

Project CROSSINNO

WP3 – 3.2 Mapping of the ICC on the regional territory

Final Version: 31/07/2020

Prof. Guido Guerzoni | Università Bocconi

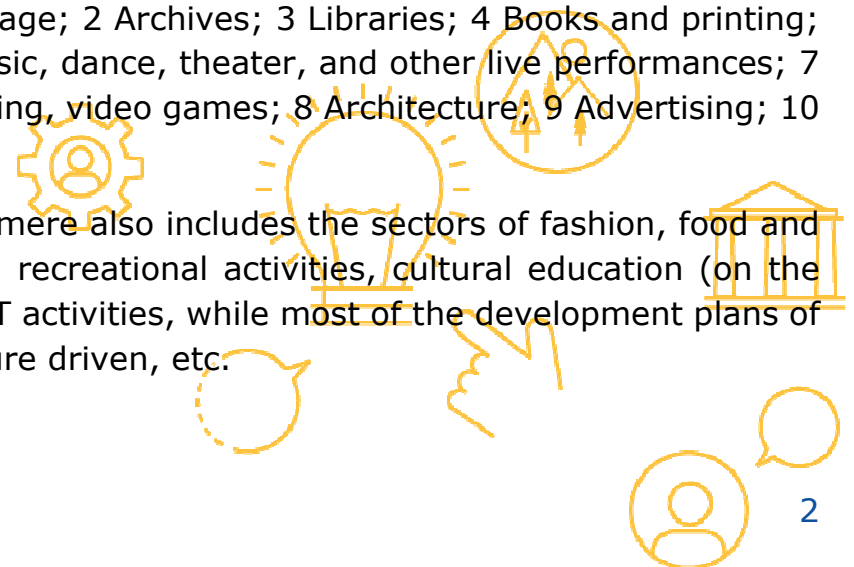


Mapping of the ICC on the regional territory

Over the past two decades, the cultural and creative industries have been the subject of a broad academic debate at national and international level, capturing the attention of national governments and international organizations, until they have become the subject of a specific European framework programme (Creative Europe). ICCs have also become an element of territorial recognition and entrepreneurial attractiveness and the concept of "creativity" has become a mantra - not always supported by solid practical evidence - of the economic literature. Numerous attempts have been made to "formalize" the perimeter of ICCs and quantify their economic importance: the 2006 report developed by KEA European Affairs on behalf of the European Commission is one of the first. The economic and employment impact highlighted by the study has paved the way for a new perspective on the strategic role of these sectors, proven by the proliferation of international and national research published in the last decade.

The term "Cultural and Creative Industries" may seem easy to understand but it includes a plurality of meanings and definitions, both at a conceptual level and with reference to the determination of the sectors involved. As an example, the European Statistical System Network on Culture - ESSnet-Culture (2009-2012) has classified 10 different sectors (1 Heritage: museums, historic sites, archaeological sites, intangible heritage; 2 Archives; 3 Libraries; 4 Books and printing; 5 Visual arts: plastic arts, photography, design; 6 Performing arts: music, dance, theater, and other live performances; 7 Audiovisual and multimedia: film, radio, television, video, sound recording, video games; 8 Architecture; 9 Advertising; 10 Artistic craftsmanship).

Given these boundaries, the definition accepted by Symbola – Unioncamere also includes the sectors of fashion, food and wine service; Acume's research includes engineering studies, fun and recreational activities, cultural education (on the basis of what has been done in Emilia Romagna, see Ervet 2012) and IT activities, while most of the development plans of national creative districts does not promptly list which sectors are culture driven, etc.



In this sense, all the academic contributions and empirical findings, different in terms of purpose, approach and geographical context, propose similar schemes and have policy objectives or implications. As a rule, the perimeter is defined first and then metrics are introduced to measure the economic significance of the sector. The overall panorama is now highly fragmented, the perimeter is often uncertain and has gradually widened, with a growing tendency to extend it to the "Cultural and Creative Production System" which is misleading, since – by including in the analyzes activities that although not part of the supply chain ICC in the strict sense use cultural contents and skills to increase the value of their products (creative driven activities) – it excessively dilute the focus and prevent clarifying boundaries between different sectors.

