

## **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

<https://chimera.interreg-med.eu/>

#### **D. 3.2.2 SWOT Analysis PP02**

##### **WP 3. Studying**

#### **Act. 3.2. Analysis of the state of the art of the innovation system for the cultural creative sector**

Authors/Responsible partner : PP02

Status: final

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## REGIONAL SWOT ANALYSIS

**Partner:** *DISTRETTO PRODUTTIVO PUGLIA CREATIVA*



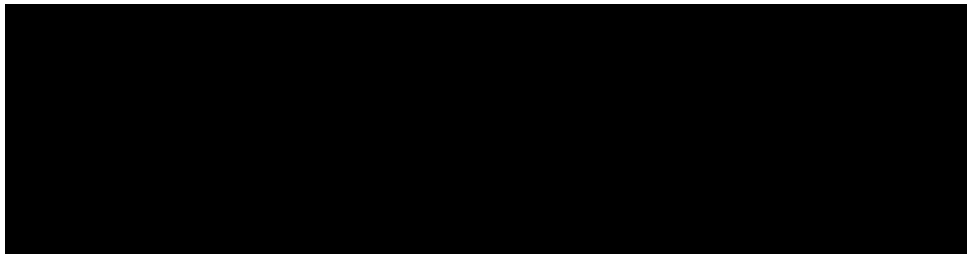
The SWOT Analysis has been conducted with the following schema:

- 4 thematic tables
- 4 host at each table, that directed the analysis with the "world café" format
- 4 series of questions, for every SWOT macro-area, that had the goal to animate and activate the discussion
- 1 specific goal: give the guide lines to the ChiMera project to hypothesise interventions, measures, action or law-making opportunities to develop the Cultural and Creative Industry and improve the internationalization.

Thematic tables:

**MANAGEMENT AND INTERNATIONALIZATION**  
**AUDIENCE DEVELOPMENT AND MARKET ACCESS**  
**TECHNOLOGY AND DIGITALIZATION**  
**LANGUAGES AND COMMUNICATION**

STRENGTHS	WEAKNESSES
<p><b>TECHNOLOGY AND DIGITALIZATION</b></p> <ul style="list-style-type: none"><li>- <b>Being able to create better products with a cheaper cost</b> It also improves the access to the quality for a CCI Operator and it can be guaranteed cheaply</li><li>- <b>It's possible to create more accessible and editable products</b> Technology allows to develop a greater number of creative products, with a better and quicker access to the public, more in target and allows to access the contacts in different moments, more times and with the possibility to collaborate to the content generation (i.e. e-books)</li><li>- <b>Low-cost access to new markets and new geographical</b> Local CCI Industry benefits of a better opportunity to develop itself</li></ul>	<p><b>TECHNOLOGY AND DIGITALIZATION</b></p> <ul style="list-style-type: none"><li>- <b>Democratization of the value for creative products can generate difficulties to confer to the products an intrinsic value,</b> especially for complex products, because it is hard to create aesthetic standards of reference</li><li>- <b>Digital Divide,</b> if a digital divide subsists the access to markets remains costly and not simple for organization, moreover it create a more serious condition of isolation and irregular evolution or backwardness</li><li>- <b>Rapid obsolescence of innovation</b> and consequent necessity to organise the continuous access to the technology and a valid use of it or planning of the operations made</li></ul>



in National and International markets

- **Access to new resources, to innovative "shared" resources, and to new management paradigmas, so far only available to other industries**, such as crowdfunding or crowdsourcing platforms, or the possibility for radios to show online videos.
- **Availability of a huge quantity of free and usable data**, such as open data
- **Digitalization favours meritocracy**, it push authentic content up, because public likes them and they are not mediated or proposed by the critics, it also makes it possible to create diffusion metrics

