

Culture & Economic Performance



What strategies for  
sustainable employment and urban  
development planning ?

**Case study : Florence**

## Preface

Florence, capital of the Tuscany region, is a city in Italy with just over 365,000 inhabitants. This city is an open-air museum, captivating due to its illustrious heritage and impressive buildings. Its 43 museums open their doors to more than 7 million tourists every year.

Florence's leading economic sector, tourism has undergone significant growth during the last twenty years, propelling the city towards the development of an impressive range of hotels and a significant cultural offering.

Economic activity in Florence is also driven by the arts and crafts sectors (textiles, leather, jewellery, watch-making, the furniture trade...) renowned for their *savoir-faire* and the quality of their production.

The city and its province are therefore heavily dependent on tourism consumption and the exportation of local products.

Facing stiff international competition in manufacturing products and the development of counterfeit goods, Florence must contend with the fact that it may now need to step up its game, taking its *savoir-faire* to the next level.

The massification of tourism also commands a strategic re-think within the city in terms of developing infrastructures and maintaining the quality of services and quality of life for its residents.

Florence is, as a consequence, upping the ante and launching more initiatives so as to reposition itself as a high-end tourist city, as a hub for cultural production capitalising on the vast number of cultural industries across the region and so as to utilise culture as a vehicle for rebuilding social cohesion amongst its residents.

## Strengths/Weaknesses/Opportunities/Threats in Florence

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>▪ <i>Highly influential heritage based on the Renaissance and a high number of museums</i></li> <li>▪ <i>Powerful international cultural tourism</i></li> <li>▪ <i>Production of luxury products centred around the industrial districts focused on exportation (haute couture, design, arts and crafts)</i></li> <li>▪ <i>Emerging as a centre of excellence in art restoration</i></li> <li>▪ <i>National and international cultural trade fairs held every year</i></li> <li>▪ <i>Certain schools renowned in Western Europe as centres of excellence in niche markets</i></li> </ul>	<ul style="list-style-type: none"> <li>▪ <i>Economic dependency on foreign tourism consumption</i></li> <li>▪ <i>Demographic decline in favour of the peripheral regions, accelerated by rising house prices and drop in quality of life</i></li> <li>▪ <i>Constant rise in unemployment</i></li> <li>▪ <i>Difficult to retain students once their studies are complete</i></li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>▪ <i>« Firenze Sapere » : a collaborative project between public and private players piloted by the city to promote innovation and creativity</i></li> <li>▪ <i>Structuring the arts and crafts industry to match European standards</i></li> <li>▪ <i>Gradually becoming more open-minded and receptive to architecture and contemporary art</i></li> <li>▪ <i>Developing practices linked to new technologies paving the way for new cultural experiences</i></li> <li>▪ <i>Developing tourism in the emerging markets (China, India, Russia, Brazil, Arabian Gulf)</i></li> </ul>	<ul style="list-style-type: none"> <li>▪ <i>Tension between the rationale behind conserving heritage and the rationale behind developing the cultural life of the city</i></li> <li>▪ <i>Dependency on the major fashion houses</i></li> <li>▪ <i>Development of counterfeit products and international competition in luxury products</i></li> <li>▪ <i>Development of mass tourism and the « city-museum » effect to the detriment of high-class tourism</i></li> <li>▪ <i>Competition for tourism from other more appealing destinations in terms of the niche cultural travelling market (Rome, Venice, Barcelona, Istanbul, Lisbon, Madrid, Budapest, ...)</i></li> </ul>