However, it is necessary to clarify the various formulations in which ICCs operate, otherwise it is difficult to talk about cross-fertilization: to establish what is "cross" one must know the areas and boundaries of the different sectors involved. To adopt a shared framework for mapping the ICCs of the Friuli-Venezia Giulia Region, it is possible to align the definition of ICC with the provisions adopted by the European Parliament in the Resolution of 13 December 2016 (2016/2072 (INI): A coherent EU policy for cultural and creative industries), possibly asking for a formal opinion on the sectoral perimeter.

The objective of this step, preparatory to any serious definition of policy actions, is in fact to clarify the different - and sometimes conflicting - formulations of the sectors in which the Cultural and Creative Industries operate, which, in the absence of a legal / formal definition shared and official, depending on the context and on the analysts' orientation, include or exclude relevant activities, sectors, sub-sectors and professional profiles, with evident repercussions on the completeness and usefulness of the analysis.

As part of the CROSSINNO project, the objective is not to identify perimeters able to increase the share of regional GDP attributable to ICCs, but to understand who the subjects attributable to the more rigorous notion of ICC, adhering to the most stringent EU formulations, are and what they need. Limiting the field of investigation, sectors, sub-sectors and professional profiles included in the definitions of the CCIs at EU, national and regional level, is essential to avoid methodological mistakes that make it impossible to compare in time and space the obtainable data (eg. those relating to

employment and profitability). The objective of CROSSINNO is not to map the ICCs to obtain an indistinct representation of all the realities active in the regional territory, but to select those that can be involved in terms of competence, experience, degree of innovation and interest in participation, to test pilot actions and processes of cross-fertilization capable of producing medium-long term impacts.

Within the CROSSINNO project, the ICCs present in the regional territory were mapped through three tools:

1. The extraction from the regional Chamber of Commerce database, according to ATECO codes
2. A search through the professional social network LinkedIn
3. The selection of the realities included in regional databases



Mapping according to the ATECO codes

The selection of the sectors included in the ICC perimeter, implemented starting from the standard classification of national economic activities (ATECO), allows to adopt homogeneous criteria¹. With the project team we selected 63 ATECO codes, to eventually extract the lists of companies present in the databases of the Venezia Giulia Chamber of Commerce, thanks to the collaboration of its inhouse company, Aries Scarl.

Table 1. List of ATECO codes referred to the ICCs used for the local mapping.

| CODE | DESCRIPTION | CODE | DESCRIPTION |
|----------|---|----------|--|
| 13.20.00 | Weaving | 60.20.00 | Programming and television broadcasts |
| 16.10.00 | Cutting and planing of wood | 63.12.00 | Web portals |
| 16.29.19 | Manufacture of other miscellaneous wood products (except furniture) | 63.91.00 | Press agency activities |
| 16.29.30 | Manufacture of articles of straw and plaiting materials | 63.99.00 | Other information service activities |
| 18.11.00 | Newspaper printing | 70.21.00 | Public relations and communication |
| 18.12.00 | Other press | 71.11.00 | Activities of architectural firms |
| 18.13.00 | Preparations for the press and the media | 73.11.01 | Creation of advertising campaigns |
| 18.14.00 | Bookbinding and related services | 74.10.10 | Fashion and industrial design activities |

¹ Several previous experiences have used this approach to circumscribe cultural and creative industries at regional and national level, in particular we refer to:

