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OPENING TO THE PRIVATE SECTOR: A DIFFERENT PERSPECTIVE IN THE MANAGEMENT OF CULTURAL HERITAGE

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Abstract

When is the private sector best involved in the management of cultural heritage? This thesis investigates the best strategies to enhance private participation. Forced by the present Italian condition, recent legislation has conceded a big bulk of tax incentives to stimulate donations to heritage, i.e. the Art Bonus. Nevertheless, although it represents a necessary starting point, setting fiscal incentives proves not enough to enhance private participation. Indeed, concrete examples show the utmost importance of involving citizens at the level of the civic community and treating cultural patrons as partners, not merely as sponsors. The benefits of such a new strategy would not only be in terms of heritage promotion and valorisation, but also of social capital and quality of life.

Key words

Cultural heritage, private participation, sponsorship, partnership, Public Private Partnership, social capital, quality of life, economic development

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1. Introduction

Italian heritage, both cultural and natural, is unrivalled in the world. Its uniqueness relies on the fact that unlike other countries, its treasure is not concentrated in few big places. On the contrary, Italian heritage is highly *diverse* and *diffused* in its territory: its "cities of art" –such as Rome, Florence, Venice, Milan, Turin, Naples and so on, are only some notable examples of a mixture of tangible and intangible heritage spread all over the peninsula. Such a unique treasure requires a big effort from all the parties involved for its conservation and valorisation.

The Italian legal framework has valued the importance of heritage since the outset of the contemporary Italian State: the Constituent Assembly wisely included its safeguarding and promotion among the fundamental principles of the newborn Republic (It Const., art. 9). Unfortunately, things do not always go as they are envisaged and good rules are not always respected. Except for a few outstanding cases, the lack of funds and sometimes expertise made Italy notorious for its inefficiency in heritage management. To a certain extent, it is true that the vastness of the Italian asset can constitute an economic disadvantage (Benhamou, 2011). Yet, it is undeniable that our heritage has too often been disregarded, if not purposely neglected, in favour of individual and clientelistic interests, as Stella and Rizzo clearly illustrated in 2011[1]. The economic crisis of 2008 delivered the coup de grace to a sector that had been bleeding for ages, complicating the situation even further. Later on in this paper, the run-down condition of Italian heritage will be better outlined, but for the moment being, be it enough to notice that since 2008, the cultural sector overall has lost 1.5 billion euros of private and public resources (Grossi, 2014).

The impression is that the Italian government is no longer capable of providing sufficient resources to the heritage sector. Indeed, virtually all experts agree that looking for private funds represents the only possible solution (Parini, 2014; Fontana, 2014). In particular, they pinpoint at fiscal incentives as the best way to stimulate private donations

[1] Gian Antonio Stella and Sergio Rizzo are two Italian journalists famous for their detailed invectives of the scandals regarding the political class. What was mentioned is "Vandali. L'assalto alle bellezze d'Italia", [Vandals. The assault on Italian beauties] a book that openly denounces the malicious negligence the political class reserved to the management of the Italian Heritage.

to the heritage sector. In fact, also policymakers share this view: on May 31, 2014 the Minister of Cultural Heritage, Activities and Tourism (MIBACT), Dario Franceschini, succeeded in having promulgated the Art Bonus, a section of a Decree Law that encourages cultural patronage by conceding a big bulk of tax incentives (65% for 2014/15 and 50% for 2016). It has been academically proven that a proper system of tax credit is efficient in the sustainment of the cultural sector (Schuster, 2006): from this point of view, the Art Bonus represents a big step forward and indeed, it was welcomed by many. At the same time, it is wrong to expect that it will solve all Italian problems at once, as it is simply an emergency measure and not a long run provision. It is certainly too early to assess its effectiveness, but relevant literature allows for making some predictions about the outcome of this new legislation and helps better understand what should be done next. Indeed, including the private sector in heritage management means far more than barely setting fiscal incentives, but also enhancing participation in both its supply and consumption.

This thesis investigates the most efficient ways to involve the private sector in the protection and promotion of cultural heritage. The research question goes as follows:

> **RQ**: When is the private sector best involved in the management of cultural heritage?

This thesis draws upon recent academic contributions in the field. In the theoretical background, cultural heritage will be briefly presented as an economic asset whose intrinsic characteristics are typical of a public good. For this reason, public intervention is always required, be it direct, indirect or in the form of regulation. In the following chapter, private support to heritage will be analysed in detail. Peacock's diagram (1994) illustrates how households (and firms) are the ultimate suppliers of heritage funds; particularly, in an indirect system, they are freer to allocate their resources. The best way to stimulate donations seems via tax incentives, but since many variables must be considered, there is no academic certainty about the exact proportions of the results (Schuster, 2006). Walter Santagata (2014) proposes to take into account different kinds of motivations when designing a policy to attract private support. Indeed, donors' behaviour can be intrinsically, extrinsically and reputationally driven: as it will be analysed in chapter 4, it would be a mistake to consider donors as moved by only economic benefits. Chapter 5 moves to the core of the research: after briefly sketching the Italian heritage sector, this thesis will examine the Art Bonus and predict, in accordance with Santagata's analysis, whether it will manage to reach the desired amount of donations. Specifically, it will be demonstrated that to stimulate support from private citizens, the reform should be accompanied by a plan to strengthen the civic community, notoriously weak in certain Italian regions. At the same time, to attract donations from firms and not for profit organisations, the Art Bonus should have envisaged a major involvement of private entities in each phase of the project they are financing, i.e. from conceptualisation to final monitoring. Patrons want to have a say in the project they are financing: in other words, they do not want to be mere *sponsors*, but *partners* (Moneta, 2014). Accordingly, chapter 6 will present some successful examples of partnership between cultural institutions and private organisations. Such a strategy proves particularly effective in terms of not only heritage safeguarding and valorisation, but of economic and social benefits as well. A short conclusion will provide the reader with remarks about heritage policies and suggestions for future legislation.

The relevance of this thesis must be understood from the point of view of the policymaker. Now more than ever we need a complete set of reforms to redesign the way we conceive the cultural sector. "We have to work out a new middle-long run strategy (…) in a nutshell, culture must be put back in the centre of the executive action" wrote Pietro Grasso, President of the Italian Senate, in the Preface of the 10th Federculture Annual Report 2014 (p.11). Such a reform must be carried out on the ground that, as this thesis will modestly try to demonstrate, not only is heritage strictly intertwined with economic development (the European Commission has listed culture and creativity in the 2020 agenda), but it is also an instrument for social cohesion and citizens' happiness. In this sense, cultural policies serve the highest political objective, namely attaining the *common good*. As heritage represents a huge pillar of Italian society, it is therefore necessary to design a plan for an efficient promotion whereby every citizen is invited to contribute.

2. Theoretical Background

Before moving to the core of the research, it is important to clarify the theoretical background this thesis draws upon. The notion of cultural heritage has been broadening a lot in the recent years (Vecco, 2010), as exemplified by the evolution of international charters. Throsby (2010) differentiates among built heritage (such as monuments or natural sites), movable heritage (such as artworks) and intangible heritage[2]. Heritage can also be listed among the creative industries, together with manufacture goods, e.g. Made in Italy, and copyright goods, such as cinema or publishing industry (Santagata, 2014). In this sense, it is made up of museums, architecture, monuments, contemporary art, theatre, music and opera.

Be it tangible or intangible, natural or cultural, this thesis will refer to heritage as an *asset*. Indeed, just as capital, heritage requires investment when created, is a store of value over time and its value depreciates if not properly maintained (Throsby, 2010). From the point of view of the policymaker, it is very useful to define heritage in these terms. Indeed, "Defining heritage as capital enables concepts such as investment, depreciation, rates of return, and so on, to be applied to its evaluation and management" (Throsby, 2010, p.108). Of course, this is not to say that heritage must be thought of only in economic terms. Many authors have struggled to build a typology of the different values relevant to an evaluation of heritage (Mason, 2002; Throsby, 2010; Klamer, 2013). Some values cannot be accounted for in economic terms, such as those that are *aesthetic* (qualities of beauty that are commonly recognised), *spiritual* (when heritage connects people to a particular belief or religious faith), *social* (contributing to social stability and cohesion), *historical* (accounting for the origins of the present), *symbolic* (conveying a cultural meaning), *authenticity* (uniqueness and integrity) and *locational* (due to physical and geographical position) (Throsby, 2010). Finally, there are also some economic values

[2] Article 2.1 of the UNESCO Convention for the Safeguarding of the Intangible Cultural Heritage, defines: "The "intangible cultural heritage" means the practices, representations, expressions, knowledge, skills – as well as the instruments, objects, artefacts and cultural spaces associated therewith – that communities, groups and, in some cases, individuals recognize as part of their cultural heritage. This intangible cultural heritage, transmitted from generation to generation, is constantly recreated by communities and groups in response to their environment, their interaction with nature and their history, and provides them with a sense of identity and continuity, thus promoting respect for cultural diversity and human creativity."

that are not reflected by the market: Throsby (2010) calls them "non-use values" and distinguishes among *existence value* (I value it because it exists), *option value* (I value it to preserve my possibility to use it one day) and *bequest value* (I value it because I want to pass it on to future generations).