Florence's identity card	
Population	<ul style="list-style-type: none"> <li>▶ Florence : population of the city proper 365, 659 inhabitants, in 2008</li> <li>▶ Metropolitan area of Florence – Prato – Pistoia : 1.5 million inhabitants</li> <li>▶ 10% of the population hail from other parts of the world : Albanians, Filipinos, Romanians, Chinese</li> <li>▶ Demographic vulnerability : Florence has lost almost 36,000 inhabitants since the 1970s</li> </ul>
Surface area	<ul style="list-style-type: none"> <li>▶ 102 km<sup>2</sup></li> </ul>
Economic dynamic	<ul style="list-style-type: none"> <li>▶ Unemployment in Florence went up 2 points between October 2007 and October 2008 reaching 6.4%.</li> <li>▶ 23.537€ GDP/per inhabitant, ahead of Genoa and Venice (22,163€), behind Bologna and Rome (26.362€)</li> <li>▶ <b>Tourism is the city's most important economic sector</b></li> <li>▶ Working population split by sector: <ul style="list-style-type: none"> <li>▪ Agriculture : 4.2%</li> <li>▪ Industry : 34.1%</li> <li>▪ Services : 61.7%</li> </ul> </li> <li>▶ <b>The commercial sector accounts for 40% of activity</b> in Florence, experiencing a growth surge, linked to tourism.</li> <li>▶ Other vibrant economic sectors: <ul style="list-style-type: none"> <li>▪ The textiles and luxury product industry (fashion, leather, jewellery ...)</li> <li>▪ Mechanical engineering, pharmacy (Eli Lilly, largest biotechnology centre in Italy)</li> <li>▪ Gastronomy (<i>chianti wine</i>, oil...)</li> <li>▪ Furniture</li> <li>▪ Watch-making and jewellery</li> </ul> </li> </ul>
Key tourism figures	<p><b>An international cultural destination that is withstanding the economic crisis</b></p> <ul style="list-style-type: none"> <li>▶ Tuscany ranks 3<sup>rd</sup> region for tourism in Italy.</li> <li>▶ Tourism is by far and away Florence's most important economic sector <ul style="list-style-type: none"> <li>▪ <b>More than 7 million visitors in 2007</b></li> <li>▪ <b>70% of tourists come from abroad</b></li> <li>▪ International leisure tourism has been faltering slightly since the current economic crisis hit (-6.5% between 2007/2008) but has stood the test more successfully than Italy's seaside destinations in terms of tourist spending in 2008. <b>The balance of trade in Tuscany in 2008 remained positive.</b></li> </ul> </li> <li>▶ The tourist typology is changing: compared to the Europeans (principal contingent: German, English, French), the numbers of American tourists (20%) and Japanese (8%) have been dwindling since 2002, offset by <b>Russian, Chinese and Indian tourists flocking to the city in their droves</b> since 2005, motivated by the opportunity to purchase luxury products.</li> <li>▶ The city is facing stiff competition from other destinations offering cultural travel opportunities and is losing ground in terms of image, dropping from 59<sup>th</sup> to 69<sup>th</sup> place in the 2008 « city-trip » rankings for 200 cities from around the world (<i>source Euromonitor international</i>)</li> </ul> <p><b>3<sup>rd</sup> tourism destination for conferences in Italy, behind Rome and Milan</b></p> <ul style="list-style-type: none"> <li>▶ Florence is also a destination for business tourism (55% of tourists in Tuscany).</li> <li>▶ The number of visitors to Florence attending conferences and trade fairs has increased significantly due to the redevelopment during the 1990s of conference centres and due to the more extensive range of hotels on offer (development of 3 star hotels).</li> <li>▶ The number of conferences in Florence (medicine..) has increased.</li> </ul>
Cultural Sector	<p><b>Culture economy in Tuscany and in Florence itself</b></p> <ul style="list-style-type: none"> <li>▶ In Tuscany, more than 9000 employees work in the cultural sector, which is equivalent to <b>6.5% of the national total working in cultural employment.</b></li> <li>▶ Half of these workers fall within the «Creation and artistic and literary interpretations» sector</li> <li>▶ There is a degree of job insecurity: 25,300 people are in temporary or voluntary employment</li> <li>▶ Florence focuses its efforts primarily on certain professions, particularly painters and sculptors, writers and artists, those employed in libraries, archives, museums</li> <li>▶ In Florence, less than 2% of the working population (2.300 people) work in the cultural sector and there are 653 registered businesses. There are numerous cultural jobs (in the arts and crafts industry, fashion) located in the province of Florence.</li> <li>▶ Public spending in Florence dedicated to culture/per inhabitant in 2007 was relatively low (60€/per inhabitant)</li> </ul> <p><b>There are three mainstays of the cultural economy in Florence and its province: Tourism,</b></p>

