PARTICIPATION IN CREATIVE EUROPE AND THE IMPACT ON THE DIGITAL TRANSFORMATION OF ITALIAN ORGANIZATIONS: A COMPARISON BETWEEN THE CULTURAL AND AUDIOVISUAL SECTORS

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Abstract

Although academic literature has extensively investigated the measures to support cultural and creative industries and creative entrepreneurship at national level, the contribution of Creative Europe - Framework Program of the European Commission dedicated to the cultural and creative sectors for the period 2014-2020 - to the development of the macro-sector has still been little investigated, also due to its recent conclusion.

Looking at the Italian context, the paper compares the organizations financed by Creative Europe both in the framework of both the Culture sub-programme and of the MEDIA sub-program, highlighting the differences between the two sub-groups with respect to the impacts obtained thanks to participation in the Program.

Thanks to a survey conducted on 94 Italian organizations benefiting from Creative Europe between 2014 and in 2019, the paper analyses the impacts on innovation and on digital adoption, identifying how technologies have entered the cultural production process, which new skills have been introduced or developed within the staff of the organizations, and which concrete results have been achieved.

Finally, the main development trajectories undertaken by the beneficiaries of the Creative Europe Program are discussed highlighting some policy making and management implications.

Keywords: Creative Europe, Creative Industries, Innovation, Funding, Cultural entrepreneurship

1. Introduction

The economic impact of cultural and creative industries in Europe and their contribution to the evolution of society, to the richness and diversity of contemporary cultural production is widely recognized and explored both in the academic literature and at an empirical level.

According to Eurostat, CCIs in Europe employ over 7.4 million people, i.e. 3.7% of the European workforce, and, over time, the sector's ability to create value has increased: between 2014 and in 2019 (the last year for which comparable data is available at EU level) the number of firms grew on average by 2% per year, a much higher rate than the rest of the non-financial firms in the EU. Furthermore, the added value of the cultural sector in the EU increased by an average of 2.9% per year between 2014 and 2019.

On the other hand, evaluating the performance of the CCI macro-sector by looking at the export capacity of cultural and creative products, cultural goods represent a relatively small percentage of the total (non-EU) exports of the EU-27, equal to approximately 1 %, with a growth of 1.04% in 2019 compared to 2014.

The countries in which this category of exports has the greatest importance - considering extra and intra-EU trade - are France (with a 2.0% share of exports of cultural goods out of total exports), Italy (with 1.7%), Poland (with 1.4%) and Latvia (with 1.1%).

In general, in Europe between 2014 and 2019 there was a growth in imports (+5.9%) greater than the growth in exports (+4.3%). Among EU Member States, only 11 countries recorded a positive trade balance in 2019: Italy (over €5.0 billion), already the leader in 2014, followed by Poland (€0.8 billion), France and Germany (both 0.6 billion euros). Furthermore, in 2020, the Covid-19 pandemic had a negative impact on exports of cultural and creative goods and services (imports remained unchanged), thus contributing to a worsening of the trade balance at European level for this macro-sector.

In this context, Italian performances are only partially positive: Italy, in fact, is first in terms of number of cultural and creative enterprises, but third in terms of turnover and added value in the sector (declining by 1.4% per year between 2021 and 2017), behind the United Kingdom, Germany, France. It is a structural situation, very similar in all the other productive sectors in Italy.

On the export front, on the other hand, in comparison with the countries that express a similar export capacity - France and Germany - there is an opportunity for Italian cultural industries to grow exports, and that the country continues to be characterized by a strong ability to create value in the creative industries sector.

Taking into consideration the audio-visual sector (cinema, radio, television and music production), for example, this is of strategic importance at a national level: in terms of usage time, in fact, it is the sector in which the main cultural consumptions of the population - not only in Italy - and, for this reason, it is also of great interest for exports (ISTAT, 2022, Symbola-Unioncamere, 2019).

In this context, however, Italy has a low export capacity compared to the other major European countries. Looking at the latest available data, in fact, between 2006 and 2018, in a global panorama that saw non-European multinationals establish themselves in the world audio-visual market through highly pervasive digital distribution strategies, Italy almost halved the share of the sector's global added value, going from 4 to 2.3% and thus dropping from seventh to ninth place in the world ranking (Eurostat, 2019).

