

NUTS-3 region of Udine, following Eurostat Regional Yearbook 2016, was in 2014 the sixth NUTS-3 region in EU-28 by CDs registrations, accounting for 1% of EU-28 CDs registrations and with 1.115,3 CD registrations for million inhabitants (148,1 EU-28).

Table 9 – EU trade mark (EUTM) applications by NUTS 3 regions

	2012	2013	2014	2015	2016
Pordenone	45	56	44	49	64
Udine	92	74	118	110	79
Gorizia	10	12	17	16	18
Trieste	15	26	36	59	39
AR FVG	162	168	215	234	200
Nord-Est	2.296	2.482	2.541	2.777	2.628

Source: Eurostat (online data codes: ipr_ta_reg)

Table 10 – EU trade mark (EUTM) registrations by NUTS 3 regions

	2012	2013	2014	2015	2016
Pordenone	40	46	35	54	54
Udine	76	65	88	110	93
Gorizia	13	10	15	12	18
Trieste	20	22	23	42	45
AR FVG	149	143	161	218	210
Nord-Est	1.943	2.172	2.337	2.430	2.434

Source: Eurostat (online data codes: ipr_tr_reg)

6. MAIN CULTURAL AND CREATIVE INDUSTRIES



This chapter is the conclusion of each regional state of the art analysis.

(3-4 pages)

6.1 Identification of 3 main sectors or subsectors



On page 57 of ChIMERA application form is written: "(...) the project starts from a comprehensive analysis of best practice of innovative clusters models in CCI sector (with focus on individual, design and digitalization) at transnational level."

If in your territory some of this sectors are non-existent or irrelevant, select 3 main sectors or subsectors that has more expression in your region, and justify your choice.

In addition to weight in terms of employment, number of companies and added value it is necessary also consider the existence of stakeholders, the presence of policy focus and other dedicated initiatives, the presence of dedicated events and the presence of cross-sector supply chains. The Architecture for example, significant from the point of view of the number of enterprises and the value added, is made for more than 85% by autonomous and free professionals operating in various areas of difficult characterization (consultancy, reports and certifications for the public administration, public building) and mainly targeting the local market.

There are no officially defined CCI sectors in FVG but the relevant CCI sectors in FVG region are: Film, Video, Radio, TV (audiovisual production industry), Design, software and computer services. Moreover, considering both the number of companies and employees occupied are relevant the following cultural and creative sectors: Architecture, Books and Press. The audiovisual production industry is the one AR FVG choose as sector of relevance for the CHIMERA project.

The audiovisual production industry is one of the highest quality in Friuli Venezia Giulia and with very interesting economic potential for the region. Surely, some of this performance is due to the system of regional stakeholders. In fact, the Audiovisual Fund of Friuli-Venezia Giulia²¹ and Friuli-Venezia Giulia Film Commission in recent years have contributed to the audiovisual production industry steady growth in accompanying the authors, the producers and the regional workers. A number of international events, repeated over the years, has created a series of stable relations between the sectors operators, artists, institutions and enterprises. International Festivals (Alpe Adria Cinema; Far East Cinema; Silent Film Festival). All of them were

²¹ The Audiovisual Fund of Friuli-Venezia Giulia (funded 100% by the Department for Productive Activities of the Region Friuli Venezia Giulia), operates in three main sectors: a) training, to encourage the participation of local audiovisual professional in national and international courses for directors, scriptwriters, producers, editors, camera operators, and sound engineers; b) development, to cover all the 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; c) distribution, along with the promotion of the projects, this last action includes a financial support to cover production expenses, so as to create more competitive products. Along with the ordinary management of the fund, the Fvg Audiovisual Fund has 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.

able to weave a dense network of collaborations and exchanges of experience, in which even the audiovisual Workers Association of Friuli Venezia Giulia has played an important role. The network is international thanks to co-productions and events concerning co-productions as like “Ties That Bind” Asia/Europe Co-Production Workshop (since 2008); “When East Meets West” – Trieste Co-production Forum. A “new-born” cross-border co-production initiative is RE-ACT (Regional Audiovisual Cooperation and Training)²².

The design industry is at the center of initiatives, both from the chamber system that other parties for the creation of business networks and its internationalization. "Italy for Contract" is the network of companies that, from 2016, is operative as business network promoting the Friuli's design excellence. The term "contract" means the ability and availability to carry out large turnkey projects. In the wood-furniture sector, the term declines in providing products custom-designed and related services necessary to install them before a date. The contract is operational, for example, in the hospitality industry, hotels or residences, but also large ships.

