EXTENDED ABSTRACT

Title: Culture and creative industries in Genoa

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Subject area: *S01 – Geography of Creative Industries: Why do they cluster?*

Abstract:

The aim of the paper is to quantify the presence of cultural and creative industries in the historical centre and the city of Genoa (Italy) and their dynamics, partly using the approach of *Atmosfera Creativa* (Creative Atmosphere) by Bertacchini and Santagata (2012) as the main reference for the analysis.

The study of cultural and creative industries is functional for the Management plan 2019-2024 of the UNESCO World Heritage site “Le Strade Nuove and the system of the Palazzi dei Rolli”. The main aims are: to structure a knowledge base prior to the plan; to indicate the strengths and weaknesses of contemporary local cultural production; to present an assessment of the development of the sector at city level and a focus on the relative importance in the context of the buffer and core zone of the Site and to specify the strategies that can be used to connect the Site with subjects operating in the cultural field.

Atmosfera Creativa is a model promoted by the CSS-Ebla research center, since 2018 Fondazione Santagata for the Economics of Culture, aimed at identifying and measuring the key elements of an economic development based on culture and creativity.

This approach has been applied mainly in Italy, in particular Piedmont Region in 2011, Milan province in 2014, Ferrara Province in 2015, Monviso Transboundary Biosphere Reserve in 2015 and Cuneo Province in 2016.

According to Santagata's intuition, the main point is the construction of a creative atmosphere capable of mobilizing and guiding the new forces of local development in sectors with high production of cultural goods and services and of favoring the conditions for the unfolding of reciprocal advantages, positive and shared by all the actors involved. In this sense the creative atmosphere is defined as "*the context in which the ability to mobilize the economic and social resources of a territory is measured*" (Santagata and Bertacchini, 2012). Starting from this principle, the local systems can give life to the Creative Atmosphere when they are immersed in a concentration of talents and cultural, natural excellence sufficiently dense: more in a city and in the surrounding territory creative systems are developed, the more the atmosphere reaches the critical mass necessary to produce culture-driven local economic growth. A fundamental requirement is therefore a dense network of actors who frequently interact and mutually support each other in the production of goods and services with a high cultural content, innovative and symbolic, also bearing in mind the principles of sustainability and the defense of cultural diversity, in favor of the future generations.

More in detail, the Creative Atmosphere approach is divided in four steps/parts:

1. *the mapping*, with which is intended to quantify the economic importance of the cultural sector, determined through the measurement of the consistency in terms of number of companies and number of employees aimed at tracing the specializations and the capacity of the territory to express and support creativity;

2. *the factories of culture*, or the study aimed at describing the cultural and natural excellences present in the territory;

3. *the micro-services* of the creative and cultural sectors, or the identification of small-scale production specializations in service and functional to the sector;

4. *the local systems of creativity*, or the recognition of links and networks between subjects along and between production chains.

When the system reaches a critical mass - the "creative critical mass" - the creative atmosphere becomes operational and visible. It therefore becomes sustainable and self-nourished, as well as being able to generate positive externalities and to attract excellence and talents external to the territory, which are thus inserted into the productive chain and bring value back to the territory itself, forming a virtuous circle.

Concerning the application case study of Genoa, for information we mostly relied on the ASIA database by Istat (2012), but we also interacted directly with local cultural operators through interviews and field visits. This approach allowed us to obtain data about the main sectors of interest for the study, based on their ATECO code – which synthesizes the economic activity of a firm into a pre-set category. We mainly focused on 4 sectors at the macro level, that is Material culture, Content industry, Heritage and performing arts and Tourism; as well as the respective subsectors (Historic and cultural heritage, performing arts; Media and new media; Craftmanship and design, Food and beverage, Fashion; and Tourism). According to our model (Bertacchini and Santagata, 2012), these categories make-up the creative tissue of a city; an analysis taking into account such information could provide a better understanding of the hidden dynamics of the territory, and potentially reveal new patterns for development.

