

ChIMERA

Innovative cultural and creative clusters in MED area

P.A. 1: Promoting Mediterranean innovation capacity to develop smart and sustainable growth

Obj. 1.1: To increase transnational activity of innovative clusters and networks of key sectors of the MED area

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D.3.2.1 Regional Analysis

WP 3. Studying

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Interreg
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INNOVATIVE CULTURAL
AND CREATIVE CLUSTERS
IN THE MEDITERRANEAN AREA

STATE OF THE ART ANALYSIS

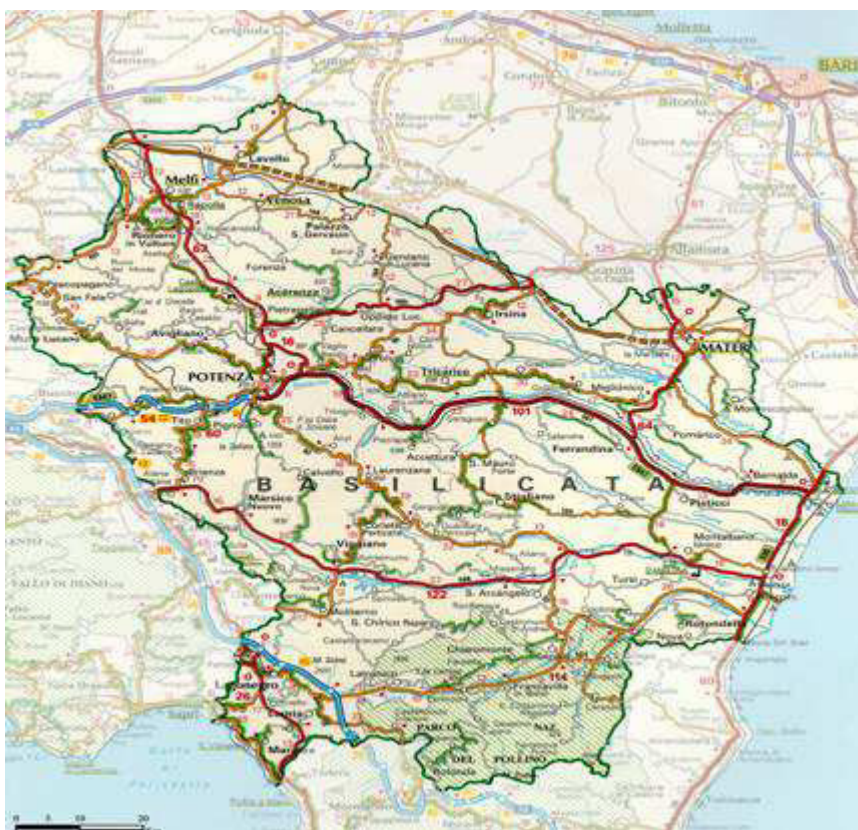
Basilicata Region

Project co-financed by the European
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The State of the Art Analysis and the data collected for the Basilicata Region has been carried out at regional level (NUTS-2) because the cultural and creative ecosystem to be implemented concerns the overall regional territory.

1. REGION PRESENTATION

1.1 Territorial framework



Basilicata, also known as Lucania, is a region in Southern Italy, bordering on Campania to the west, Apulia (Puglia) to the north and east, and Calabria to the south. With its 9,995 km², Basilicata is the 14-th Italian region, and its surface represents 3.3% of the overall Italian surface.

It has two coastlines, one on the Tyrrhenian Sea between Campania and Calabria, and a longer coastline along the Gulf of Taranto between Calabria and Apulia. The region can be thought of as the 'instep' of Italy, with Calabria functioning as the 'toe' and Apulia the 'heel'. The region covers about 10,000 km² (9,995 km²) and in 2016 had a population of 570,365¹. The regional capital is Potenza. The region is divided into two provinces: Potenza and Matera.

Basilicata covers an extensive part of the southern Apennine Mountains between Ofanto in the North and the Pollino massif in the South. It is bordered on the East by a large part of the

¹ Istat (Italian National Institute for Statistics), 2016

Bradano river depression which is traversed by numerous streams and declines to the Southeastern coastal plains on the Ionian Sea.

Basilicata is the most mountainous region in the South of Italy, with 47% of its area covered by mountains. Of the remaining area, 45% is hilly, and 8% is made up of plains. Notable mountains and ranges include Monte Alpi, Monte Carmine, Dolomiti lucane, Monti Li Foj, Pollino, Toppa Pizzuta, and Monte Vulture. The mountains are found to the West while the coastal and central area is hilly and the arid *Murgia* stands in the Matera district where, in the town of Matera, you can admire the Sassi.

1.2 Demographic data

Its population, of 570,365 inhabitants, is shared throughout the 131 *comuni* (town councils) representing only 0.9% of the national population. The disequilibrium between population and surface is shown by the very low value of the demographic density (60 inhabitants per km²) which is the second lowest density for the 20 Italian regions (compared to 200.4 nationally in 2010). This low density is accompanied by a very important dispersion of population in the regional territory: 80% of the populations lives in municipalities with less than 5,000 inhabitants, the biggest town has less than 70,000 inhabitants. The Capital city, Potenza, counts 67,112 inhabitants² and the other Province Matera 60,436 inhabitants.

Basilicata went through a decline in birth rates during last years, very strong in 2000-2005 period, when the region lost something about 1% of the population (passing from 599,404 to 594,086 unities). Besides this decline, a progressive process of ageing (in 2005 19.6% of the total population was composed by over 65 years old people) is recorded, as well as an increase of the migratory flow; this is particularly true for young people, and it is due to the morphological characteristics of the Region, that make very difficult both the accessibility to smaller villages and the search for a job.

At 1st January 2016, Basilicata region counted 570,365 residents, of which 2.9% were foreigners, low value compared to the rest of the Country, although it is growing. Since 2008, its population has lost 3,129 units, due to the natural balance as a reflection of a relatively elderly population, as mentioned before (the old age index is 21.2%, compared with 19.1% of the South of Italy and 21.4% of the Country, posing a series of problems of social and health policies for the elderly) and a modest fertility rate (1.12%, compared to Southern and domestic ones respectively of 1.31% and 1.39%), as a consequence of the low level of income. Net migration is moderately positive due to an increase in non-EU population. But it remains a brain drain problem: 11,929 university students decided to study in Basilicata, instead, 32,828 students, almost three times more, are studying in universities outside the region, and they

² Istat, 2016

often decide not to come back to their region of origin. According to Istat forecasts (intermediate scenario), by 2020, the region's population could drop to 565,358 units.

Out of the two capital cities, the region is characterized by variable degrees of remoteness as far as the services are concerned. For these reasons, there are fewer economies of scale and increased costs in the delivery of public network services.

The interior areas are those that have suffered the most serious expansion processes of the development gap, the demographic structure indexes are very weak and are away from the supply points of the services.

1.3 Economic framework

The region's contribution to Italy's gross value added is very low (under 1% in 2015). As the other regions in the South of Italy, the per capita GDP is well below the national average and represents around 73% of the EU average.³

Among industrial activities, the manufacturing sector contributes to the gross value added of the secondary sector with 64% of the total, while the building sector contributes 24%. Within the services sector, the main activities in terms of gross value added are business activities, distributive trade, education and public administration. In the last few years, new productive sectors have developed: manufacturing, automotive, and especially oil extraction.