#### AUDIENCE DEVELOPMENT E ACCESSO AL MERCATO

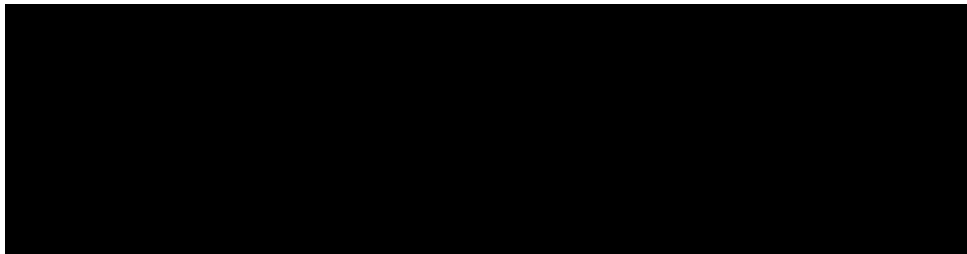
- **The richness of our territory of some areas that are affine to the CCI**: agriculture, tourism, food
- **CCI in Apulia has targetted the community needs, also using a intersectorial mixup** (such as culture-tourism; culture-new business; culture-agrifood)
- **Obtain access to an international audience** straight into the local communities (thanks to tourism)
- **Have a strong regional policy support to the CCI** to improve the exposure of our territory at national

by managers and professionals to be up-to-date.

- **It is necessary to have or educate new persons** to access innovation, to manage the generational trasformation and the upgrading
- **The digitalization reduces the live fruition of creative performance**, reduces revenues and change the essence of their nature

#### AUDIENCE DEVELOPMENT E MARKET ACCESS

- **Promotion of territory is stil insufficient and ther is not enough mix between different industry sectors or markets nd related targets**, this is why the partnerships are often mediate by policy makers in order to respond to specific projects, without a good follow up of growth, or EU projects, that activate the mrket but do not animate operators after that
- **Difficulties in finding and obtaining good creative and cultural contents** to widespread, produce and give value
- **The audience is often not made by passionate but poeple looking for status** that do not contribute to engage other audience
- **Financial support by politics is often too wide and not really meritocratic**, so it is also insufficient to sustain good initiatives



and international (i.e. Apulia Film Commission)

- **Obtain funding from local politics**

#### **MANAGEMENT AND INTERNATIONALIZATION**

- **Cultural and Creative District such as an hub, a place**
- **Bravery, strenght and passion**
- **We already have a network on the territory that created connections, opportunities and a good basis on which invest for the future**

#### **LANGUAGES AND COMMUNICATION**

- **Ability to collect stories and give a better exposure to the cultural identity of the territory**
- **Digital language as an opportunity to give voice to contents and scale up to national and international scale**

- **There are not financial tools that provide the opportunity to use a mixed model between public and private funding for ICC industries**

#### **MANAGEMENT E INTERNATIONALIZATION**

- **Know themselves as a suburb, out of the network that counts is an obstacle both psychological and physical to develop and have an entrepreneurial enthusiasm**
- **Limited access to some sources of information**, that are prerogatives of other geographical areas
- **Difficulties to access resources and lack of skills and knowledge to obtain private resources**
- **Lack of professionals and competences in managing, strategizing and govern the process of internalization**

#### **LANGUAGES AND COMMUNICATION**

- **Mistrust and resistance due to an excess of information**
- **Huge fragmentation of information and languages, that is not positive to create dialogue and promote the circulation of the message.** The message has to be appropriate to the target and this is a complexity multiplier or not prepared organizations and teams
- **Recently digital communication generated “anthagonim patterns” (the haters) and this is a strong**



challenge to face for old style communicators

- **Even in the communication area there is a strong resistance of dilettantism**, that is a state of mind and is a problem if it is not recognised as a need of training to invest in and to stay in line with the times
- **“Territorial language” (the language used in a geographical area) is far from national and international trends of communications** and risks to be out if it does not set trends itself

## OPPORTUNITIES

### TECHNOLOGY AND DIGITALIZATION

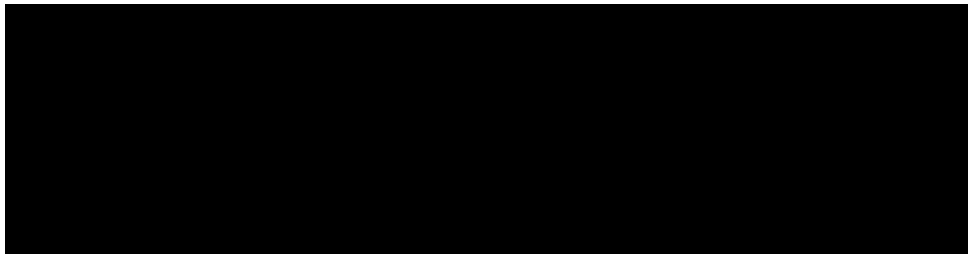
- **New products**
- **More interactive products**
- **Creative products that are “made in local” and acquire value to promote**
- **Opportunity to exceed geographical boundaries or time limits or specific targets**
- **Suburbs does not exist anymore in productive processes , the opportunity is to develop specialized competencies and make them emerge despite of the geographical allocation ,taking part in creative processes and productive fluxes in Italy o at an international level**
- **Easily acquire skills and knowledge ad create mechanisms of innovation**

