State of Art and SWOT Analysis of the Friuli Venezia Giulia Region CCI Sector

1.Key statistics about Friuli Venezia Giulia region

a. GENERAL INFORMATION

Autonomous Region Friuli Venezia Giulia region (FVG), 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. FVG has a low weight in demographic and economic terms, but certainly not a marginal one. 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.

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 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.

Table 1 – GDP and GDP per capita

Mln. Euro	2008	2009	2010	2011	2012	2013	2014	2015
FVG	35,8	33,8	35,0	35,7	34,6	35,1	35,5	35,7
Italy N.E.	362,1	347,5	355,5	367,3	362,9	365,4	371,6	376,8
Italy	1.632,2	1.572,9	1.604,5	1.637,5	1.613,3	1.604,6	1.620,4	1.642,4
% Italy N.E.	22,2%	22,1%	22,2%	22,4%	22,5%	22,8%	22,9%	22,9%
% FVG	2,2%	2,1%	2,2%	2,2%	2,1%	2,2%	2,2%	2,2%

Source: ISTAT

In the last 15 years, FVG population has remained stable due to positive net migration flows. As of 31.12.2015, the residents amounted to 1.221.218 inhabitants, representing 2.01% of the Italian population. [1]

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

1 http://www.regione.fvg.it/rafvg/export/sites/default/RAFVG/GEN/statistica/Allegati/04112016_Regione_in_cifre_2016_-_Sintesi_dei_dati.pdf

Italy’s economic recovery is set to continue at a modest pace (from -0,3% in 2014 to 1,0% in 2018), as still tight financing conditions and uncertainty hold back a stronger recovery. The phasing out of incentives for new hires is expected to lead to a deceleration in employment growth. The rise in energy prices sustains headline inflation while wage pressures remain muted. Deficit and debt are both set to broadly stabilize as a ratio of GDP.

b. CCI

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. The reclassification of economic activities between ATECO 2002 and ATECO 2007 does not allow, at the level of 4 and 5 digits, to reconstruct the series before 2009, as partial assignments were made between new and old codes.

Table 2 - Cultural and Creative Sectors[2]

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 (**3**)*; Communication and branding (**3**)*; Design (**4**)*;
Creative-driven production of goods and services	Creative-driven production of goods and services (**32**)*

Source: Symbola Foundation – Union of Chambers(*) Classes and Categories Ateco 2007 by Subsector

This set of economic activities subsumes the definition of EU Regulation No. 1295/2013 establishing the Creative Europe Programme (2014-2020) and the industries definition of the EU Commission document COM (2010) 183 final, "Green Paper -The cultural and creative

[2] Symbola Foundation – Union of Chambers, Io sono Cultura 2014, Rome, 2015, pp.268-270.

industries, unlocking the potential ' which defines in a more analytical way the creative sectors:" those **industries that use culture as an input and have a cultural dimension, although their output is mainly functional**. This classification includes architecture and design, which integrate creative elements into wider processes, as well as subsectors such as **graphic design, fashion design or advertising**. At a more peripheral level, many other industries, among others those of **tourism and new technologies**, rely on content production for their development and are therefore **to some extent interdependent with CCIs**".

In line with this definition also the **decoration, fashion, furniture, lighting, interior design materials and luxury goods, jewelry and toys**, etc., are creative industries related to European materials and European manufacturing industries[3]. The previous two rather broad definitions of European derivation, allow the inclusion of the Creative and Cultural industries in the Smart Specialization Strategy of Friuli Venezia Giulia.

As Eurostat and OECD do not produce regional statistics, in order to allow some comparison this standard was chosen as, at least at the aggregate level of the system of cultural and creative industries and the core of the cultural and creative enterprises Foundation Symbola Unioncamere public, although not in a systematic way, data at regional level.

Table 3 - Comparative Table Italy-FVG (cultural and creative system)

	2009	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**
Number of SMEs in CCI sector in Italy	*n.a*	*n.a*	443.653 (7,3%)	458.243 (7,5%)	443.458 (7,3%)	443.208 (7,3%)	412.521 (6,7%)
Number of SMEs in CCIs in FVG	*n.a*	*n.a*	8.758 (8,0%)	8.970 (8,3%)	8.622 (8,0%)	8.475,1 (8,1%)	8.723[+] (8,3%)
Number of employed in CCIs in Italy (.000)	1.412,0 5,0%	1.390,6 5,6%	1.488,1 5,6%	1.397,1 5,7%	1.393,6 5,8%	1.450,8 5,9%	1.491,9 6,1%
Number of employed in CCIs in FVG	*n.a*	33.841 6,6%	36.500 7,1%	36.700 6,4%	32.955 6,5%	34.800 6,5%	32.900 6,3%
Total added value of CCI SMEs in Italy (mrd.)	68,1 mrd. 5,2%	68,1 mrd. 4,9%	75,8 mrd. 5,4%	75,6 mrd. 5,4%	80,0 mrd. 5,4%	78,6 mrd. 5,7%	89,7 mrd. 6,1%
Added value of CCI SMEs in	1.784,3 5,7%	1.841,0 5,7%	1.866,3 5,7%	1.865,9 5,8%	1.767,1 5,7%	1.800,1 5,7%	1.725,5 5,7%