The automotive production, based on SATA plant of Melfi, plays a major role in the overall automotive industry of the country. With its 8,000 workers, the SATA district is the productive centre of the main exported models of Fca group, and an example of a very productive and efficient plant

In 2009 Eni employed 230 people in this area (of whom over 50% were from Basilicata), and about 1,800 were employed in activities directly generated by Eni's operations, distributed in 80 companies of which over 50% were from Basilicata. The region produces about 100,000 bbl/d (16,000 m³/d), meeting 11 percent of Italy's domestic oil demand.

In 2014, regional GDP was 0.7% of National GDP. GDP per capita was equal to 18,740 € per inhabitant, and amounts to 70.6% of national average, although this value is higher than the Southern average (106.6%). In 2015, the GDP per capita increased to 19,473 €.

The employment rate is 50.3 % (vs. Italy 57.2), while the unemployment one is of 13.3 % (Italy 11.7%); youth unemployment is 34.2 (Italy 37.8). Youth entrepreneurship is under the Italian percentage: 5.9 % compared to 6.3⁴.

³ Eurostat, https://web.archive.org/web/20120219091825/http://circa.europa.eu/irc/dsis/regportraits/info/data/en/itf5_eco.htm

⁴ Istat, 2015

Even if macroeconomic data show that Basilicata has a very poor weight in national economy, the region has an economic role that encompasses the mere statistical data because of the presence of the largest onshore oil reserves of the Country, satisfying 10% of national energetic demand.

One of the economic drivers in recent years has been tourism thanks to important poles like Matera, Melfi, and Metaponto attracting cultural tourism.

The development of multi-dimensional tourism systems comprising tourism districts based on specific cultural, natural and eno-gastronomic attraction is a realistic whilst forward looking proposition. Reaching a critical mass of economic activities is crucial for growth to gather pace, therefore a systemic integration of the regional touristic activities is crucial- there is scope for a cross-regional system as well that connects the region with the neighboring ones.

Istat calculated that in 2010, tourism accounted for 6% of Italian value added; the weight of the tourism cluster in the region and its fundamental characteristics would inform policy with evidence-based recommendations. According to *Impresa Turismo (2012)*, Basilicata already presents a high pull factor in relation to fitness and health farm interested visitors. However, cultural and eno-gastronomic pull factors are medium for Potenza but low for Matera. Finally, Matera has a high pull factor for being 'a new place to discover'.

According to Apt (public agency for tourist promotion) data, arrivals in Matera have grown, from 2012 to 2015, at a pace of 40.4%. Foreign tourism has grown, in terms of arrivals, up to a 70.7% rate, in the same period. Matera 2019 is expected to generate further tourist dynamism, based precisely on culture, arts and creativity, according to the interventions forecasted in the program.

In Vulture, the second most important cultural area, the increase in total arrivals, from 2012 to 2015, is 51.6%. Foreign tourism has grown at a 79.2% rate.

Amongst new forms of cultural tourism is the movie-induced tourism, which has proved very interesting from an economics viewpoint in Basilicata (24 films since 2014).

The Smes registered in 2016 at the Chamber of Commerce were 2,633, the total number of companies registered is 52,627 divided into the following categories:

- ✓ agriculture: 18,005,
- ✓ Industry: 4,132,
- ✓ construction: 6,070,
- ✓ commerce: 12,381,
- ✓ services: 12,024,
- ✓ Other: 15.

2. LEGAL FRAMEWORK

2.1 Description of the legal framework on CCI

National Normative Acts, Strategies, Action Plans

In the national context, as a general overview, it should be recalled that with the DM of November 30, 2007, the MIBACT (Ministry of cultural and tourism activities) established a study commissioned to draw up a report on creativity and production of culture in Italy. The Commission has elaborated the "White Paper on Creativity - For an Italian Development Model" published by the University Bocconi in 2009.⁵

As regards to Operational Programs for the CCI sector, it should be reminded the 'Culture and Development' National Operational Program (PON) 2014-2020 which is intended for 5 regions of Southern Italy - Basilicata, Calabria, Campania, Puglia, and Sicily - and has as its main objective the enhancement of the territory through conservation of cultural heritage, enhancing the tourism services system and supporting the business chain related to the sector⁶.

With the DM 243 of 11 May 2016 an aid scheme was set up to support the cultural and creative sector and strengthen the competitiveness of micro, small and medium - sized enterprises, aimed at development and consolidation of the production sector linked to the Italian cultural heritage in the Basilicata, Calabria, Campania, Apulia and Sicily - Priority Axis II of the National Operational Program for Culture and Development 2014-2020 .

The aid program, called CULTURA CREA, managed by the National Agency for the attraction of the investment and business development S.p.A - Invitalia, instrumental body of the Ministry of Economic Development, was presented right in Matera on 19 July 2016. The terms and conditions for the submission of applications for access to the facilities were defined by the Mibact directive n. 55 of 20 July 2016.

It is under discussion the new Discipline and promotion of cultural and creative companies. In the new text of the law, it will be established the set of necessary requirements for an enterprise to be qualified as a cultural and creative company and how it can enrol in the list of CCI companies kept by the Ministry.

As far as the regional level and specific legislation for the CCI companies, two Regional Laws partially discipline the sector.

⁵ <http://documenti.camera.it/leg17/dossier/pdf/cost260.pdf>

⁶ http://www.beniculturali.it/mibac/export/MiBAC/sito-MiBAC/Contenuti/MibacUnif/Comunicati/visualizza_asset.html_1618058599.html

1. **Regional Law 37/2014 Promotion and development of the *entertainment system***⁷.

The aim pursued by the Basilicata Region is that of contributing to the development of the entertainment system, promoting the quality of the offer, both internationally and multidisciplinary, and the plurality of artistic expressions, innovative work projects and processes, the qualification of artistic skills, interaction between the show and the entire cultural, educational and tourism chain; determining the conditions for a territorial rebalancing of supply and demand; supporting the ability to operate on a network among public and private artistic subjects and structures.

Among the articles of this Law, Art. 8 defines the Regional Programme of the entertainment system; Art. 9 the Annual Plan outlines the cultural and promotional initiatives that involve the subjects of the system and concern the entire regional territory, the requirements, the modalities of admission to the regional contribution, and the qualitative and quantitative characteristics of the initiatives falling within the activities supported; Art. 10 the Regional Observatory in order to stimulate the promotion and development of regional cultural processes; Art. 11 the Regional Register of the operators.

2. **Regional Law 27/2015 ‘provisions concerning cultural heritage, finalized to the valorization, management and improvement of material and immaterial goods of the Basilicata region’** with which the Region intends to promote the collective fruition of culture.

The Region has started a process of recognition of tangible and intangible assets of the regional territory through the establishment of a platform that was built on the basis of ‘Recognition Cards’, approved by UNESCO.⁸

2.2 Regional innovation strategies for smart specialisation (RIS3)

The cultural and creative industry is one of the five areas of smart specialization identified in the Smart Specialization Strategy of the Basilicata Region.

The components of this creative and cultural ‘ecosystem’ are split into three CCI macro areas:

- 1) creative industry for tourism,
- 2) creative industry and design,
- 3) creative industry serving the production sectors.