	<p><b>Fashion, the Arts and Crafts industry</b></p> <ul style="list-style-type: none"> <li>▶ <b>International cultural tourism</b> <ul style="list-style-type: none"> <li>▪ Birthplace of the Renaissance, Florence is one of the world's most influential artistic cities.</li> <li>▪ An intellectual city since the XIVth century whose artists and thinkers have made a real impact on European culture in the fields of painting, sculpture, architecture and literature: Giotto, Michelangelo, Botticelli, Dante, David, Machiavelli, Leonardo de Vinci...</li> <li>▪ The city has become a privileged tourist destination in Italy, by virtue of its cultural heritage</li> <li>▪ 43 Florentine museums, including the <i>Galerie des Offices</i>, one of the oldest and most beautiful museums in the world (Carravage, Leonardo da Vinci, Michelangelo) and the <i>galerie de l'Académie</i></li> <li>▪ City centre classified as a world heritage site for humanity by UNESCO in 1982</li> <li>▪ European Capital of Culture in 1986</li> <li>▪ An urban heritage that has been conserved since the Renaissance: squares (piazza San Marco, ponte Vecchio, Boboli gardens), palaces (Pitti...), churches (Basilica of the Holy Cross, Cathedral, Campanile...), <i>loggias</i>...</li> <li>▪ Florence has the highest number of cultural venues per inhabitant in Italy, alongside Bologna (Teatro Comunale-Maggio Musicale, Teatro Puccini, Teatro Verdi...)</li> <li>▪ Florence boasts the highest concentration of art works, in proportion to its size, in the world.</li> </ul> </li> <li>▶ <b>Exportation of haute couture and leather accessories</b> <ul style="list-style-type: none"> <li>▪ Florence prides itself on a longstanding tradition of <i>savoir-faire</i> since the XV<sup>th</sup> Century (fine wool, silk).</li> <li>▪ Birthplace of « made in Italy » branding (synonymous with design and quality) : Versace, Gucci, Ferragamo</li> <li>▪ Production centre for « luxury » fashion in the province of Florence based on the « industrial districts » and cooperation networks between domestic SMEs</li> <li>▪ Leather production (footwear and luxury luggage) engages 1.500 businesses, 6.000 employees, and generates a turnover of more than 1 billion Euros. 15.2% of Italian leather businesses are based in Florence.</li> <li>▪ The clothing sector, in the main disposed towards luxury, represents 886 businesses, 7.000 employees and a 550 million Euro turnover, two thirds of which is gained through exportation.</li> </ul> </li> <li>▶ These textiles clusters are under threat from the fact that « accessible luxury » products are arriving on the scene, from international competition from emerging countries and from counterfeit goods.</li> <li>▶ <b>Boasting an abundance of speciality areas in the arts and crafts industry, this is a sector focused on exportation</b> <ul style="list-style-type: none"> <li>▪ With 1317 registered arts and crafts businesses, the province of Florence focuses its energies on specialities in wood/furniture, precious metals and stones, work on non-precious metals and also art restoration.</li> <li>▪ The ceramics, glass and wood sector employs 10.000 people and generates a 850 million Euro turnover, half of which comes from exportation (to Europe, the United States, Japan, Russia)</li> <li>▪ Growing expertise in art restoration, an industry that has been structuring since 2009</li> </ul> </li> </ul>
Education	<p><b>A city with high numbers of international students, but with few links with the international world</b></p> <ul style="list-style-type: none"> <li>▶ Florence is a city that appeals to students (living environment, climate) : <ul style="list-style-type: none"> <li>▪ More than 58,000 students are enrolled in Florence</li> <li>▪ 15% of students are from abroad</li> <li>▪ The <b>large contingent of American students</b> (8.000) is due to the significant number of branches of prestigious American universities located in the city (University of New York, Georgetown, Harvard...)</li> <li>▪ The European University Institute in Florence is one of the most selective postgraduate social sciences research programmes in the world, widely renowned across Western Europe</li> </ul> </li> <li>▶ However the city struggles to retain graduates and the creative set (due to crippling property prices, the cost of buying business premises, the appeal of other metropolitan cities...)</li> <li>▶ <b>9% of students (or more than 2800 students) take courses in cultural studies</b></li> <li>▶ There are 3 examples of cultural courses set the bar, only a few schools enjoying international recognition: <ul style="list-style-type: none"> <li>▪ The University of Florence, which has three cultural departments (Sciences of Antiquity, History of Performing Arts, Masters in Multimedia).</li> <li>▪ Exceptionally selective schools, with their sights set firmly on professions with high added value: the Polimoda Fashion school; School of Hard Stone Manufacturing for Art Restoration; the Leather School of Holy Cross; « the Arti Orafe » jewellery school</li> <li>▪ A multitude of private schools dedicated to fine arts and architecture (drawing, illustration, design): the Accademia di Belle Arti (1<sup>st</sup> School of Drawing in Europe, 1562), the Accademia Italiana (Interior Design) ; the Florence Design Academy (futuristic design)...</li> </ul> </li> </ul>

