



CONFINDUSTRIA SERVIZI
INNOVATIVI E TECNOLOGICI

Creativity as an opportunity for growth in the cultural sector

@luigiperissich december 2015



indice

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- **The DSM opportunity for Cultural industry**
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The Federation

35 Associations

40 provincial sections

Confindustria Servizi Innovativi e Tecnologici (Confindustria Innovative and Technological Services) is the Italian Federation that gives a common voice to all those businesses that create technological, professional, managerial, and organizational innovation.

The Federation aims at increasing the sector's economic growth and political influence, so as to make it a driving factor enhancing Italy's productivity and modernization in the frame of the economic trend of convergence between Information & Communication Technology and businesses and professional services, fostering the adoption by companies of new business models and competitive tools.

Confindustria Servizi Innovativi e Tecnologici represents the following Business and Cultural services: consulting services, culturale and museum services, advertising, public relations and marketing, computer technologies, digital contents, e-media, engineering, internet, certification bodies, radio and television networks, research and surveys, satellite applications, training, technological and professional services. Altogether all the above sectors are a very significant part of the economy representing 10% of the Italian GDP.



CSIT: our regional presence

LOMBARDIA

LECCO, MANTOVA, BRESCIA

VENETO

ROVIGO, TREVISO, VICENZA, BELLUNO, PADOVA, VENEZIA,
VERONA

FRIULI VENEZIA GIULIA

TRIESTE, UDINE, PORDENONE, GORIZIA

LIGURIA

LA SPEZIA

EMILIA ROMAGNA

BOLOGNA, FERRARA, MODENA, PARMA, PIACENZA, RIMINI

TOSCANA

FIRENZE, PRATO

UMBRIA

(TERNI, PERUGIA)

MARCHE

ANCONA, MACERATA, PESARO-URBINO

LAZIO

UNINDUSTRIA (ROMA, VITERBO, FROSINONE, RIETI, LATINA)

ABRUZZO

CHIETI, PESCARA

MOLISE

CAMPOBASSO

CAMPANIA

CASERTA, NAPOLI, SALERNO

PUGLIA

BARI, BRINDISI

BASILICATA

CALABRIA

CATANZARO, COSENZA

SICILIA

MESSINA, PALERMO





CSIT: our European commitment on innovation

▪ **2011 Members Expert Panel on Service Innovation**

The report shows the strong transformative power of Knowledge Intensive Business Services

▪ **2013 Members of High Level Group on Business Services**

The Report shows how Business Service, empowered by digital technologies, are able to innovate the traditional sectors with a focus on digital manufacturing, Culture and tourism

▪ **From 2011 Membri della Digital Economy Task Force of Business Europe**



The impact of BS on new Business models

From a world of...

To a world including...