⁷ <http://www.consiglio.basilicata.it/consiglioweb/site/consiglio/detail.jsp?sec=107173&otype=1150&id=1223633&anno=2014>

⁸ <http://www.patrimonioculturalebasilicata.it/>

The priority application areas on which the Region intends to invest are distinct in macro-areas of development and application of technologies for the management, protection and use of cultural heritage; support for the adoption of technologies for the creative industry and design. More in details, the areas of intervention on which the Region will intervene are:

1. the development of technologies and the creation of technological products for the virtual reconstruction of archaeological sites, monumental environments, cultural landscapes, which can also be used by mobile devices to improve the quality and quantity of tourist information;
2. the development of online and offline platforms for the visualization and virtual enjoyment of architectural and archaeological contexts that are difficult to physically access (rocky sites, places in rough contexts, etc.);
3. the creation of a cloud-based integrated management system, for the sharing and communication of cultural heritage on a geographic basis (GIS-Cloud) to support regional cooperation among the various subjects that own and manage content, information and scientific data and public administrations; for the optimization of the use of economic resources; to encourage start-up ideas and initiatives in the field of ICT technologies and services for the enjoyment of cultural and landscaping tourism; for interactive teaching and e-learning; to encourage smart participation initiatives through citizens-tourists, sensors spread across the territory;
4. the development of materials, devices, portable instrumentation, 'near' and 'remote sensing' methodologies and good practices for the monitoring of degradation and disruption of monuments and areas of monumental interest or archaeological contexts and diagnostics for the conservation of cultural heritage and preventive archaeology;
5. developing low-cost and/or open, user-friendly technologies to foster the use of a broader audience (from public to private) and to increase stakeholders' interest in documentation, security, monitoring of the mobile and immobile cultural heritage;
6. the development of tailor made design and manufacturing technologies, the production of tailor made objects. A future-oriented craftsmanship with renewed technological and financial needs, capable of affirming its reputation among young people and accessing distribution channels using social networks.

For this purpose, the main technological trajectories to be followed in order to target the Smart Specialization strategy in Basilicata are the following:

- **Trajectory n. 1:** ICT Technologies for the acquisition, use, recovery, cataloguing, dissemination and sharing of tangible and intangible cultural heritage and environmental heritage (landscape, geological, biological, archaeological, monumental, anthropological, historical, historical artistic, linguistic), also through interactive virtual environments.

- **Trajectory n. 2:** GIS-Cloud Technologies for integrated management, sharing and communication of cultural heritage on a geographical basis: implementation of Open Data systems, sharing and communication of projects and initiatives concerning natural and cultural heritage as well as tangible and intangible one (landscape, geological, biological, archaeological, monumental, anthropological, historical, art-historical, linguistic), asset atlases.
- **Trajectory n. 3:** Technologies related to innovative materials, electronic and remote sensing devices, integration of satellite remote sensing technologies and non-invasive electromagnetic techniques for the monitoring of degradation and collapse of monuments and sites of natural, archaeological, historical, and artistic sites, geosites.
- **Trajectory n. 4:** Technologies related to the use, enhancement and social web communication also in terms of social media marketing, of the territory of Basilicata and its tangible and intangible cultural heritage as well as environmental, landscape, geological, archaeological, monumental, anthropological, historical, historical-artistic, and linguistic one (for example, through collaborative platforms and Crowd and Source Founding for the creation, implementation and enhancement of cultural events).
- **Trajectory n. 5:** Innovation linked to the themes of entrepreneurship, especially youth, in the cultural and creative sector and receptivity: innovative technologies to define a territorial system, supply chains and clusters in the tourism, culture, art and creativity industries, even through training and development of international hubs, to combine synergistically with actions finalized to the creation and support of existing local entrepreneurship, encouraging especially youth entrepreneurship (incubators), and innovative start-ups and spin-offs operating in the aforementioned sectors.
- **Trajectory n. 6:** Technological innovation linked to design, ergonomics, quality and tailor made craftsmanship, to the film industry, upholstered furniture, artistic handicraft: integration of businesses and creative and artistic organizations promoting local traditions with local economic-productive supply chains most closely linked to traditional and / or high-tech businesses.
- **Trajectory n. 7:** Non technological innovation, for the creation of new models for social innovation and self-employment related to tourism, to the management, and enjoyment of environmental and cultural tangible and intangible heritage (landscape, geological, biological, archaeological, monumental, anthropological, historical, historical-artistic, linguistic assets).

The Smart Specialization Strategy integrates the policies that Basilicata Region intends to promote and implement in the programming period 2014-2020 for the development of the cultural and creative sector.

For the S3 implementation, the resources of the Operational Programme 2014-2020 ERDF will be mainly exploited.

In terms of skills and policy development for employability, the ESF OP 2014-2020 foresees transversal interventions also useful for the development of the CCI sector, namely: active policy measures for employment, for young people and long term unemployed, or for the promotion of new businesses, also in the cultural and creative sector.

2.3 Other strategic documents

Regional Law, n. 1, 2001 'Recognition and establishment of industrial districts and local production systems' with which the Basilicata Region promotes, supports and encourages local initiatives and development programs aimed at strengthening the identity of its territorial systems and the competitiveness of organizations, businesses, consortia and agencies operating in the fields of agriculture, fisheries, crafts, industry, tourism, and trade⁹.

⁹ http://www.old.consiglio.basilicata.it/Lavori/leggi_promulgate/leggi2001/L2001-001.asp

3. STRATEGIC CHALLENGES FOR CCI SECTOR

3.1 Regional initiatives

In recent years, several initiatives have been taken to stimulate the birth and growth of cultural and creative entrepreneurship in different CCI sectors. Among the most important and fruitful ones, we can mention:

- the Urban Visions project, implemented under the initiative *'Patto con i Giovani'* (Pact with young people), together with the Ministry of Economic Development, funded by national resources (FAS), with the aim of creating and animating six Creative Centers on the regional territory;
- *'Sensi Contemporanei'* (Contemporary Senses), a program promoted by the Basilicata Region, the Ministry of Economic Development, the Ministry for Cultural Heritage, and the Venice Biennale Foundation, for the realization of a project aimed at promoting and enhancing, through the contemporary art, of one of the most beautiful naturalistic areas in Europe: the Pollino area;
- the establishment of the *Lucana Film Commission*, approved by Regional Council Resolution no. 356 of March 27, 2012, which was born to capitalize the great media return given to the region by some movie mayors that have chosen Basilicata as a natural set for filming, thus favouring an entrepreneurial and handicraft network of suppliers to support this segment of creative industry;
- the remarkable organizational and design effort that led to the designation of Matera as the European Capital of Culture for 2019;
- the activation of the *'Diploma in Restoration'* for the academic year 2015-2016 with a special agreement between Basilicata Region, Municipality of Matera and the Institute for Conservation and Restoration, as a direct consequence of Regional Law No. 8 of April 30, 2014;
- the adoption of two laws, one on the *'Promotion and development of the performing arts'* and the other one on *'Cultural heritage provisions'*, with the aim of structuring an offer on the cultural and creative enterprise as an essential element for the creation of a cultural district with zero bureaucracy;
- the Lucania Film Festival which has reached the 18th edition in 2017 and that takes place in Pisticci-Marconia;
- the *'Matera in musica'* show, organized by the Ico Orchestra "Magna Grecia" and the Duni Festival (8th season);
- the Duni Festival (held in Matera, 18th edition this year);

- the Materadio initiative (7 editions since 2011) organised and broadcasted by Radio3 (national channel);
- the Urban street art festival (2nd edition);
- the Jazz Festival 'Gezziamoci' (30th edition).

4. THE CREATIVE SYSTEM IN THE REGION

A brief Introduction in order to contextualise the creative ecosystem in the region.

Unioncamere (the Italian Public Body representing the Chambers of Commerce) has often carried out studies on the creative industry and has adopted a definition, also statistical, in the report '*I am Culture*', annually carried out in partnership with the Symbola Foundation.

