

Employment and sustainability in CCIs contribution to CCT

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“In 2017, the Cultural and Creative sector generated about 6% of the total wealth produced in Italy: over 92 billion euros, thanks to the employment of 1.5 million people (6.1% of the total employed).

The sector grew both in terms of added value (+ 2.0%) and number of employees (+ 1.6%).

The most valuable geographical areas are those with a strong manufacturing vocation.

Culture and creativity have a “multiplier effect” on the rest of the economy: the supply chain produces 255.5 billion (16.6% of the national added value), with tourism as the first beneficiary.”

Io sono cultura - 2018 L'Italia della qualità e della bellezza sfida la crisi

Symbola Foundation



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WHY CCIs ARE SO IMPORTANT AT LOCAL LEVEL?



Culture and Local Development

Cultural and creative industries constitute **one of the most resilient and rapidly expanding sectors**. Building on local cultural assets, cities and regions can trace a pathway **to sustainable development**.

“The decline of traditional manufacturing led many cities and regions to look for **a new economic base** often mobilising their cultural heritage to attract visitors and **regenerate the economy**. In parallel, the rapid emergence of creative industries has started to attract the attention of policy makers for the **jobs these sectors create and their contribution to GDP**.

Cities and regions recognise the increasing priority of culture and the creative economy **as part of a wider economic development and well-being agenda**. However, culture and creative industries generate value far beyond the narrow economic output of the individual sectors involved.”

BUT...
WHAT DO WE
MEAN WHEN WE
TALK ABOUT
CCIS?

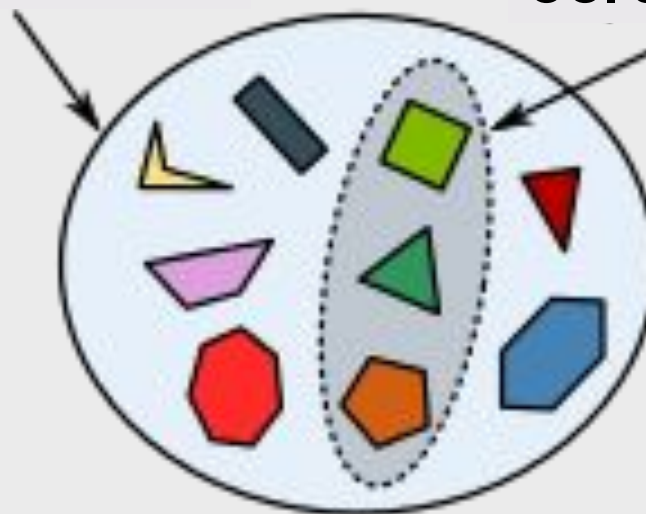
- ◆ There is no shared definition of CCIs
- ◆ ... several studies tried to define and trace the perimeter of the cultural and creative sector (also at local level)
- ◆ ... based on different theories and different models
 - N.B., depending on how the CCI sector is defined, the weight of the sector on the whole economy changes (for example with reference to the share of GDP, employment, export, etc.)



THE
IMPORTANCE
OF A
REFERENCE
PERIMETER...
*according to the
international
descriptions*

Total economy

CCI sectors



CCI sector by Symbola Foundation

(based on Throsby model)

CULTURAL AND CREATIVE SECTOR	1. CREATIVE INDUSTRIES	Architecture	SELECTED SECTOR (ATECO 2007)
		Communication and branding	
		Design	
		Design and creative driven products and services	
	2. CULTURAL INDUSTRIES	Audiovisual and multimedia (film, television, radio)	
		Video games and software	
		Music	
		Book and press	
3. CULTURAL HERITAGE	Heritage, museums, archives and libraries		
4. PERFORMING ARTS AND VISUAL ARTS	Performing arts and visual arts		
CULTURAL AND CREATIVE OCCUPATION	5. CREATIVE DRIVEN		SELECTED PROFESSIONAL PROFILE (ISTAT CP2011)

Fonte: Symbola Foundation (2014 Annual Report)