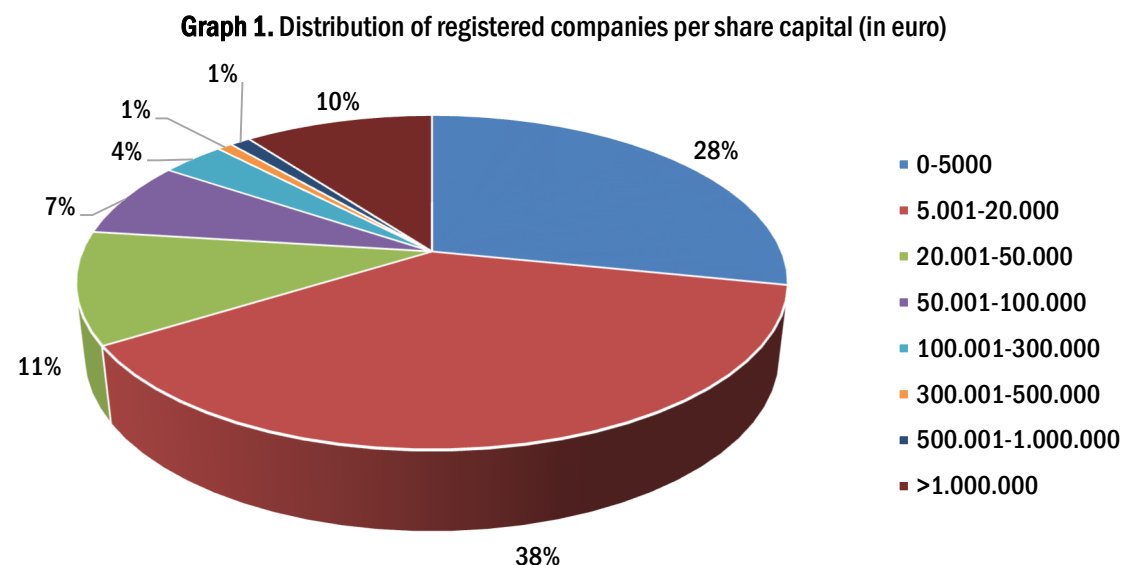
- 2019 -Symbola & Unioncamere reports
- 2017 - Della Lucia M. & Segre G., "Il perimetro di industrie culturali, creative e turismo: specializzazioni e implicazioni di policy in Italia" (152 ATECO codes)
- 2014 - Research by AUR Regione Umbria (82 ATECO codes)
- 2012 - Report CULTURA&CREATIVITÀ by ERVET - Emilia-Romagna Valorizzazione Economica del Territorio
- 2009 - Istituto Tagliacarne, "Il sistema economico integrato dei beni culturali" (138 ATECO codes)

| | | | |
|----------|---|----------|---|
| 18.20.00 | Reproduction of recorded media | 74.10.20 | Activities of graphic designers |
| 23.19.20 | Handmade and blown glass processing | 74.10.21 | Activities of graphic designers of web pages |
| 23.41.00 | Manufacture of ceramic products for domestic and ornamental purposes | 74.10.29 | Other activities of graphic designers |
| 23.70.20 | Artistic processing of marble and other related stones, mosaic works | 74.10.30 | Activities of technical designers |
| 25.99.30 | Manufacture of iron, copper and other metal objects | 74.10.90 | Other design activities |
| 47.61.00 | Retail sale of new books in specialized stores | 74.20.10 | Photographic shooting activities |
| 47.78.31 | Retail sale of art objects (including art galleries) | 74.20.11 | Photojournalist activity |
| 58.19.00 | Other publishing activities | 74.20.12 | Aerial photography activities in the field of photography |
| 58.21.00 | Edition of computer games | 74.20.19 | Other photo shooting activities |
| 58.29.00 | Edition of other packaged software (excluding computer games) | 74.20.20 | Photographic laboratories for development and printing |
| 59.11.00 | Film, video and television program production activities | 74.90.93 | Other technical consultancy activities |
| 59.12.00 | Post-production activities for films, videos and television programs | 79.90.11 | Ticket services for theatrical, sporting and other entertainment events |
| 59.13.00 | Cinema, video and television program distribution activities | 82.30.00 | Organization of conferences and fairs |
| 59.14.00 | Cinematographic projection activities | 85.52.01 | Dance courses |
| 59.20.10 | Edition of sound recordings | 85.52.09 | Other cultural background |
| 59.20.20 | Printed music edition | 90.01.00 | Artistic representations |
| 59.20.30 | Sound recording studios | 90.01.01 | Acting activities |
| 60.10.00 | Radio broadcasts | 90.01.09 | Other artistic representations |
| 90.02.0 | Support activities for artistic performances | 90.04.00 | Management of theaters, concert halls and other artistic structures |
| 90.02.01 | Rental with operator of structures and equipment for events and shows | 91.01.00 | Libraries and archives |
| 90.02.02 | Activities in the field of directing | 91.02.00 | Museum activities |
| 90.02.09 | Other support activities for artistic performances | 91.03.00 | Management of historical places and monuments and similar attractions |
| 90.03.02 | Conservation and restoration of works of art | 94.99.20 | Activities of organizations pursuing cultural and recreational purposes |
| 90.03.09 | Other artistic and literary creations | | |

From the information extrapolated from the chamber of commerce data, over 5.200 companies are registered associated with the codes listed above, distributed regionally as indicated in Table 2, mainly with a share capital of less than 20,000 euros, as shown in Graph 1.