According to this report, the national and regional situation of the creative industry is as follows:

Table 1 - Absolute values and incidence of the main data of the cultural and creative industries on national/local economies, 2015

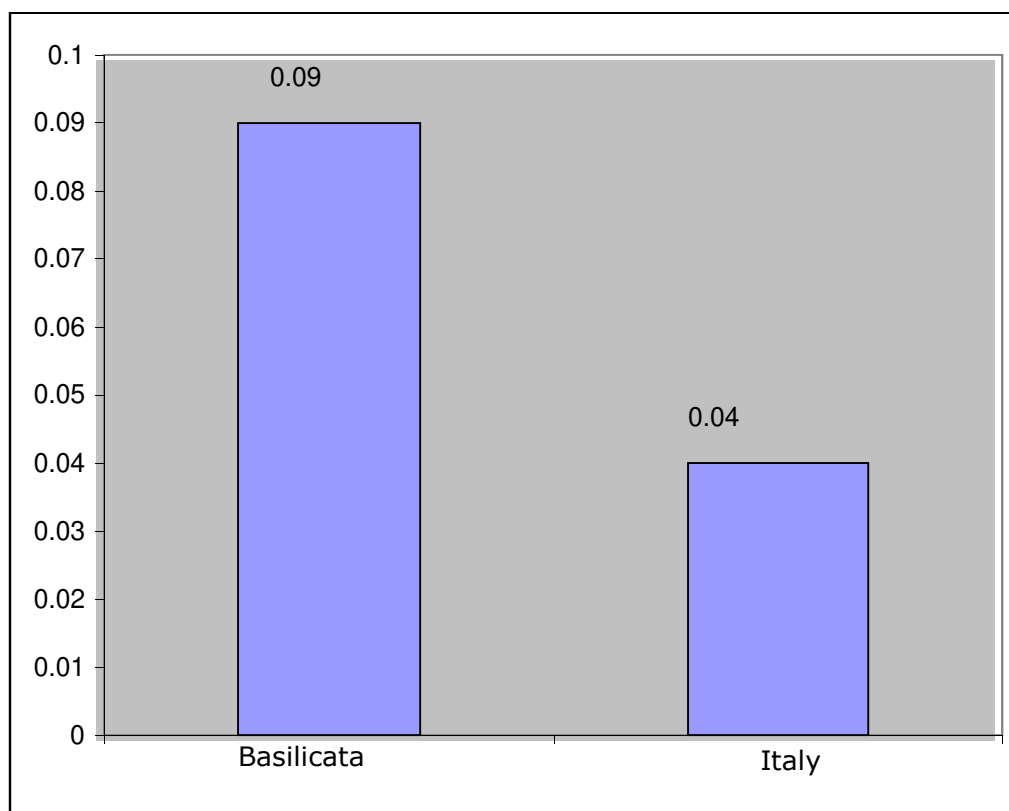
	Basilicata	Italy
Value added (billions)	0.383	89.7
Incidence on national / local economy (%)	3.9	6.1
Employment (millions)	0.083	1.5
Incidence on national / local economy (%)	4.4	6.1
Number of SMEs (*)	2,041	288,199
Incidence on national / local economy (%) (*)	3.9	4.7

(*) figures related to the core of the four cultural sectors, without the 'production of creative-driven goods and services'.

Data source: Unioncamere/Symbola Foundation

As you can see, the creative and cultural productive system is definitely undersized in Basilicata, in terms of incidence of the regional economy on the national one. As far as our region is concerned, it is a more recent phenomenon, since for many years the regional economy has mainly lived in traditional sectors (traditional agriculture, construction, traditional services to individuals, low or at most medium-tech manufacturing industry). However, just because of its 'freshness', this sector is growing faster than the national one, thus providing a response to the crisis of our economy.

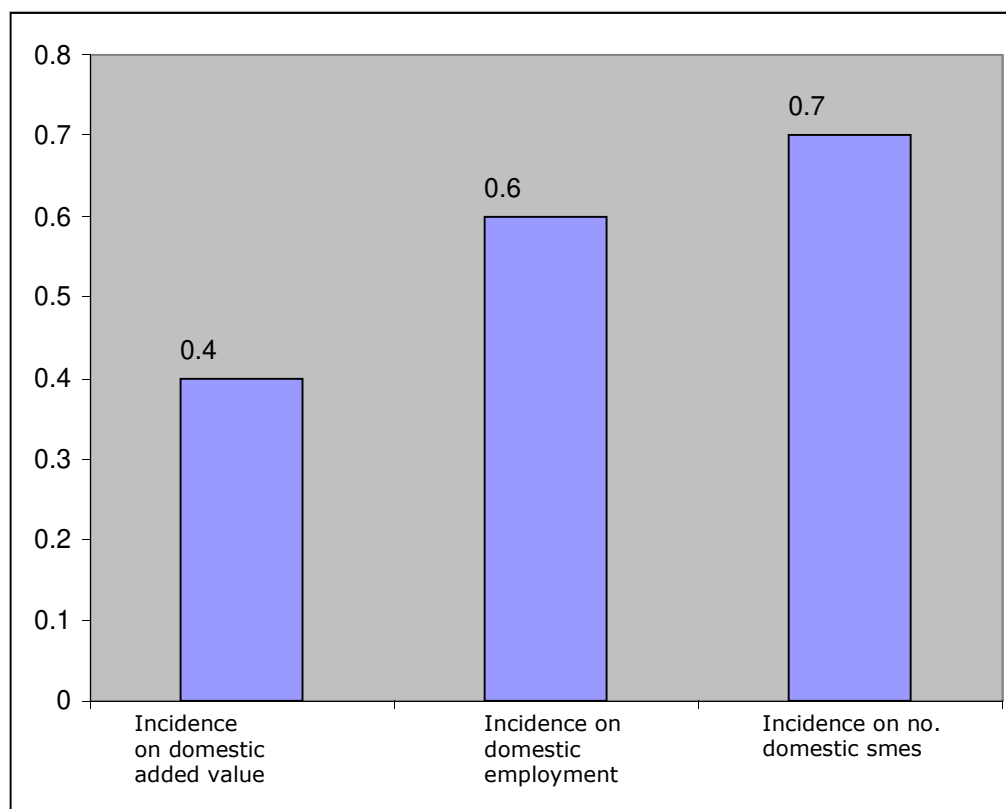
Figure 1 - Growth of the creative industry's share in total value added between 2011 and 2015



Data source: Unioncamere/ Symbola Foundation

The regional incidence on the national creative industry sector remains small, and in line with the more general underweight of Basilicata economy on the Italian economy. It is worth mentioning that the employment incidence in terms of number of companies is higher than that in terms of value added, which could be an indication that the system is not very productive, in terms of wealth generated, and then this would indicate an insufficient competitiveness.

Figure 2 - Incidence of the creative and cultural industry of Basilicata on the domestic data, 2015



Data source: Unioncamere/ Symbola Foundation

A very relevant aspect for the Basilicata economy is the capability of the creative and cultural sector to activate the tourist sector. In fact, with the Matera 2019 Candidacy, the main tourist brand on which the region invests in is the cultural and creative one. Actually, according to the Symbola / Unioncamere data, the cultural and creative regional production sector activates 37.9% of the total tourist expenditure in the area, compared to the national 37.5%. As evidence of the driving force that creativity has on tourism, there also is a significant disproportion between the two Provinces of Basilicata, in terms of the incidence of the sector on the total of the provincial value added. In fact, with respect to the above mentioned indicator, Potenza is only ranked at the 64th place among the 110 Italian provinces, while Matera is at the 26th.