On the other hand, the difficulties that the Italian and European cultural and creative industries must face on the global market are increasingly varied. Among these, in particular, the fragmentation of the sector along geographical, cultural, linguistic lines - think for example of the marginality of the Italian language in the current *koiné* - and sub-sectoral lines play an important role; globalization and digital transition and the need to access sustainable and diversified finance (Anica, 2019).

Creative Europe - framework program of the European Commission - was created precisely in the face of the recognition of this evidence.

Made up of two Sub-programmes (Culture Sub-programme and MEDIA Sub-programme) and an inter-sectoral section (which frames all the transversal aspects of the two programmes), the Program had a budget of 1.46 billion euros in the seven-year period 2014-2020: 455 million (31%) for the Culture Sub-programme, 824 million (56%) for the MEDIA Sub-programme and 181 million (13%) for the cross-sectoral section.

Italian cultural organizations have largely benefited from the Programme. Between 2014 and 2020, 320 cultural organizations of the Culture Sub-programme (which receive 7.6% of the funds disbursed by the Programme) and 133 of the MEDIA Sub-programme (which receive 7% of the total funds disbursed by the Programme) had access to the plan.

Although the academic literature has covered the topic of support policies for entrepreneurship in the cultural and creative sector in a broad and diversified way (Greffe, 2016), much less attention has been paid to the impact of European funds and, specifically to the Creative Europe programme.

The purpose of the paper is therefore to analyse the impacts of the Creative Europe program on the participating organizations looking specifically at Italy.

In particular, the contribution aims to investigate 3 specific research questions, namely:

- **RQ1** - Does the program provide organizations with support that allows them to work on their innovative capacity? Through what methods?
- **RQ2** - What are the innovative processes triggered by participation in the Program?
- **RQ3** - What are the results of the innovation processes?

2. Background and literature review

In the last thirty years the economic value generated by the industries producing cultural and creative goods and services and the potential growth of this macro-sector has turned the spotlight on the creative economy and has led to a rich academic literature in the field.

Literature on creative industries has focused on many different aspects. Scholars have engaged in analysing the potential of the creative economy (Caves, 2000; Howkins, 2002) and of the spatial concentration of creative talents for territorial competitiveness (Scott, 2000; Hall, 2000; et al.), and cultural and creative industries have been described as a tool for urban regeneration (Communian, 2011), in terms of sustainable and "smart" economic growth and innovation (Potts et al., 2008; Santagata, 2009). More recently, scholars have also focused on the analysis of support policies and on the development of incentive schemes for entrepreneurship in the cultural and creative sector (Bakhshi et al., 2015; Varbanova, 2016, Cunningham and Flew, 2019, Kolb, 2020 et al.).

International organizations such as UNESCO, UNDCTAD (2018), and the OECD have also joined this debate by promoting important reports on the creative economy. Moreover, important theoretical contributions came also from the European Commission (European Union, 2018; KEA, 2018).

Many countries have mapped and quantified their own creative sectors, adopting ad hoc support policies and launching, important investments, public and private. These investments have been directed to both general structural or sector-wide interventions and generic measures aimed at the development of innovative companies and creative start-ups (Foord, 2008; Friel and Borrione, 2020 et. al)

These policies have shown however significant limitations and studies show how these strategies have deflected a situation of growing market failure, particularly in traditional micro and small cultural activities (Foord, 2008; Hausmann, 2010).

Micro and small cultural and creative activities, which in the past have been able to count on public resources, today find themselves competing in an increasingly crowded market with ever more limited economic resources. Moreover, creative enterprise often show a general weakness in terms of managerial and organizational skills, and in terms of process and product innovation, which penalizes them in accessing alternative resources from the private sector (Bilton and Cummings, 2015).

Today this requires a rethinking of policies to support cultural and creative sectors and the issue concerns not only the public national policies but also the European ones, and the different funding measures that the European Union has implemented to foster and sustain the growth of European cultural and Creative industries also in view of the the innovation capacity of cultural and creative industries as they intersect the innovation processes of other manufacturing and services sectors with innovative and creative outputs (Cooke and De Propris, 2011).