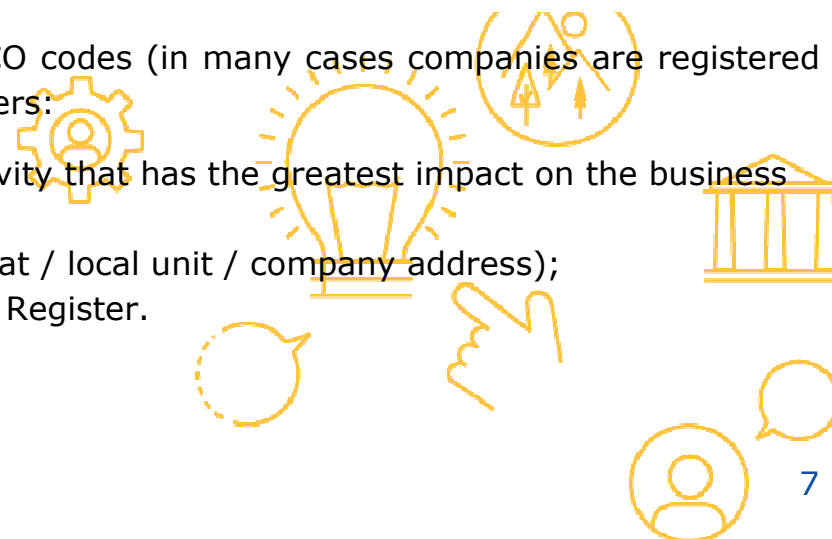
Table 2. Geographic distribution of ICC companies registered at the regional Chamber of Commerce.

| Province | Registered companies |
|--------------|----------------------|
| Udine | 2.566 |
| Pordenone | 1.267 |
| Trieste | 962 |
| Gorizia | 492 |
| Total | 5.287 |



A first analysis of the data made it possible to identify the main areas of activity, first by selecting the primary ATECO codes (in many cases companies are registered with more than one reference code), i.e. those associated with the letters:

- I - main business activity for the Register of Companies (the activity that has the greatest impact on the business value for the entire company, for all locations);
- P - main activity for the Register of Companies (for each main seat / local unit / company address);
- A - main activity for the Business Register and for the Craftsmen Register.

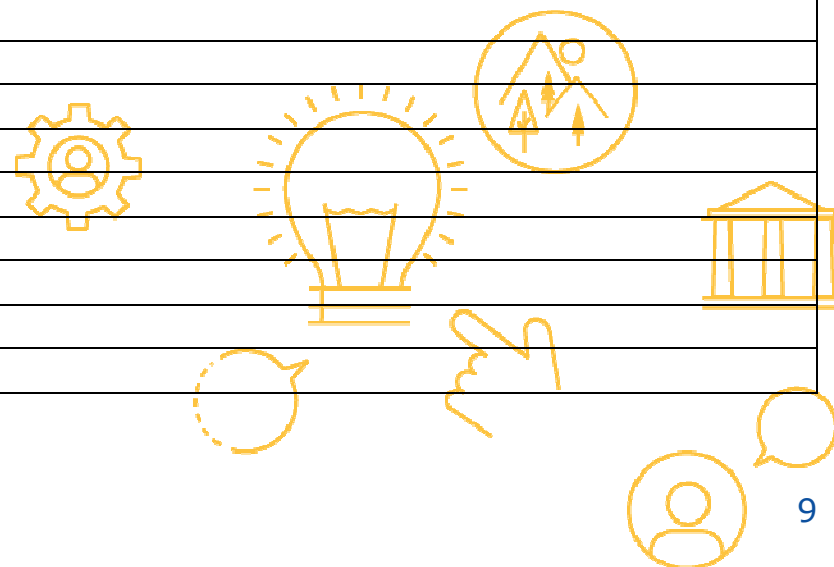


By analysing the results among the most recurrent codes, it is in fact possible to reconstruct a "mapping" of the companies active in the ICC world registered in the regional databases. Table 3 shows the details of the ATECO codes attributable to the most recurring ICCs, having chosen as selection criterion the categories with a minimum of 15 companies registered in the database.