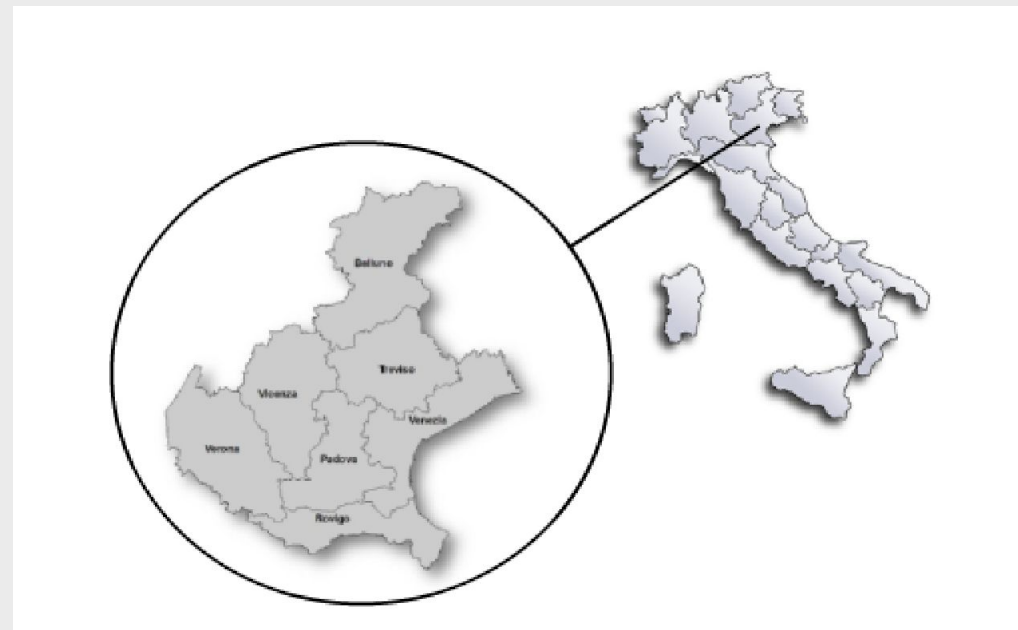


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THE CASE OF VENETO REGION



The main characteristics of Cultural and Creative sector in Veneto region is an **high rate of creative activities and creative professions in the more traditional sector of manufacturing.**

... not really creative sectors, but **creative driven sectors.**

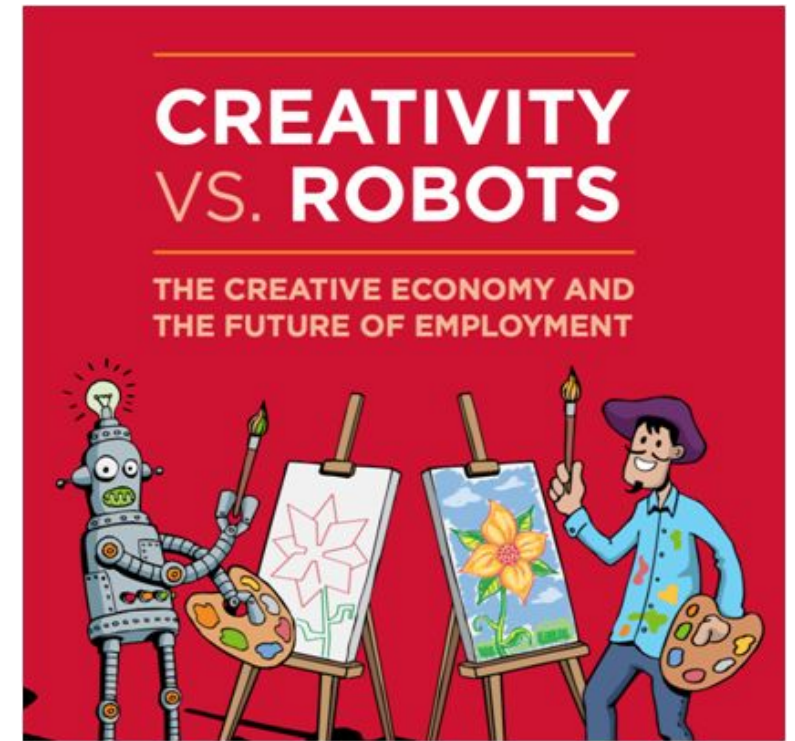
Moreover, there are some important cultural and creative sector in the region, most of them linked to the cultural heritage of the region and to the tourist sector.