## THREATS

### TECHNOLOGY AND DIGITALIZATION

- **Reduction of protection, particularly copyright**
- **"Hyper-democratization of taste" - the quality no longer recognized** difficulties in affirmation of the authority of sources and lack of procedures for defining the performance and value of the sources which establish (es. Academy of Crusca for Italian)
- **Digital Divide**, where there prevents access to opportunities such as participation to the production processes

### AUDIENCE DEVELOPMENT AND MARKET ACCESS



**outside our organisation**, adopting professionals from other experiences or in outsourcing, acquiring companies or startups that come from other sector and can leverage on innovation to find new business models, new product and new opportunities for ICC

- **New opportunities to protect copyright (such as SIAE competitors in Italy)**
- **Opportunity to create a network and a channel of continuous international contact**, like a virtual space or a working lab to collaborate
- **Possibility to customize and personalize creative and cultural products in order to respond to performance marketing rules**, lend from e-commerce e ads

#### **AUDIENCE DEVELOPMENT AND MARKET ACCESS**

- **In the last years collaborations with complementary realities or synergies with other operators are multiplied and widespread**, and this is really stimulating to ICC operators and their contents
- **New opportunities come also from diversification of places to enjoy or play or use cultural products**, this makes ICC closer to audience and new target or new segment of public, just decontextualizing old contents or complex products or

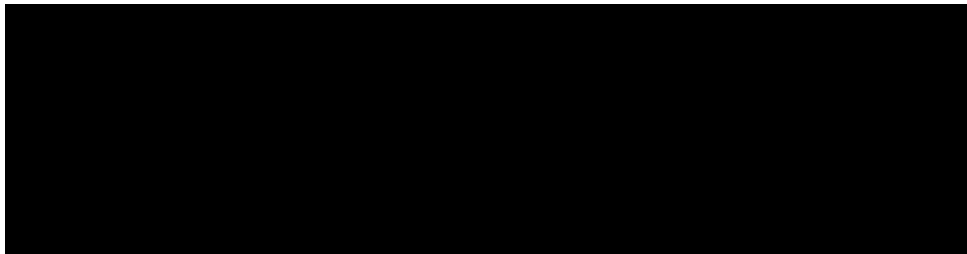
- **The democratization of taste and increased competition in some challenging environments**, reduced the quality of the products ICC
- **Difficulty retaining the audience**, which finds countless leisure opportunities, including cross and has no way to become attached or improve a product
- **There is a need to organize and make effective cross-sectoral and networking events with the aim of activating the dynamics of contamination with other worlds and create new virtuous models**
- **The investment policies are numerous in quantity, but still not adhering to the real needs of the sector**

#### **MANAGEMENT AND INTERNATIONALIZATION**

- **Lack of convenience in growth, increase in costs, lack of managerial figures to support growth**
- **Lack of proper / correct programming at the enterprise level and aggregate**
- **Loss for the internationalization of**  
1. Fiscal Incentive 2. “follow rights”

#### **LANGUAGES AND COMMUNICATION**

- **Lack of expertise and coordination figures or connection, connection**



actualize languages to make them more comprehensive and clear

- **Sinergies and dialogue with local economies can generate new occasions of exposition or new formats and model of exhibitions**
- **Crowdfunding platform and investment opportunities for public-private combination of capital (from startup world) can be used in ICC contexts and adapted**

**to ensure a bridge between the ICC and the world of communication**

- **We must get out of the fragmentation and create new forms of association to give a single voice to the system and promote the professionalization of languages**