4.1 Private sector

As far as the regional private stakeholders, here are the most relevant:

- *Confindustria*: main trade association in manufacturing industry, for the manufacturing part of the CCI;
- *Confartigianato*: trade association for craft industry ;
- *Confederazione Nazionale dell'Artigianato e della Piccola e Media Impresa* (CNA): trade association for craft industry;
- *CONFAPI Basilicata*: Regional Federation of Associations of small and medium industries of Basilicata;
- *Associazione dell'industria manifatturiera e dell'impresa privata di Basilicata* (CONFIMI Industria Basilicata: manufacturing and private enterprise industry Association);
- *Confcooperative*, association of cooperatives;
- *Legacoop*, association of cooperatives;
- Regional centres for creativity: Casa Cava, Centro Tilt and Centro Cecilia.

Private law institutions in public control:

- Sviluppo Basilicata spa, development agency of the Basilicata region, in-house providing services' company to the Basilicata Region. Managing body for ICC regional and EU projects.
- T3 innovation - Technology, Transfer, Transformation - is the technology transfer structure of the Basilicata Region, created by the collaboration of a grouping of companies that have been operating for years in the field of strategic consulting and innovation: PwC, Noovle, *I3P* (Incubator of innovative companies of the Polytechnic University of Turin), *Reti* and *Fleurs International*. The project is part of the initiatives that the Basilicata Region has set in the field of implementation of the RIS3, aimed at boosting the level of competitiveness of the regional production system mainly in the five areas of Specialization identified: Aerospace, Automotive, Bioeconomics, Energy, Cultural and Creative Industry

4.2 Public sector

The public sector gathers:

- the Regional Government with the specific Departments involved,
- the Chambers of Commerce of Potenza and Matera and Unioncamere,
- APT, the Regional Agency for the tourist promotion,
- The Foundation Matera—Basilicata 2019,

- the Lucana Film Commission,
- Municipalities that have included the ICC sector as a priority in their strategic plans (such as Matera and Aliano that has applied for the Italian Capital of Culture 2018);
- the University of Basilicata and the research centres (which are going to be described in detail in chapter 5).

4.3 Professionals involved

Regarding the composition of the regional entrepreneurial tissue, the overall situation is summarized by the recent data reported by Symbola Foundation in the following Table. The firms could be both individuals and micro or small sized companies.

The business system is characterized by micro, small and medium-sized family-run and under-capitalized businesses with a low propensity for internationalization and, often because of their size, they often have limited access to credit.

Table 2: Companies of the Core Culture in Basilicata per subsectors

REGIONS	CREATIVE INDUSTRIES			CULTURAL INDUSTRIES				PERFORMING AND VISUAL ARTS	HISTORIC-ARTISTIC HERITAGE	TOTAL CULTURAL CORE
	ARCHITECTURE	COMMUNICATION AND BRANDING	DESIGN	FILM, VIDEO, RADIO-TV	VIDEOGAMES AND SOFTWARE	MUSIC	BOOKS AND PUBLISHING			
BASILICATA	423	255	63	112	186	21	787	94	15	1955
ITALY	63093	43417	20164	14449	33629	4700	96264	12337	1061	289112
INCIDENCE %	0,67%	0,59%	0,31%	0,78%	0,55%	0,45%	0,82%	0,76%	1,41%	0,68%

Data source: Symbola Foundation (*Io sono Cultura*, 2017)

4.4 The cultural and creative synergy

The ecosystem of the CCI companies in Basilicata is still very fragmented and not very specialised even though the big potential of professionals working in this sector. That is why the trajectory n.5 recognised in the RIS3 for Basilicata is devoted to the establishment of 'innovative technologies to define a territorial system, supply chains and clusters in the tourism, culture, art and creativity industries, even through training and development of international hubs, to combine synergistically with actions finalized to the creation and support of existing local entrepreneurship, encouraging especially youth entrepreneurship (incubators), and innovative start-ups and spin-offs operating in the aforementioned sectors'.

5. EDUCATION AND RESEARCH

5.1 Educational curricula offered

In this chapter, we will analyse the educational landscape of Basilicata region.

First of all, it is important to underline two important assets Basilicata is characterised:

- a remarkable basin of expertise. The rate of participation in upper secondary education by 2011 was 116% (made up of 100 national averages); graduates, in 2011, represent 17.1% of the population aged 30 to 34, compared with 16.4% in the South;
- a network of centers of recognized technological competence, starting from the CNR of Tito, ENEA, the University of Basilicata, the Space Geodesy Center, Alsia-Metapontum Agrobios.

Since 2012, the University of Basilicata has been divided into six primary structures in which the functions of the pre-existing twelve Departments and eight Faculties have been integrated:

- 4 Departments: Department of European and Mediterranean Culture (DICEM), Department of Mathematics, Informatics and Economics (DiMIE), Department of Science (DiS), Department of Human Sciences (DiSU);
- 2 Schools: Engineering (SI-UniBas) and Agrarian, Forestry, Food and Environmental Sciences (SAFE).

The facilities are located in Potenza, only the DICEM is based in Matera.

These are the courses divided into the two different university paths:

- 3- year- Degrees: Pharmacy, Biotechnology, Civil Engineering and Environmental Engineering, Mechanical Engineering, Forestry and Environmental Sciences, Agrarian Technologies, Food Technologies, Chemistry, Science and Technology, Informatics, Geological Sciences, Mathematics, Architecture, Operator of Cultural Heritage, Literary, Linguistic and Historical-Philosophical Studies, Primary Education Sciences;
- 5-year Degrees: Biotechnology for Medical, Pharmaceutical and Veterinary Diagnostics; Civil engineering; Information Technology; Mechanical Engineering; Engineering for the Environment and the Territory; Mathematics; Chemical Sciences; Viticulture and Environment; Agrarian Sciences and Technologies; Sustainable Management of Food Quality; Food Science and Technology; Forestry and Environmental Sciences; Tourism and Cultural Heritage; Archaeology and Classical Studies; Philosophical and Communication Sciences; History and European Civilization.

Moreover, Matera also hosts the High School for Conservation and Restoration (*Scuola di Alta Formazione –SAF- dell'Istituto Superiore per la Conservazione ed il Restauro*).

Two are the Conservatories of Music located in Matera (*Conservatorio Statale di Musica E.R. Duni*) and in Potenza (*Conservatorio Statale di Musica Carlo Gesualdo Da Venosa*).

5.2 Research centres, laboratories and research institutes

In the region, there is an important presence of large public institutions and public-private consortia operating in the field of research and innovation at national and international level.

The **National Research Council** in Basilicata is settled in the industrial area of Tito Scalo near Potenza, with three institutes:

- the Institute of Methodologies for Environmental Analysis (IMAA), which research activities are directed to the development and the integration of 'Observations of the Earth' technologies by satellite, air and the ground, for the study of geophysical processes and environment, with a special attention to natural hazards, security and cultural heritage;
- the Institute of inorganic methodologies and plasmas (IMIP) that conducts research on laser methods applications for the production of innovative materials and the detection of environmental pollutants;
- the Institute for archaeological and monumental heritages (IBAM) specialised in research activities on innovative approaches for ancient landscapes' knowledge, diagnosis activities for the preservation of architectural and archaeological heritage in the Mediterranean area, and for the preservation, restoration and presentation of archaeological and monumental heritages.

The **Italian Agency for New Technologies, Energy and Environment (ENEA)** has its seat at the Trisaia Centre, in the province of Matera. It operates in energy, environment and new technologies sectors, to support competitiveness policies and the sustainable development of the Country.