3 European Commission Directorate-General for Research and Innovation Directorate G— Industrial Technologies Unit G3 Materials, *Materials research and innovation in the creative industries*, Report on the round table discussion, Brussels, 5 October 2012, Brussels, October 2012, page 6.

FVG (mln.)							
Share in exports of CCI SMEs on national level	10,6% (30.696 mio)	10,2% (34.417 mio)	10,1% (38.138,5 mio)	10,1% (39.418 mio)	10,7% (41.639 mio)	10,8% (43.176 mio)	*n.a*
Share in exports of CCI SMEs on regional level	18,2%	15,9%	13,8%	16,1%	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. + Author estimate on ASIA (Archive of Active Enterprises) - ISTAT.

Source: Symbola Foundation-Umnion of Chambers, "Io sono Cultura" 2012-2016;

Tab. 4 - Percentage composition of CCI's SMEs by sector and sub-sector in Italy

	2009	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**
Architecture	*n.a.*	*n.a.*	31,7	31,7	34,1	34,5	15,1
Handicraft	*n.a.*	*n.a.*	22,4	23,4	*n.a.*	*n.a.*	*n.a.*
Communication and Branding	*n.a.*	*n.a.*	7,6	7,3	7,4	7,3	10,6
Design and Production of Style	*n.a.*	*n.a.*	6,3	5,2	*n.a.*	*n.a.*	*n.a.*
Design	*n.a.*	*n.a.*	*n.a.*	*n.a.*	3,3	3,4	4,6
Creative Industries	*n.a.*	*n.a.*	*n.a.*	*n.a.*	44,8	45,2	30,3
Film, Video, Radio, Tv	*n.a.*	*n.a.*	3,1	2,9	2,7	2,7	3,9
Books & Press	*n.a.*	*n.a.*	12,1	11,9	11,2	11,0	23,9
Music	*n.a.*	*n.a.*	0,5	0,5	0,5	0,5	1,0
Video Games and Software	*n.a.*	*n.a.*	10,0	10,1	10,2	10,3	7,9
Cultural Industries	*n.a.*	*n.a.*	25,7	25,4	24,6	24,5	*n.a.*
Historic-Artistic Heritage	*n.a.*	*n.a.*	0,2	0,3	0,2	0,2	0,2
Performing and Visual Arts	*n.a.*	*n.a.*	6,1	6,6	6,1	6,2	2,5
Production of Goods and Services Creative-Driven	*n.a.*	*n.a.*	*n.a.*	*n.a.*	24,2	23,8	*n.a.*
Total	100	100	100	100	100	100	100

Source: Symbola Foundation-Umnion of Chambers, "Io sono Cultura", 2012-2016;

Tab. 5 - Breakdown of the Added Value of CCIs in Italy

	2009	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**
Architecture	9,8	12,6	16,4	15,9	16,8	16,8	5,6
Handicraft	15,7	13,0	13,8	13,5	*n.a.*	*n.a.*	*n.a.*
Communication and Branding	4,7	5,5	5,2	5,8	5,3	5,2	4,9
Design and Production of Style	31,1	16,0	11,8	11,5	*n.a.*	*n.a.*	*n.a.*
Design	*n.a.*	*n.a.*	*n.a.*	*n.a.*	2,9	3,0	3,6
Creative Industries	62,4	49,3	47,1	47,1	25,0	25,0	14,2

Film, Video, Radio, Tv	5,3	7,9	10,3	10,7	10,7	10,9	8,3
Books & Press	14,6	18,7	19,3	19,2	19,0	18,7	15,4
Music	0,2	0,4	0,5	0,5	0,5	0,5	0,3
Video Games and Software	13,5	17,6	16,4	16,0	16,1	16,6	12,5
Cultural Industries	33,5	44,6	46,5	46,4	46,4	46,8	36,6
Historic-Artistic Heritage	0,5	1,2	1,4	1,4	1,5	1,5	3,2
Performing and Visual Arts	3,5	4,8	5,0	5,1	5,2	5,3	7,9
Production of Goods and Services Creative-Driven	*n.a.*	*n.a.*	*n.a.*	*n.a.*	22,0	21,5	38,2
Total	100,0	100,0	100,0	100,0	100,0	100,0	100,0