Products

Outputs

Transactions

Suppliers

Elements

*The shift to
services requires
business model
innovation*

Solutions

Outcomes

Relationships

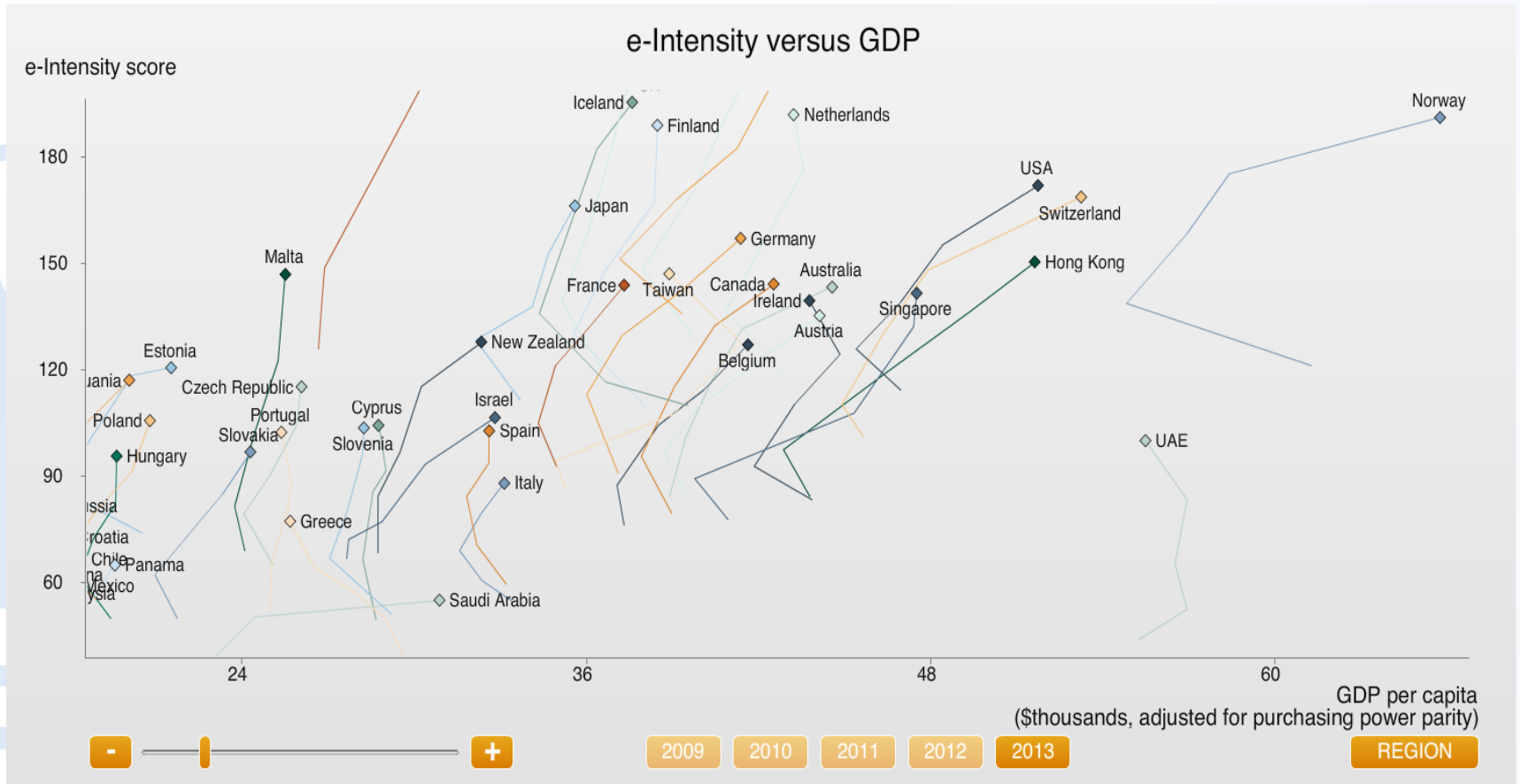
Network partners

Ecosystems

Commissione Europea: High Level Group on Business Service Report



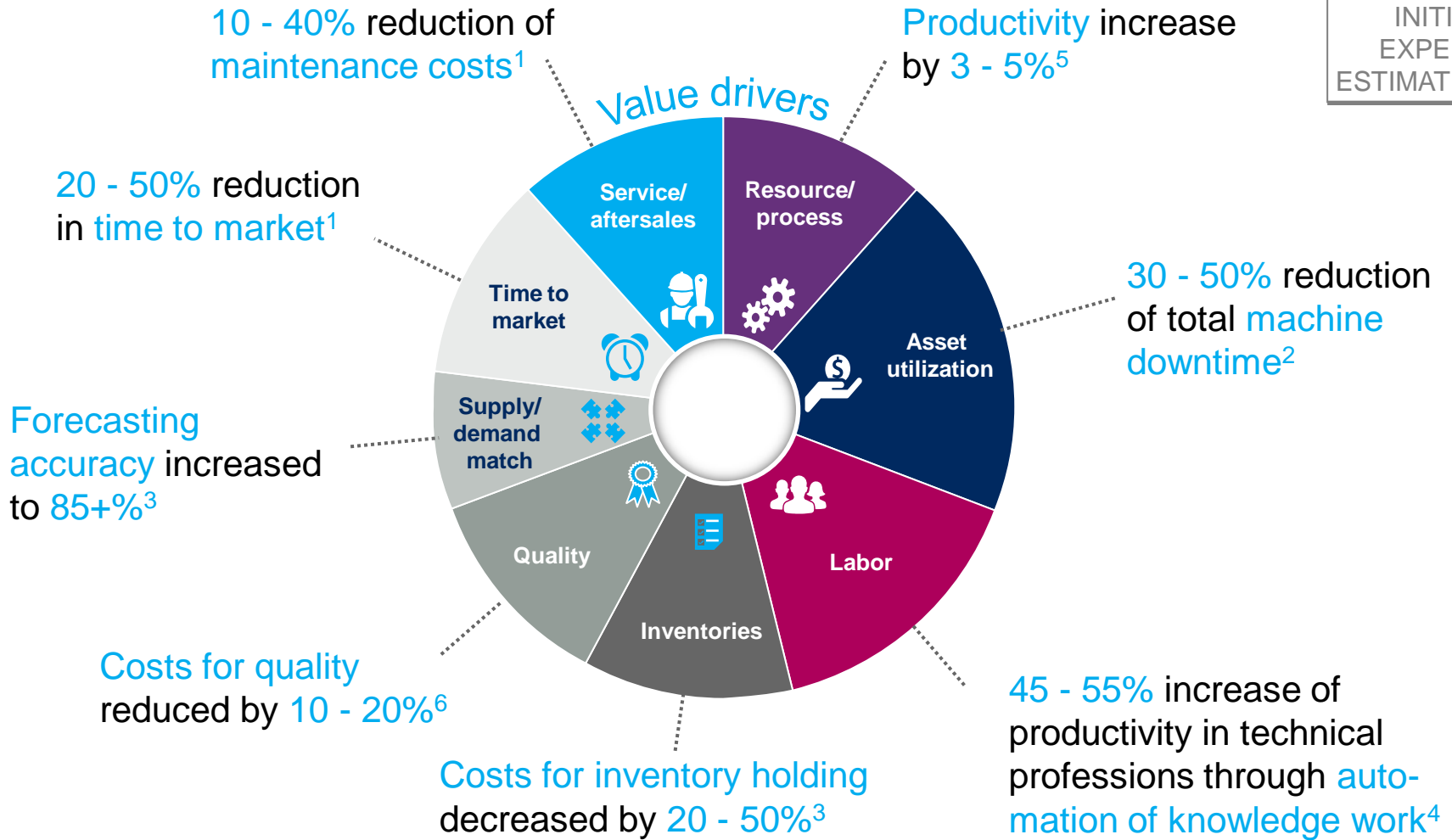
Digital Maturity: Big differences in the worlds and in Europe BCG: Infrastructures (50%), Skill (25%), Investments in online retail (25%)