One of the dimensions of the analysis is the spatial localization of the industries, to detect the potential presence of clusters – sector-based or in terms of production and supply chain – in particular with respect to the historic center of the city. For this purpose, we considered a spatial delimitation of the historic center of Genoa that took into account different criteria and components. Among these, we particularly put attention on the historical and architectural profile of the settlement; the urban asset of a city grown in time around the harbor and its activities, and at the same time limited by the mountains; and finally, the complex administrative system of its districts.

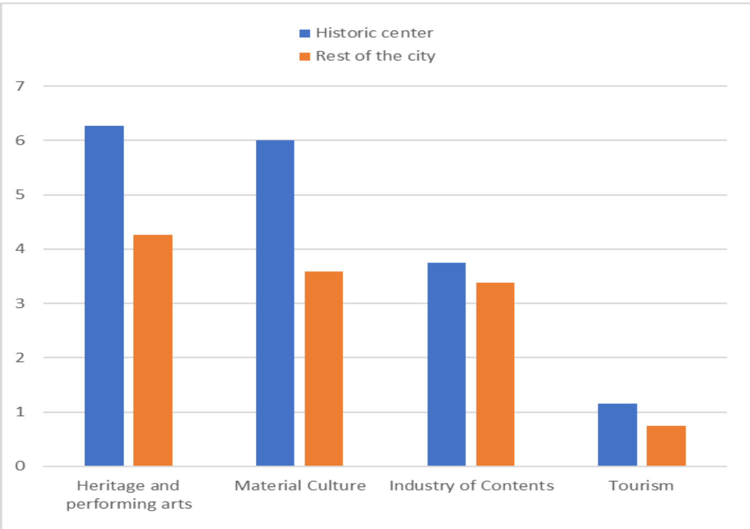
According to the available data, there are 6243 creative and cultural organizations in Genoa, which account for the 12,6% of the industries of the city. Comparing the most recent data with the information of previous years (From 2007 to 2012) we detect a constant – though slight – decrease in the number of firms of high cultural content over time.

In particular, out of all sectors considered, the only one with a positive trend is that of Food and beverages, which registered a 7,9% growth since 2007. This result partly counterbalanced the trend of the corresponding macro-sector, that of Material culture, which saw an overall decrease of 0,6%, with the sizable loss in terms of firms operating in the fashion and in the design and craftmanship industries.

As for Heritage and performing arts, the trend is a noticeable decrease of 11,2% – the highest out of all sectors considered. The decrease in the other two macro-sectors, though relevant, remains under the 10. Respectively, the industries operating in the Tourism sector decreased of the 9,3%, while those ascribable to the Industry of contents registered a loss around the 8%.

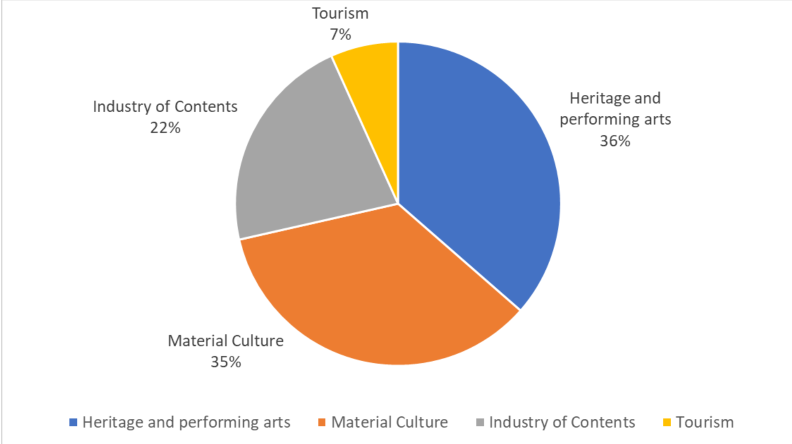
In spatial terms, at first glance the absolute number of cultural and creative industries of all sectors clearly appears highest in the zones outside the historic center of the city – mainly because of dimensions. However, looking at the specialization index of the city center – that is how much the creative and cultural industries weight in the economic tissue inside the perimeter with respect to the other economic activities – we discover how this area is more specialized in the cultural sector than the rest of the city, with and index of 21,26% as opposed to the 11,36% registered outside the perimeter. Figure 1 shows the disaggregated index by macro sector.