Source: Symbola Foundation-Umnion of Chambers, "Io sono Cultura" 2012-2016;

Tab. 6 - Breakdown of the employed in the cultural production system by sector and sub-sector in Italy

%	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**
Architecture	15,9	16,0	15,9	16,0	16,1	5,8
Handicraft	17,7	17,8	17,7	n.a.	n.a.	n.a.
Communication and Branding	5,7	5,7	5,8	5,8	5,8	6,7
Design and Production of Style	13,8	13,9	13,9	*n.a.*	*n.a.*	*n.a.*
Design	*n.a.*	*n.a.*	*n.a.*	3,5	3,6	4,2
Creative Industries	35,6	35,6	35,5	25,3	25,4	16,7
Film, Video, Radio, Tv	n.a.	5,3	5,3	5,3	5,3	4,0
Books & Press	n.a.	17,4	17,3	17,1	16,9	*n.a.*
Music	n.a.	0,4	0,4	0,4	0,4	*n.a.*
Video Games and Software	n.a.	16,1	16,1	16,3	16,8	10,7
Cultural Industries	40,4	39,2	39,1	39,0	39,4	*n.a.*
Historic-Artistic Heritage	1,2	1,5	1,6	1,6	1,7	3,3
Performing and Visual Arts	5,2	5,9	6,0	6,1	6,2	8,2
Production of Goods and Services Creative-Driven	*n.a.*	*n.a.*	*n.a.*	27,9	27,3	*n.a.*
Total	100,0	100,0	100,0	100,0	100,0	100,0

Source: Symbola Foundation-Umnion of Chambers, "Io sono Cultura" , 2012-2016;

Tab. 7 - Percentage composition of CCI's exports by sector and sub-sector in Italy

(milioni di euro)	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**
Architecture	*n.a.*	*n.a.*	*n.a.*	*n.a.*	*n.a.*	*n.a.*	*n.a.*
Handicraft	*n.a.*	*n.a.*	*n.a.*	*n.a.*	*n.a.*	*n.a.*	*n.a.*
Communication and	*n.a.*	*n.a.*	*n.a.*	*n.a.*	*n.a.*	*n.a.*	*n.a.*

Branding							
Design and Production of Style	91,3%	91,0%	91,7%	92,1%	*n.a.*	*n.a.*	*n.a.*
Design	*n.a.*	*n.a.*	*n.a.*	*n.a.*	*n.a.*	*n.a.*	*n.a.*
Creative Industries	91,3%	91,0%	91,7%	92,1%	n.a.	n.a.	n.a.
Film, Video, Radio, Tv	2,7%	2,7%	2,7%	2,4%	1,9%	2,0%	2,1%
Books & Press	5,1%	5,3%	4,7%	4,7%	4,5%	4,5%	3,8%
Music	0,1%	0,1%	0,1%	0,1%	0,1%	0,1%	0,1%
Video Games and Software	0,8%	0,8%	0,8%	0,7%	0,7%	0,7%	0,7%
Cultural Industries	8,7%	8,9%	8,3%	7,9%	7,2%	7,2%	6,6%
Historic-Artistic Heritage	0,0%	0,1%	0,0%	0,0%	0,1%	0,0%	0,1%
Performing and Visual Arts	*n.a.*	*n.a.*	*n.a.*	*n.a.*	*n.a.*	*n.a.*	*n.a.*
Production of Goods and Services Creative-Driven	*n.a.*	*n.a.*	*n.a.*	*n.a.*	92,7%	92,8%	93,4%
Total	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%

Source: Symbola Foundation-Umnion of Chambers, “Io sono Cultura” 2012-2016;

Tab. 8 - Brakdown of CCI’s SMEs by sector and sub-sector in FVG (core)

	2010	2011	2012	2013	2014	2015*
Architecture	27,2%	17,4%	21,2%	24,9%	24,7%	*21,2%*
Communication and Branding	9,3%	10,1%	9,8%	9,6%	9,6%	*12,9%*
Design	14,0%	15,4%	15,2%	15,0%	15,4%	*8,7%*
Creative Industries	40,1%	44,2%	42,2%	40,7%	40,1%	*53,1%*
Film, Video, Radio, Tv	2,6%	2,9%	2,7%	2,6%	3,0%	*4,6%*
Books & Press	18,3%	20,2%	19,4%	18,7%	17,7%	*34,0%*
Music	0,5%	0,5%	0,5%	0,4%	0,5%	*1,2%*
Video Games and Software	18,7%	20,6%	19,9%	19,0%	18,9%	*13,3%*
Cultural Industries	40,1%	44,0%	42,5%	40,7%	40,1%	*53,1%*
Historic-Artistic Heritage	0,3%	0,4%	0,3%	0,3%	0,4%	*0,3%*
Performing and Visual Arts	9,1%	12,5%	10,9%	9,4%	9,8%	*3,8%*