It does not really matter if heritage assets are privately or publicly owned, as they will always show public –or semi-public, characteristics (Throsby, 2010). With some notable exceptions as in the case of congestions or museums (Towse, 2010), heritage goods are *non-rival*, as someone's use of the good does not prevent anyone else from enjoying it; and *non-excludable*, as no one (non-payers either) can be excluded from using the good. Together with the risk of free riding, many other characteristics such as the limited knowledge of individual preferences (Throsby, 2010), externalities and supply-induced demand (Towse, 2010), make the market fail and public intervention necessary. Public policies in the heritage sector can take different forms, but their outcome "depends on the interactions among the various actors that take part in policy formulation and implementation: politicians, bureaucrats, the electorate and organized groups with vested interests, which, in turn, are influenced by the institutional framework in place" (Klamer et al., 2013). Each country has virtually a unique set of cultural policies, depending on many factors, such as their own definition of heritage and on what they focus most (some may value most cultural tourism, some cultural heritage, some intangible heritage and so on).

Klamer et al. (2013) classify different countries comparing their administrative settings and indirect interventions in the cultural sector. A first relevant distinction concerns countries with a centralised organization (such as Italy and France) and those with a more decentralised one (usually in a federal system, e.g. Germany). A second line of analysis investigates if funding is mostly public or private. The authors find out that the latter, connected with a process of decentralisation and désétatisation[3], has become an important determinant of a country's administrative system. Finally, they distinguish among three different forms of cultural policies implementation: *direct* public

[3] By désétatisation, Klamer means the tendency of the State to hand over to the private sector part of its responsibility in the cultural sector.

expenditure, when the government directly distributes funds to cultural organisations and institutions; *indirect* support, when it is the private sector to allocate funds, but the government stimulates donations via tax incentives; and *regulation*, non-economic constraints, usually in the form of listing.

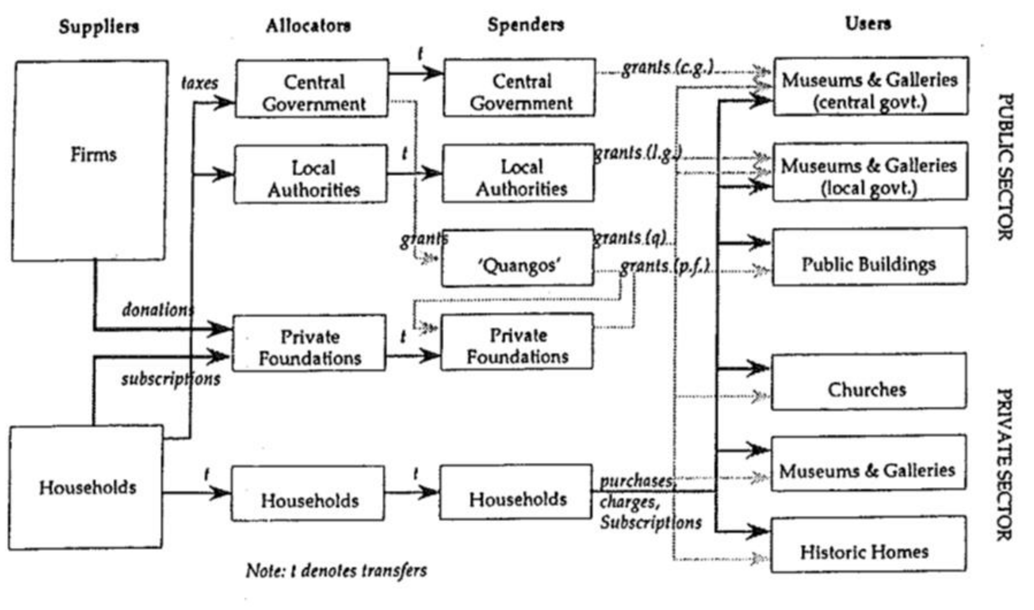
3. Private Support

Having outlined the different cultural policies' forms, it is now momentous to clarify what constitutes indirect support in the heritage field. The shrink of public funds due to the economic crisis of 2008 has forced many countries where direct support to heritage is dominant, to start looking for private contributions. Moreover, a long run tendency towards decentralisation and devolution in the cultural sector made tax policies appear the best way to set a governance model whereby the decision making process be broader and more sensitive to plural needs (Schuster, 2006). Indeed, we are now assisting to a spread phenomenon whereby, through fiscal incentives, support to heritage is changing from *direct* to *indirect*. This general trend can be easily traced in many European countries, but is particularly relevant in Italy, where the opening to the third sector "may have become necessary if cultural heritage has to be preserved but also made known to people" (Klamer et al., 2013; p. 41).

Tax regimes can be used to support heritage in different ways, (e.g. lowering the cost of certain services or attracting experts), but the general attention seems now to be almost exclusively paid to what has been defined as the *American model* (Schuster, 2006). Particularly, US cultural organisations depend primarily on indirect donations that are then deductible from the taxes to the government. "It has been clearly documented that the indirect aid embedded in various taxes forgone by the various levels of American government are a much more important source of financial support than are the government programs of direct support and that preeminent among these is the deductibility of such contributions" (Schuster, 2006, p. 1258).

Starting out with an analysis of the British system, Sir Alan Peacock (1998) develops a diagram (Fig. 1) to track the flow of funds from origins to uses in heritage funding. Both public and private agents contribute to what he calls the *supply* of heritage funds: the aim of the diagram is exactly to clarify these passages. The diagram must be read from the left to the right and actors are vertically classified according to their function. In the first column, households are the ultimate source of funds: they are identified as *suppliers* in the form of taxation, donations and subscriptions (firms contribute only through donations). The column of *allocators* is occupied by government (both local and central), private foundations and households. When it comes to *spenders*, Peacock ranks the same actors as for *allocators* plus quangos[4]. Finally, the last columns lists different *users*.

Figure 1: Peacock's Diagram of the Passage of Funds in Heritage Funding



Opening to the private sector means increasing the amount of funds for heritage that comes through donations instead of taxes. To a certain extent, direct and indirect support are functionally equivalent (except for few cases such as charity to religious institutions, since State and Church should formally stay separated) but have a significant difference: decision-making relies on individual choices rather than collective (Schuster,

[4] Peacock classifies these bodies "using the popular nomenclature of Quangos (Quasi Autonomous National Government Organisations) though in official parlance they are known as Non-Departmental Public Bodies" (Peacock, 1998; p. 10). Some countries (e.g. UK) prefer to have these organisations to warrant the independence of public funds' allocations.

2006). To put it bluntly, money will always come from households, but they can directly decide where to allocate it.

Many liberals would welcome this scenario as desirable, as they maintain cultural policies are often too paternalistic[5]. "Heritage policies rest on the hypothesis that government knows best what should constitute our legacy to future generations" (Benhamou, 1998, p. 90). Moreover, according to Peacock (1994), indirect support enhances consumer sovereignty and solves the *principal/agent problem* that characterises this sector. Nonetheless, this does not come with no downturns. Firstly, for the Coase theorem to apply, information costs would be overly high. Indeed, "if voters are to judge properly what they should be expected to pay for any service, such as heritage, then they must have a clear idea what that service is, how that output is to measured, and clear information on what it costs to produce it" (Peacock, 1994; p. 207). Secondly, the attention of a public of non-experts focuses mainly, if not exclusively, on star items at the expenses of less popular, but equally valuable, heritage goods. That is why we need to develop a proper combination of both sectors.

When designing fiscal incentives, it is crucial to make sure that moving from direct to indirect support is economically sustainable. For what concerns donations from households, Schuster (2006) prescribes considering several economic factors that influence the outcome of tax policies. Unfortunately, there is still much academic uncertainty about the exact proportion of increased donations corresponding to a certain incentive, as each case deserves particular empirical considerations. The main problems arising in the field of patronage consist of *price elasticit*y[6] and *income elasticity*[7], but also other secondary facts could have equally valuable influences, such as the donor's educational and income levels or the particular sector one may want to donate to.

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[5] Consider that heritage may be also defined as a *merit good* (Peacock, 1994): as the value of each item is generally obscure to non-experts, it is the State and its bureaucracy that, more and less paternalistically, chooses what is worth protecting and providing to citizens.

[6] To put it simple: "What percentage change in giving is engendered by a one percent decrease in the price of giving?" (Schuster, 2006; p. 1272)

[7] A decrease in the price of giving is accomplished through a decrease in the donor's marginal tax rate. If the donor's marginal tax rate decreases, his taxes decrease and his net after-tax income therefore increases. As a result, the donor's contribution may go up. Thus, one also needs to model the income effect on donations (Schuster, 2006; p.1276).

The situation gets further complicated when considering donations from firms. Always taking the American model as an example, Schuster (2006) notices that "corporate tax rates are much lower than the highest marginal tax rates for individuals and that ceilings on contributions are lower" (p. 1278). Furthermore, firms may entertain relationships with the heritage sector that could be classified as sponsorship, which is definitely another kind of transaction. If *philanthropy* is a donation with no expectation of return, *sponsorship* "is the expenditure of corporate funds to advance the image of the corporation" (p. 1279) and thus pursues economic interest under a marketing strategy.

Even so, there is no academic agreement on the actual outcome of fiscal incentives. Many authors seem to suggest that setting a favourable tax regime will immediately induce a great flow of voluntary contributions. On the contrary, others claims that tax incentives have received an "undeserved emphasis" (Santagata, 2014). Firstly, there is always the risk that the forgone taxes will not be offset by private contributions (Schuster, 2006). Secondly, "so far, there has been no clear evidence that tax exemptions through fiscal policies have provoked an extraordinary flow of private donations to the cultural sector" (Santagata, 2014; p. 109). Globally, the average level of voluntary support to culture is around 10% (Inkei, 2001). In Italy, where until recently there was no particular system of fiscal incentive for culture, donations are estimated to swing between 1 and 3.2%[8], whereas in the US, in 2007, donations to culture and the arts where approximately 4.8% of the total[9]. In fact, culture seems to be what Santagata (2014) dubs a "residual choice" for donors, who are always much more concerned with supporting basic needs, such as health or religion. Direct or indirect involvement with the issue at stake would then prove crucial for arousing donations.