Source Boston Consulting Group

Productivity: Indicative quantification of value drivers – up to 15% potential in overall operational efficiency

INITIAL
EXPERT
ESTIMATES



1 Cf. McKinsey Global Institute: Big data: The next frontier for innovation, competition, and productivity

2 McKinsey analysis

3 McKinsey analysis

4 Cf. McKinsey Global Institute: Disruptive Technologies

5 See, for example, ABB case study

6 Cf. Bauernhansl, Thomas, ten Hompel, Michael, Vogel-Heuser, Birgit (Hrsg.): Industrie 4.0 in Produktion/Automatisierung/Logistik (2014)



The Digital Revolution: changes the way we look at business

Every business activity and decision needs to take the digital sphere as a starting point

Rethink the Business Model

Re-design the production system

Re-shape the company itself

- Define company-specific knowledge, ideas, data, and algorithms; and identify the unique digital assets that enable a differentiating business model
- Strategically build/leverage new services as source of business opportunity and competitive advantage

Take the digital thread as a starting point for designing the production system, not just its digital image
Enable the most efficient production system and open new pockets of value potential by ensuring digital-to-physical conversion as late as possible

Consider digital in every major decision concerning the setup of the company
Align all asset development needs with the digital core and digital strategy of the company and ensure the right level of investments

To ensure competitiveness to European Cultural and Creative sector it is necessary to actively reshape the business environment

Why is this important?

Innovation and competition

Move from product to service innovation. More private and less Public

Digital skills

Higher demand for “digital” skilled labor from traditional competences

Connectivity

Spread-through broadband communication infrastructure as key enabler

Cyber security and Data

Data security and ownership critical to allow digitation and networking

Strategic direction to follow

- Support/facilitate new innovation-related investments and innovative services (e.g. through fiscal, regulation, IP protection, public-private cooperation model, innovation clusters, etc.)
- Increase the role of private entities in the management of cultural assets; facilitate creation of new user driven services
- Set up a strategy for Digital competences
 - Continuing education
 - Update the technical/university training
- Boost broadband penetration beyond metro areas
- Foster other digital infrastructure investments (server farms, cloud infrastructures, etc.)
- Support alignment and standardization of protocols
- Secure the legal/regulatory framework and environment to support digital growth



The last Commission initiatives: a process to follow?

- **Digital Innovation Hubs**
- **Digital Platforms**
- **Digital Skills**
- **Liabilities**
- **Free flow of data, Access and Usability**



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• www.confindustriasi.it

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