The production of software and computer consulting is a category that in 2015 concentrate a large number of innovative start-ups (20.9% of regional total start-up). This performance is also due to the presence of the technological-digital DITEDI District, composed of over 120 companies in the digital sector of Friuli Venezia Giulia. The production of software and computer consulting accounts for 76% within the ICT sector (industry also understand production and trade) is attributable to the production of software, consultancy and related activities, or to the group of data processing, hosting and related activities, portals web. MoU signed in September 2016 between the national coordination of the 17 Film Commission on the national territory and AESVI, the trade association representing publishers and game developers operating in Italy. The two main goals of the Protocol are: a) more opportunities for the growing Italian videogame industry, helping to raise the level of competitiveness; b) encourage the exploitation of the territory and of the historical, artistic, landscape and tourism of the country, by supporting the creation and production of video games and interactive applications linked to it²³.

FVG Region is strengthening an integrated system for the management of cultural heritage thanks to a participatory management model. The establishment of a Foundation for for the management of the archaeological site of Aquileia, the increasingly number of exhibitions and cultural events of international importance at Villa Manin added recently with the new Regional Agency for Cultural Heritage (ERPAC). Moreover, an important reform of the regional system of museum will lead to

²² RE-ACT is an initiative set up in 2015 by the Croatian Audiovisual Centre, Friuli Venezia Giulia Audiovisual Fund and Slovenian Film Centre in collaboration with TorinoFilmLab aimed in developing new audiovisual projects and fostering international co-productions. It is designed for filmmakers and producers who wish to foster closer ties within Croatia, Friuli Venezia Giulia (IT) and Slovenia.

²³ The first step is the Italian Videogame Program (IVIPRO), a project aimed at mapping in key gaming territory and the artistic, architectural and historic Italian heritage. The research and cataloging results will feed into a database linked to regional Film Commission: a tool available to the institutions and the Italian and foreign developers. The IVIPRO mapping work will start from Friuli-Venezia Giulia, Lombardy, Tuscany and Trentino.

a reorganization of libraries and historical archives. Aquileia Foundation organized Contest for Ideas for a variety of maintenance and enhancement activities; the technologies for the preservation and promotion of cultural heritage represent one of the development trajectories identified by the regional RIS3. ERPAC manages the residences of performing arts at Villa Manin and manage the promotion of cultural and hospitality residences and the promotion or direct participation in special initiatives of culture and tourism regional development.

6.2 Identification of 3 regional best practices

Name	<i>FVG Film Commission</i>
Profile	<i>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 Film Commission, has assisted until 2016 hundreds of productions, including films (50), documentaries (43), television series (46), music videos and commercials (19).</i>
Description	The FVG Film Commission offers operators (movie, television, advertising and multimedia) a number of services free of charge (link between production and local human and productive resources). Concerning the assistance to production companies Friuli Venezia Giulia Film Commission offers its collaboration, and provides a significant number of free services as welcome and lodgings, direct liaison with local Public Officers, introductory information about technical, logistical and bureaucratic matters, assistance with bureaucratic proceedings, general information about production resources, visits to the locations detected by the production, location scouting regarding other possible shooting sets, liaison with resident professionals offering production services. Qualified and experienced professionals, casting agencies,

catering and other expert staff are listed in online a production guide , as well as all the local human, technical and professional resources needed during production and post-production. The Production Guide is constantly updated with names, and addresses of Friuli Venezia Giulia's film professionals available to guest production companies.

**Context
impact**

In 2003, the Friuli-Venezia Giulia Regional Authorities and the Film Commission were the first in Italy to launch a Film Fund with the aim of creating a financial incentive to shoot in the regional territory, by financing up to a certain percentage of the total production expenses depending on the days of shooting and the amount of expenses. The total grant will never amount to more than 50% of the whole film budget.

Films, Animated Films, Tv Dramas and Series, Web Series

more than 24 days of filming in FVG
up to 200.000 euros
150% expenditures in FVG
up to 24 days of filming in FVG
up to 70.000 euros
150% expenditures in FVG

Documentaries, Short Films And Music Videos

more than 10 days of filming in FVG
up to 30.000 euros
100% expenditures in FVG
up to 10 days of filming in FVG
up to 10.000 euros
100% expenditures in FVG

The fund is based on an economic development (versus 'cultural value') logic. Grants are accorded to productions mainly based on 'territorial spill overs' concerns. The rationale is that productions coming to shoot in the territory demand services, stimulating the local economy in the cinematic industries (e.g., requesting qualified personnel such as technicians, cameramen); in related services (e.g., transportation, machinery rent etc.) and in 'induced' services (e.g. restaurants and hotels for the troupes); the ratio between the FVG Film Commission investment and productions economic fallout is around 1 to 6.