Table 3. Details of the ATECO codes related to most recurring ICCs (minimum 15 companies). Source: Chamber of Commerce Venezia Giulia. Aries Scarl

| ATECO Code | N. registered companies | Description of the code |
|------------|-------------------------|--|
| 16.1 | 284 | Cutting and planing of wood |
| 74.20.19 | 239 | Other photo shooting activities |
| 18.12 | 230 | Other press |
| 74.90.93 | 223 | Other technical consultancy activities |
| 25.99.3 | 182 | Manufacture of iron, copper and other metal objects |
| 74.10.3 | 153 | Activities of technical designers |
| 59.11 | 149 | Film, video and television program production activities |
| 74.10.29 | 132 | Other activities of graphic designers |
| 90.02.09 | 132 | Other support activities for artistic performances |
| 23.70.2 | 115 | Artistic processing of marble and other related stones, mosaic works |
| 47.61 | 114 | Retail sale of new books in specialized stores |
| 82.3 | 113 | Organization of conferences and fairs |
| 70.21 | 96 | Public relations and communication |
| 62.01 | 88 | Production of software not related to the edition |
| 73.11.01 | 87 | Creation of advertising campaigns |
| 18.13 | 78 | Preparations for the press and the media |
| 74.10.1 | 76 | Fashion and industrial design activities |
| 16.29.19 | 75 | Manufacture of other miscellaneous wood products (except furniture) |

| | | |
|----------|----|--|
| 74.10.21 | 73 | Activities of graphic designers of web pages |
| 90.03.02 | 73 | Conservation and restoration of works of art |
| 74.20.2 | 53 | Photographic laboratories for development and printing |
| 63.12 | 53 | Web portals |
| 90.03.09 | 45 | Other artistic and literary creations |
| 74.10.9 | 44 | Other design activities |
| 23.41 | 43 | Manufacture of ceramic products for domestic and ornamental purposes |
| 94 | 38 | Activities of membership organizations |
| 85.52.09 | 31 | Other cultural background |
| 59.14 | 31 | Cinematographic projection activities |
| 73.11.02 | 28 | Conducting marketing campaigns and other advertising services |
| 18.14 | 26 | Bookbinding and related services |
| 71.11 | 25 | Activities of architectural firms |
| 85.52.01 | 24 | Dance courses |
| 47.78.31 | 24 | Retail sale of art objects (including art galleries) |
| 85.59.2 | 23 | Training courses and professional refresher courses |
| 73.11 | 21 | Advertising agencies |
| 59.20.1 | 21 | Edition of sound recordings |
| 58.29 | 20 | Edition of other software |
| 63.99 | 20 | Other information service activities |
| 13.2 | 19 | Textile |
| 58.19 | 18 | Other editorial activities |
| 90.02.01 | 18 | Activities in support of performing arts |
| 90.01.09 | 16 | Other type of performing arts |
| 91.02 | 16 | Activities of Museums |



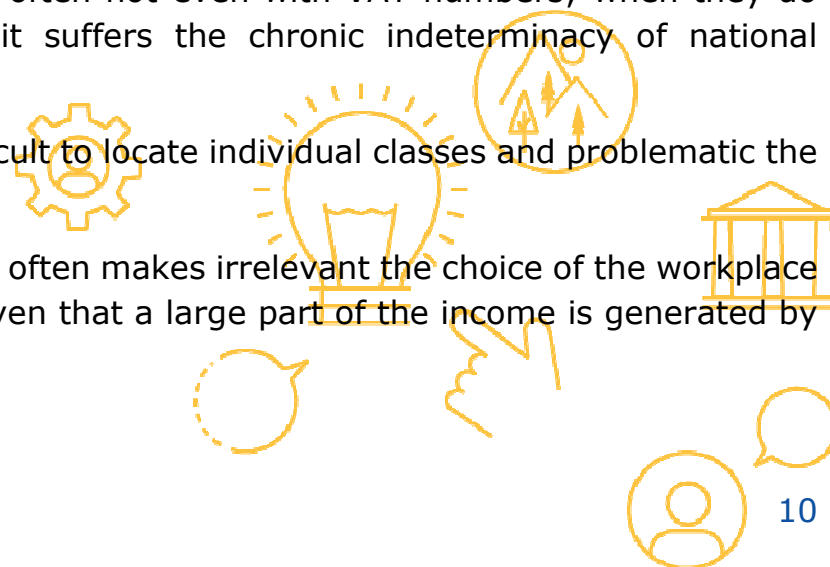
| | | |
|---------|----|---|
| 74.10.2 | 15 | Activities of graphic designers |
| 71.1 | 15 | Activities of architecture, engineering and other technical sectors |