- Cultural and Creative Industries and professional profile are spread across all sectors
- Cultural and Creative Sector has been recognized as one of the main areas of the regional Smart Specialization Strategy



CCIs AND LABOUR MARKET

The importance of Cultural and Creative sector is recognized in order to the potential in creating and saving jobs.



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A VERY FIRST ANALYSIS CARRIED OUT USING ADMINISTRATIVE DATA IN VENETO REGION

- ◆ ... better performance of cultural and creative sectors compared to the total economy (more stability in the crisis);
- ◆ but some critical aspects as for contractual arrangements and professional profiles:
 - higher “mobility” in the CCI labour market, due to higher rates of fixed term contracts;
 - a lower rate of workers with a tertiary education level and a higher share of skilled occupations and specialized workers.



These could be signals of a dearth in the offer of targeted educational paths as well as a difficult identification of skills and professional profiles.

Results of the research seem to suggest the need to reinforce the educational and professional offer (targeted and innovative educational paths according to skills needs of the companies/market).

Also any strategy should aim at reinforcing the competences of labour market intermediaries to better match employee and employer needs and, ultimately, improve the match between demand and offer.



THANK YOU!

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Focus on the regional CCI sector labour market: first results

... employment trend

Veneto Region. Hiring flow on employee* by sector

	CCI INDUSTRIES						ALL SECTORS	CCI sector on total
	CREATIVE INDUSTRIES	CULTURAL INDUSTRIES	CULTURAL HERITAGE	PERFORMING ARTS AND VISUAL ARTS	CREATIVE DRIVEN	TOTAL		
2008	2.802	1.917	10	2.217	115.237	122.183	756.650	16%
2009	35.168	8.537	646	8.834	79.244	132.429	593.935	22%
2010	45.902	12.911	634	8.920	74.021	142.388	635.100	22%
2011	46.671	12.987	655	8.518	74.103	142.934	665.865	21%
2012	49.842	11.232	701	8.072	53.827	123.674	621.435	20%
2013	51.958	9.937	633	7.925	52.614	123.067	621.055	20%
2014	58.362	11.134	512	7.046	56.959	134.013	673.555	20%
2015	67.100	13.408	583	8.771	66.313	156.175	760.780	21%
2016	67.740	12.000	677	8.690	60.835	149.942	732.080	20%
2017	86.052	16.902	851	10.639	69.619	184.063	852.250	22%