4. How to enhance private support

In order to understand the logics of donations, Walter Santagata (2014) suggests taking into account also other factors. Motivations to donate are not only economic, but

[8] The data are, of course, prior to the promulgation of the Art Bonus

[9] Santagata (2013) report the data of the Giving USA Foundation for 2008.

belong to what he calls *pro-social behaviour*, as some correspond more to the dimension of the Homo Moralis rather than of that of the Homo Oeconomicus. Indeed, "It is worth noticing how donations are universally generated by ethics and moral laws and constitute a phenomenon influenced by local traditions and institutional factors" (Santagata, 2014; p. 108). According to Santagata, three are the different motivations that account for someone's desire to donate.

Intrinsic motivations are those coming from our inner feelings and corresponding to the joy of giving. Economically, they can be dealt with in terms of *pure altruism*, when the agent wants to actively contribute to the common good; *impure altruism*, when the very fact of donating instils pleasure and personal satisfaction, called warm glow; and when the explanation for giving must be attributed to particular moral *commitments*. In particular, one's willingness to give seems to be positively correlated with four variables. Firstly, previous experience in the consumption of cultural heritage creates a dependence effect whereby access costs are lowered, but direct advantages increased. To put it bluntly, the more museums I visit, the more museums I want to visit in my life. Secondly, donations positively correlate with existence and option values (Ch. 2). Thirdly, those who have known the personal satisfaction of giving –the so-called warm glow, tend to replicate the experience. Finally, civic engagement and personal belonging to the community are positively associated with donations, which may look as a duty of indirect reciprocity.

Extrinsic motivations consist of external conditions that favour donations. Santagata (2014) separates them from intrinsic motivations because they draw upon political and economic thinking, rather than pre-social behaviour. Indeed, for they appeal to rational decision-making, extrinsic motivations are usually economic incentives, most often, fiscal incentives that frame donations in a cost-benefit perspective. For this reason, it is important that monetary incentives be high enough to crowd in a sufficient amount of resources[10].

[10] To a certain extent, Santagata specifies, it is equally important that fiscal incentives be not too high either. In that case, they could instead crowd out donations, as donors could feel their ethical values as being corrupted.

Finally, reputational motivations hinge upon the desire to have recognised one's voluntary contribution in terms of social status. They do not spring from morally high objectives. Conversely, most of the time, the aim is simply to prove one's wealth and power (as in the case of patronage) or to receive gratification from lauds and respect. In the case of intrinsic motivations, donors may have an interest in keeping their generosity anonym. On the contrary, donors moved by reputational reasons want their name to be associated with some outstanding results. It is thus fundamental for the policy maker who wants to encourage patronage to warrant transparency and visibility. In fact, policy makers should also bear in mind that leveraging on reputational motivations will produce effects only on a small percentage of citizens, since donors who do not own an extraordinary budget seem not to pursue reputational goals.

Santagata (2014) also conducts an empirical survey on Italian population to test the validity of his hypothesis about private contributions to the cultural sector.[11] The sample reproduces the Italian population for sex, age and geographic origin and is composed of 1,000 over 25 citizens who visited at least a museum in the past 12 months. On the one hand, the data would suggest an active private participation, as more than a third belongs to a voluntary association, the average number of museums visits is three per year and 32.7% declares willing to donate to a museum or a heritage site. On the other, only 4% of the sample has donated to a cultural organisation. Young people and women tend to donate more, even though the average amount of the donation increases with the age, and mechanisms of anonymity seem to work as an incentive for 61% of donors. Among contributors, 78% is motivated by passive values (option, existence and possibly bequest values), 17% by the desire to improve heritage services and 1% by the joy of giving. "These data confirm that intrinsic motivations are not proportionate with a direct use of the heritage good, but with the preference for its characteristics as a public good" (Santagata, 2014; p. 116). Finally, education and previous experiences are confirmed to be equally important determinants of the willingness to donate to the cultural sector.

[11] The data come from a survey conducted in 2009 [Bertacchini, Santagata & Signorelli 2011].

In the end, Santagata prescribes his recipe to enhance private participation. His thesis is that it has become momentous to develop a new system whereby both the public and the private sectors cooperate in the management of cultural heritage. Indeed, independently, neither the government nor private citizens could accomplish this objective efficiently and effectively. To begin with, Italian government should elaborate a middle-long run strategy to strengthen intrinsic motivations, which comes mostly through the education of citizens. These policies aim at raising collective responsibility for Italian heritage and increasing the demand for cultural consumption, via institutional programs in schools and universities, but also awareness campaigns. Furthermore, if policy makers want to attract new donors, tax incentives should be very high and transactions completely transparent. However, it is crucial to be cautious about the risks of setting fiscal incentives that could prove too high or disregard important heritage assets (Ch. 3).

5. Private Support in Italy

As private support to cultural heritage has been properly analysed and explained, the next step of this thesis is to apply such theory to the Italian context. Although there is no need to prove the vastness and the heterogeneity of Italian heritage, a few figures will provide the reader with a clearer idea of what Italy disposes of. Italy owns "46,025 historic buildings, which means one per 1,200 citizens, 3,872 museums (more than the sum of those in Africa and South America) and 48 opera theatres (compared to the 34 of France, Russia, USA, Spain and UK)" as reported by Roberto Grossi, President of Federculture, in the annual report of 2014 (p.33). Furthermore, Italian heritage is composed of unique intangible elements spread all over the peninsula such as festivals, traditions, knowledge and skills, which are exemplified by the world leadership in the export of *Made in Italy* products[12]. Finally yet importantly, UNESCO Heritage List internationally recognises the immense value of Italian asset: counting fifty properties listed, Italy holds the highest number of heritage goods inscribed in the document.

[12] According to a research by Future Brand "Made in. The Value of Country of Origin for future brands", Italy ranks fifth after USA, France, Germany and Japan in the overall ranking, and second in "Food & Beverage" and "Fashion", after France and USA, respectively. Italy could even fare better.

The Italian Constitution has valued the importance of its national heritage since the beginning of the Italian Republic. The Constituent Assembly wisely included its protection and valorisation among the fundamental principles of the newborn State. Indeed, article 9 of the Italian Constitution goes as follows:

"The Republic promotes the development of culture and of scientific and technical research.
It safeguards natural landscape and the historical and artistic heritage of the Nation."

It is interesting to notice how in 1948, it was already well clear that managing national heritage implies the attainment of two different objectives at the same time, namely *safeguarding* it and *promoting* it. On the one hand, to safeguard one's national heritage means to protect and to defend it from wear and destruction, but also to keep it alive by making sure that citizens acknowledge the importance of the set of cultural values attached to it. On the other, to promote heritage means to valorise it, by making it available to citizens, and to enhance it. For this reason, promoting refers also to renovate heritage, by keeping the pace with new technology, and to encourage the creation of new assets. To a certain extent, the idea of heritage promotion already implies a duty to support the development of creative industries (Santagata, 2014).

Such a purpose requires a strong commitment and a huge economic effort, especially if we consider the vastness of Italian asset. To a certain extent, whatever its policy to manage heritage, Italy will always be constrained in a situation of economic inefficiency. As Françoise Benhamou (2011) puts it, safeguarding will always be overly expensive, because when the available stock of heritage is as large as the Italian, the marginal value of each single item decreases significantly, which in turn causes the cost of preservation to increase likewise. Nevertheless, this is not a justification for the fact that since many years Italian governments have proved inadequate to fulfil the objectives as set in article 9. Most executives have failed to understand the great potential of Italian heritage; on the contrary, compared to other sectors, they have considered it as secondary and thus have allocated to it less and often insufficient resources. Indeed, culture and heritage constitutes only 0.2% of the overall Italian budget. Moreover, the economic emergency, due to the 2008 crisis, brought about considerable cuts in the budget for heritage, delivering the coup the grace to a sector already bleeding. If in 2004 the Ministry of Cultural Heritage received 2,197 million of funds, in 2014 the same office (now responsible for tourism as well) received 1,595 million, with an overall reduction of 27.4%. Useless to say, even donations from private entities (both households and firms) have been decreasing: despite a slight recovery between 2012 and 2013, private contributions have shrunk of 41% between 2008 and 2013[13]. As reported in the introduction, since 2008, the cultural sector overall has lost 1.5 billion euros of private and public resources (Grossi, 2014). In such a scarcity, it is almost impossible to design a long run strategy to safeguard and promote our heritage. Indeed, the majority of executive interventions in the field has been emergency reparations aiming to avoid total collapse, as it happened with the Decree Law "Valore Cultura" in 2013, when Minister Bray allocated 75 million to prevent the failure of many theatres and lyrical entities, such as the Opera Theatre in Rome[14].

The Italian issues are not merely related to poor resources. In their book "Vandali" (2011), Stella and Rizzo analyse why and how Italian heritage is constantly put at risk. Certain museums are so unprofitable that one could hardly believe to the figures she reads[15]; other are so isolated and poorly connected to the rest of the peninsula that it is practically impossible for a tourist to reach them, such as the museum whose collection includes the famous Riace Bronzes in Reggio (only 36,136 paying visitors in 2009). In other cases, the problem is the absence of a proper promotion strategy. The 2014 Federculture annual report illustrates how 25% of Italian museums still does not have a website. A tangible example of this lack of a proper digitalisation is www.italia.it, a site launched in 2011 to promote Italian heritage globally, though with no English section: as

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[13] All these data come from the section of data analysis on culture and tourism "Dati e Analisi sulle Dinamiche del settore cultura-turismo 2012-13" from the Federculture annual report of 2014. The date here quoted only refer to national figures, but the document goes through the budget of regions, provinces and municipalities.