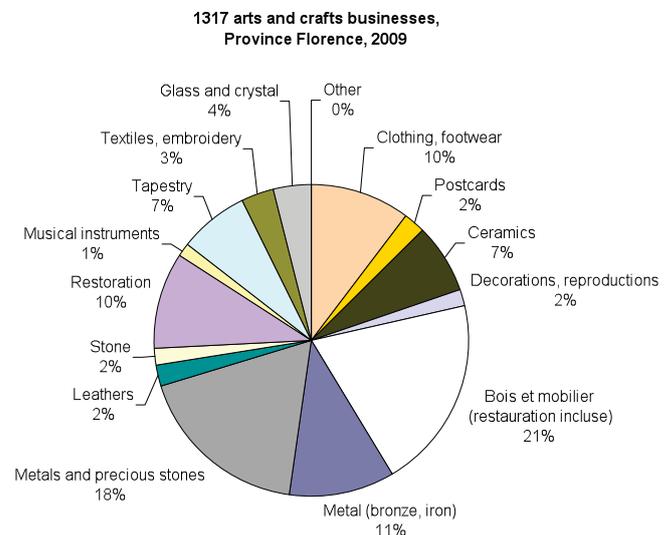
**Florence's touristic appeal is based upon two main strongholds: its illustrious heritage and the quality of the city's *savoir-faire* in the craft industry**

***Florence's tangible heritage (buildings and works of art) enables the city to manoeuvre itself into a position as a tourist destination to be reckoned with***

- ▶ Birthplace of the Italian Renaissance, Florence is one of most important cities for art in the world: **Italy is home to 60% of the world's most eminent works of art** and half of these are to be found in Florence.
  - The most visited city in Tuscany, its 43 museums open their doors to more than 7 million visitors every year, equivalent to 21% of revenues generated by museums in Italy and 15% of museum-goers in Italy.
  - The *Galleria degli Uffizi* and the *Galleria dell'Accademia* are Italy's 3rd and 4<sup>th</sup> museums respectively with more than a million visitors every year.
  - The city itself is an open-air museum: squares, gardens, bridges, churches, libraries, loggias...
- ▶ Tuscany boasts 25,000 businesses dedicated to tourism (6.2% of Tuscany's total businesses) the majority of which are located in Florence (23.4%). A third of the city's activities are earmarked for the hotel/catering sector, with approximately 35,000 hotel rooms and 23,000 accommodation sites aside from hotels (camping sites, rooms for rental or guest houses).
- ▶ Between 2003 and 2009, the number of overnight stays went up by 10%, with 6.6 million overnight stays in 2009.
- ▶ Foreign tourists have a higher socio-economic profile in Florence than in the rest of Italy. They spend more in Tuscany: 180€/per day compared to a national average of 140€/jour.
- ▶ The range of events on offer in Florence is limited, essentially based on classical stage: opera, music and ballets (« Maggio Musicale » equivalent to the Bayreuth or Salzburg classical music festival, Fiesole Summer, Friends of Music). The Florence Biennial of Contemporary Art (650 artists from 85 countries) is an event that is increasingly raising its profile on an international scale

***The Florentine arts and crafts industry is an extremely well diversified sector, which is home to and generates high numbers of businesses***

- ▶ In addition to cultural tourism, the local cultural economy is driven by the arts and crafts industry: jewellery, goldsmiths/silversmiths, embroidery, work in wood, glass, bronze, leather, haute couture, furniture (cabinet-making), art restoration and ceramics.
- ▶ According to the 2009 survey carried out by the province of Florence's Arts and Crafts Foundation, this industry plays a particularly dynamic role in terms of creating businesses. However, it struggles to attract young talent and to navigate the road towards internationalisation.



- ▶ Worth noting with regard the 1317 registered arts and crafts businesses:
  - a dominant number of sole traders (49%)
  - or companies employing only 2 to 3 workers (35%)
  - located mostly in Florence (48%) or its immediate surrounding areas (23%)
  - 1<sup>st</sup> generation entrepreneurs (47%)
  - a manual production sector not particularly conducive to electronic techniques, such as laser techniques (70%)
  - the majority of those students with a degree have a master of arts
  - the arts and crafts industry is characterised by a relatively mature workforce. The average age of an entrepreneur in this sector is 49 years old.
  - e-marketing techniques are still under-developed in the sector : 60% of businesses do not have a website; 34% do not email.

▶ **Certain arts and crafts exhibitions are becoming more widely renowned:**

- the 2010 International Arts and Crafts trade fair (clothing, accessories, jewellery, furniture, beauty/care, gastronomy) played host to 700 exhibitors and 151,500 visitors equating to + 40% compared to the 2009 event.
- New professional exhibitions were introduced in the 2000s: the international jewellery exhibition Preziosa Contemporary Jewellery; the national Furniture fair.