*It includes: open ended, apprenticeship, fix term, temporary work

Source: Veneto Lavoro/VLMIS data



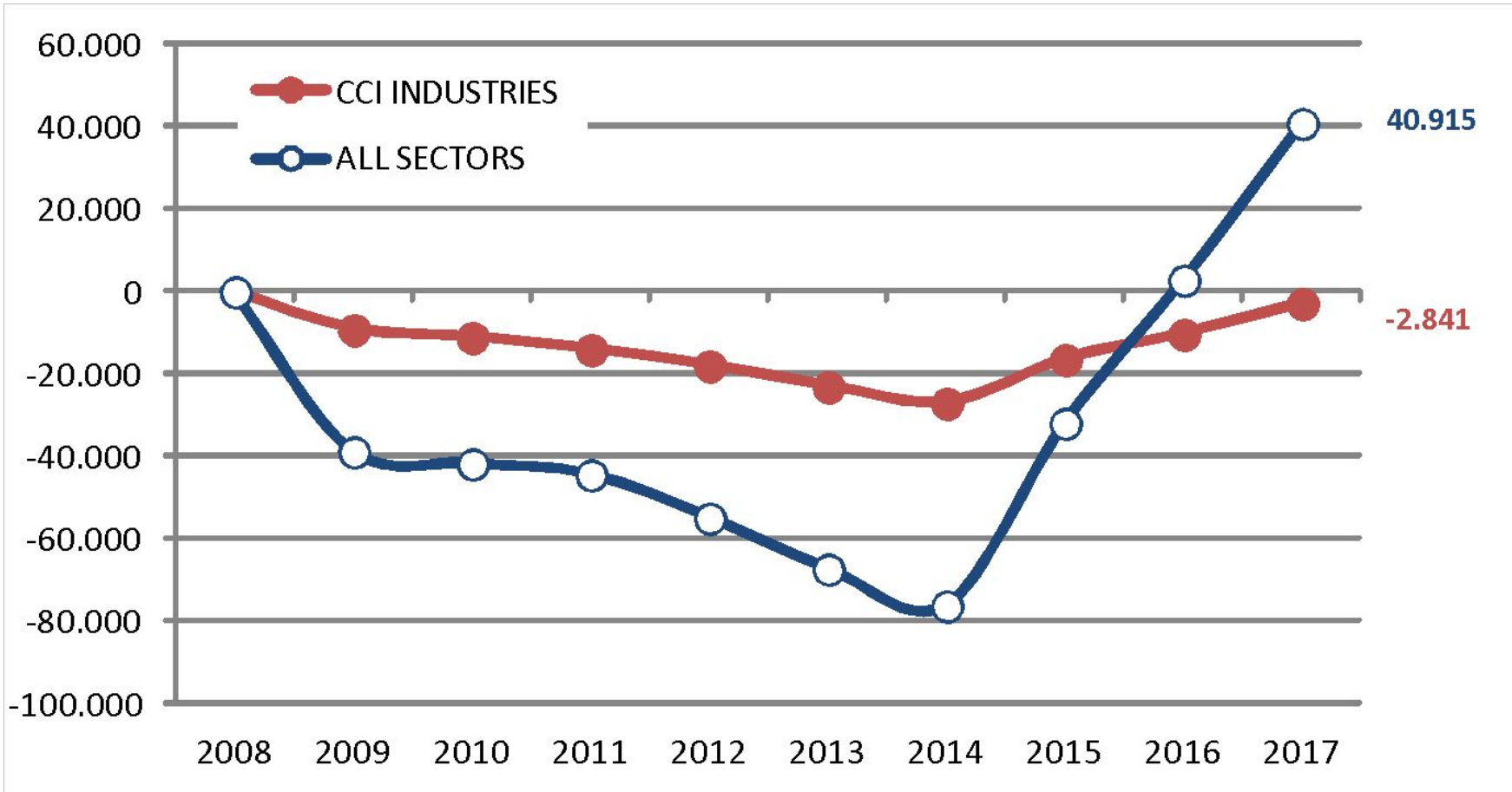
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Veneto Region. Employee jobs* by sector – CCI sector and all sector
Cumulative yearly balance, December 2008 = 0