[14] To consult the whole text of the Decree Law, see the following link: http://www.altalex.com/index.php?idnot=64103

[15] In Sicily, for example, the Terrasini Museum of Natural History cashed 7658€, a fourth of what it takes to pay for only one of its 23 guardians, whereas Villa Romana in Messina sold 404 tickets, with a revenue of 772€, but spending 358.000€ only for the staff.

a result, even though it had cost a great amount of public money, another website (www.verybello.it), practically the same as the previous, had to be designed in occasion of the Expo 2015. More generally, Stella and Rizzo report a tendency, of both normal citizens and the ruling class, to take the immense Italian heritage "for granted" and to consider that sometimes as an obstacle, sometimes as a means for personal (and often illegal) advantage. Eventually, Italian disregard for its treasure has become notorious in the world. Indeed, a study[16] conducted to analyse how the foreign press reports Italian heritage scandals, lists "bad management and excessive bureaucracy", "lack of funds and cuts", "negligence", "theft" and "opening hours and structures" among the principal reasons.

Meanwhile governments fail to attain what the Constitution would require and heritage is commonly seen as a burden rather than as a treasure, important resources are being lost forever. Confronted with a sector about to crumble together with Pompeii villas, many academics and policy makers have started calling for a radical change in the way heritage is currently managed. The only possible solution appears to be making every citizen take responsibility for what is after all a common good. If the government does not have sufficient resources, then new ways of funding should be explored, especially in the private sector. Pietro Grasso, President of the Italian Senate, maintains that "we need new investments in the cultural sector and an acceleration in the relationship between public and private in a positive sense" (Preface to Federculture Report 2014; p. 11). Marco Parini, President of "Italia Nostra"[17] considers essential a Cultural New Deal based on the cooperation between the public and the private sectors (Parini, 2014), while Carlo Fontana, President of AGIS[18], maintains that "the only possible remedy, if not the only one, is to stimulate, through the instrument of the tax credit, the sustainment to the private initiative from both citizens and enterprises" (Fontana, 2014; p.3).

[16] The study is commissioned by Ornelliana and is called "Stampa estera: allarme beni culturali in Italia". It is reported by Stella and Rizzo (2011; p. 64)
[17] Italia Nostra is an association for the safeguarding of the Italian historic, artistic and natural heritage
[18] Italian General Association for the Show Business

It is a common mistake to confuse such a strategy with the sale of national heritage to private entities. In fact, not only is the latter strongly opposed by the public opinion (Santagata's survey demonstrates that people care about heritage public nature), but it also proves to be ineffective. Indeed, during the Monti government in 2012, Italy declared it would start selling part of its built heritage, called "demanio pubblico", expecting a revenue of 15 billion. In fact, overall the attempt can be deemed a failure, except for few negotiations that are still taking place (e.g. some old barracks close to the MAXXI museum in Rome). As a recent enquiry by L'Espresso illustrates[19], no one seems to be willing to buy. On the contrary, opening to the private sector means changing support from *direct* to *indirect* (Klamer et al.; 2013) and building a strategy whereby public and private strictly cooperate. Italy has been generally known as a country where such a collaboration is hard, especially when managing cultural heritage. In the analysis of cultural public policies by Klamer et al. (2013), Italy is classified as country developing a decentralised approach where the State is the biggest investor and where, despite considerable effort, the private-public cooperation is still *difficult*. Peacock and Rizzo (2008) describe Italian institutional setting in the cultural sector as "state-driven, top-down 'bureaucratic' system, where politicians and bureaucrats decide how to distribute public funds and the public production of heritage services is widespread" (Peacock & Rizzo, 2008, p. 142).

The Decree Law 83 of May 31, 2014 aspires exactly to reverse the situation sketched above. Indeed, it was presented as the greatest reform in the heritage sector of the recent years. Not only does it aim to intervene in many fields of what can be defined heritage (e.g. lyrical foundations, touristic mobility and even youth employment), but also to redesign something "that will make us more competitive in a globalisation century, that is our beauty, our history, our built heritage, our creativity and all the skills that our new generations are not put in the right conditions to use" (from the speech of Minister Franceschini after the approval of the Decree Law). For academic precision, this thesis focuses only on the Art Bonus (art. 1), which sets conspicuous tax incentives to encourage private support: this analysis will allow us to conclude if the executive will succeed in

[19] For the original article, see: http://espresso.repubblica.it/inchieste/2014/12/19/news/i-palazzi-di-stato-non-li-vuole-proprio-nessuno-la-vendita-del-patrimonio-pubblico-e-un-flop-1.192747

attracting the great amount of donations the Decree Law is meant to, and in reinforcing the Italian private sector.

In fact, privates were not completely excluded from the heritage sector before the Art Bonus. Firstly, as reported by Klamer et al. (2013), Italy is among those countries that allocate *lottery funds* for cultural heritage. However, despite great premises[20], also the latter have been shrinking: between 2013 and 2014, they underwent a reduction of 39.4% (Federculture, 2014). Secondly, "From 2006, taxpayers are allowed to allocate 5‰ of their income tax payments, and can choose to assign it to several non-profit organizations operating in various fields, ranging from social assistance to cultural heritage conservation, scientific research, civil rights, and so on" (Peacock & Rizzo, 2008; p.141). Unfortunately, in the end, as discussed in Chapter 3, contributors choose to allocate only a tiny percentage of these funds to cultural heritage. Thirdly, in the last decade Italy followed what Cappelli (2002) calls the American or the Dutch model by creating cultural *foundations*, autonomous organisations with administrative and financial independence, but legally owned by the State that keeps the power to watch them over. This model seems to have been particularly successful in Italy: many examples show outstanding results, such as in Turin[21], Florence[22] and Venice[23]; yet, by their own definition, foundations are replicable only in few cases and not extendable to the wide definition of heritage we have to adopt when considering Italian asset. However, the most important opening to the private sector prior to the Art Bonus was probably the law 4/1993, also known as Ronchey Law[24], which allowed granting private entities the management of *ancillary services*. By the latter, we mean all the commercial services offered to the public in museums, galleries, sites, libraries and archives that are beyond the visit itself, but increase the quality of its usability, such as guides, catalogues, surveillance, information facilities and cafeterias. Improperly regulated, in some cases this reform led to a scenario whereby private entities were allowed to cash in all the revenues, leaving to the State only a

[20] Peacock and Rizzo (2008) estimated that 72% of lottery funds was devoted to culture in Italy
[21] Egyptian Museum of Turin (http://www.museoegizio.it/) has recently renovated itself (the inauguration was on 1st April 2015) and represents an excellent centre of scientific research and cultural promotion
[22] The Palazzo Strozzi Foundation (http://www.palazzostrozzi.org/) generates 30 million every year, receiving only 2 million of public funds (Camaleonte, 2014).
[23] The MUVE – Foundations of Civic Museums in Venice, is the biggest museum networks in Italy and counted 2,3 million of visitors only in 2003 (grossi, 2014)
[24] http://www.stato.rdbcub.it/ministeri/beniculturali/normativabenicult/L_Ronchey4_1993.pdf

derisory amount, and to a status quo where ancillary services were often granted to the same firm or cooperative without opening new announcements[25]. As a result, on February 2015 Minister Franceschini launched a collaboration between MIBACT and CONSIP[26] to redesign regulations and revise contracts yearly. In addition, together with the Constitutional Reform of Title V, the Ronchey law led to an implied institutional partition of article 9: while safeguarding was increasingly seen as something pertaining only to central authorities, valorisation was devolved to local governments or granted to privates (Acidini, 2014). This antinomy is exactly what the Art Bonus wants to overcome.

The Art Bonus is a set of emergency measures contained in article 1 of the Decree Law 83 of May 31, 2014[27]. The objective is to favour cultural patronage by setting exceptional tax incentives (65% for 2014-2015 and 50% for 2016) for all private entities that wish to support projects of maintenance, protection and restauration of public cultural heritage; public museums, archaeological sites, archives and libraries; public theatres and lyric foundations. The tax credit must stay within the limits of 15% of taxable income (for physical entities and not for profit organisations) or 5‰ of annual income (for profit organisations). A key point on which the Decree Law insists is transparency: "beneficiaries communicate monthly to MIBACT the amount of donations received in that month; they must also share that publicly, together with the destination and the use of the sum donated" (art. 1.5). A webpage on the institutional site of MIBACT will inform the public on the total amount of funds received and on the current state of each project. In addition, in article 1.6 the Ministry engages in the creation of zero cost strategies of fundraising, also through internet portals (e.g. crowdfunding).

It is certainly too early to assess the outcome of the Art Bonus. Nonetheless, the theoretical background outlined in the previous chapters can help to understand whether it constitutes a step in the right direction. No doubt, we have to acknowledge two major reforms. Firstly, by encouraging donations the Art Bonus involves the privates also in the safeguarding of heritage, reconciling the two objectives set in article 9 of Italian

[25] A recent enquiry by L'Espresso (http://espresso.repubblica.it/plus/articoli/2015/01/08/news/i-musei-italiani-sono-un-affare-solo-per-i-privati-1.194188) clearly illustrates the situation
[26] CONSIP is an SpA of the Ministry of Economy and Finances (MEF) that checks on Public Administration expenditures
[27] For the whole text, see: http://www.altalex.com/index.php?idnot=67782

Constitution that had been considered separated since the 1990s. Secondly, setting a tax credit of 65-50% represents certainly a good incentive for every possible donor, as it has been proved that extrinsic motivations work only if there are significant economic benefits at stake (Santagata, 2014). However, the Art Bonus is, by definition, an emergency measure, and there is no warrant that the same tax incentives will be confirmed in 2017, depending on if they are still economically sustainable. Best case scenario would be that in these two years MIBACT collects all the money it needs, but are we really sure there will be such a great flow of donations?