Fig. 1 Specialization index by sector



Source: Elaboration on ASIA – Istat 2012 database

Fig. 2 Share of creative and cultural industries in the city center of Genoa, by sector



Source: Elaboration on ASIA – Istat 2012 database

In Figure 2 is outlined the internal composition of the cultural and creative sector in the city center. The Heritage and performing arts sector is the most present in the city center, followed closely by the Material Culture-related activities.

The Heritage sector is mostly concentrated in the city center, especially museums and contemporary art production and fruition; while the sub-categories of architecture and performing arts are mostly based outside the perimeter (80%).

The Industry of contents counts 1701 organizations, distributed in a fairly unbalanced way on the territory. The majority of the activities ascribable to this category (87%) is located outside the city center, especially considering the production of audiovisual content and software.

The Material Culture sector is the second in terms of dimensions in the city center of Genoa. The related activities account for the 35% of all creative industries of the city. The highest concentration of these activities is detected in the areas connecting the districts of Maddalena and Molo, where the specialization index in the production of Material Culture is the highest in the city – with a specialization of 10,7% against the city average of 3,9%. Out of the three components of the sector, i.e. Fashion, Design and Craftmanship and Food and Beverage, the latter is the most important in the city.

Lastly, the organizations operating in the tourism sector are mostly located outside the perimeter of the city center (82,6%). Considering the employment, the situation is even more unbalanced, as the most of the workforce in the sector is concentrated in the area of the waterfront and in the San Vincenzo district.

The analysis reveals a well-defined profile of the city of Genoa: ever the first management and restoration plans of the city center, there has been a considerable increase in the presence of activities more or less related to the production of cultural and creative contents and goods. Mapping the organization and the level of employment in each sector was helpful in highlighting some preliminary results.

It was possible to detect not only an increase in the numbers of organizations over time (in terms of firms and workforce involved in cultural and creative sectors), but also in the type of cultural activities present in the city. Though the recorded overall decrease in absolute terms of activities in all sectors considered, we also noticed that some specific types of creative industry grew in terms of quality of the production, like the industries producing cultural and creative contents (software, audiovisual content, advertising, publishing and music production). In particular, the film industry seems to be thriving, though remaining low in numbers.

Adding to these activities are the ones related to education and culture in the more traditional sense: the museum network has expanded over the years, just as the private galleries and exhibition spaces have started gaining more influence and more central roles in the cultural life of the city. Organizations dealing with contemporary art, just like the Industry of contents, were sustained by a sort of creative "buzz", an excitement linked to both the traditional practices and the experimentation of new technologies in an unusual artistic contagion – forms of videoart, mixed performances, street art, to name a few – that have enabled the operators to engage the public in new ways, contributing to the perception of a creative atmosphere in the city.

On the basis of the analysis and the results so far illustrated, we can state that a transition from an economy based on traditional industries to one centered on culture and tourism has started; however, it appears clear that the process has been difficult, and is not yet complete.

Further investigation on the topic, however, is necessary: on the indication of some of the interviewed cultural operators: since 2012 they registered a clear decrease in the number of creative industries in all sectors considered in our analysis, and especially those related to traditional craftmanship, advertising and technical studios. The performing arts sector, instead seems to be growing, as well as the production of software (mostly in terms of employment per sector).

Keywords: *(maximum 6 words)*
Creative industries, cultural production, local development, cultural districts, creative atmosphere, UNESCO World Heritage.

JEL codes: Z1