3. Methodology and data

To try and give a contribution to the topic and to better understand the impact of the Creative Europe Program on the innovation processes of cultural organizations that participated in it during the 2014-2020 period looking at the Italian context, we adopted an evaluation framework derived on the one hand from the European Parliamentary Research Service (Zygierewicz, 2018) and, on the other hand, from studies done at national level by the UK Creative Europe Desk (SQW, 2021).

The assessment scheme identifies six types of impact, in line with the aims and objectives of Creative Europe - both at a strategic and operational level - and for each type it defines the measures in order to estimate the impacts themselves.

These are (i) Internationalization, partnerships and networks; (ii) new management schemes, new technologies and applied research; (iii) economic and financial impact; (iv) cultural and public development, (v) knowledge, skills and abilities; (vi) social impact.

Data was collected through three main sources:

- documents of the Creative Europe Desk.
- two questionnaires - one for the beneficiaries of the MEDIA sub-program and one for the beneficiaries of the Culture sub-program - administered to the Italian organizations that participated in Creative Europe between 2014 and 2020.

Concerning the two questionnaires, they followed the same structure, composed of three main sections. A first section was dedicated to the characteristics of the interviewee and his or her organization and was aimed at gathering information on the characteristics of the beneficiaries of the two programs in terms of typology, geographical location, number of collaborators, cultural and creative sector of activity.

A second section explored participation in Creative Europe in terms of the chosen funding scheme, participation in other European programmes, evaluation received and reasons for participation.

Finally, a third section was dedicated to the identification and study of the impact areas being analysed, namely: (i) internationalisation, partnerships and networks; (ii) new management models, use of new technologies, applied research and creativity; (iii) economic-financial; (iv) development of knowledge and skills; (v) cultural and audience development; (vi) social impact.

Finally, a fourth section has been foreseen only for the Media sub-programme.

The questionnaire was distributed to 453 potential respondents - 320 participants in the Culture Sub-programme and 133 in the Media Sub-programme - between 1 and 15 April 2021 via the Italian Creative Europe Desk.

Reminders and follow-ups were sent via email and phone to encourage survey completion. In the end, 94 responses were collected, 53 from participants in the Media Sub-program and 41 in the Culture Sub-program: with a response rate of 20% of the total number of potential interviewees.

4. Results

4.1 The participation of Italian organizations in Creative Europe

In the seven-year period 2014-2020, Italy participated 515 times in Creative Europe Culture Sub-programme projects, being leader 136 times: a result, in absolute terms, better than other comparable countries.

Participation has also grown over time, from just over 20 organizations a year in the early years to around 40 in recent years. Since there are many organizations that have been selected several times, both as leaders and as partners, the total number of organizations that have won a Creative Europe project in Italy is 320, 103 as project leaders.

Overall, this is 8.6% of the organizations at European level which, taken together, received 7.6% of the funds from the Programme.

In comparison with other European nations of comparable size, the selected Italian organizations are higher in number while, as regards the total amount of funding received, there are nations that have been able to intercept a higher amount.

Furthermore, Italy shows a lower success rate of about 10 percentage points compared to Western European countries, which are more effective in obtaining Program funds. The relatively low success rate is a general problem of the Program, considering the high number of organizations seeking to participate and the low budget with which it was funded for the period 2014-2020, but it is a particularly visible problem for Italy, given the high number of requests sent.

As regards the type of organizations that participated in the programme, in most cases the participants are cultural organizations such as cultural associations (33%), foundations (20%), cooperative societies (8%) or corporations operating in cultural sphere. This group is followed by that of universities (11%) and that of public bodies such as Municipalities (5%), Provinces, Regions and also Institutes of the Ministry of Culture, which together account for 3% of the organizations financed in Italy. Finally, there are also a series of entities such as consortia and other types of companies which make up the remaining 9%.

The macro-sectors in which these subjects operate are the performing arts (51%), publishing (27%) (with a focus on translation, given the dedicated call), tangible and intangible heritage (16%), visual arts (6 %) and other sectors of cultural production (4%).

If we look at businesses by turnover, all the businesses in the sample interviewed belong to the small or micro-enterprise (about 90%). The largest number of financed organizations stands in a turnover range ranging from 100,000 to 500,000 euros; a few less have a turnover between 500,000 and 2,000,000 euros. A similar result can also be obtained by looking at the number of people employed within organizations: more than a third of organizations have fewer than 10 people on staff and almost as many fewer than 50.