***The luxury product industry, the jewel in the crown in Florence's economy, relies on the quality of local savoir-faire***

- ▶ **One of the Florentine textile sector's ace cards is its structuring into industrial districts.** These were developed in the 1950s, in response to increase in production demand. The districts geographically regroup local SMEs that work together based on one craft or market. They are characterised by their ability to tailor production to new market trends, to the diversity of the marketplace and to its bespoke demands. *Savoir-faire* has been passed down from generation to generation since the XVth century (fine wool, silk). Large investments were earmarked for promoting local products. As a result, an exhibition on the textiles of the future was founded in 2004. The districts also design and produce the machines that carry out their activity.
- ▶ **The textile sector and the fashion sector are showcased, as has always been the case, as one of the sectors of excellence carrying the « Made in Italy » brand** (synonymous with quality and design). Its success can be seen via the large number of exports. Italy has the most successful textiles and clothing industry throughout Europe. It accounts for approximately a quarter of European production with a turnover of in and around 54 billion Euros. This sector flies the flag as the second most important manufacturing sector in Italy. The Italian fashion industry earns 60% of its turnover from sales abroad. According to the textiles and fashion federation, this sector, with 500,000 employees in Italy, accounts for 9.8 billion Euros in Italy's 2008 balance of trade.
- ▶ **Florence holds its own first and foremost as a place that revolves around the clothing industry and production, due to its industrial textile districts.** International labels originating from Florence or Milan such as Prada, Gucci, Ferragamo, Fendi have their factories located in Florence. French brands such as Vuitton or Céline... also attract this local *savoir-faire* in the fields of textiles, leather, and jewellery. Whilst textile production is based in Florence, the principal fashion houses have their social headquarters and their design departments located in the fashion capitals of the world including Milan, Paris, London or New York.
- ▶ **This *savoir-faire* is firmly anchored within the territory above and beyond the geographical position of its districts.** Its presence is equally felt across the diverse range of local museums (Galerie du Costume, Musée Salvatore Ferragamo...), the design school (Polimoda, Leather school,...), the luxury product shopping district (via Tornabuoni), and the exhibitions (Immagine Italia & Co., Polimoda Fashion Week...)

***The fairs and events organised around the fashion sector throw the spotlight on the city and boost development on both a national and international scale***

- ▶ The « Pitti » fairs are, in this context, a symbolic example of this approach to promoting the industry:
  - Florence's international fashion fair « Pitti Imagine » held in February is the biggest fashion fair in Europe.
  - Spin-off fairs under the Pitti « brand » take place throughout the year in Florence, with fashion as their central theme.
  - The Pitti fairs champion new niche designs and drive urban, cultural and social trends: Pitti Immagine Uomo (65th edition), Pitti Immagine Bimbo (68th edition), Pitti *Immagine Fragranze* (7<sup>th</sup> edition), Pitti *Woman Pre-collections* (3rd edition), Pitti *Immagine Casa* (interior design), ...
- ▶ They are truly indispensable as tools for developing the marketing policy behind these brands. All the key players with a role to play in the local and the international industry attend. The objective for those that attend (buyers, press, designers...) is to make their mark, to clinch new clients, to talent spot, to network, to capture the latest trends.
- ▶ The fairs are growing in complexity and are now set to combine special events *in situ* or throughout the city, art exhibitions, happenings, and conferences...
- ▶ **The internet is playing an increasingly pivotal role** in the fairs, as a supportive tool prior to, during and following the fair has taken place.

Florence is a victim of its own success and is feeling the brunt of the adverse effects of mass tourism. It must also contend with the issue of counterfeit goods

### **Mass tourism is detrimental to the quality of life in the city**

- ▶ **Tourism in Florence has massified** and has a nocuous effect on the quality of life for the city's residents.
- ▶ During the 1990s, the number of visitors to Florence's most important museums doubled. This figure has almost quadrupled during the last 20 years. According to certain projections, the number of tourists could continue to rise by 2 to 3% each year.
- ▶ **These significant influxes of tourists exert pressure on the region**, and risk bulldozing Florence into becoming a « museum-city ». Given that the city is geographically modest in size, the development of hotels and tourist infrastructures, which brings with it growth in tourism, is beginning to have adverse effects on housing and residential development (higher numbers of rentals, decentralisation of the shopping centres...).
- ▶ **Faced with the numbers of tourists flooding in, residents are tending to move away from the city centre in favour of the closest most residential suburb.** The city has lost 36,000 inhabitants since the 1970s. Certain estimations predict that over the next 10 years, the city could lose a further 15% of its population.
- ▶ This exodus towards the city's surrounding areas, whilst it does restore quality of life for the residents, does in turn mean more commuting, particularly true of professional people, and therefore sows the seeds for a deterioration in the quality of life in the city centre due to higher levels of traffic, pollution, which introduces risks in terms of preserving the buildings.