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

Tab. 9 - Breakdown of the employed in the cultural production system by sector and sub-sector in FVG (core)

%	2010	2011	2012	2013	2014	2015

Architecture	25,1%	21,7%	22,9%	24,2%	23,4%	n.a.
Communication and Branding	6,4%	5,9%	6,2%	6,6%	6,6%	n.a.
Design	6,9%	7,0%	7,2%	7,5%	8,0%	n.a.
Creative Industries	38,4%	34,6%	36,3%	38,3%	38,0%	n.a.
Film, Video, Radio, Tv	3,3%	3,0%	2,9%	2,9%	2,9%	n.a.
Books & Press	25,2%	26,0%	25,3%	24,7%	23,3%	n.a.
Music	0,3%	0,2%	0,2%	0,2%	0,2%	n.a.
Video Games and Software	25,2%	26,2%	25,6%	25,0%	27,0%	n.a.
Cultural Industries	54,0%	55,4%	54,0%	52,8%	53,4%	n.a.
Historic-Artistic Heritage	0,5%	1,0%	1,0%	1,0%	1,0%	n.a.
Performing and Visual Arts	7,1%	9,0%	8,5%	8,0%	7,5%	n.a.

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

Tab. 10 - Percentage composition of CCI's turnover* by sector and sub-sector in FVG

%	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**
Architecture	18,6%	22,1%	22,8%	23,8%	14,9%	*n.a.*
Communication and Branding	7,6%	7,5%	7,9%	8,1%	3,4%	*n.a.*
Design	4,0%	4,6%	4,7%	4,9%	2,3%	*n.a.*
Creative Industries	30,2%	34,2%	35,4%	36,8%	20,6%	*n.a.*
Film, Video, Radio, Tv	4,0%	3,9%	3,2%	2,6%	4,7%	*n.a.*
Books & Press	31%	27%	27%	27%	35%	*n.a.*
Music	0,2%	0,2%	0,2%	0,2%	0,1%	*n.a.*
Video Games and Software	29,2%	34,3%	33,0%	31,6%	44,4%	*n.a.*
Cultural Industries	64,4%	65,4%	63,4%	61,4%	84,2%	*n.a.*
Historic-Artistic Heritage	0,2%	0,3%	0,3%	0,4%	0,2%	*n.a.*
Performing and Visual Arts	5,5%	5,1%	4,8%	4,5%	2,3%	*n.a.*

(*) Author's calculation of the central values of the turnover classes on ASIA (Archive of Active Enterprises) - ISTAT;

2. Characteristics of CCI of FVG 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.

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. So 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).

Regarding the state of internationalization of CCI SMEs in AR FVG, the percentage ratio between the regional ICCs exports and total regional exports, representing the cultural specialization of exports and therefore the degree of internationalization of the cultural system of the AR FVG, it is quite high (average of 16,4% on the period 2009-2015) and stably puts the region among the top five Italian regions after Toscana and Veneto.

The most relevant CCI sectors

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 businesses activities and the added value, 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.

The 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 one of 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, Friuli-Venezia Giulia Film Commission with the Film Fund (and its innovative financing criteria) and the Audiovisual Fund of Friuli-Venezia Giulia 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; etc.). All of them were 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.

The design industry is at the center of initiatives, both from the regional CCICs that from 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. Udine province, NUTS-3 region part of NUTS-2 FVG AR, was in 2014 the sixth NUTS-3 region in EU-28 by Community Design registrations, accounting for 1% of EU-28 CDs registrations and with 1.115,3 CD registrations for million inhabitants (148,1 EU-28)[4].

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)[5]. 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 Italian Film Commission (IFC), national coordination of the 17 Film Commissions 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 it[6]. 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.