#### **MANAGEMENT AND INTERNATIONALIZATION**

- **Being a periphery strengthens the identity and makes attractive the area operators**
- **Space for new territorial initiatives related to international relations existing and potential.** Idea: international art fair in Puglia, involving eastern Europe and the Mediterranean
- **Training requirement**, extending competences and skills for all operators
- **Opportunity to organize sectoral bilateral B2B meetings**, with strong upstream research and the real involvement of weight actors and real support to follow up the agreements
- **There is a new patronage to be treasured**, international and composed many niches of investors to "conquer"



## LANGUAGES AND COMMUNICATION

- **An aggregation model could be decisive with respect to the problem of fragmentation and updating of languages**, to carry out monitoring activities and be more effective because "together" in the communication of cluster operations. The aggregation contains in itself the answer
- **Create a link between the ICC and the world of communication**

## FINAL CONSIDERATIONS

*Write down relevant aspects or final thoughts that you consider important to highlight about your regional SWOT analysis.*

The work on the SWOT analysis has given interesting results, because it has revealed some clear trends, issues and considerations that have proved common to the four tables and afflict differently, but mirroring the themes treated respectively. The trends emerged:

### **HUB, PLACES AND OPPORTUNITIES OF MEETING, UNINTERRUPTED OR RICURRING>>> MEETING OF OCCASIONS, EXCHANGE AND COLLABORATION**

Both in managerialization optics, that in communication has emerged the need to increase the frequency and quality of meetings between operators, which could in the aggregation, also real, ie, working together with collective initiatives or creating common structures to do operations or communication of their initiatives. The system could grow and reduce the difficulties and obstacles to growth such as costs, access to credit and access to funding sources and the audience.

The nanism of the industry has emerged so clearly and it is necessary to assess what steps to take to help businesses grow ICC, join or even incorporate initiatives that contain the germ of innovation and experimentation of new models, such as startup high potential.



### **NEED 'OF FIGURES OR ORGANIZATIONS THAT BRIDGE MORE SECTORS OR WORLDS >>> NETWORKING PROBLEM**

The contamination need has emerged not only in reality of the same industry or the same territory, but also as a natural evolution of the external model. In particular to develop the number and the quality of the audience, bringing local production on a national and international scale, gain outside expertise, (as manager able to professionally manage growth and its international expansion).

The networking to which reference is made must have items, however effective that do not seem to have been up to now present in other initiatives: ensuring follow up on the initiatives to be supported by public and private financial resources, to be managed through integrated planning and programming even among sectors and a clear design strategy.

### **NEED OF BUSINESS AND MANAGEMENT PROFESSIONALISATION >>> TRAINING REQUIREMENTS**

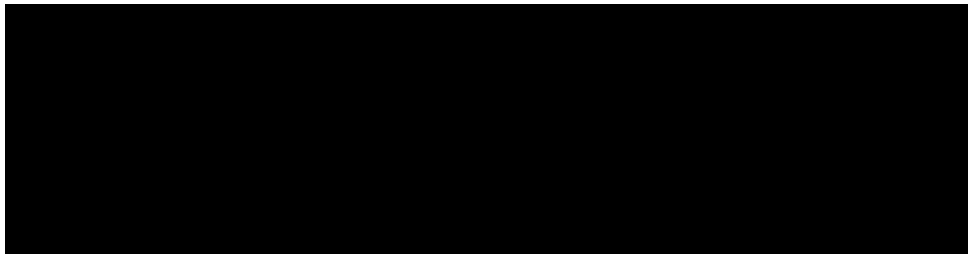
It is definitely necessary to grow the internal competences of the ICC businesses and organizations: technical, computer skills, digital communication, innovation and knowledge of legal and international economic management.

### **DEMOCRATIZATION OF TASTE AND DIFFICULTY 'RESPECT TO THE NEW TRENDS audience: FRAGMENTED AND NOT IN HABIT WITH THE QUALITY' >>> NEED OF A QUALITY STANDARD AND CHANGE OF LANGUAGES**

Interesting starting point, this felt so widespread is the consideration that the taste is democratized and is difficult to perceive the actual quality of the public productions. Also this hint is definitely a result of digitization, the affirmation of the spontaneous language and a spread of a culture medium that does not reward the complexity and raises the question of 1. To train the public and raise the demand for culture 2. Understand languages of the public and the new (are interesting in this regard to gaming and gamification of experiments iCC content)

**It 'also interesting to bring all the ideas that emerged during the works**

- 1. Creation of a connection fair of Eastern Europe and the Mediterranean world and in Foggia in Puglia**
- 2. Create a virtual space for exchange and cooperation, as an open channel between ICC operators**



### **3. Organization of B2B meetings and networking workshops to conceive and give birth to a transnational level or intra-sector initiatives**

#### **IN SUMMARY**

**S:** participating operators see as a strength of the Apulian ICC own territory, membership and passion and affection that implies, and this feature has declined as management determination, opportunities to make communication effective and consistent, in terms of audience and followers and strong base from which to draw to scale through technology at a national and supranational level.