This approach is aimed at giving concreteness and operability to projects often characterized by an excessive level of abstraction, however it does present some limits. The ATECO classification, in fact, does not record:

- pure artists and creatives who don't belong to a corporate organization;
- freelancers and self-employed workers who are not registered in the Chamber of Commerce registers (considering that the tendency rate of non-registration tends to increase);
- innovators / edging professionals not yet classifiable (the ATECO classification dates back to 2007);
- creative hubs and cultural incubators, which often have misleading classifications.

Furthermore, most of the subjects operating in the field of ICCs:

- normally do not operate through corporate structures and often not even with VAT numbers; when they do (e.g. in the form of social enterprise or benefit enterprise) it suffers the chronic indeterminacy of national implementation regulations);
- practice multi-activity by necessity or choice, making it difficult to locate individual classes and problematic the identification of the prevailing one;
- has high mobility, both nationally and internationally, which often makes irrelevant the choice of the workplace or the application of geographically rigid identification criteria, given that a large part of the income is generated by non-regional customers;



- denotes physiologically a very high birth/mortality rate.

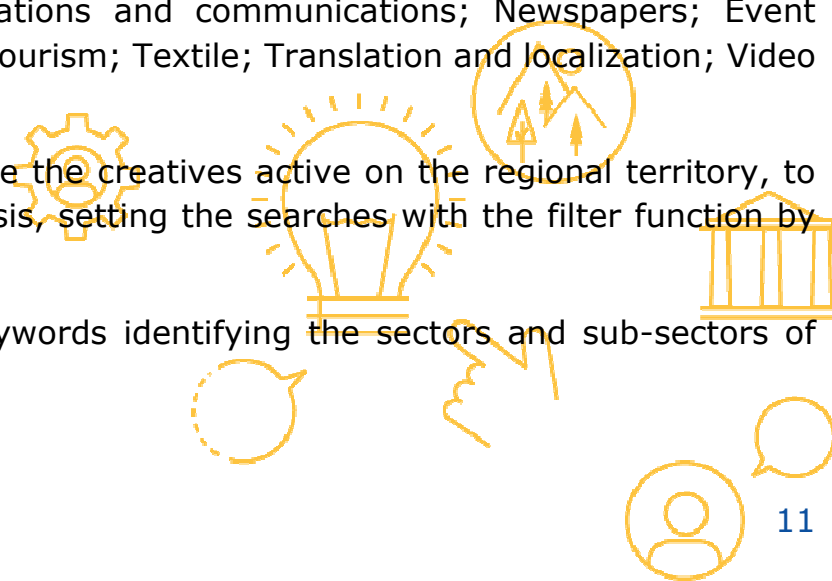
Chamber of Commerce data and/or those taken from national accounts, cannot profile the emerging professions in a complete and updated way, nor they take into account the most innovative enterprises and individuals capable of activating cross-fertilization processes. For these reasons, another research was conducted, intersecting the ATECO mapping with the examination of the professional social network LinkedIn, which maps creative professionals in the regional territory by offering a quantification based on self-determination criteria of the job title and the sector of belonging.

Mapping through LinkedIn

Through the LinkedIn advanced search tool, creative professionals active in the four provinces of Friuli-Venezia Giulia have been "registered", grouping them into 32 professional areas that refer to the ICCs: Accessories and fashion; Animation; Architecture and design; Furniture; Performing arts; Arts and crafts; Fine Arts; Luxury goods and jewelery; Libraries; Paper and forest products; Cinematography and films; Design; Publishing; Photography; Management of non-profit organizations; Entertainment; Marketing and advertising; Online media; Radio and television media; Museums and institutions; Music; Average production; Graphic design; Public relations and communications; Newspapers; Event services; Print; Recreational facilities and services; Leisure, travel and tourism; Textile; Translation and localization; Video games.

Starting from the sectoral filter, it was possible to quantify and localize the creatives active on the regional territory, to date almost 32,000; the provincial matrix was used as a territorial basis, setting the searches with the filter function by location.