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 the management of the archaeological site of Aquileia (Aquileia Foundation) and the increasing number of exhibitions and cultural events of international importance at Villa

[4] Eurostat Regional Yearbook 2016, p.161.
[5] Rapporto sull'Economia del Friuli Venezia Giulia - Start-Up, Imprese Creative e Culturali, p. 38.
[6] http://www.italianfilmcommission.it/news/aesvi-e-ifc-insieme-per-promuovere-lindustria-nazionale-dei-videogiochi.pdf

Manin added recently with the establishment of the new Regional Agency for Cultural Heritage (ERPAC). Moreover, an ongoing important reform of the regional system of museum will lead to a reorganization of libraries and historical archives. Foundation Aquileia 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.

Tab. 11 - Position of Cultural and Creative Sectors of AR FVG in 2015 in the Regional Matrix for incidence of Added Value and Number of businesses

	M	BP	HAH	PAVA	PGSCD	A	C&B	D	FVRT	V&S
Added Value	11	10	18	18	3	19	10	7	12	9
Number of SMEs in FVG	*10*	*7*	*12*	*10*	*3*	*8*	*5*	*3*	*5*	*4*
Average Position	*10,5*	*8,5*	*15*	*14*	***3***	*13,5*	***7,5***	***5***	***8,5***	***6,5***

Source: "I am Culture 2016" (in Italian), 2016

3. Main stakeholders of CCI of FVG region

The stakeholders that could be involved in the project are around 30 plus a number of associations, start-ups and other subjects.

The responsible regional institutions are 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. Moreover, 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.

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.

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) three Chambers of Commerce, Industry and Crafts (Udine, Pordenone, Venezia Giulia) and Uniocamere FVG as they organize the Days of Economy and the 14th edition was dedicated to the CCI.

Incubators (4). 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 TECHNOLOGICAL POLE OF PORDENONE "Andrea Galvani" focus on co-working spaces, Innovative materials, Internationalization of innovative start-ups. FRIULI INNOVATION is a center for research and technology transfer that is in the Digital Technology District, DI.TE.DI. Friuli Innovation manages the business incubator Techno Seed.

Banking Foundations (3). 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.

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" manages the promotion of cultural and hospitality residences and the promotion or direct participation in special initiatives of culture and tourism regional development.

AQUILEIA FOUNDATION 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.

FRIULI VENEZIA GIULIA FILM COMMISSION - The Film Commission of Friuli Venezia Giulia, born in 2000, has assisted hundreds of productions, including films, documentaries, television series, music videos and commercials.

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.

MuDeFri is the acronym for the Design Museum of Friuli Venezia Giulia. This virtual Museum, born in 2016 thanks to a crowdfunding, thanks to this form of self-financing will bring forward the reflections on design and build the memory of the creative heritage of Companies of Friuli Venezia Giulia.

Associations and Businesses representing Performing Arts and Creative Industries (4). 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. Workshops and master classes, presentations and meetings put in contact professionals and international artists with the public, students and fans. 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 audiovisual sector, sharing and developing best practices with the rest of Europe. 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 with 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 actually an international web platform for fashion, accessories and jewellery designers providing support, visibility/networking and showcasing the most interesting young talents.

University Departments (2) - University of Trieste - Department of Engineering and Architecture; Department of Economics and Statistics – of University of Udine.

In May 2016 the innovative start-ups belonging to CCIs were about 80 including 48 belonging to Industry and Crafts, 29 to the Production Software and the IT Consulting and 6 to Architecture and Engineering Studies. In addition, a number of companies are in the process of incubation and post-incubation imminent by the incubators. Both incubators that the chamber system may involve a number of start-ups in the planned local activities.[7]

4. SWOT analysis (short version)

STRENGTHS	WEAKNESSES
• *Co-presence of centers of tertiary education* academies and institute of technology, *industrial cluster* (Agribusiness; engineering; maritime technologies; "smart health") and the CCI. • Presence *"extended" inter-sectoral chains* which cross the cultural and creative sectors, especially the creative-driven sectors (tourism-fashion-film; wood-furniture-nautical) • P*resence of structures (incubators) that facilitate innovation processes ("from idea to market")* using models of support to the creation / development of enterprise • *Promotion Events of businesses / talent / products in some CCI* (eg: Mittel Moda; Film Festivals; International Talent Support; Design Week) •	• *Insufficient capacity to attract investments* due primarily to poor ability to promote and enhance the entrepreneurial projects to financial institutions, in a marketing logic • *Inadequate managerial skills and lack of networking capacity* often add up to the lack of a solid business model. • *Lack of facilities and / or events (Bar-Camp) putting in contact in a non-pre-structured way* artists, designers, culture and entertainment workers, public administrators, funders, researchers). • Low confidence of the business world on the ability of the ICC to bring economic benefits in common projects • *Low presence of entrepreneurs "under 35"* as FVG region is the Italian region with the lowest incidence of "under 35"