**W:** the lack of professional managers and the difficulty of access to financing instruments hamper growth and also slows the participation in decision making and makes it difficult to get people who have strong skills to support growth

**O:** the opportunities that arise are therefore the ability to set effective learning pathways, interior, through training, external through the creation of hubs and trading places with territorial and extra-territorial realities. Virtual, technology can be just the first channel that opens doors to new growth targets

**T:** the environment remains complex and therefore must be handled the difficulties of access to credit, geographic limitations, the exponential growth of competitors and lowering the level of culture and creative quality, even thinking in terms of audience education and administration "minimum" of culture through political and territorial and national planning.

The Chimera project could be an excellent growth opportunity for the ICC and the system should aim to reduce friction to the growth and generate virtuous processes of intra-industry contamination and to give international cultural and creative tools and all'industri the economic levers and context to assert its presence and grow naturally

.In order of priority interventions are:

- Set up a strategy, a program of growth and economic policies, such as infrastructure investment, financing instruments and meritocratic easy access and opportunities contamination between economic sectors (such as tourism – food - agriculture and Culture)
- Strengthen existing meeting places, existing relationships and bring value to concrete initiatives
- Creating new models of learning, training, acquisition of skills (accelerators, international exchanges, collaborative virtual spaces)



- Create opportunities for interaction and effective networking, involving ICC, innovative sectors, institutional investors and new patrons

## REGIONAL SWOT ANALYSIS

**Partner:** *Distretto Produttivo Puglia Creativa*

STRENGTHS	WEAKNESSES
<p><b>1. Technology and Digitalization</b></p> <ul style="list-style-type: none"> <li>- Creation of new job opportunities, in particular for young workers;</li> <li>- Possibility to produce and promote new work with small budget;</li> <li>- Accessibility and visibility of the cultural heritage;</li> <li>- Digital preservation of the knowledge;</li> <li>- Access to the information: Database;</li> <li>- Multidisciplinary.</li> <li>- Valorisation of the individual professional value.</li> </ul> <p><b>2. Audience Development and Market Access</b></p> <ul style="list-style-type: none"> <li>- The territory and his resources;</li> <li>- Regional politics have supported the constitution and development of associations;</li> <li>- The exchange with international best practices;</li> <li>- Dialogue between institutions and stakeholders</li> </ul> <p><b>3. Management and Internationalization</b></p> <ul style="list-style-type: none"> <li>- Bigger company open to new collaborations;</li> <li>- Multidisciplinarity;</li> <li>- Access to co-working spaces;</li> <li>- Capacity and speed in reading the changes;</li> </ul> <p><b>4. Languages and Communication</b></p> <ul style="list-style-type: none"> <li>- New competences developed in the last years;</li> <li>- The territory offer many elements that can be communicated in different ways and with many languages;</li> <li>- New marketing strategies;</li> </ul>	<p><b>1. Technology and Digitalization</b></p> <ul style="list-style-type: none"> <li>- Needs of continious updates;</li> <li>- Risk of loosing information;</li> <li>- Less privacy.</li> <li>- Less professionalism.</li> </ul> <p><b>2. Audience Development and Market Access</b></p> <ul style="list-style-type: none"> <li>- Lack of funds;</li> <li>- The Apulia region is one of italian area with the lower index of cultural fruition;</li> <li>- Lack of instruments to calculate the audiovisual fruition;</li> <li>- Dialogue between institutions and stakeholders in the small municipalities;</li> <li>- Wrong or inexistent management plans;</li> <li>- It's very difficult to find competent actors in the public system;</li> </ul> <p><b>3. Management and Internationalization</b></p> <ul style="list-style-type: none"> <li>- Lack of incubators and accelerators and, ingeneral, a support process to the enterprises;</li> <li>- The Public Administration work at a different speed than management; it doesn't offer consultant in the field of the cultural management; it's slow and very bureocratic;</li> <li>- Difficut to develeop good networking;</li> <li>- The territory doesn't offer enough international exchange opportunities and whent it happens those are not enough promoted and communicated;</li> <li>- Lack of support for the internationalization process of the companies;</li> </ul> <p><b>4. Languages and Communication</b></p>