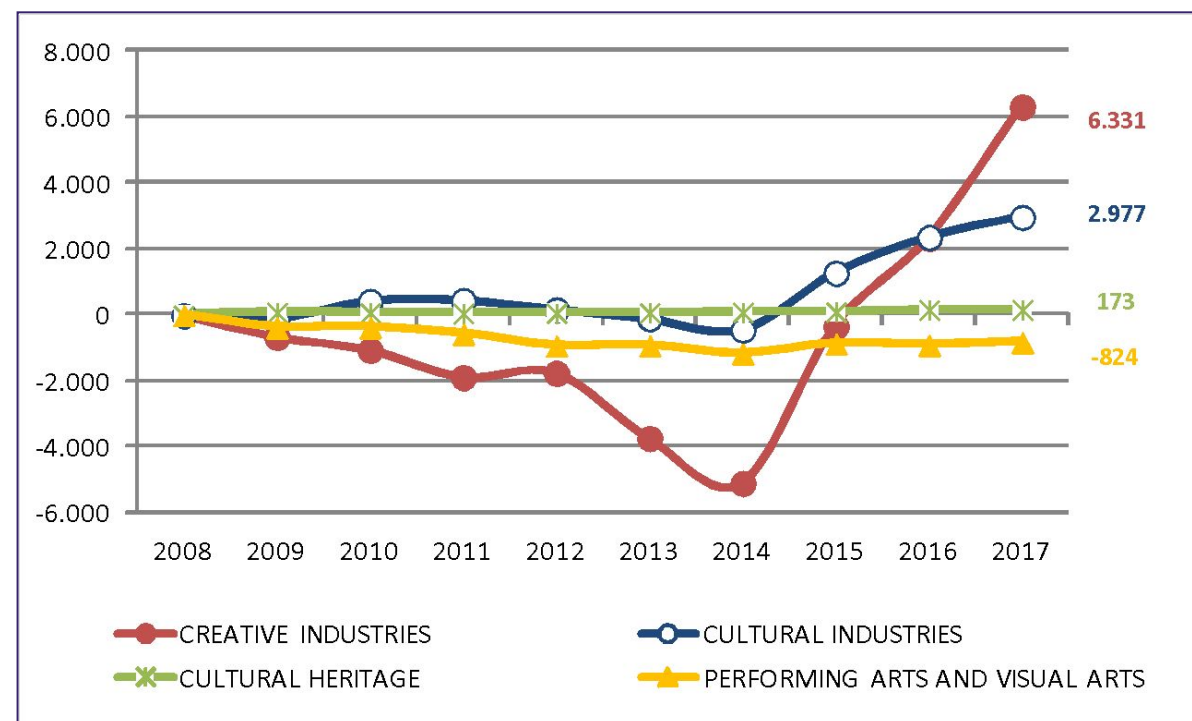
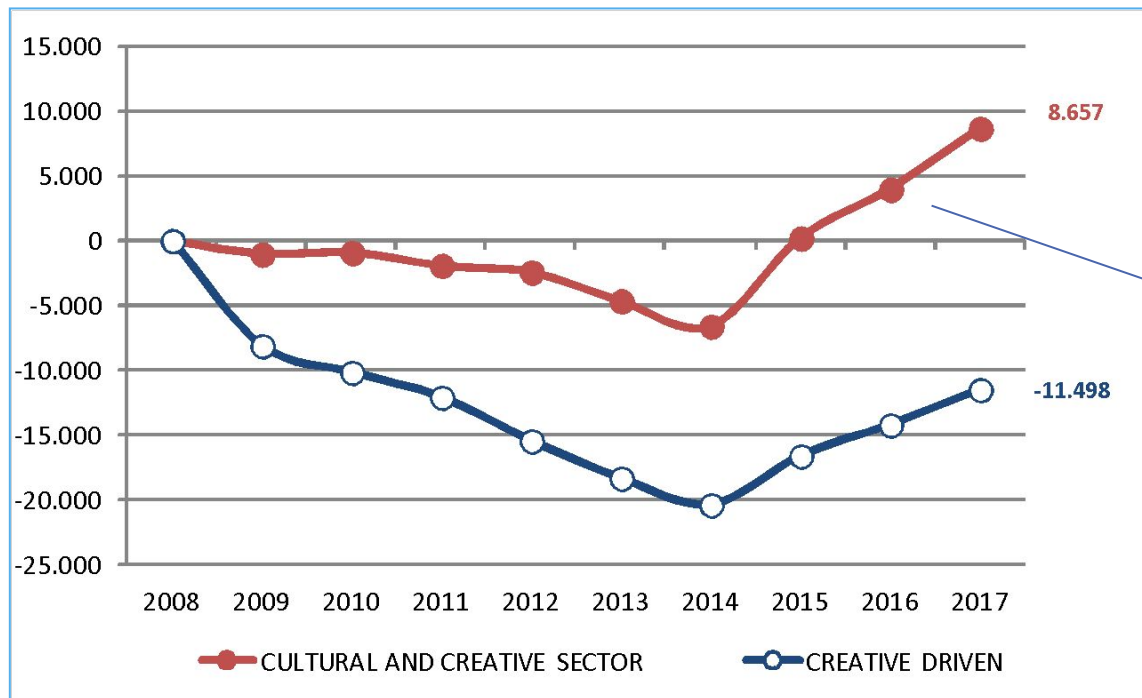
Occupational trends of the last 10 years