[7] Unioncamere Friuli Venezia Giulia, *Rapporto sull'Economia del Friuli Venezia Giulia - Start-Up, Imprese Creative e Culturali*, 14° giornata dell'Economia, Udine, May 2016, p.38.

	companies (8.2% in 2015; Italy 10.7%) • Inexistence of structured links between education and CCIs
OPPORTUNITIES	**THREATS**
• *Development of specific legislation for CCI SMEs on tax issues* (income tax deductions; cash taxes), *employment and unemployment* (benefits for a range of professional profiles) • Identification, at regional and national level, of *ways of promoting and supporting young entrepreneurs ("under 35") more effective than current ones*, failing to counter the downward trend of their impact and weight on the national and regional productive systems. • *Promotional Events of cross-border CCIs companies and talents in a territorial marketing logic* (cultural and creative local brand, eg. "Brained in Alpe-Adria"). • *Development of alternative financing services and tools, starting from the crowdfunding platforms* (32 nowadays) "reward based" operating in Italy. • *Development of dedicated structures* (innovation centers and cultural experimentation) *and interaction platforms* (web platforms of co-creation and collaboration between artists) to develop the "supply chain" of education, training, civil society / institutions / associations, artists and cultural and creative enterprises.	• *The banking sector in the first place, lack adequate business valuation models for CCI businesses*, both for capital assets (intangible assets) than revenues (quantification of services). • *"Cognitive" gap between the institutions and CCIs*: institutions often miss to identify the needs and requirements of the start-ups operating in the creative sector. • Further *worsening of business confidence and increase of risk aversion* - primarily of the innovative and creative startuppers - due to the protracted seven-years crisis for the Italian economy and the uncertain internal and external growth prospects • *Uncertain sustainability of the Promotion events of businesses / talent in different CCI*, as sustainability is strongly linked to the economic cycle and the variable results of fund-rasing. • Data gap

5. Regional policy

Friuli Venezia Giulia AR 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.

As of 31.12.2015, the residents amounted to 1.221.218 inhabitants, representing 2.01% of the Italian population.

As regards the infrastructure, the railway network extends for 472 km of lines of which 299 km of double track. The region is making efforts, at political and technical level, nationally and internationally, so that new high capacity and high-speed (HS / HC) lines they are designed and enter the national agenda. These lines are: the European Railway axis Adriatic - Baltic; the Mediterranean Corridor (former Pan-European V) Lisbon –Lvov. In FVG region, there are two ports: the most important is that of Trieste, a port with ferry traffic, freight ships and shipyards, industrial terminals and a petroleum terminal that serves the pipeline Trieste - Ingolstadt. The airport service of Friuli-Venezia Giulia is composed of an international civil airport and two military airbases. The road and motorway network connects the whole territory with the Po Valley, Austria and Slovenia. The ordinary road network has undergone profound changes in management, as they have been assigned to the ownership and regional management 650.214 kilometers of former state roads, while 269.616 km were state-owned and are managed by the Region and 160.244 kilometers remained to the state.[8]

As regards the economic growth, the latest forecasts point to an FVG AR growth of 1.3% in 2016-2107, The consumptions of families also will register an expansion of 1,4% compared to 0.9% in 2014-2015 period. Investments will show a significant acceleration from -1,6% in 2014-2015 to 3,4% in 2016-2017.

Tab. 12 - FVG Region Main economic aggregates

Aggregates	**2014**	**2015**	**2016**	**2017**
GDP	0,8	0,9	1,3	1,4
Export	5,3	7,3	3,9	4,3
Import	2,5	13,6	2,0	2,5
Fixed Gross Investments	-4,1	0,9	2,9	3,9
Consumptions of families	0,6	1,2	1,3	1,5
Consumptions of Public Administration	-0,2	-0,3	-0,6	-0,5

Source: Prometeia in Political Planning Report 2016-2018 - Region FVG.

FVG has seen an evolution in 2016 in line with the national average. GDP accelerated from + 0.8% to + 1.1% in 2016 (+ 1.0% Italy). The value added has been growing again in 2016, both in industry and in services. Investment growth above the national average has continued from + 1.2% in 2015 (+ 0.8% Italy) and + 2.6% in 2016 (+ 2.3% Italy). The recovery of households income will be among the highest in Italy but mainly will go to fuel savings as household consumption will remain substantially unchanged from 1.4% in 2015 (+ 1.1% Italy) to +1,5% in 2016 (+ 1.3% Italy). The export has registered a strong recovery from + 1.3% in 2015 to + 4.2% of 2016% (from + 4.1% to + 3.1% Italy).