As regards Creative Europe - Media Sub-programme, 133 organizations took part between 2014 and 2020, some of which submitted multiple projects, thus resulting in selections in various calls. Over the period, these are 5.5% of the organizations at European level that received 7% of the funds allocated by the Programme.

Table 1 - Success rate in participating in the subprogrammes by country

COUNTRY	Success rate in the Culture Program (%)	Success rate in the Media Program (%)
Belgium	37	46
France	24	35
Italy	**11**	**32**
Spain	18	26
UK	19	26

Source: Elaboration on data from the Santagata Foundation.

The projects submitted by Italian organizations in the seven-year period amounted to 1,639 of which 518 supported out of the total of 12,546 financed at a general level by the MEDIA sub-programme, with a success rate of around 32% and a share of funded projects of just over 4% of the total.

Compared to other European countries with a high audio-visual production capacity, Italy ranks third for projects presented, after France and Germany, but surpassing Spain and the United Kingdom.

In terms of supported projects, however, the country is in third place with a share of funded projects of 4%, after France and Germany with 9% and 8% respectively.

Since 2014, the Italian audio-visual and broadcasting industry has benefited from 48 million euros in economic contributions through the Media sub-programme, i.e. 7% of the total 695 million euros allocated at European level, and 48% of the approximately 99 million euros requested at national level.

If one looks at the classification of enterprises by turnover, there are no particular differences with the organizations that participated in the Culture Sub-programme. Also in this case, in fact, around 90% of the companies in the sample interviewed fall into the category of small or micro-enterprises. The largest group of funded organizations are in the €100,000 to €500,000 turnover range (42%), and around half have a turnover between €500,000 and €2,000,000 (21%).

Even taking into consideration the number of employees in the organisations, the result is similar to that recorded for the sample of participants in the Culture Sub-programme. More than a third of organizations have less than 10 employees, and almost as many have less than 50. Only 6 have more than 50 people working within the organization.

4.2 Creative Europe: support to creativity and innovation

One of the objectives of the Program is to provide organizations with support that allows them to work on: (i) their innovative capacity, thanks to research and experimentation; (ii) the development of innovative languages and formats, thanks to new artistic, interdisciplinary and intersectoral collaborations; (iii) innovation in promotion and communication tools; (iv) the use of new technologies; (v) the development of new business models.

The organizations seem to respond adequately to this intention of the program (Tab. 2): in fact, more than half of those participating in the Culture Sub-programme declare that participation in Creative Europe has allowed them to develop new ways of working, thus recognizing a capacity of the Program to encourage innovation of management models and processes. 50% highlight the fact that the organization has been able to innovate and take more risks, and around 30% believe that the Program has allowed them to maintain direct creative control of projects that otherwise would have had to be outsourced to other organizations for realization.

The impact of the Program on the ability to innovate is perceived differently by companies in the audio-visual sector, compared to the organizations participating in the Culture Sub-programme. The share of audio-visual companies that believe that the Program allows for the development of new ways of working is in fact lower for the MEDIA sub-programme, where however the share of organizations that believe that the Program has an important impact in maintaining creative control of projects is almost double compared to the Culture sub-programme. In a sector where the contribution of capital for production is an important, if not decisive, factor, obtaining Creative Europe funding also contributes greatly to not losing creative control, and not having to review the methods of artistic creation due or lack of resources or, conversely, due to the presence of significant development capital from third parties.

Table 2 - Impact of the program on the ability to innovate

	% Culture Program Organizations	% Media Program Organizations
Develop new ways of working	**83**	**62**
Innovate and take more risks	50	55
Maintain the creative control of the projects	30	55

Source: Elaboration on data from the Santagata Foundation. The total is not 100 because more answer options could be chosen.

Regarding the ways in which the Program promotes innovation (Tab. 3), according to the participants in the Culture Sub-programme, these are mainly linked to qualification and the diversification of skills.

The ability to be exposed to new networks, ideas or working approaches and the possibility of drawing on the skills and knowledge of partners are in fact considered, together with formal learning opportunities, the main factors through which the program supports the innovative and creative capacity of organizations.

