



THE EFFECT OF ORIGINAL PRODUCTIONS ON CULTURAL AND CREATIVE SUPPLY CHAINS AND ON OTHER SECTORS

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EXECUTIVE SUMMARY

This evaluation study analyses the effects of Matera 2019 on the cultural and creative supply chains and on the other economic sectors activated thanks to **investment in original productions** made between 2018 and 2019. The work, through a qualitative and quantitative analysis of the resources spent on Matera 2019, in continuity with the skills analysis, aimed to assess the ability of Matera 2019 to activate and stimulate the local, national and international entrepreneurial and economic fabric for the realisation of original productions.

The work therefore focused on analysing the information relating to **3,355 suppliers**, for a total of 4,010 contracts activated, and over **36MLN Euros spent** (around 70% of the total resources spent on Matera 2019), collected as part of the Foundation's management activities.

These resources were mainly allocated to the purchase of **Services** (3,391 contracts and around 33 MLN Euros) amongst which stand out, in line with the **organisational efforts and the productive approach** of the Foundation, *Venue management services for the management of venues* (€5.6 MLN), *Artistic services* (€5.3 MLN) and *Event management and organisation services* (€3.7 MLN).

The choice to invest directly in **original productions, craftsmanship and care** of the Foundation has necessarily influenced the composition of the supplies that are varied and differentiated. Rereading these expense items through the lens of **professionalism** allows us to understand the extent of the impact in terms of the supply chains involved. In fact, Matera presented itself as a workshopping city and the type of supplies activated proves this. Although fragmented, the expenditure for **specialist and craft supplies** (glassmakers, carpenters, blacksmiths, etc.) has shown involvement in the production of economic sectors apparently distant from the cultural one.

The **spillover effect** of Matera 2019 on all sectors of the economy is confirmed by the **photograph** of suppliers through the **ATECO** lens. The choice to invest in **original productions** has made it possible to stimulate **an interaction** and **a connection** between **artists and cultural and creative companies with other sectors of the economy** and society, determining a **wider positive effect** that has **spread throughout all economic chains**. As proof of this, it should be considered that among the active sectors of the economy there are sectors that are apparently distant from the cultural one, such as construction and manufacturing activities.

The application to the analysis of supplies of the methodology adopted by the Symbola Foundation for the definition of the **cultural and creative system** (ICC), carried out on a sample basis, allows us to quantitatively demonstrate this data. Only **51% of the resources spent on Matera 2019 refer to the ICC sectors**, the remaining **49% was invested in non-cultural and creative sectors** generating positive external effects on the "surrounding" supply chains. This shows that the **investment in original productions**, stimulating varied and more articulated demand, has not been focused exclusively on the core culture sectors (ICC) but has created a **spillover effect on all sectors of the economy**. The data that emerged are consistent with the analysis of the economic impacts of Matera 2019 which estimated a multiplier effect of 2, a better result than the national figure of 1.77 (Io sono cultura 2019).

The choice to invest in the creation of original productions has proved to produce positive externalities also in **geographical terms**. A territory, such as that of Basilicata, which, due to the characteristics and composition of the economic system, tends to purchase supplies outside its borders, has been able to retain over €15 MLN Euros, which, if added to the resources spent in the southern regions, account for 56% of the total resources spent on 71% of contracts. It should be noted **that in the South the impact generated has translated into a high demand for supplies, but very widespread**, and for this reason with average amounts lower than in other regions.

The concentration of investments in the South, however, did not occur for the categories of expenditure relating to **artistic production** (e.g. artistic curation services and artistic performances), for which the weight of local suppliers is significantly reduced, demonstrating the **significant dynamism** of the scouting work carried out to guarantee a broad representation of languages, professionalism, experiences, genres and cultures and to be able to interpret the **national and international dimension that Matera 2019** wanted to embody in its path.

Matera 2019 has therefore represented a production hub that has been able to operate **keeping its roots firmly at the local level** (also from a country system perspective) but at the same time managing to **activate profitable connections at national and international level** in the various supply chains of the economic system.