### **The luxury products industry is coming under threat from counterfeiting and from international competition**

- ▶ Florence's luxury products industry **is heavily dependent on exports** which accounts for 27% of the value added from total production across the province. Incidentally, exports are suffering a decline: - 5% in Tuscany in 2007.
- ▶ **Businesses linked to the fashion industry have been closing down during the last 10 years.** Production dropped by 15% between 1999 and 2008, prompting the closure of 184 businesses, which have taken their skills and *savoir-faire* along with them. This decline is partly due to counterfeiting and to competition from the Chinese, Eastern European or Turkish textile industries, which benefit from lower costs.
- ▶ Fashion accounts for 60% of counterfeit products. Forgery is set to kill off close to 4.000 jobs every year in Italy. It is responsible for a loss of earnings estimated between 7 and 8 billion Euros of Italy's turnover every year.
- ▶ **The 2008 economic crisis** weakened the luxury products sector further still:
  - Luxury product from Florence is under threat from non-Italian brands or labels that offer «accessible luxury».
  - The Italian fashion industry, which employed 508,000 people in 2008, saw 26,000 job losses in 2009, the loss of 2.000 businesses, and a 15% drop in its activity according to the professional federation Sistema Moda Italia.
  - There were fewer buyers than normal at the 2009 Fashion week, and what more they were more conservative in terms of the amount of purchasing. Taking steps to save money, approximately fifteen couture houses declined to take part in the show (only 79 houses participating compared to 95 in 2008).
- ▶ **The fashion houses are gradually repatriating their clothing workshops** (from Bangladesh, Turkey and Romania) in Italy (Giorgio Armani ...) so as to restore the quality of the work produced for **limited editions, to reduce the middle-men and so that the work is done right besides the design studios.**
- ▶ **Midway through 2010 the business for the Italian labels picked up again** after a great deal of effort in terms of product design and also due to the fall in value of the Euro. This trend is boosted further by Asian consumers spending (with the exception of Japan) and especially due to the Chinese (according to the Altgamma Foundation, chairman Santo Versace, which unites leading companies whose chief business is Italian luxury products).

Florence is creating a strategic framework and is upping its game by increasing the number of initiatives designed in response to innovation, to harness development in the region and to achieve social cohesion

### **Florence has established a strategic metropolitan plan of action to support its cultural economy**

- ▶ The 2<sup>nd</sup> Strategic Plan « Firenze 2010 », deployed in June 2009 and led by the metropolitan forward planning agency (Firenze Futura), aims to create a plan of action for the city with a view to:
  - fostering innovation,
  - harnessing development in the region,
  - organising internal mobility and access to the city more efficiently,
  - improving quality of life for its residents.
- ▶ **The plan's key strategic axis aims to consolidate the city's appeal and to harness development in tourism, so as to offer tourists a visit of the highest quality as well as quality of life for its inhabitants.** The objectives are as follows:
  - put Florence on the map once again as a centre of excellence for cultural production, for higher education and as a place for applying new technologies to cultural products
  - strengthen the role of Florence and its metropolitan surrounding areas as a centre for design and « made in Italy » production of the highest quality
  - promote high-end tourism and regulate the number of tourists flooding the area
  - unveil a new image of Florence, not just a city of art and cultural consumers, but also as a centre for designing and producing the « made in Italy » brand and as a place that is ideal as a breeding ground for innovation.
- ▶ Since June 2009, the Florentine municipality has established **new governance**, reshuffling the organisation chart, and recognising the need to drive development and to foster cooperation between three political spheres: Culture and contemporary art, Economy, and the University and Research.
- ▶ The **collaborative public-private approach entitled Firenze Sapere** (2009) is an illustration of this governance. This initiative brings together the city, schools/the university, the chamber of commerce, banks, the American Consulate, and the State. This bilingual internet site offers an online database on cultural training opportunities in Florence and on the region's major assets. Firenze Sapere, still in the early stages of development, aims to improve the structure behind how training opportunities are communicated, not particularly clear beyond Italian realms.