Financial support, linked to the increase in the budget and the consequent reduction of the financial risk, is also mentioned among the tools for supporting innovation and the development of creativity but to a lesser extent, especially compared to what happens for Media.

The availability of a higher budget and the reduction of the financial risk are instead judged as the most important ways in favouring the innovative processes linked to production by the organizations participating in the MEDIA sub-programme which, instead, evaluate less relevant the intervention axes of the program relating to the increase and to the qualification of skills.

Table 3 - Ways through which the Program foster innovation

	% Culture Program Organizations	% Media Program Organizations
Through exposure to new networks, new ideas and / or approaches	**78**	42
Through the possibility of drawing on the skills and knowledge of the partners	63	32
By increasing the available budget	63	**77**
Through formal learning / training opportunities	38	21
Thanks to the reduction of financial risk	25	**66**

Source: Elaboration on data from the Santagata Foundation. The total is not 100 because more answer options could be chosen.

The Program supports the ability to innovate mainly during the project (Tab. 4): the moment in which Media organizations take more risks, experiment, and innovate is precisely during project implementation, while a smaller number of organizations continue even after the project, thanks to the momentum provided by Creative Europe.

Most of the organizations also state that they took more risks in creativity, experimentation, and innovation during the project. Only a third state that they have taken greater risks even later. This result indicates that the Program's ability to encourage experimentation is important but that it manages to become structural only for a few organizations, affecting the methods of organization and production, permanently changing their DNA.

4.3 Creativity, research, and process/product innovation

With regard to the second research question, i.e., what are the innovative processes triggered by participation in the Programme, it should be noted that the creation phase is strongly affected by innovative processes in Creative Europe projects.

In addition, new ways of learning, sharing skills and training have been used, proving that the learning factor for innovation is considered to have a great impact for organizations.

They follow the new practices identified by the participants i.e. having experimented and used new ways of cultural creation; different ways to reach out and work with communities and the public; new cross-sectoral practices.

The other important area in which the fact of having experimented is recognized is that of distribution and activities related to the organization's business model: an important number of organizations, in fact, have been able to share and learn new distribution practices, new models of business and remuneration for one's work.

On the other hand, fewer organizations have experimented with sustainable practices in the environmental field: these are in particular those that participated in the last Call Coop 2019, in which there were several projects on the issue of environmental sustainability. In this regard, it should be remembered that in the cultural sphere, UNESCO is carrying out an important work of dissemination of the Sustainable Development Goals of the UN Agenda 2030.

Table 4 – New working practices tested during the project

	% Culture Program Organizations	% Media Program Organizations
New ways of learning, sharing skills	**73**	30
New ways of cultural creation	**73**	40
Different ways to reach and work with communities	58	28
New ways of doing tours / exhibitions (Culture) / New ways of presenting works (Media)	43	**49**
Intersectoral work	33	15
New business models	33	26
Sustainable practices	23	11
New remuneration methods	8	4
New ways to better control rights	-	15
Bureaucracy	3	-
None	-	9

Source: Elaboration on data from the Santagata Foundation.

A final innovative process concerns the fact of incorporating new technologies in the planning and implementation of activities (Tab. 5), using them in an innovative way (in 48% of cases), or by building part of the activity in digital mode (again in 48% of cases). This is a very topical theme especially for those projects that were carried out between 2020 and 2021 or that are still in progress, considering the difficulties in using cultural places caused by the closures carried out in the various countries during the Covid-19 pandemic. Also in this case the Program is recognized as having an impact on skills, since it has made it possible to qualify people with respect to this specific issue.

Table 5 – Impact of Creative Europe on the use of new technologies

	% Culture Program Organizations	% Media Program Organizations
Build a part of the offer in digital mode	**48**	35
Using new technologies in an innovative way	**48**	25
Become more competent in the use of new technologies	45	**40**
Not applicable (Culture) / No (Medium)	10	15

Source: Elaboration on data from the Santagata Foundation.

4.4 Creative Europe and the results on the innovation processes

The third and final research question concerns the results of the innovation processes.

One of the outcomes taken into consideration by the survey was therefore the fact that new products, contents or activities had been created and introduced on the market.

In most of the cases examined there is a positive response with respect to the ability to create new products, contents or activities, above all while the project was in progress and, to a lesser extent, when it was already finished.