The **Italian Space Agency (ASI)** is active in various fields of science, promoting research in the field of both spatial and terrestrial observations. The **Centre for Space Geodesy** based in Matera, through an organization of 100 employees, develops systems for the management of natural disasters and fires, landslides and mudslides. It is also engaged in remote sensing, robotics and space interplanetary missions. All activities are conducted in cooperation with research centres, such as the **Interdisciplinary Centre for Environmental Monitoring (CIMA)**. Its main tasks are related to the promotion and conduction of research and technological innovation activities, also through the creation of prototypes and the collaboration with organizations and institutions of other countries. The Institute carries out its activities through 19 research laboratories, ranging from agro-biotechnology to waste treatment, from metrology to renewable sources.

Alsia - Metapontum Agrobios with its research laboratories dealing with the development and transfer of innovation in agriculture and the agro-industrial system through research projects and agronomic and analytical services with plant biotechnology approaches.

TERN Consortium 'Technologies for Earth Observations and Natural Hazards' is a public (51%) - private (49%) consortium born in 2005 with the following partners: 'the Regional Agency for environmental protection in Basilicata - ARPAB ', the National Research Council - CNR, the Network of University laboratories of Earthquake Engineering - RELUIS, Telespazio SpA, CREATEC Consortium for 'Environment and technological innovation'. The TeRN Consortium aims to develop industrial research and pre-competitive development for the creation – in Basilicata - of a technological district in the field of detection technologies, systematic monitoring, prevention and mitigation of natural and environmental hazards

In addition to these public research centres, **the Ministry of Education, University and Research (MIUR) has approved 27 research laboratories** in Basilicata, mostly operating in private companies (13), in national public bodies (9) and in University (5).

Table 3: Research laboratories approved by MIUR

Name	Seat
CNR Lab - Analysis of clay minerals - Institute of Research on Clays	Potenza
CNR Lab. New Laser Spectroscopy and Applied Materials - Institute for Special Materials (IMS)	Potenza
Edp La Traccia Cooperative of Edp La Traccia LTD	Matera
Enea Lab. - Integrated Food Innovation Centre - Trisaia Research Center	Matera
Enea Lab - Laser Applications Laboratory - Trisaia Research Center	Matera
Enea Lab. - Laboratory of Experimental Biomass and Solar Thermal Plant - Trisaia Research Center	Matera
Lab. Enea - Laboratory of Waste Recovery and Treatment - Trisaia Research Centre	Matera
Lab. Enea - Laboratory for Chemical Processes and Analytical Chemistry - Trisaia Research Centre	Matera
Lab. Enea - Dynamics and Environmental Test Laboratory - Trisaia Research Centre	Matera
Lab. Enea - Radiation Protection Laboratory - Trisaia Research Center	Matera
Lab. I.R.S.A.Q. of I.R.S.A.Q. LTD	Potenza
Lab. Inpes Prefabs SPA.	Potenza
Lab. Valdagri Fish S.p.a.	Matera
Lab. Metapontum Agrobios – Chemical Laboratories of Metapontum Agrobios LTD	Matera
Lab. Metapontum Agrobios – Agronomy Laboratories of Metapontum Agrobios LTD	Matera
Lab. Metapontum Agrobios – Biotechnology Laboratories of Metapontum Agrobios LTD	Matera
Lab. Polinea della Polinea SPA.	Potenza
Lab. R&S Management of R&S Management S.p.a.	Potenza
Lab. Sinter & Net of Sinter & Net S.p.a.	Potenza
Lab. Sniaricerche of Sniaricerche S.c.p.a.	Matera

Lab. Tab Consulting of Tab Consulting S.r.l.	Potenza
Lab. Tecnoparco Valbasento of Tecnoparco Valbasento S.p.a.	Matera
Lab. University of Basilicata - Department of Architecture	Potenza
Lab. University of Basilicata - Department of Chemistry	Potenza
Lab. University of Basilicata - Department of Animal Production Science	Potenza
Lab. University of Basilicata - Department of Structures, Geotechnics and Applied Geology	Potenza
Lab. University of Basilicata – Technical-economical Department for management of agricultural land and forest	Potenza

Source: MIUR

Even though a good variety of R&D centers, Basilicata has indeed one of the lowest levels of R&D intensity (measured as R&D expenditures as a % share of GDP) and patent applications to the European Patent Office per capita in the EU-27 (Eurostat Regional Yearbook 2012). The Basilicata region is dominated by small (often family-owned) businesses with low levels of competences¹⁰.

The number of new patents is much lower than national and European data.

Table 4: Innovation indicators

		POPULATION WITH TERTIARY EDUCATION	R&D EXPENDITURE IN THE PUBLIC SECTOR	R&D EXPENDITURE IN THE BUSINESS SECTOR	NON-R&D INNOVATION EXPENDITURES	SMES INNOVATING IN-HOUSE	SMES INNOVATING COLLABORATING WITH OTHERS	EPO PATENT APPLICATIONS	SMES INTRODUCING PRODUCT OR PROCESS INNOVATIONS	SMES INTRODUCING MARKETING OR ORGANISATIONAL INNOVATIONS	EMPLOYMENT IN KNOWLEDGE-INTENSIVE ACTIVITIES	SALES OF NEW TO MARKET AND NEW TO FIRM INNOVATIONS
IT	Italy											
ITC1	Piemonte	0.277	0.273	0.503	0.387	0.664	0.248	0.381	0.651	0.486	0.768	0.544
ITC2	Valle d'Aosta/Vallée d'Aoste	0.268	0.121	0.261	0.350	0.272	0.100	0.198	0.321	0.572	0.570	0.508
ITC3	Liguria	0.370	0.360	0.385	0.282	0.359	0.133	0.300	0.360	0.345	0.541	0.514
ITC4	Lombardia	0.296	0.268	0.398	0.311	0.565	0.180	0.356	0.588	0.523	0.777	0.543
ITH1	Provincia Autonoma Bolzano/Bozen	0.278	0.148	0.217	0.444	0.505	0.117	0.527	0.551	0.610	0.263	0.501
ITH2	Provincia Autonoma Trento	0.352	0.477	0.189	0.191	0.447	0.208	0.219	0.517	0.489	0.440	0.515
ITH3	Veneto	0.263	0.235	0.237	0.418	0.582	0.095	0.353	0.579	0.531	0.558	0.541
ITH4	Friuli-Venezia Giulia	0.292	0.379	0.342	0.412	0.733	0.292	0.383	0.705	0.644	0.541	0.546
ITH5	Emilia-Romagna	0.389	0.297	0.389	0.355	0.574	0.126	0.399	0.609	0.523	0.663	0.552
IT11	Toscana	0.291	0.433	0.270	0.311	0.445	0.107	0.296	0.474	0.405	0.469	0.523
IT12	Umbria	0.335	0.379	0.170	0.284	0.319	0.074	0.236	0.349	0.462	0.465	0.524
IT13	Marche	0.280	0.184	0.232	0.323	0.412	0.056	0.289	0.412	0.457	0.494	0.506
IT14	Lazio	0.326	0.668	0.304	0.195	0.353	0.076	0.197	0.359	0.411	0.646	0.506
ITF1	Abruzzo	0.278	0.327	0.243	0.388	0.509	0.127	0.206	0.577	0.419	0.478	0.523
ITF2	Molise	0.306	0.288	0.052	0.198	0.253	0.128	0.042	0.248	0.305	0.393	0.524
ITF3	Campania	0.179	0.428	0.271	0.372	0.416	0.065	0.181	0.449	0.465	0.456	0.506
ITF4	Puglia	0.210	0.346	0.160	0.324	0.214	0.048	0.160	0.254	0.369	0.376	0.506
ITF5	Basilicata	0.257	0.336	0.138	0.232	0.241	0.258	0.144	0.241	0.223	0.410	0.508
ITF6	Calabria	0.212	0.273	0.039	0.413	0.431	0.169	0.081	0.416	0.408	0.288	0.508
ITG1	Sicilia	0.179	0.351	0.180	0.321	0.338	0.107	0.123	0.356	0.463	0.509	0.503
ITG2	Sardegna	0.161	0.369	0.062	0.367	0.302	0.143	0.139	0.312	0.390	0.275	0.498