[8]http://www.regione.fvg.it/rafvg/cms/RAFVG/infrastrutture-lavori-pubblici/infrastrutture-logistica-trasporti/

The favorable economic situation reflects in the labor market, with the unemployment rate falling from 8.0% in 2015 to 7.5% in 2016 (from 11.9% to 11.5% in Italy). Employment in the region rose by 0.7% on a trend basis as well as increased the employment rate (+ 0.5%); the unemployment rate, however, remained stable at 8%. The data on the first half of 2016 show an increase in employment by 0.6 percentage points, determined in particular by the increase in services (+ 2.3%) and agriculture (-29.5%). However, employment in industry (-3.4%) and construction (-15.8%) is falling, Also the unemployment rate is decreasing, a percentage point lower in trend terms for a value which totaled 7.6%, slightly higher than that recorded in the North-East area but well below the national average.[9]

As for the main types of economic activity, the "food chain" is one of the most significant segments of the regional economy (it ranks second in importance after the engineering industry) both for its size and for its role in linking more productive sectors (agriculture, food and beverage industry, wholesale and retail trade, catering). The “food chain” also provides a fundamental contribution to the region’s image readily spendable, for example, in the tourism sector[10]. Another of the most important segments of Friuli Venezia Giulia is represented by the engineering sector that coincides with the segment of metallurgy, manufacture of metal products and machinery and equipment. Another relevant manufacturing sector is the so-called "home" system, coincident with all production activities that manufacture goods that find their place in the household (eg. furniture, household appliances, furniture, cutlery and household in general, materials for the building finishing) - meaning even the building products such as tiles, wallpaper and so on[11]. The chemical-pharmaceutical industry includes a wide range of productive activities, in many cases very heterogeneous among themselves, divided into the following three sub-branch: Manufacture of coke, refined petroleum products and nuclear fuel, manufacture of chemicals and manufactured fibers; Manufacture of rubber and plastics. The last two considered branch are of greater importance in terms of employment, especially in Friuli Venezia Giulia.

The BioHighTech industrial sector is represented by companies operating in the field of health (Smart Health) within three Bio-sectors closely linked: the Biomedical (BioMed), the Biotechnology (BioTech) and Bioinformatics (BiolCT).

The scope of specialization of "maritime technologies" includes traditional areas of Friuli Venezia Giulia, highly characteristic given the positioning of the territory, which over time has shaped strong interdependencies with other sectors of the regional economy. This area includes the following sectors: naval and shipbuilding, offshore including its specialized supply chains, transport, logistics services for navigation and yachting. With nearly 7000 people starting to work in 2015, which represents an annual increase of 107%, the

[9] Relazione Economica Friuli Venezia Giulia, pp.2-3.
[10] Regione Autonoma Friuli Venezia Giulia, Strategia regionale di ricerca e innovazione per la specializzazione intelligente del Friuli Venezia Giulia S3, March 2016, p.59.
[11] Regione Autonoma Friuli Venezia Giulia, Strategia regionale di ricerca e innovazione per la specializzazione intelligente del Friuli Venezia Giulia, March 2016, p.62.

shipbuilding sector looks like one of the most promising in terms of employment and growth of companies[12].

The artistic and cultural heritage is for many tourists the drivers and the starting point of their vacation experience.

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[13].

Tab. 13 – FVG CCIs and RIS3

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

Source: Author

Main legal acts which regulate CCI on national and regional levels

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 April 30 1985 163 ", 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 circuits multidisciplinary, 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).[14]

Regional Law 11 August 2014, n. 16 Regional Standards in the field of cultural activities, Article 31 (Cultural District), amended by Law 23/2015 1. The Region, in order

[12]Regione Autonoma Friuli Venezia Giulia, Strategia regionale di ricerca e innovazione per la specializzazione intelligente del Friuli Venezia Giulia, March 2016, p.69.

[13]Regione Autonoma Friuli Venezia Giulia, Strategia regionale di ricerca e innovazione per la specializzazione intelligente del Friuli Venezia Giulia, March 2016, p.79.