Firstly, the Art Bonus fails to understand the importance of intrinsic motivations, especially for private citizens with an average income. To a certain extent, it is remarkable that MIBACT envisaged new strategies of fundraising such as *crowdfunding*, an Internet-based form to raise funds for new projects. Recent evidence suggests it is a particularly effective strategy in the cultural field, as exemplified by the crowdfunding with which the Louvre Museum succeeded in collecting one million to acquire the Three Graces by Lucas Cranach (Federculture, 204; p. 216). Indeed, not only do its online characteristics enhance dissemination and advertising mechanisms, but contributors are also more motivated to participate as they "identify themselves with the specific project seeking funding" (Hemer, 2011). Moved by experiential motivations and specific commitment to the project, the consumer behaviour, especially in the creative milieu, is closer to that of the *prosumer* (Quero et al, 2013). The prosumer is a neologism for a new economic subject that is a producer and a consumer at the same time: "through interactivity, this transformation is leading to *user generated content*, which is the possibility that the consumer changes and enriches a cultural content according to her preferences revealed through the internet and the social media" (Santagata, 2014; p. 37). Nevertheless, it is academically proven that "The means of success of a crowdfunding project are related to the existence of a community prior to the launch of the project" (Quero et al, 2013; p. 16). In this sense, crowdfunding strategies will only be effective when the society interested possesses already a good level of community belonging and reciprocity. To put it à la Santagata (2014), these fundraising programs depends on intrinsic motivations. Indeed, if potential donors are not intrinsically motivated as well, the Art Bonus will fail to attract great flows of donations from private citizens with an average income. Since Italy has been generally known as a nation showing different levels of social capital across geographical regions (Putnam, 1993) and a tendency to disregard heritage (Stella & Rizzo, 2011), there is the risk that the Art Bonus will attract only a little amount of funds, because, as it happened for 5‰, extrinsic benefits are not correlated by measures to increase intrinsic motivations. True, the latter can only be attained in the long-run, but it is now more than ever momentous to stop making only reparative, emergency policies and start developing long-run programs for the economic and social welfare of the nation.

A second problem of the Art Bonus is more subtle and concerns reputational motivations, which usually interest citizens with extraordinary income or organisations (both for and not for profit) willing to donate in virtue of their good name. In fact, the Decree Law respects all the conditions prescribed by Santagata (2014), as MIBACT promised to show complete transparency of transactions and of how donors' money is being used for a certain project. Nevertheless, patrons do not want simply to put their money in a project and a signature close to the results; on the contrary, they have an interest in commissioning a specific program. Back in the 17^{th} century, Pope Innocentius X Pamphilij or Alexander VII Chigi did not just ask Gian Lorenzo Bernini to realise *a* fountain or *a* square: no, they wanted *the* Fountain of the Four Rivers and *the* colonnade of Saint Peter Square. Patrons want to be involved in the program: they want to have a say, as it is in their interest to maximise their reputation. Similarly, it is unlikely that a private entity donates money when the receiving institution, however transparent, keeps discretionary powers to allocate funds. Given a general distrust towards the efficiency of public decision-making, do we really think that an entrepreneur will donate to MIBACT or a cultural organisation when she cannot influence what her money will be used for? What if one's donation serves to pay for a company of poor restorers? What if for a project opposed by the public opinion? And what if it is used even for a necessary, well-grounded intervention that unfortunately does not enhance one's good name, such as redecorating the public restrooms of a museum? Patrons are moved by reputational motivations to increase their good name and status, which especially in the case of for profit organisations turn out to be also economic motivations. A firm will not take up such a program if the risks of engaging in insensible marketing strategies are too high, but will rather look for direct agreements with the beneficiaries that will warrant them their money will be used their own way. Of course, as it was already clearly stated, this comes with the risk of concentrating funds only on the most "profitable" heritage assets, but opening to the private sector means also putting donors in the right conditions to invest and thus involve them in the whole creative process, not only at the end of it.

6. From sponsorship to partnership

There are already many cases, in Italy as well, of for profit organisations sponsoring specific heritage programs they collaborated to develop directly with the relevant cultural institution. On January 21, 2015 for example, Milan National Museum of Science and Technology Leonardo da Vinci launched “MuseoscienzApp”[28], a free app for smartphones developed by the museum in partnership with Samsung and designed by ETT. Downloadable from the museum’s Wi-Fi, the app allows visitors to have thematic tours of the museum, to accede to a set of contents they can consult anytime and to stay updated with weekly initiatives. MuseoscienzApp is also the greatest international mobile project realised with beacon technology, i.e. more than 300 Bluetooth Low Energy antennas that map museum’s hotspots. To a certain extent, in this project private entities participate in the promotion of heritage and only indirectly to its safeguarding –by increasing the quality of the tour, more visitors should be attracted and revenues go up. Nonetheless, what is intrinsically original is the collaboration between a cultural institution and two for profit firms whose job is not normally in ancillary services. Obviously, both Samsung and ETT are not simply moved by reputational motivations - as they do not just want to increase their social status, but also by extrinsic motivations. Indeed, they are pursuing a marketing strategy that not only will advertise their (good quality) products, but will also build up a symbolic corporate image that is sustainable and supports culture, which is increasingly more appealing to today’s customers (Van Tulder et al., 2014). These firms engage on projects whose objective is not strictly profitable, but also social welfare: to a certain extent, their motivations can also be ascribed as intrinsic. It is therefore crucial to pay attention to company’s statements: “Samsung considers culture an essential value for people’s education and social progress (…). Our collaboration sustaining the digital strategy of National Museum of Science and

[28] See the website http://www.museoscienza.org/news/dettaglio.asp?idnotizia=919

Technology must be understood in this framework"[29] or "Technologies create an interactive environment that introduces the visitor to a new idea of museum, not simply a place of conservation, but also a place devoted to valorisation, participation and sharing, where one can be inspired to create and experience"[30]. Eventually, for such companies it is not enough to donate money for a good cause; nay, their good name can be even more enhanced by taking part to a cultural project offering all their technical and marketing skills and helping a cultural institution to attain some socially valuable objectives. To put it bluntly, for such companies it is not enough to be sponsors; they want to be partners.

The Italian project CULTURA + IMPRESA (Culture + Business) was born in 2003 to set at regional level an online -and offline, market place to favour the meeting of experts, cultural operators and firms. The rationale behind it is that "today Business could and should play a fundamental role in the diffusion of Culture to generate social and economic capital" as Moneta, President of the Committee CULTURA + IMPRESA, wrote in the 10th Annual Report of Federculture (Moneta, 2014; p. 163). In 2013, the first edition of the contest CULTURA + IMPRESA[31] was announced not only to stimulate the supply of funds to the cultural sector in the form of donations and professional and technological expertise, but also to create a benchmarking occasion where knowledge could be spread and standards compared.

The success of the first edition of such a contest inspired UPA[32] (Association of Advertising Users) to conduct an empirical research to investigate what made the selected projects so valuable. The final stage of the contest saw the competition of "corporate" projects sponsored by the typical cultural donors, such as banks or insurance companies, but also marketing partnerships financed by firms producing durable goods, such as cars and fashion items (Moneta, 2014). The main conclusion of the UPA inductive research can be summarised in the motto "from sponsorship to partnership". According to the

[29] In the words of Antonio Bosio, Product & Solutions Director Samsung Electronics Italia, as reported by the press release of the museum of January 21, 2015
[30] In the words of Giovanni Verreschi, CEO of ETT (*ibidem*)
[31] The official announcement, the rules of the contest and all the relevant press releases can be found on the following website: http://culturapiuimpresa.ideatre60.it/
[32] It is a landmark association counting more than 400 firms that invest in advertising and communication. The relevance of this research is that its associates represent more than 80% of national investments in marketing and advertising (Moneta, 2014; p. 165-6).

definition adopted by UPA, *sponsorship* means “investments or funding initiatives of a firm towards cultural and social activities, sport, the environment, education etc. arranged/organised by other entities/operators”; whereas *partnership* means “investments or funding initiatives of a firm towards cultural and social activities, sport, the environment, education etc. whereby though the firm itself cooperates in the development and arrangement of the initiative” (Moneta, 2014; p.166). In other words, evidence suggests that private entities are best involved in the management of a heritage project when they are not merely sponsors, but also partners, i.e. when they cooperate actively in the development process through not only economic donations, but also by sharing their competencies, technologies and marketing channels (Moneta, 2014). Indeed, among the criteria chosen to select the winners in the competition, CULTURA + IMPRESA lists innovation, communication strategy, networking with institutions, media and other firms, sustainability, CSR, measurement of results and job opportunities created.

Among the fifteen finalists, two projects were selected as co-winners for the 2013 edition of the contest CULTURA + IMPRESA. The first one is “Pappanoinweb”[33], a partnership between Telecom Italia, an Italian telephone company, and the National Academy of Santa Cecilia in Rome. The objective was to divulgate classical music by sharing on the web eleven lyrical concerts taking place in Rome Auditorium directed by the famous orchestra leader Mario Pappano. The project was a great success, as about 900,000 people watched the online performances and the dedicated website reached more than 5 million contacts. The other was a partnership between MUVE (Foundation of Civic Museums of Venice) and Mavive SpA, an Italian leader in the perfume sector. The objective was to reopen and restyle the museum of Mocinego Palace in Venice as a centre devoted to the study of the history of Fashion[34] with a thematic tour devoted to show how artisanship and traditional knowledge made Italy a leading producer in the perfume sector. In an operation of co-marketing, Mavive SpA also launched “The Merchant of Venice”, a new brand dedicated to the project that carries MUVE’s logo.