### **New cultural services for visitors and inhabitants**

- ▶ Florence has recognised the need to promote its heritage in a more innovative way and to break with the conservatism that has been given full play until this point. New cultural services have been put forward:
  - **The tourism sector**, in association with the Italian textile federation, has been developing the fashion and accessories industry since 2004 by **establishing « fashion courses in the city centre »** spotlighting the hundred or so design centres (free guided visits to the workshops/SMEs, brochures, exhibitions, museums, schools). This initiative underlines the desire to champion cross-purpose development between tourism, designers, and the art trade.
  - As part of the "New technologies to develop the historical centre" project, "**Arianna**" the **multimedia guide which can be downloaded on pda** was launched in 2008. This project was developed by *Incubatore*, a group of businesses associated with the city of Florence. Arianna facilitates access to maps, images, videos, sounds, to extraordinary cultural sites, the cultural agenda, shops and art studios, and routes for people with restricted mobility.
  - In support of the museum industry, a **Museum Card** was introduced in 2009. This federates more than twenty or so museums and grants visitors preferential entry fees and additional cultural services. There is an online site for purchasing tickets at 13 major museums.
  - The introduction of digital technologies in Florentine museums has not yet fully taken off. Nevertheless, certain initiatives such as the **Centrica and UffiziTouch® project** (May 2010) **presented at the Shanghai Exhibition** have already been given the green light. This project aims to offer the visitor a virtual experience at the museum. Works from the Uffizi Gallery are therefore digitised and displayed for public viewing on an interactive digital screen. The Uffizi museums now is putting forward an application for i-phone and for touch screens so as to display acclaimed works of art via the highest quality format possible (April 2010).
  - The current municipality aspires to develop **contemporary art** in order to diversify the range of public visitors and to captivate young people, alongside the more « classic » cultural offerings (museums, opera...). Currently, there are only a few contemporary and experimental arts festivals that enjoy local

recognition: Fabbrica Europa (music, theatre, literature), the Florence Biennale international contemporary art fair, Festival of Creativity (fashion, design, music, art, technology, poetry...).

- ▶ The city council elected in 2009 also aims to reassign cultural infrastructures to make them available to the local population so as to encourage the re-appropriation of the city and the development of social cohesion. In this context, a number of projects have been launched, notably :
  - The re-appropriation of the premises that were formerly the Convent of the Oblate, now home to a city library open to all the city's inhabitants making the city's documented heritage widely available and developing new technologies.
  - The opening of the *Casa della Creatività* (House of Creativity), a place dedicated to innovation and to contemporary art is intended to boost cultural exchanges on an international scale and networks, and to incubate young designers.
  - Late-night opening of some of the city's monuments offering the residents free visits.

Florence is structuring its cultural sectors in order to unite the players involved, catapulting them onto the international arena and developing skill-sets

### **Asserting the arts and crafts industry at regional and European level so as to support business start ups in the sector, production and commercialisation**

- ▶ **Artex, Centre for Artistic and Traditional Handicrafts**, founded in 1999 by professional associations backed by the City of Florence, the Province of Florence, the Region, the employers, the Chamber of Commerce and the tourism and culture sectors. Its objectives are :
  - to promote innovative artistic techniques,
  - to put a competitive offer on the table, in line with international demand,
  - to stimulate innovation through a competition connecting the schools of art, design, the University, and Tuscan businesses,
  - to promote the products, on the one hand through the publication of a directory for tourists listing 600 art workshops, events and museums, and on the other through an online bilingual database with a Google map geo-location of products and businesses.
- ▶ At a European level, the **International Charter of Artistic Craftsmanship** was drafted and signed in May 2010 by the *Ateliers d'Art* (Art Workshops) in France, the Chambers of Commerce, Italian craftsmen and Artex.
  - this approach aims to build a European network that drives the European Commission to consider the arts and crafts industry as part of the creative economy due to cross-disciplinary measures (promotion, internationalisation, innovation, training, tourism).
  - the Charter defines art works, their value, and their economic, cultural and social contribution.

### **Structuring the art restoration industry to unite key players and to support the sector**

- ▶ Due to its history, Florence has been fortunate to develop a *savoir-faire* that is unique as well as state of the art techniques in art restoration. This niche industry is both dynamic and innovative and secures international recognition for the city:
  - 145 businesses and 700 jobs in art restoration have been registered in Florence
  - ¾ of these work exclusively in the field of antiques restoration
  - 61% of them are sole traders, the rest rarely employing more than approximately twenty people.
  - This is an **innovative sector**. Laser, until now used in medicine and in industry or research, was introduced by the Florentine cultural sector at the end of the 1990s, to clean hard stone or bronze. Another example: The University of Florence's Department of Chemistry is advocating research in **nanotechnologies** for restoring oil paintings.
- ▶ The **restoration sector is divided into sections and comprises many different players. The Restoration Foundation**, supported by the Firenze Futura Association, was launched in 2009, **to bring together all the professionals pertaining to the restoration sector (academic sector, private sector, National Research Centre...)**. The Foundation is commissioned to :
  - facilitate interaction between the sector's key players,
  - develop the ways in which information on grants and invitation to tender is made available internationally
  - support the sector in the international markets,