Moreover, the presence of productions in loco is deemed to generate knowledge spill overs and the development of a competence base by learning effects among the professionals in the local industry. The financial coverage for the fund was introduced in the regional financial law; such a framework was very innovative with respect of national models of public grants for the production of audio-visual products. These latter were mainly focused on 'cultural value' of cinematic projects, i.e. representation of national culture and identity. The regional (or local) Film Funds (with a mixture of cultural and economic

logics are now a diffused practice among regional and municipal authorities in Italy.

Links to Resources

<http://www.fvgfilmcommission.com/en/>

<http://www.fvgfilmcommission.com/productionguideonline/>

<http://www.filmlocations.it/>

<https://it-it.facebook.com/fvgfilmlocations/>

<http://www.audiovisivofvg.it/>

<http://www.annuariodelcinema.it/annuario/news-2/1845-fvg-film-commission-tira-le-somme>

Key words Audio-Visual industry

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8. ANNEXES

8.1 Private sector

Does not exist in Italy an official definition of the CCI. However from 2010, de facto a standard created by the reports "I am Culture" Unioncamere – Symbola Foundation, which uses data from the Union of Italian Chambers considering a number of national and international references.

Symbola Foundation considers the set of Cultural and Creative Sectors described in the Table below, referring to a set of economic activities classified by the Institute of Italian Statistics Institute (ISTAT). The classification of economic activities "ATECO" is a type of classification adopted by Italian National Statistics Institute (ISTAT) for National Statistics surveys of economic character. It is the Italian translation of the Nomenclature of Economic Activities (NACE), created by Eurostat, adapted to ISTAT to the specific characteristics of the Italian economic system. ATECO 2007 version, which took effect from 1 January 2008, is currently in use, replacing the previous ATECO 2002, which was adopted in 2002 to update the ATECO 1991.

Table 1 - Cultural and Creative Sectors

Sector	Sub-sector
Performing arts and visual arts	Performing Arts (5), entertainment; conventions and fairs (1)*
Management of historical and artistic heritage	Museums, libraries, archives and management of historical sites and buildings (3)*
Cultural Industries	Film, Video, Radio and Television (8)*; Video Game & Software (5)*; Music (4)*; Books and Press (14)*
Creative Industries	Architecture (1)*; Communication and branding (3)*; Design (4)*;
Creative-driven production of goods and services	Creative-driven production of goods and services (32)*

Source: Symbola Foundation - (*) Classes and Categories Ateco 2007 by Subsector

Table 2 - Comparative Table Italy-FVG for some indicators (system)

	2013	2014	2015
Number of SMEs in CCI sector in Italy	443.458 (7,3%)	443.208 (7,3%)	412.521 (6,7%)
Number of SMEs in CCIs in FVG	8.622 (8,0%)	8.475,1 (8,1%)	8.723 (8,3%)
Number of employed in CCIs in Italy	1.393,6	1.450,8	1.468,2

(.000)	5,9%	5,9%	6,0%
Number of employed in CCI in FVG	32.955 6,5%	34.800 6,5%	32.900 6,3%
Total added value of CCI SMEs in Italy (mrd.)	80,0 mrd. 5,4%	78,6 mrd. 5,7%	89,7 mrd. 6,1%
Added value of CCI SMEs in FVG (mln.)	1.767,1 5,7%	1.800,1 5,7%	1.725,5 5,7%
Share in exports of CCI SMEs on national level	10,7% (41.639 mio)	10,8% (43.176 mio)	<i>n.a</i>
Share in exports of CCI SMEs on regional level	17,3%	18,0%	17,3%*

*Estimate. The estimate was produced by calculating 3-digit NACE (ATECO Italian version) annual change of share in exports of CCI SMEs on regional level.

Source: Symbola Foundation-Union of Chambers, "Io sono Cultura" 2012-2016; Author estimate.