[33] http://www.telecomitalia.com/tit/it/pappanoinweb.html
[34] http://www.visitmuve.it/it/fondazione/sostienici/partnership/tra-moda-e-profumo-mavive/

It is also relevant to quote some of the data collected by UPA as reported by Moneta (2014). The first relevant figure is that among the firms interviewed, 82% invested in heritage in the past five years. Surprisingly, *culture* results the most chosen sector for developing a sponsorship or a partnership (80%), followed by *sport* (72%), *education* and *science* (between 35 and 40%) and the *environment* (20%). When choosing culture, sponsors and partners prefer to invest in exhibitions (60%), music (55%) and festivals (45%). The latter are followed by museums and restoration (35 and 25%), theatre (35%), photography (25%), ballet (20%) and contemporary art (17%) –beloved by banks and financial associations. As Moneta notices, sponsors prefer to deal with heritage when culture presents itself in the form of short events, as it is easier to arrange them, to promote them and probably to extract a profit from them. Indeed, that private sponsors are interested in the organization of "happenings", especially exhibitions, is nothing new in recent years. Cappelli (2002) analyses why it has become a trend for most museums (particularly the big ones) to organise exhibitions. In her words, "they make sure that the public will come back to see the permanent collection; thanks to the marketing apparatus (posters, invitations, fliers, banners and flags spread in our cities), they grant corporate sponsors' satisfaction; they strengthen the relationship with the local community and the press; increase museums and museum directors' reputation; favour a wider spectrum for the educational and cultural function of museums; contribute economically to the protection and valorisation of heritage" (Cappelli, 2002; p. 87).

The reasons for building a partnership with a cultural organisation are found in the desire to strengthen the relationship with the local community (55%), Brand and Product Communication (48%) –especially in the sport sector, CSR (40%) and Corporate Communication BtoB and BtoC (35%). Unlike what one may expect, the will to be on the news, i.e. to be advertised, is pursued by only 25% of firms, confirming that a successful project aims at attaining wider objectives than a mere sponsorship. Building a partnership seems to be a strategy to be continuative over time in 55% of cases and well integrated with the overall marketing strategy of the firm in 72%. However, what about the level of satisfaction? In the UPA research, 45% declares *quite* satisfied, the remaining 55% *very* satisfied, and 100% is willing to continue the experience. Nevertheless, although these data could let us fancy a rosy scenario, 63% lament organisational and managerial difficulties, particularly in setting shared goals (45%) and cooperating with partners with different work styles (35%). The biggest problem though seems to be in quantifying and measuring the results (50%). Indeed, heritage is well known for its difficulty to be measured, as many values are to be considered when making an evaluation (Ch. 2).

We should not think that public entities are completely out of the picture in this context nor that it is more desirable if they are. Conversely, the public sector can play a fundamental role in the development and the attainment of great heritage programs. The specific contractual relationship between public institutions and private entities is sometimes referred to as Public Private Partnership (PPP). The National Council for Public-Private Partnership -an American not for profit nor partisan organisation founded in 1985 whose objective is to encourage and promote efficient partnerships, defines PPP as follows: “A public-private partnership (P3) is a contractual arrangement between a public agency (federal, state or local) and a private sector entity. Through this agreement, the skills and assets of each sector (public and private) are shared in delivering a service or facility for the use of the general public. In addition to the sharing of resources, each party shares in the risks and rewards potential in the delivery of the service and/or facility”[35]. The NCPPP lists then seven best practices that maximise the outcome of a PPP: public sector championship (recognising the role of public figures acting as spokespersons); statutory environment (assuring transparency and fair competition); public sector’s organised structure (during conceptualisation, negotiation and final monitoring); a detailed contract (business plan); a clearly defined revenue stream; stakeholder support (i.e. from all the people affected by the PPP); and picking one’s partner carefully. Recurring to PPP has been a successful strategy for long years, especially in the infrastructure or industrial sector. However, this type of management organisation is intrinsically new in the heritage field, where, in fact, it has been proving to have an unexplored potential not only for the efficiency of the project, but also for its economic and social dimension in terms of continuity and sustainability (Mannino & Mignosa, 2014).

[35] http://www.ncppp.org/

Even though cultural PPP are still pretty unusual in Italy, there are already some examples showing significant results for heritage safeguarding and valorisation. Some successful examples can be found among the projects that won the seventh edition of the competition “Culture of Management Award” organised by Federculture (2014)[36]. This thesis analyses one of them, namely the project “Maceratamusei”[37] organised by Macerata Institution for Culture, Library and Museums and the municipality. Everything started when the latter put all heritage services (reception, information, promotion and valorisation for cultural attractions) in a unique civic network and when museums management was temporarily granted to an association of companies. As a result, whereas previously they could be visited under permission and with an ambiguous regulation, heritage sites are now accessible with a unique ticket, their services are integrated across all areas and exhaustive information is available online. The same logics has been applied to all stakeholder, i.e. all the subjects inevitably involved in cultural and touristic services in Macerata. Maceratamusei thus opened partnerships with commercial enterprises in town, such as restaurants and hotels: by showing proof of having enjoyed one of the latter services, visitors are accorded a conspicuous discount, and vice versa. Federculture 2014 has awarded this project for its “evident and synergic attempt” to reconcile heritage safeguarding with a wide definition of valorisation that involves all stakeholders, both public and private. Thanks to this approach, heritage is not simply a work of art or a civic museum, but the whole experience of being in Macerata can be considered as such. Useless to say, Maceratamusei has attained numerous results: as reported by Federculture (Camaleonte, 2014; p. 177), it “brought about a significant improvement and expansion of the municipal cultural supply, with a consequent increase in the overall number of visitors in all places of the municipal network”. Indeed, 31,000 were the visitors of Maceratamusei in 2013, with an increase of 48% compared to the previous year. The project was completed on March 21, 2014 when the requalification of Palazzo Buonaccorsi was concluded and returned to citizens and tourists. This case exemplifies how a smart heritage management can be profitable, sustainable and at the same time increase the quality of life of the local community.

[36] http://www.federculture.it/premio-cultura-di-gestione-2013/
[37] http://www.maceratamusei.it/

Mannino & Mignosa (2014) consider a partnership between the University of Catania, a public institution that owns an ex Benedictine monastery inscribed in WHL, and Officine Culturali, a private not for profit organisation[38]. Before that cooperation, the site was closed to the public as the university lacked the financial and human resources to re-open it. In 2010, an agreement was signed between the university and Officine Culturali, a cultural association composed of young students and a lecturer from the university, which allowed the re-opening of the site to the public. Such private organisation is not paid for this service; on the contrary, it pays rent to the University (for bookshop and information points) and a percentage of the donations it receives from visitors. The project was a great success, as 75,000 people visited the monastery[39]. However, the success of PPP cannot only be measured in terms of number of visitors, because each project has many positive externalities. Indeed, the cooperation between the University of Catania and Officine Culturali brings up several interesting considerations about the social dimension of heritage. Firstly, the mission statement of Officine Culturali is to make the monastery "understandable to everyone": the association works with cultural and technological professionals to increase participation to the heritage site. Specifically, not only does it offer daily guided tours and spreads knowledge on and off-line, but it also organises concerts, *edutainment* activities for young generations, theatre performances and many other events to raise awareness of the site and make it "a place of encounter and integration for the whole community" (Mannino & Mignosa, 2014). Secondly, as the two authors clearly illustrate in section 3, this partnership puts the University in line with E3M[40], the European project that promotes universities' *third mission*. Indeed, beyond teaching and research, European universities are now encouraged to have a beneficial influence on the surrounding community. The offering of a heritage service to everyone, together with an engagement to social inclusion –the University has a project to train convicted minors, makes this a good case of how by striking a PPP, a public institution can extend its competencies to impact beneficially on the society overall.

[38] http://www.officineculturali.net/

[39] Mannino & Mignosa (2014) report the following datum excluding those that visited the monastery on their own and not in a guided tour.

[40] http://www.e3mproject.eu/

In particular, heritage seems to fit particularly well this kind of objective. An Italian psychological study (Grossi et al., 2010) demonstrates the positive effects of heritage on individual well-being. In particular, their research proves that access to culture is the third most significant variable to influence subjective well-being, only after "absence of disease" and "income", and thus more important than many other factors such as "age", "education", "gender" or ""employment" that are usually considered crucial (Grossi et al., 2010). Cultural policies, prescribe the authors, should be paid particular importance, because they are also *public health* policies. In other words, there is a clear gap between the social relevance of heritage and the status it enjoys among the public opinion. As it has already been discussed, few donations to heritage are often justified on the ground that it is *less important* for the society, when in fact, it is not. Moreover, great effects are ascribed to direct participation in heritage management. Indeed, the authors conclude: "the quality of cultural participation alone may generate powerful developmental effects, irrespectively of the instrumental economic impact of cultural activity, and that the public health dimension is of foremost importance in this respect" (Grossi et al., 2010; p. 405). This particular capacity of heritage to shape social architecture makes the partnership between Officine Culturali and the University of Catania even more relevant. If we think that the South of Italy has been notoriously known for low levels of social capital (Putnam, 1993), this kind of PPP can thus be elected as a good policy to enhance it. The outcome could be extraordinarily positive, as social capital is not merely related to community bonds and sense of belonging: its positive impacts encompass also economic development, institutional performance and, ultimately, quality of life (Putnam, 1993). Santagata defines the latter as "the extent to which people are able to participate actively to social, economic and cultural life and to the development of their community so as to improve collective well-being and individual potential" (Santagata, 2014; p. 20). The utmost value of heritage is then not strictly artistic nor barely economic, but is social. As heritage is public, it is a common responsibility, a duty of every citizen to defend it and to promote it. In Italy more than elsewhere, it is necessary to adopt the most efficient ways to increase private participation in heritage management not simply for heritage per se, but also for that "community welfare" –as Peacock (1993) calls it, that enhance the economy of the country and the quality of life of its citizens.