The fact that about 30% of the interviewees created new content or activities even after the project is a positive sign of the organizations' ability to make use of the skills learned thanks to their participation in the Program also in the medium and long term.

However, the ability to create does not always translate into the ability to distribute on the market: only half of those who created new content, products or activities introduced them on the market during or after the end of the project.

In the case of the MEDIA Sub-programme organisations, the questions on product creation were not asked, because the creation and distribution of new products is the actual purpose of the calls. Instead, a survey was carried out with respect to the prizes won which are numerous, both abroad and in Italy. A non-exhaustive list of awards includes: Sundance Film Festival, ECFA Award, Best film for children at Just Film 2020 - Blacknight Film Festival Tallin, WEMW, TFL production award, Sunny Side of the Doc Pitch Award - Social Issues Pitch, Best film Shanghai Film Festival , "Silver World Medal" at New York Festivals TV and Film Award 2019, "Best Documentary Short" at The Fine Arts Film Festival/FAFF 2018, Nora Epron Prize of the Tribeca Film Festival of New York, Selection at the Venice Film Festival, MIBACT quality award, Best film Orizzonti Venice Film Festival, David di Donatello.

5. Concluding remarks

The analysis conducted demonstrates how the experience of participation in the Creative Europe Program experienced by organisations, both for Culture and for MEDIA, has been of great value with respect to the acquisition of skills, above all thanks to informal learning conveyed by continuous contact and exchange with partners.

The skills acquired thanks to participation in the Creative Europe Program are also transformed into the ability to continue working in other countries, to innovate, and to build strategic partnerships.

Furthermore, more than half of the organizations participating in the Culture Sub-programme state that participation in Creative Europe has allowed the organization to develop new ways of working, thus recognizing the program's value in fostering innovation of management models and processes.

For MEDIA organisations, the Program supports the ability to innovate mainly during the project, i.e. at the time when audio-visual industry organizations take more risks, experiment and innovate.

The Italian participation in Creative Europe can therefore be read as one of the ways of supporting and guaranteeing the maintenance and growth of the "creativity rate" at a national level over time.

However, there are still several weaknesses that reduce the effectiveness of the participation of Italian organizations in the Programme, due to the main characteristics of the sector in Italy, which can be summarized as follows:

- the limited number of large enterprises, and the large number of small and small micro enterprises that are struggling to work outside the national market
- the scarcity of limited companies
- the dependence of companies on a very small number of customers
- the fragmentation of the supply chain into sub-supply chains
- the concentration of operators in a few cities: Rome first, followed by Milan, Turin and Bari.

The fragmentation of cultural and creative entrepreneurship in Italy and the presence of a limited direct export market - due to a reduced cross-border market in Europe and the marginality of the Italian language in the international context - are a further brake on growth.

Moreover, this vulnerability is not only Italian but is also visible at a European level: from a linguistic point of view, but also of identity, culture and preferences, in fact, the European market is not a single market, as is the case instead for other important audio-visual markets and cultural (American and British, Indian, but also Nigerian and neighbouring countries).

The need therefore arises for national policies to support the sector, capable of being complementary to the funding of Creative Europe.

Specifically, five main axes appear particularly relevant:

1. Structuring of financial or fiscal instruments: in order to enhance the effect of the Program at the national level and give operational continuity to the organisations.

2. Training and mentoring: enhancing the work already carried out by the Creative Europe Desk Italy Culture and MEDIA and taking the best practices at European level as an example.

3. Networking: building connections and opportunities for contact, increasing awareness of the Program and other funding programs and funds.

4. Communication: in order to clarify all the tools of the Program but also to give greater visibility to the selected projects with respect to the audience of national stakeholders.

5. Research: work continuously both from the point of view of scouting the most innovative and interesting experiences of the Programme, and in terms of producing reports and thematic and territorial analyses, in order to involve other national administrative levels and local stakeholders in support processes.

However, these initial results deserve further study, also considering the limitations of this research.

Indeed, in this first phase, the research jointly analysed the two lines of the program with reference to a specific area of impact. A further development of the research will be to analyse in depth the other areas of impact and the relationships between them.

However, in the light of the analyses carried out, some first important areas of work emerge which will benefit from further investigations.

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