- establish permanent professional training courses that also compliment those that already exist,
  - provide scholarships and grant prizes for innovation.
- ▶ Since 2009 Florence has been able to promote itself by means of its local and international expert exhibitions:
- **The Florence Art and Restoration Fair**, established in 2009, was the showcase for new technologies and products from the sector and a place to educate very young people.
  - Basking in its niche market success (141 exhibitors, 17,800 visitors), the second edition, to take place in November 2010, has its sights on the international stage: it will be integrated as part of the **Biennale dei Beni Culturali e Paesaggistici di Firenze** (a 10 day event including exhibitions and conferences on the protection and promotion of international cultural and environmental heritage), which is supported by public and private decision-makers, the academic world, the State, UNESCO,...
  - In order to raise its profile, the fair has established an agreement with its counterpart, the *FIRPA - Cultural Heritage and Restoration Fair* in Granada, in Spain, with an especially dedicated area in 2011.
  - Expertise in art restoration was highlighted at the 2010 Universal Expo Shanghai

### **Training opportunities that go hand to glove with structuring the industries and secure Florence's international renown**

- ▶ Training opportunities have come on leaps and bounds, and this signifies **the importance of research in managing heritage**:
- **The "Palazzo Spinelli" a private Institute for Art and Restoration** is offering, in addition to its permanent training activity already in place, a Master of Arts in Management of Pictorial Art Restoration, a Master of Arts in Management of Fresco Restoration and is set to launch in 2010 a Master of Arts in the Conservation of Cultural Heritage.
  - **School of Hardstone Manufacturing and its Restoration Laboratories**: an independent Institute, the School has offered courses for the last ten years alternating every 5 years based on certain specialist areas: stone materials, metallic works, furniture, paintings, textiles... With entry based on competitive examination, the school only admits 15 students per year. Alongside its teaching activities, this Institute is dedicated to pure and applied research, also using new technologies to restore heritage. It also publishes its research.
  - **Many foreign universities have a branch in Florence** and offer their students courses in history of the Renaissance or in the cultural sectors. Some universities, particularly American ones, actually have campuses based in the city centre, such as Harvard University located in la Villa *I Tatti* in the Settignano district or the University of California, Pepperdine University, the University of Florida, the University of New York with its largest European campus located in Florence in la Villa *La Pietra*... Florence is the city that boasts the largest number of American universities outside cities in the United States.
- ▶ Polimoda sets the bar as a **Fashion School for entrepreneurs**. It was established as a result of the need for the luxury industry in Florence to come up to par with the increasingly competitive worldwide fashion market. **The school is part of a public-private initiative first introduced in 1986** and funded by the cities of Florence and Prato, professional associations, the Tuscan region, and the European Social Fund. Chaired and managed by two names from the international fashion world, Francesco Ferragamo and Linda Loppa, the school **is striving to become anchored to the reality of the fashion market**. It brings together local professionals to construct educational courses (Chamber of commerce, footwear sector, fashion sector...).
- Market needs were the catalyst for establishing the « **Fashion Stylists** » and « **Fashion Brand Management** » **Masters Degrees, 25 Masters in English, and Summer school in Chinese**.
  - **Students are taught on subjects encompassing the length and breadth of the fashion value chain, on designing haute couture collections in line with Italian style, and on commercialisation** (buying/selling, customer relations, art of window displays...). Work placements and projects are encouraged in association with the industrial districts and Florentine fashion houses.
  - Student projects are regularly presented to the press, public decision-makers, and the private sector, through fairs and local galas and in the city's shop windows.
  - Commercial agents, the network press and the teaching body play a role in promoting the school and in talent spotting in the emerging markets (lecturing in foreign universities, educational fairs in Moscow...).
  - Within the school, **a spin-off, chaired by the Chairman of the Versace label**, offers advice services on the marketing strategies of 35 different fashion companies (Ferragamo, Gucci, Tod's, Chaloub Group in Qatar, in India...). This sector captures the market trends and facilitates student placements.
  - 94% of graduates find a job within 6 months, primarily in the larger fashion houses, in the fashion capitals of the world, but often somewhere other than Florence (Milan, London, New York, ...).

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