	<ul style="list-style-type: none"> <li>- Storytelling focuses only on positive aspects;</li> <li>- Compence badly comunicated;</li> <li>- Sterotipated languages;</li> <li>- Non specificity of the language in relation to the local context.</li> </ul>
OPPORTUNITIES	THREATS
<p><b>1. Technology and Digitalization</b></p> <ul style="list-style-type: none"> <li>- Facing needs and requirements of the national and international legal framework;</li> <li>- Stimulating the sales and distribution activities;</li> <li>- Job employment;</li> <li>- Valorization of actions to enrich and protect the cultural heritage;</li> <li>- E-learning and development of creative thinking;</li> <li>- Access to new markets;</li> </ul> <p><b>2. Audience Development and Market Access</b></p> <ul style="list-style-type: none"> <li>- Audience can become more interested and competent if the cultural policies are well designed;</li> <li>- More dynamism in the knowledge and expertise of crow funding;</li> <li>- Active participation of the audience to the events and activities;</li> <li>- The cooperation opens new scenarios to the internationalization process;</li> <li>- Cooperation = Associations = Diversification of the skills;</li> <li>- Engagement of local organizations</li> </ul> <p><b>3. Management and Internationalization</b></p> <ul style="list-style-type: none"> <li>- Regional innovation politics and cultural strategies;</li> <li>- Creation of new professionalism and job</li> </ul>	<p><b>1. Technology and Digitalization</b></p> <ul style="list-style-type: none"> <li>- Lost of data;</li> <li>- Increasing of competitions and/or deacresinf of demand;</li> <li>- Intellectual property not protected;</li> <li>- Technology can make relational network weak;</li> <li>- Increasing of attention can apport dissatisfaction;</li> </ul> <p><b>2. Audience Development and Market Access</b></p> <ul style="list-style-type: none"> <li>- Lack of competences;</li> <li>- Sometimes, the cooperation can create clash;</li> <li>- The lack of interest in the regeneration process of dismissed places;</li> </ul> <p><b>3. Management and Internationalization</b></p> <ul style="list-style-type: none"> <li>- International competitors replace local operators;</li> <li>- Polical sistem and lack of reforms;</li> <li>- Depauperate the human local capital 'cause of the emigration phenomena;</li> </ul> <p><b>4. Languages and Communication</b></p> <ul style="list-style-type: none"> <li>- Focus on the territory could be dangerous because the territory is a temporary phenomena;</li> <li>- Too much demand create caos</li> </ul>

<p>opportunities;</p> <ul style="list-style-type: none"> <li>- International exchange;</li> <li>- Development of thematic clusters and network acting as mediators;</li> <li>- More competences and skills from an international dimension.</li> </ul> <p><b>4. Languages and Communication</b></p> <ul style="list-style-type: none"> <li>- Strong elements of natural and human landscape: excellent elements of marketing;</li> <li>- Competences matured in the last years;</li> <li>- The role exercised by organizations such as Puglia Sounds, Apulia Film Commission, Distretto Creativo, etc.</li> </ul>	
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## FINAL CONSIDERATIONS

*The workshop was very productive and positive. The participants discussed about many relevant topics, but the group sometimes focuses more on generic/national issues than on local level.*

*The SWOT analysis highlights a common sentiment in the general discussion, with some elements recurring in each table.*

*It's a common sentiment, for example, that Institutions such as Apulia Film Commission, Puglia Sounds, Distretto Creativo can support in a very productive way the cultural and creative industries, from the management to communication, from internationalization to audience development: this role is important, but can be even more important in the future.*

*On the other hand, a weakness element is represented by the low knowledge of the English language, a strong limit in the internationalization and management process.*

*The public sector is seen as slow, bureaucratic, and in general as a weak element in the development and support of the CCI.*