The reliability of the research was proven by the insertion of the keywords identifying the sectors and sub-sectors of reference.



To ensure the reliability of the data obtained, it was double-checked that the number of creative workers actually came from the tracked sector; in this regard LinkedIn itself helped us: by entering the keyword, the system automatically reports both the reference sectors and the similar ones. In this way, for example, to calculate the number of workers active in the "Animation" sector, all professionals in the sector were included, but not those who by "Animation" mean 3D graphic modeling, who were inserted more correctly in the "Architecture and design" category.

With respect to the data on employed people that emerged from the analysis of the ATECO data, the test on LinkedIn provided very interesting insights: although it was an exercise conducted by hand, using the basic functions of the free version, information related to 32,000 individuals emerged (number which already excluded high school and university students), providing valuable information on emerging segments: for example 445 people are employed in the field of cinema and film, 1,413 in the field of design and 382 in the field of animation.

These are numbers that are often not found in surveys based on chamber of commerce data or on national accounts, but they are the real objective of any serious cross-fertilization project, also because LinkedIn contains the individual data and contacts of the individual subjects, constituting de facto a professional registry that possesses all the information that a regional policy maker may need.

Table 4 summarizes the proportion of people working in the 32 selected sectors, while the graph below shows the distribution of the first 10 registered sectors divided by the 4 provinces.

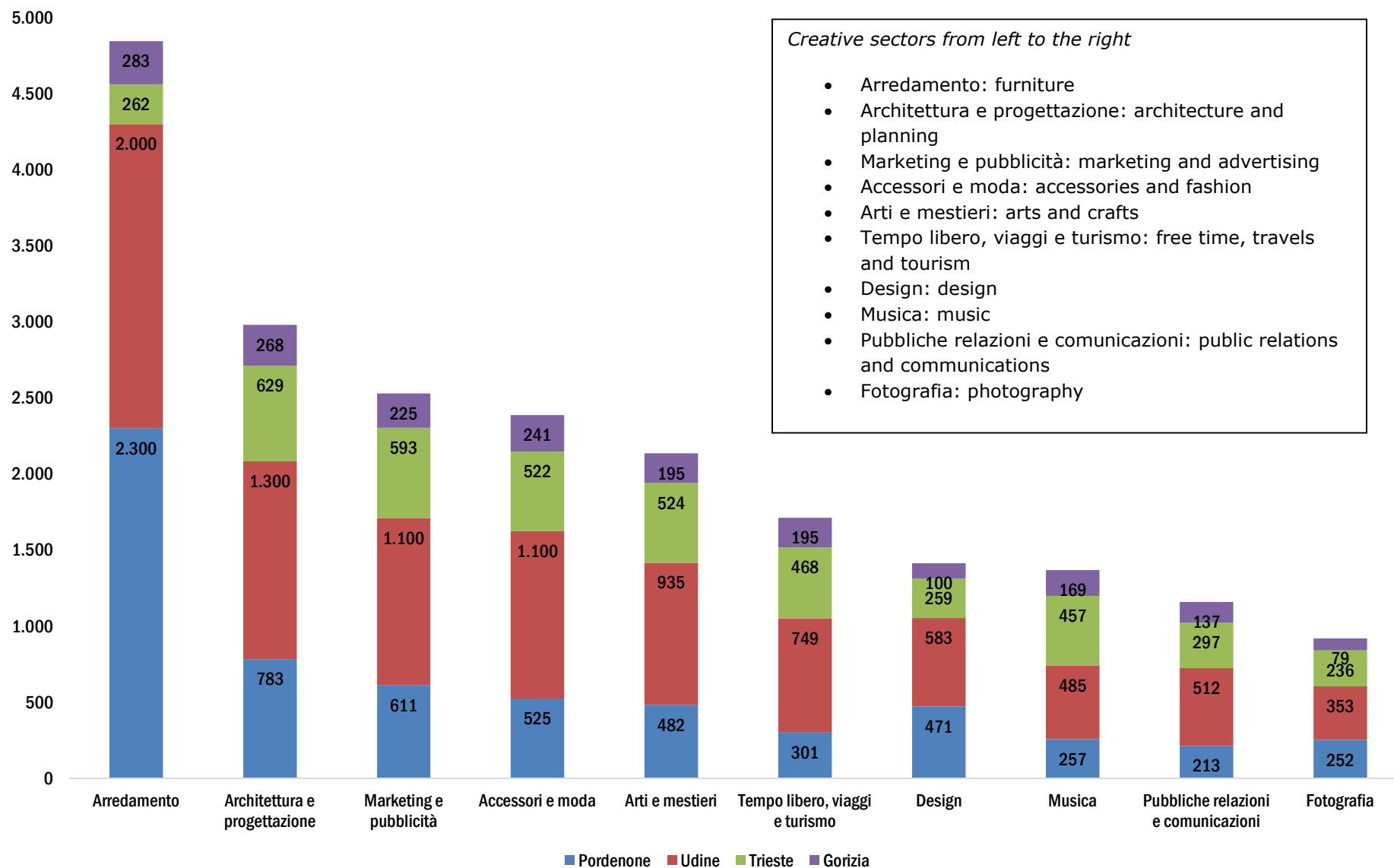
Table 4. number of professionals registered on LinkedIn and registered in the Friuli-Venezia Giulia Region in the ICCs.