Tab. 3 – The Creative e Cultural System in FVG AR (core) in 2013-2015

%	FVG SMEs	FVG Employed
Architecture	23,6%	23,8%
Communication and Branding	10,7%	6,6%
Design	13,0%	7,3%
Creative Industries	47,3%	38,2%
Film, Video, Radio, Tv	3,4%	3,0%
Books & Press	23,5%	24,0%
Music	0,7%	0,2%
Video Games and Software	17,1%	26,0%
Cultural Industries	44,6%	53,1%
Historic-Artistic Heritage	0,3%	1,0%
Performing and Visual Arts	7,7%	7,8%

Source: Author estimate on ASIA (Archive of Active Enterprises) -ISTAT; Symbola Foundation-Union of Chambers, "I Am Culture" 2016;

8.2 Brief description of the context of the VET system in Italy²⁴

Compulsory education in Italy lasts for ten years (from ages 6 to 16) and includes the first cycle of education and the first two years of upper secondary school, or the three-/four-year paths of vocational education and training for which Regions have competences. All young people who finish compulsory education and training (at age 16) have a right/duty to education and training for at least 12 years (from age 6 to 18), either in the upper secondary school or until they have gained a professional qualification through the three-/four-years training paths managed by the Regions and Autonomous Provinces or through a specific apprenticeship scheme.

²⁴ <http://www.eqavet.eu/gns/what-we-do/implementing-the-framework/italy.aspx>

Post-secondary (non-tertiary) education and training is organised by the higher technical education and training system, articulated in two different training pathways offered by Higher Technical Institutes (ITS - Istituti Tecnici Superiori) and by Higher Technical Education and Training (IFTS Istruzione e Formazione Tecnica Superiore).

At the completion of the secondary education, young people can enter higher education consisting of the university system, organised on the cycles of the Bologna process: a first-level degree after three-year courses (bachelor's), a second-level at the completion of two more years (master's), a doctorate lasting usually three years.

All young people who have left the education system and are going to enter the labour market can get a VET qualification within the vocational training system managed by the Regions. IVET courses usually last one year, although there are a few two-year courses. The programmes are targeted at young people, according to their general education qualifications; we distinguish between first level (for those who have just completed compulsory education), second level (see earlier) and third level courses (for those with a tertiary level education).

Finally, there are some apprenticeship programmes for young people from ages 15 to 29. In the main apprenticeship programme, young people are awarded a vocational qualification designed in the collective bargaining; there are two small programmes to get a diploma or other qualifications from the secondary and/or higher education system. For adults, employed or unemployed, there is a CVET system that is publicly funded, together with a large range of courses in almost all sectors provided by private providers; these are not considered in the following overview.

8.3 Educational curricula offered (Secondary Education relevant for CCI's)

High Schools

In the AR FVG there are 4 Art High Schools²⁵ offering 4-year courses. The courses are divided, starting from the second 2-year period, in following addresses: 1) Architecture And Environment; 2) Figurative Arts; 3) Audiovisual And Multimedia; 4) Industrial Design; 5) Fashion Design; 6) Interiors Design; 7) Graphics. Arts High School Diploma

1) *Architecture and Environment (4 yrs). During the last 2 yrs the student will broaden the knowledge and the use of projective methods of technical drawing directing it towards the study and the architectural representation and the environmental context, as well as the elaboration of architectural design form.* 2) *Figurative arts (4 yrs). During the last two years, students will broaden the knowledge and use of techniques and technologies, tools and traditional and contemporary materials; will deepen the procedures relating to space management, design, pictorial material, color and light.* 3) *Audiovisual and Multimedia. The student deals with the new technologies of communication by studying history, forms and techniques; he experiment and applies the principles of expression, assembly techniques and operational processes of the new media even with the aid of computer programs and*

²⁵ Art High School Enrico and Umberto Nordio (Trieste); Artistic high school Sello (Udine); Artistic high school Enrico Galvani

software for image processing and sound. 5) Fashion Design. Elements of graphic language codes, design and shape; expressive strategies of different traditional areas of design and applied arts. How to approach in the project-functionality-environment relationship in the various purposes related to goods, services and production. Techniques and technologies appropriate to the definition of graphic design, prototype, and the three-dimensional model; cultural and technical Heritage of Applied Arts; The principles of visual perception and the form of composition. 7) Graphics. The student deals with the different fields of graphic design: from designing typefaces to editorial design, visual identity of organizations and institutions to signs and systems of interaction offered by new technologies. The experiments with analog and digital photographic image, with the traditional techniques of image duplication, and with the computer software for graphics

In the AR FVG there are 3 Music and Dance High Schools²⁶

The path of the musical or choreographic high school, articulated in the respective sections, explores the culture of music and dance, its historical evolution of light and aesthetic, theoretical and scientific knowledge, creativity and their technical skills. It provides students with the knowledge, skills and abilities to master the musical heritage and dance, ensuring, through laboratory activities, the proper management of music and dance languages in terms of its composition, interpretation, execution and representation .

²⁶ Liceo "G.Carducci"; Istituto Magistrale "C.Percoto"; Istituto Magistrale "Collegio Uccellis"