**It includes: open ended, apprenticeship, fix term, temporary work*
Source: Veneto Lavoro/VLMIS data

Veneto Region. Employee jobs* by sector – CCI sector
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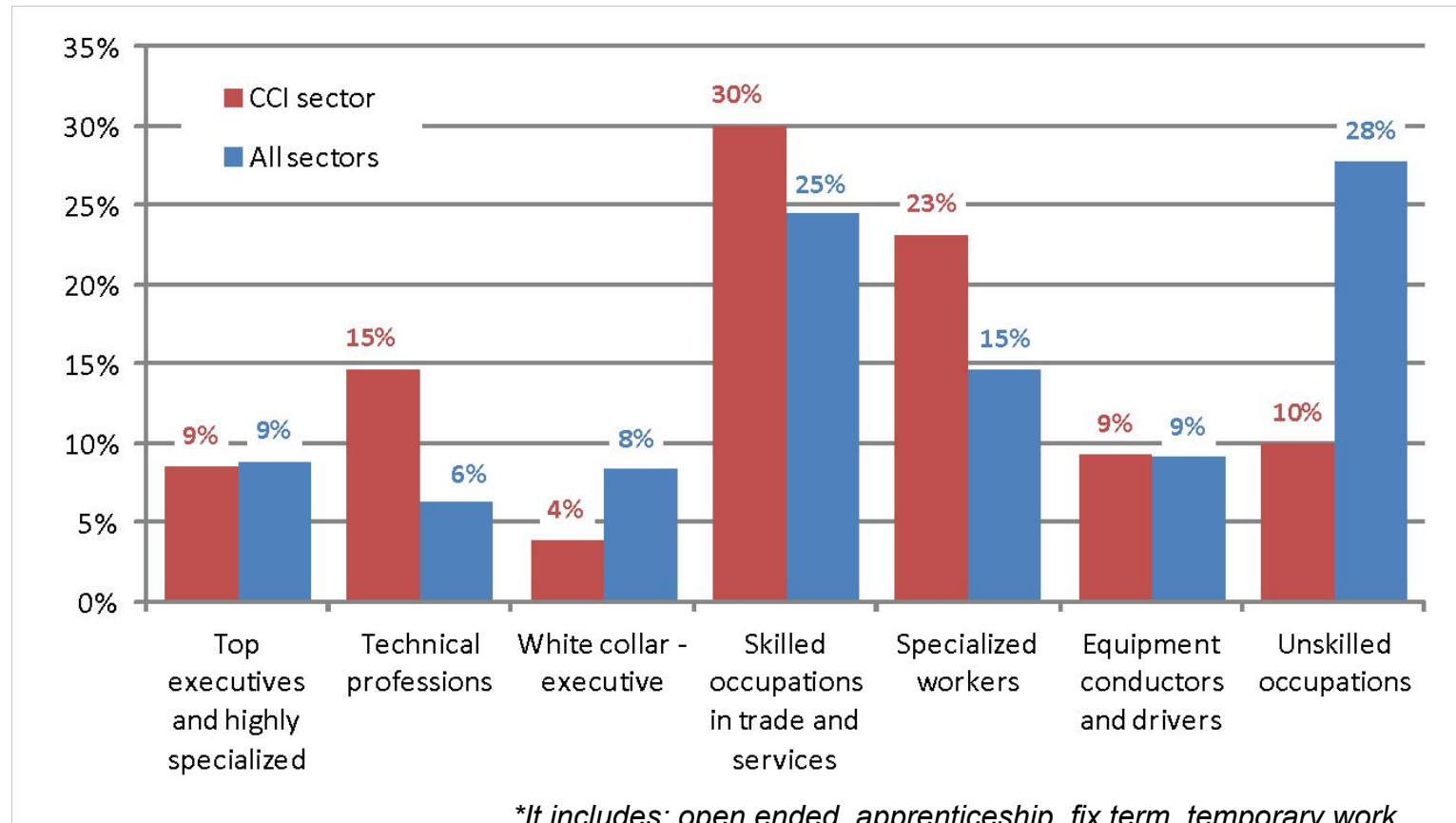
Hiring by educational level:

- Tertiary education → 24% CCI sector; 26% all sectors
- No title / Low ed. level → 49% CCI sector; 43% all sectors
- Intermediate level → 34% CCI sector; 37% all sectors

**Observing
2017 hiring
flow**

Hiring by professional profile: →

**Fig. 5 – Veneto
Region. Hiring flow
on employee* by
professional profile
– CCI sector and all
sector (%
composition)**



**It includes: open ended, apprenticeship, fix term, temporary work
Source: Veneto Lavoro/VLMIS data*