Source: European Commission, *Regional Innovation Scoreboard, 2014, RIS 3 Basilicata*

¹⁰ Sketch of a Strategy for the Basilicata region - Towards an Operational Regional Development Program Basilicata Region 2014-2020

6. MAIN CULTURAL AND CREATIVE INDUSTRIES

6.1 Identification of 3 main sectors or subsectors

As already described in Chapter 2.2, the cultural and creative industry is one of the five areas of smart specialization taking into account the three following sectors:

1. creative industry for tourism,
2. creative industry and design,
3. creative industry serving the productive sectors.

Creative industry for tourism

According to ISTAT, tourism can be defined as the set of activities and services for people moving outside their 'habitual environment': to spend a period of time for recreational purposes or for work. Starting from this definition, since 2007, the year in which the reform of tourism administration has begun, the increase recorded in Basilicata is by + 29%, and in absolute terms about more than 130,000 arrivals.

If we compare the arrivals and attendance in the period 2010 - 2015, Basilicata continues to stand out for high growth rates of tourism, under the push of Matera's growing reputation.

Figure 3: Tourist arrivals and attendance in Basilicata

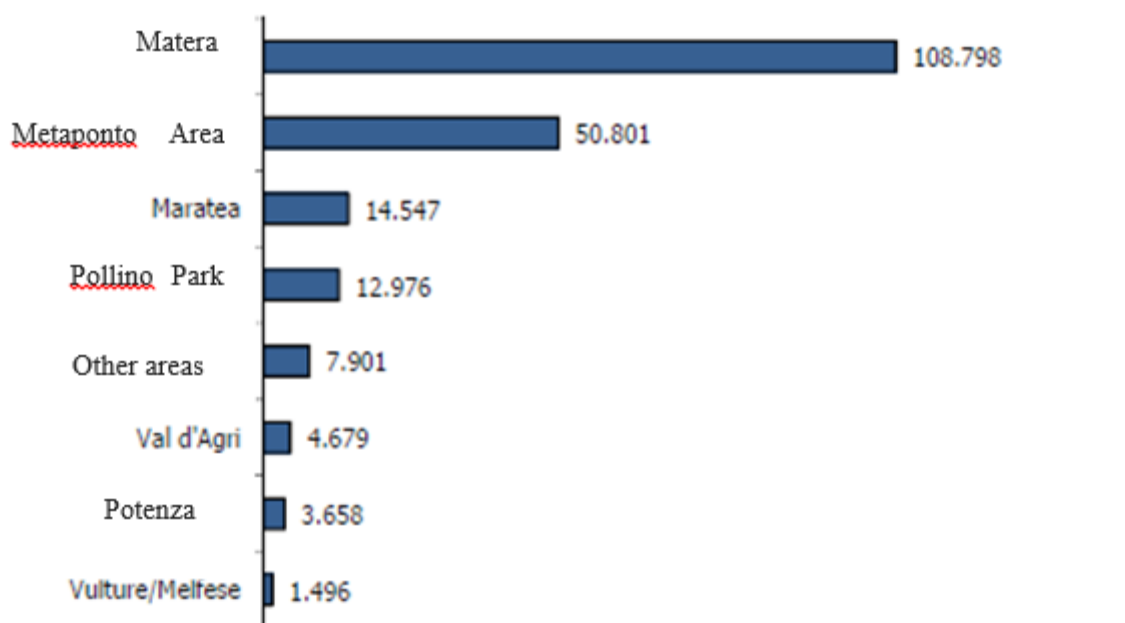
	arrivals	attendance	arrivals	attendance	arrivals	attendance
2010	493.828	1.890.108	26.544	1.412	5,7	0,1
2011	511.677	1.963.474	17.849	73.366	3,6	3,9
2012	517.901	1.881.814	6.224	-81.660	1,2	-4,2
2013	532.666	1.949.123	14.765	67.309	2,9	3,6
2014	579.111	2.100.083	46.445	150.960	8,7	7,7
2015	674.461	2.304.939	95.350	204.856	16,5	9,8

Data Source: Uniocamere Basilicata - APT Basilicata

In 2015, tourist attendance in the region's tourist facilities marked an increase of 9.8%, about 205 thousand more, bringing the total amount of overnight stays to over 2.3 million. Even more marked was the increase in arrivals (+ 16.5%, over 95 thousand more), which narrowed the 675,000 units. The increase in the number of guests compared to the overnight stays is largely attributable to the strong development of less 'stationary types of tourism', as it is typically the case of cultural destinations, which are characterized by a shorter stay. From this point of view, it is no coincidence that almost two thirds of the highest arrivals recorded in 2015 at regional level concentrated in the city of Matera both for the appointment to the

European Capital of Culture for 2019 and also for the movies shot in the Sassi (like Ben Hur and the Passion of the Christ).

Figure 4: regional tourist destinations (2015)



Source: Uniocamere Basilicata - APT Basilicata

Tourism in Basilicata has gained an increasing weight within the economic and productive system, setting itself as a sector with significant growth potential. At present, despite the comforting numbers, tourism in Basilicata has not yet expressed all its potential.

Creative industry and design.

Design is considered as a very important segment of the creative and cultural industry in Basilicata. Many projects carried out can testify the importance given by the Region in order to boost this sector. Among them: the MIM Design District and the Open Design School.

Under the framework agreement of the 'Contemporary Senses' program, an agreement was signed between Basilicata Region and Sviluppo Basilicata which has seen the realization of the *MIM Design District* that is an initiative included in the program for interventions aimed at the revival of the Upholstered Furniture District of Matera.

The Matera Upholstered Furniture District is indeed one of the most significant endogenous and self-sustaining realities in the Southern Italy and still decisively contributes to the Italian primacy in the wood-furniture sector. At its peak, the district reached a total turnover of about 2,200 million Euros. Since 2003, the District has been undergoing an economic crisis, largely

due to exogenous factors such as the new geopolitical and economic scenarios worldwide, but also to endogenous factors such as the fragmented production structure and a scarce propensity to research and innovation.

The smart specialization envisaged by the Region could not ignore the impact that technological and innovation activities may have on the entrepreneurial and industrial impacts associated with the segment of upholstered furniture which, in the past decades, has been a distinguishing element of Basilicata's quality production.

The Open Design School Matera is the first design school in Europe to be based on the principles of open culture, thus representing one of the foundations of the cultural program of Matera 2019. The school is bringing together writers, bloggers, designers, craftsmen, hackers, students, academics and other professionals to transform Matera and Basilicata into a radical innovation platform in the fields of art, science and technology. The Open Design School, as well as the I-DEA (the Institute of Demo-Ethno-Anthropology), will be a gathering spot at a national and European level, an authentic living lab for experimentation and interdisciplinary innovation.

Creative industry serving the different production sectors.

Creativity is an approach that should be transversal to all the areas of smart specialization in order to give added value to enterprises, and to imagine new organizational, business or marketing models.