7. Conclusion

Time has now come to draw some conclusions from the results of this research. The present thesis was an attempt to look for the best strategy to increase private donations to heritage. Indeed, the research question inquired the best ways to involve the private sector in the management of cultural heritage. This is now particularly relevant in Italy, where a notorious negligence towards heritage and the economic crisis of 2008 made funds for heritage shrink so much that the future of the enormous Italian asset has been put at risk. A diffused lack of resources and of a strategic plan forced scholars and policy-makers to start calling for private intervention: as a result, Minister Franceschini managed to have promulgated the Art Bonus (art. 1 the Decree Law 83 of May 31, 2014), an emergency measure conceding a big bulk of tax incentives for cultural patronage. Great results are expected from this reform and the present thesis tried to predict whether it will succeed in attracting the great amount of donations the executive is aiming at.

The main finding of this thesis is that in order to increase private contributions, setting monetary incentives may be necessary, but is ultimately not sufficient. Reforms should go beyond the tax credit and instead leverage on other kinds of motivations as well (Santagata, 2014). In other words, donors will not support cultural heritage if they are not intrinsically motivated to do so, that is, if they do not perceive it as a crucial sector. For this reason, the Italian government should envisage a long-run program to promote and raise awareness of national heritage. The Art Bonus has introduced in Italy the possibility to raise funds for heritage via crowdfunding, a strategy that has proved particularly successful in this sector; nevertheless, it is difficult to imagine significant results at the national level, if there is not a receptive community committed to such a purpose. A possible strategy would be to devolve fundraising at the local level, where bonds are tighter and people feel more attachment to specific purposes. The government should grant cultural institutions more financial independence and support organisations such as *friends of the museum*. In these projects, citizens participate not only through donations, but also as prosumers, i.e. by directly enriching the heritage supply with their knowledge and experience. Only once this is systematic, it will be possible to involve the community at the national level, eventually counting on a virtuous mechanism so that the number of donations increases with the commitment to the purpose and vice versa.

Secondly, although the Art Bonus tries to appeal to reputational motivations by granting transparency, evidence suggests that private contributors are not satisfied with just donating an amount of money without significantly influencing how to use it. Privates do not want to be sponsors: they want to cooperate as effective partners (Moneta, 2014). The concrete examples analysed in this thesis, namely MuseoscienzApp, Pappanoinweb, MUVE-Mavive SpA, Maceratamusei, and Officine Culturali, all confirm that donors are willing to support specific projects they develop in co-working with relevant institutions. Indeed, these cases were so successful because all parties contributed with their particular competencies for a shared objective. In this framework, as exemplified by PPP, there exists a significant space for public entities to step in. Opening to the private sector does not mean passing on the problem; on the contrary, institutions could play a crucial role in promoting programs that could ultimately increase the social capital of certain regions enhancing their economic development but most importantly their “community welfare” (Peacock, 1994). The State should not remain in the shadow, watching the privates play: now more than ever, especially in the cultural sector, we need an effective bureaucracy of experts who are able to tell what good quality is and what is not.

Throughout this thesis, cultural heritage was referred to as an economic capital (Throsby, 2010). This was not to disregard other non-use or non-monetary values: indeed, the particular scarcity of available funds and the vastness of Italian heritage should compel all policy makers to adopt such a strategy to start their analysis. Nonetheless, such an economic thinking only serves a wider purpose. In the conclusive remarks, this research showed how maximising heritage management has important consequences on the highest political objective, namely the common good. Social capital is not only a matter of reciprocity and community bonds, but also a collective value that affects economic development and citizens’ quality of life. A greater involvement in the cultural sector would help boost in Italy a creative atmosphere, a prolific condition that favours the circulation of ideas and ultimately produces innovation. This would be desirable because the latter is positively correlated with economic growth and, most importantly, with quality of life (Santagata, 2014).

For too long in Italy, cultural policies have been considered of secondary importance. No doubt, it is true that historical conditions force us to give priority to more urgent matters. However, reparative measures are effective only in the short-run and, if nothing changes structurally, the same problems of today are very likely to occur again tomorrow. The fragility of the present should make us plan a more solid future. A new, more participatory model of heritage management could constitute a great resource for a better future for Italy. Time is now ripe to make such a move, not only for the greatness of heritage assets, but also because young generations are willing to make their talents emerge, confronted with a State that is not responsive to their needs. Heritage participation could also prove an effective strategy to strengthen civic values, which should be a priority in a country that in the recent years has been suffering, not only from an economic crisis, but also from an institutional and a social one. Culture is the best way to overcome fear. Future research should focus on the application of such a recipe to different sectors. For instance, what is the role of heritage in the future? Could it be a way to present a new competitive face of Italy to the rest of the world? Could it increase community welfare making our society more inclusive in multicultural terms, without forgetting about our past? Could it be a way to find a dialectic with other countries in the Mediterranean, strengthening our position in foreign policy?

These choices will concern legislators and ultimately the voters, but time has come to make dreams for the future become a possibility for the present. For the moment being, for this thesis is enough to have proposed an efficient way to apply what the current President of the Republic, Sergio Mattarella, wished in his inauguration speech on February 3, 2015[41], i.e. that the Italian Republic could restart from the face she presents to her citizens: “hospitals, municipalities, schools, tribunals and *museums*”.

[41] For the whole speech, see http://www.quirinale.it/elementi/Continua.aspx?tipo=Discorso&key=3

Executive Summary

1. Introduzione

Il patrimonio culturale italiano è senza pari nel mondo: l'Assemblea Costituente saggiamente ne inserì salvaguardia e promozione tra i principi fondamentali della Repubblica Italiana (Cost. It., art. 9). Tuttavia la tutela e la valorizzazione di un tale tesoro richiedono un enorme sforzo di cui, eccetto rari casi, né il governo né i cittadini italiani hanno dato buona prova negli ultimi decenni. La crisi economica del 2008 ha infine inferto il colpo di grazia a un settore già troppo spesso considerato secondario: basti pensare che il patrimonio italiano ha perso 1,5 miliardi di fondi dal 2008 a oggi.

Esperti e politici sembrano ormai quasi tutti convenire che l'apertura al privato rappresenta l'unica soluzione per trovare le risorse di cui si ha bisogno. Il maggior successo in questa direzione è rappresentato dall'Art Bonus, una sezione di un Decreto Legge voluto dal Ministro Franceschini e promulgato il 31 maggio 2014, che incoraggia il mecenatismo culturale concedendo cospicui incentivi fiscali. Sebbene i tempi siano ancora prematuri, la letteratura disponibile permette di prevedere i possibili risultati di questa misura emergenziale. Questa tesi indaga infatti in che modo coinvolgere al meglio il settore privato nella gestione del patrimonio culturale. Tale domanda di ricerca va pensata dal punto di vista del legislatore. Ora più che mai l'Italia ha bisogno di una riforma completa del settore culturale. Un intervento del genere, infatti, avrebbe benefici significativi non solo sulla condizione del patrimonio, ma anche sullo sviluppo economico del Paese, sulla coesione sociale e persino sulla qualità della vita dei cittadini.

2. Background teorico

La nozione di patrimonio culturale è cambiata molto negli ultimi anni, come testimoniato dall'evoluzione dei trattati internazionali (Vecco, 2010). Throsby (2010) distingue tra patrimonio immobile, mobile ed intangibile. Secondo Santagata (2014), il patrimonio culturale va invece considerato insieme con le industrie creative.

Questa tesi considera il patrimonio culturale come un bene economico. Ciò ovviamente non vuol dire che si ignorano i valori non economici e passivi, ma si adotta questo approccio soltanto ai fini di un'analisi più consona al contesto legislativo. In particolare, in quanto non rivale né esclusivo, il patrimonio culturale presenta le caratteristiche tipiche di un bene pubblico o semi-pubblico. Per tale ragione il mercato da solo è destinato a fallire, mentre è necessario l'intervento dello Stato.

Klamer et al. (2013) classificano i diversi Paesi a seconda della loro organizzazione amministrativa. Generalmente distinguono tre diverse forme di implementazione delle politiche culturali: spesa pubblica diretta (quando il governo decide come distribuire i fondi), supporto indiretto (quando il governo stimola donazioni private con particolari incentivi) e regolamentazioni (obblighi non economici).

3. Il supporto dei privati

La contrazione di fondi dovuta alla crisi del 2008 ha portato molti Paesi a cercare nel privato i finanziamenti per il patrimonio culturale. L'attenzione generale sembra ora concentrarsi sul modello americano (Schuester, 2006), che prevede donazioni indirette deducibili dalle tasse. Sir Alan Peacock (1998) identifica nei gruppi familiari (e nelle imprese) i finanziatori ultimi del patrimonio sotto forma di tasse, donazioni e quote associative. Aprire al privato significa dunque aumentare la percentuale di fondi attraverso le donazioni; da un certo punto di vista, tasse e donazioni sono equivalenti, con la grande differenza, però, che la scelta del finanziamento ricade sulle decisioni individuali invece che collettive. Alcuni studiosi accoglierebbero volentieri questo scenario, giacché sostengono che le politiche culturali sono spesso paternalistiche.