[14] http://www.gazzettaufficiale.it/atto/serie_generale/caricaDettaglioAtto/originario?atto.dataPubblicazioneGazzetta=2014-08-19&atto.codiceRedazionale=14A06454&elenco30giorni=false

to make it 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 subjects. Agreement can be signed by: 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.[15]

Regional Law 20 February 2015, n. Rilanciampresa 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 costs (building, first plant set-up access to credit); b) supporting potential entrepreneurs, also in the framework of regional certified incubators, (conception of the business idea. pre-start-up phases of training, co-working, operational and managerial support, provision of tools and workplaces, prediction moments of contact with potential investors); 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. The 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, business start-ups youth and new forms of entrepreneurship. Art. 24 Support for co-working facilities and promotion of the Fab-lab.[16]

Normative Acts, Strategies, Action Plans

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 (the 2016 Stability Law)].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.[17]

Program (year 2016) of urgent measures for urban regeneration and safety of the suburbs of metropolitan cities and municipalities capital of the provinces in order to regenerate down 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.[18]

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[15] https://lexview-int.regione.fvg.it/FontiNormative/xml/xmllex.aspx?anno=2014&legge=16
[16] http://lexview-int.regione.fvg.it/fontinormative/xml/xmlLex.aspx?anno=2015&legge=3&db=DBC
[17] http://www.beniculturali.it/mibac/export/MiBAC/sito-MiBAC/Contenuti/MibacUnif/Comunicati/visualizza_asset.html_1588198437.html
[18] http://www.governo.it/sites/governo.it/files/Bando_periferie_urbane.pdf

"**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 is a planning 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".[19]

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.[20]

Understanding between the Government, the Regions and Autonomous Provinces under Article n. 45 "Residences" of D.M. 01/07/2014. As for the Theatre and Dance, AR FVG adheres, together with other 11 regions, to the Three-year Interregional Project 2015/2017 concerning Artistic Residences, whose core functions are the hospitality and support of productive entities by subjects running dedicated spaces, favoring the circulation and growth.

FVG region strategy and/or action plans related to CCI

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 tourist. 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.[21]

Tab. 14 – 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

[19] http://www.gazzettaufficiale.it/eli/id/2014/07/30/14A06063/sg

[20] http://www.regione.fvg.it/rafvg/cms/RAFVG/fondi-europei-fvg-internazionale/por-fesr/

[21] https://www.regione.fvg.it/rafvg/export/sites/default/RAFVG/GEN/piano_strategico/allegati/11022016_Aggiornamento_piano_strategico_2014-2018.pdf; http://www.regione.fvg.it/rafvg/export/sites/default/RAFVG/GEN/programmazione/allegati/Piano_strategico_RegioneAutonomaFVG.pdf

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

Incentives to promote CCI

"Culture Creates" (Cultura Crea")[22] is a national incentive program to create and develop business initiatives in the cultural sector and cultural tourism industry and to support non-profit organizations that aim to enhance the cultural resources of the territory in the regions of Basilicata, Calabria, Campania, Puglia and Sicily. The program includes three lines of action:

1) support the creation of new businesses in the "core" fields of so-called cultural industries, promoting innovation in production processes, technological development and creativity (42 millions).

2) consolidate and support the activities of existing economic players in the cultural industry, tourism, creative industries, entertainment and traditional and local products, promoting the development of products and services for the enrichment, diversification and qualification of the offer cultural tourism the territorial areas of reference of the attractors (38 millions).

3) promote the creation and the qualification of services and activities related to the management of the cultural attractors and the enjoyment and cultural enhancement, realized by the third sector (27 millions).

22 http://ponculturaesviluppo.beniculturali.it/index.php/programma/assi/asse-ii/asse-ii-cultura-crea/

Region FVG's incentives are targeting the following sectors: Performing Arts and Visual Arts; Cinema and Audiovisual. The Finance Act of 2016 allocates for these incentives around 8.1 million euro.

6. Analysis and identification of main regional experiences and lessons learnt

FVG Film Commission

FVG Film Commission, born in 2000, has assisted hundreds of productions, including films, documentaries, television series, music videos and commercials. FVGFC is a founding member of EUFCN (European Film Commission Network) that is associated with the Film Commission on the European market.

In 2003 the FVG Film Fund was established; the Fund provides funding to productions that choose regional territory for shooting. 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 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.[23]

The 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). The small size of the region, make it possible to attend personally the phase of location scouting.

Contract scheme in audiovisual Production

Another good practice concerns the field of audiovisual production too, an absolute quality chain in Friuli Venezia Giulia. The documentary film "Parents" has triggered unprecedented synergies at the regional level. It is, in fact, the first time that a private company of the territory enters business association with a local production according to business logic. The operation implemented by "Parents" provides for stipulation between the parties of a contract of Association in Participation, with a significant economic intervention by the investor partner. The law of contract by virtue of specific tax incentives for

[23] http://www.fvgfilmcommission.com/en/

interventions in favor of the film industry enables the associated recognition of a tax credit equal to 40% of the financial intake. The payback is linked to the film audience and receipts in movie theaters. As regards Interreg Europe Programme Thematic priorities, this good practice manly realize SMEs competitiveness.

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