| Sector | Professionals registered | % of tot | Sector | Professionals registered | % of tot |
|---------------------------|--------------------------|----------|---------------|--------------------------|----------|
| Furniture | 4,845 | 15.2% | Print | 577 | 1.8% |
| Architecture and planning | 2,980 | 9.4% | Entertainment | 544 | 1.7% |

| | | | | | |
|-------------------------------------|-------|------|---|-----|------|
| Marketing and advertising | 2,529 | 7.9% | Textile | 528 | 1.7% |
| Accessories and fashion | 2,388 | 7.5% | Management of non-profit organizations | 504 | 1.6% |
| Arts and crafts | 2,136 | 6.7% | Cinematography and films | 445 | 1.4% |
| Leisure, travel and tourism | 1,713 | 5.4% | Luxury goods and jewelry | 398 | 1.2% |
| Design | 1,413 | 4.4% | Animation | 382 | 1.2% |
| Music | 1,368 | 4.3% | Paper and forest products | 372 | 1.2% |
| Public relations and communications | 1,159 | 3.6% | Media production | 318 | 1.0% |
| Photography | 920 | 2.9% | Radio and television media | 285 | 0.9% |
| Translation and localization | 913 | 2.9% | Online media | 254 | 0.8% |
| Fine Arts | 909 | 2.9% | Libraries | 235 | 0.7% |
| Performing arts | 874 | 2.7% | Museums and institutions | 230 | 0.7% |
| Publishing | 804 | 2.5% | Facilities and services for recreational activities | 196 | 0.6% |
| Graphic design | 788 | 2.5% | Newspapers | 137 | 0.4% |
| Event services | 625 | 2.0% | Video games | 101 | 0.3% |



Graph 2. First 10 creative sectors registered on LinkedIn per province



LinkedIn members have the opportunity to freely indicate their job title, an element that allows photographing the variety of professions in the creative and cultural sector where some professional categories are difficult to represent by a more traditional classification such as ATECO. For example, only in the "Museums and institutions" category are various professional profiles present: archaeologist, museum guide, educational operator, event organizer, HR specialist, curator, exhibition assistant, web content editor, art historian, bookshop manager, employee reception, cultural operator, freelancer, collaborator, director, librarian, sound designer, cultural activities manager, project manager, conservator, cultural communication expert, press officer, science editor, archivist, interior designer, operator of museum custody and reception services , registrar, etc.

LinkedIn has proven to be a useful tool to map and above all intercept companies and professionals operating in the ICCs to start cross-fertilization projects with cultural institutions and more traditional industries active on the regional territory, taking advantage of the microgranularity of the detection of the social network, which allows to conduct research on small territorial scales.

The overlap between ATECO data and LinkedIn data has made it possible to uniformly and punctually cover the entire universe of ICCs, guaranteeing the possibility of identifying the ideal subjects; in this sense, to map the most reactive subjects to the cross-fertilization proposals, we proceeded with the selection of the realities already present in the **regional databases** thanks to the listening process put in place with the interest groups (companies, associations, individual professionals, etc.) and thanks to the work carried out within the SACHE project "Smart Accelerators of Creative Heritage Entrepreneurship", which has identified some types of ICC companies in the area that already have collaborations with cultural institutions.