Quando si progettano incentivi fiscali è importante assicurarsi che il passaggio dai finanziamenti diretti a indiretti sia economicamente sostenibile. Sfortunatamente c'è ancora troppa incertezza accademica sui reali effetti di tale intervento. Molti autori credono che sia possibile attrarre sufficienti donazioni già soltanto concedendo sostanziosi incentivi fiscali. Altri sostengono invece che tali misure abbiano ricevuto un'enfasi mal posta e che la cultura sia soltanto una scelta residuale per i donatori.

4. Come aumentare il supporto dei privati

Secondo Walter Santagata (2014) le donazioni possono essere ascritte a diverse motivazioni. Le motivazioni intrinseche corrispondono a un comportamento pro sociale e nascono all'interno dell'animo di una persona. Economicamente, si possono considerare in termini di altruismo puro, altruismo impuro (warm glow) e vincoli morali, e risultano correlate con esperienze pregresse, valori di esistenza e opzione, tendenza a ripetersi e impegno civile.

Le motivazioni estrinseche si basano su ragionamenti politici ed economici; spesse volte si concretizzano in incentivi monetari. Le motivazioni di reputazione invece derivano dal desiderio di veder riconosciuto il proprio impegno volontario in termini di status; risultano dunque fondamentali trasparenza e visibilità. In conclusione, il legislatore deve tenere a mente che per incoraggiare il mecenatismo culturale è necessario far leva su tutte le ragioni che concorrono a motivare il donatore e non soltanto sugli incentivi economici.

5. Il supporto dei privati in Italia

La salvaguardia e valorizzazione del patrimonio culturale (art. 9, Cost. It.) richiede uno sforzo economico così ingente che l'Italia, data la vastità del suo assetto, non riuscirà mai a onorare completamente (Benhamou, 2011). Tuttavia una particolare incuria da parte delle istituzioni, ma anche da parte di molti cittadini, unita alla crisi economica del 2008, ha fatto sì che il patrimonio culturale versi oggi in una situazione emergenziale. Molti esponenti del mondo politico e accademico concordano ormai sull'esigenza di attrarre fondi privati, ovvero di abbondonare il finanziamento diretto per quello indiretto. Tale strategia non va però in alcun modo confusa con la svendita del demanio pubblico, poco gradita dall'opinione pubblica e spesso economicamente fallimentare.

In Italia la collaborazione fra pubblico e privato è spesso descritta come *difficile*, specie nel settore culturale. In realtà questo genere di rapporto non è totalmente nuovo in Italia. I fondi del Lotto destinati alla cultura, la possibilità di donare il 5‰ per il patrimonio culturale, le fondazioni culturali e la legge Ronchey del 1993, che legalizzava la concessione dei servizi aggiuntivi a enti privati, sono già esempi della sovrapposizione dei due settori. Eccetto alcune fondazioni, nessuno di questi ha apportato benefici significativi su scala nazionale. In particolare la legge Ronchey, malamente regolata, ha portato non solo a uno status quo per cui i servizi aggiuntivi vengono concessi sempre agli stessi enti che pagano fra l'altro allo Stato una quantità irrisoria di tasse, ma anche a un'implicita ripartizione istituzionale dell'articolo 9, per cui la tutela spetterebbe al pubblico, mentre la valorizzazione al privato (Acidini, 2014).

L'Art Bonus comprende una serie di misure emergenziali contenute nell'articolo 1 del Decreto Legge 83 del 31 maggio 2014. L'obiettivo è quello di favorire il mecenatismo culturale concedendo incentivi fiscali eccezionali (65% per il 2014-15 e 50% per il 2016). Il credito d'imposta deve rispettare il limite del 15% del reddito imponibile (alle persone fisiche e agli enti non commerciali) o del 5‰ dei ricavi annui (ai soggetti titolari di reddito d'impresa). Un punto su cui il Decreto Legge insiste è la trasparenza delle transazioni: una pagina web informa il pubblico sui movimenti e sullo stato dei progetti. Inoltre il Ministero ha intenzione di intraprendere iniziative di fundraising a costo zero. A questa riforma bisogna riconoscere due importanti passi in avanti: innanzitutto la riconciliazione dei due obiettivi dell'articolo 9, considerati formalmente separati dal 1993; in secondo luogo, la riforma concede incentivi fiscali sufficientemente alti per attrarre donazioni, sebbene la riforma sia emergenziale e non ci siano garanzie che nel 2017 gli stessi incentivi saranno confermati. Riuscirà infatti l'Art Bonus a raccogliere tutti i fondi di cui ha bisogno?

In primo luogo, questa riforma non considera affatto le motivazioni intrinseche. Se anche è positivo che il MIBACT intenda aprirsi a nuove strategie di raccolta fondi come il crowdfunding, particolarmente di successo nel settore culturale soprattutto nel coinvolgimento diretto degli aderenti, allo stesso modo è difficile che tali strategie funzionino se non c'è di base una comunità ricettiva con forte capitale sociale (Quero et al., 2013). Un secondo problema concerne invece le motivazioni di reputazione. I mecenati culturali non sono disposti a mettere semplicemente a disposizione il loro denaro; al contrario, hanno un interesse nel commissionare progetti specifici. Infatti è improbabile che un ente privato doni del denaro quando l'istituzione ricevente, per quanto trasparente, mantiene poteri discrezionali sull'utilizzo dello stesso. Bisogna dunque considerare i privati come partner, non come semplici sponsor. Aprire al privato significa infatti mettere i donatori nelle giuste condizioni di investire e dunque coinvolgerli in tutto il processo creativo, non solo nelle fasi finali.

6. Dalla sponsorizzazione alla partnership

In Italia non mancano gli esempi di organizzazioni for profit che hanno contribuito a sviluppare i progetti di cui erano sponsor. Si ricorda per esempio "MueoscianzApp", un'applicazione gratuita per smartphone lanciata il 21 gennaio 2015 e sviluppata dal Museo della Scienza e della Tecnologia di Milano in partnership con Samsung e progettata da ETT. L'originalità di questo di questo progetto risiede nella collaborazione del museo con due enti for profit che normalmente non si occupano di servizi aggiuntivi. Grazie a MuseoscienzApp infatti, Samsung e ETT perseguono una strategia di marketing che pubblicizzerà i loro prodotti, ma creerà anche un'immagine simbolica di un brand che supporta la cultura, sempre più apprezzata dai clienti del XXI secolo.

Il progetto italiano CULTURA + IMPRESA è nato nel 2003 per sviluppare un luogo di incontro fisico e una piattaforma online per favorire l'incontro di imprese con esperti del settore culturale. Un omonimo premio è stato indetto nel 2013 per stimolare i fondi alle istituzioni culturali, ma anche per creare un'occasione di confronto. Il successo della prima edizione del concorso ha ispirato l'UPA a condurre un'indagine sui progetti vincitori. La chiave del loro successo può essere riassunta nel motto "dalla sponsorizzazione alla partnership" (Moneta, 2014). Se nel primo caso infatti un'impresa mette soltanto a disposizione i propri investimenti e lascia che altri operatori ne curino gli aspetti, nel secondo l'impresa collabora direttamente allo sviluppo del progetto culturale. Tra i vincitori del premio, si ricordano Pappanoinweb, una partnership fra Telecom Italia e l’Accademia di Santa Cecilia di Roma, e la partnership fra Mavive SpA e MUVE (Fondazione Musei Civici di Venezia).

In questo contesto il settore pubblico non è necessariamente escluso, al contrario può ricoprire un ruolo fondamentale nello sviluppo e nel raggiungimento di importanti obiettivi per il patrimonio. La specifica relazione contrattuale tra istituzioni pubbliche e enti privati è chiamata Public Private Partnership (PPP). Questo modello gestionale si è dimostrato molto efficacie in altri settori e sembra poter dare molto al settore culturale. Dei validi esempi nella realtà italiana si possono ricercare tra i vincitori del premio Cultura di Gestione 2013, organizzato da Federculture, tra cui spicca il progetto di riqualificazione del patrimonio “Maceratamusei”. Mannino e Mignosa (2014) considerano invece una PPP tra l’Università di Catania e Officine Culturali che ha portato alla riapertura al pubblico di un monastero benedettino, patrimonio UNESCO, con significativi benefici non soltanto per la valorizzazione del sito, ma anche sulla comunità locale. Uno studio italiano di psicologia infatti (Grossi et al., 2010) dimostra gli effetti positivi dell’accesso alla cultura sul benessere individuale e collettivo. In tal senso la diffusione e la promozione del patrimonio culturale rappresentano strumenti efficaci per aumentare il capitale sociale di certe regioni, le cui conseguenze non si limiterebbero a una gestione più efficace dell’assetto culturale, ma avrebbero anche benefici sullo sviluppo economico e sociale del Paese e, dunque, anche sulla qualità della vita dei cittadini.

7. Conclusione

Il principale risultato di questa ricerca è che se si vuole aumentare il supporto privato al patrimonio culturale concedere incentivi fiscali è un punto di partenza necessario ma non sufficiente. Le riforme dovrebbero far leva anche sugli altri tipi di motivazione: il governo Italiano dovrebbe ora pensare a un programma sul lungo termine che sensibilizzi la cittadinanza sul patrimonio nazionale. Infatti è difficile immaginare grandi introiti dalle donazioni se non esiste una comunità ricettiva e impegnata in prima linea. In secondo luogo gli esempi sovra citati dimostrano come i privati non siano soddisfatti di donare senza collaborare al progetto che stanno finanziando: i donatori vanno trattati come partner, non come sponsor. Grazie al ricorso a nuovi strumenti gestionali come le PPP, esiste uno spazio significativo che potrebbe essere occupato dalle istituzioni pubbliche, le quali potrebbero così perseguire obiettivi diversi su molteplici livelli. La gestione corretta del patrimonio culturale ha infatti conseguenze importanti sull'obiettivo ultimo della politica: il bene comune.

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