An example over all: the opportunity to reinforce rural communities and to reactivate local economies, especially in those geographic regions characterized by depopulation by linking creative industries to agriculture and crafts. In this direction, the need for technological training of operators and the need to raise digital skills not only for the enhancement of cultural heritage, but also for the development of skills in the field of new technologies and ICT.

Of particular interest is therefore the *Break-in-the-Desk* project, to which many regional companies joined. It was a transnational project that is part of the Erasmus + (Key Action 2) program aiming to create innovative, productive and effective synergies through:

- ✓ coaching entrepreneurship for artists and creative people;
- ✓ the exchange of skills and visions ('give-and-take' interaction) between artists, creators and entrepreneurs;
- ✓ the exchange of skills and visions ('give-and-take' interaction) between artists, creative people, policy-makers and communities.

The aim of the project was that of supporting the inclusion of creative people in more diversified entrepreneurial realities, with important functions of innovation facilitators and problem solving.

Given that cultural and creative industries make and will use an increasingly innovative use of information and communication technologies, digital skills are crucial in order to promote innovation and competitiveness.

For this purpose, the structured presence of the University of Basilicata in the fields of ICT is undoubtedly a point of great interest. The same is the need for the cultural and creative industries of people with expertise in the field of business management, access to credit and communication, or the transferability of skills and technologies, from automotive research to issues such as ergonomics linked to the design of upholstered furniture.

6.2 Identification of 3 regional best practices

Best Practice 1

Name	<u>Matera 2019 and the process that lead to Matera as the European Capital of Culture in 2019.</u>
Profile	The application dossier for Matera European Capital of Culture was prepared by the Committee Matera 2019, with the involvement of the Municipality, the University of Basilicata, the Two Provinces, the Chambers of Commerce, the Foundation Zetema, the Matera's Murgia Park and the Conservatory of Matera
Description	<p>What is important to highlight are the various steps of the path: how to become Capital of Culture, the main lines of the Project, the reasons for the choice made by the jury of proclaiming Matera Capital of Culture among the six finalists.</p> <p>The most significant aspects emerged are:</p> <ol style="list-style-type: none"> 1) a city is not designated Capital of Culture solely for what it is/has and what it has done but for what intends to do. So what was required was a program supported by a cultural dynamism which enhance the identity of the places by developing innovative cultural products; 2) involvement of the 'city and citizens': on the one hand, to build an attractive European Capital of Culture that is able to catalyse not only the local and national population but also foreign tourists; on the other hand, to build up a 'participative' European Capital of Culture able to involve the entire population of the city, the region and other more distant places (e.g. the huge network of Basilicata

in the world);

- 3) sustainability, that means developing a program with lasting effects that fits into the long-term development of the city and it is much more than an ephemeral 'fireworks' of cultural events.

What was particularly appreciate by the jury and declared in the assessment of the project has been:

1. the visionary goal of Matera to take the lead in a 'movement' aimed at the removal of obstacles that prevent access to culture, especially through new technologies and learning processes;
2. what was initially nothing more than a popular initiative has evolved into a formal element placed in the centre of the town and regional planning;
3. the great attention dedicated to digital technology in 2019 will be even more relevant in the cultural and social context than it is now;
4. the enthusiasm and the innovation characterizing the artistic approach;
5. the recognition of a weakness in the application at the same time identified as a major goal of the program, the need for capacity building in the field of culture and public administration. Starting from the local experience and enhancing the skills of the territory, the intention is to build new networks, more robust, open and international, by valuing the individual systems related to the world of culture, both humanistic and scientific, to offer new concrete development models

Context impact

Regional, national and international

Links to Resources

[http:// www.matera-basilicata2019.it/it/](http://www.matera-basilicata2019.it/it/)

Key words

culture, creativity, internationalization, tourism, historical heritage

Best Practice 2

Name

Lucana Film Commission

Profile

The Foundation "Lucana Film Commission" (LFC) was founded in 2012 with the goal of promoting and supporting the production of films, television, audio-visual materials and advertisements in Basilicata.

Description

Its mission includes the promotion and enhancement of the artistic and environmental heritage, of the historical memory and traditions of the communities of Basilicata, of professional and technical resources active in the region, with the overall aim of creating the conditions for attracting cinema production on the territory.

The LFC offers services, information, logistical and organizational facilities to productions that run in Basilicata. Among the prerogatives of the foundation, there also is the possibility of accompanying the productions made in Basilicata at festivals and to take part in specialized national and international film markets in order to promote the cultural diversities expressed in the territory.

The LFC facilitates and accelerates, in synergy with local authorities, the procedures for issuing authorizations, permits, concessions and whatever else is necessary for the realization of film, television productions and advertisements; it wants to play the role of 'facilitator' of bureaucratic processes that often slow down the implementation of projects and initiatives mainly in the Southern of Italy.

Among the goals of the LFC are the preservation and enhancement of historical and cultural heritage as well as of audio-visual material and film archives, of film libraries, film clubs, associations, family archives, and of technical equipment of historical value as well.

Since 2014, 24 films and short films have been produced on the regional territory and in several locations, not only Matera, in the Sassi scenery, but also other locations served as backdrops to productions: the Vulture Area, the ancient town of Craco, the mountains of Castelmezzano, the archaeological area of Metaponto, the beaches of Maratea and Pisticci, and the lunar landscape of the Calanchi (kind of badlands).

Context impact

Regional, national and international

Links to Resources

<http://www.lucanafilmcommission.it/index.php?lang=it>

Key words

Audio-visual industry, culture, creativity, internationalization, tourism, historical heritage

Best Practice 3

Name	<u>The regional Centres for Creativity</u>
Profile	<p>The centers have been established under the framework of the project <i>Visioni Urbane</i> (Urban Visions), a project carried out by the Basilicata Region together with the Ministry of Economic Development, funded for 4 million euros with national resources (FAS).</p>
Description	<p>The main goal of the <i>Visioni Urbane</i> project was to recover 5 unused buildings that, once renovated, could have been used to host creative workshops by exploiting the leverage of creativity and culture to social, economic, and employment development.</p> <p>These are the 5 Centers that have been restored:</p> <ol style="list-style-type: none"> 1) Casa Cava (Matera); 2) Cecilia (Tito); 3) TILT (Pisticci); 4) Banxhurna (San Paolo Albanese); 5) The Center for the Creativity of Rionero (Rionero in Vulture). <p>The first three are really operating.</p> <p><u>Casa Cava</u> is now a theater, auditorium and congress center completely excavated in the rocks, in the heart of Sasso Barisano. Initially, it was a hypogeous complex originated as an old tufa quarry well, completely hand-dug.</p> <p><u>Cecilia</u>, with a large open space, an exhibition gallery, a bar, a training room, a conference and seminar room, an auditorium used both for shows and congresses, hosts, artistic, theatrical, technological and cultural activities in general; but especially musical events.</p> <p><u>Tilt</u> – is the acronym of <i>Torna in Lucania Team</i> which means ‘come back to Lucania team’. It is a poly-functional center consisting of indoor and outdoor spaces for training, production, debate, art performances and live performances in the field of creativity, cultural tourism and renewable energies. TILT is a socio-cultural platform available for artists and creative people ‘made in Lucania’, but also for associations, schools, institutions, businesses, and citizens who want to contribute to the generation of value through the combination of culture and economy.</p>
Context impact	Regional, national and international
Links to Resources	<p>http://www.casacava.it/?page_id=151</p> <p>www.centrotilt.it/</p> <p>https://www.facebook.com/CentroCecilia/</p>

Key words *culture, creativity, arts, music, entertainment, businesses*

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8. ANNEXES

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