

Changing Movie! Film Commissions as drivers for creative film industries: the Apulia Case

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ABSTRACT

The organizational change of Film Commissions in Italy, from service agencies to drivers for the creative film industries, is the result of the ongoing evolution from a state-controlled industry to a new kind of industrial cooperation at territorial level. This research deepens the Apulia case and shows both the increasing leading role of Film Commissions in the Apulia region – in order to improve the competitiveness of the system – and the positive effects on the territory measured through the analysis of audiovisual firms. Finally, the research shows the strengthening of community engagement thanks to the promotion and support tools (festivals, networks, etc.) for the creation of value.

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Keywords:

Creative industries

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Organization

Competitiveness

Community
engagement

Context

It has been demonstrated that culture and creative industries act as drivers in implementing change processes aimed at consolidation and structural growth (Gilbert, 2012). Policies aimed at increasing competitiveness across the cultural system are grounded on two pillars: accurate economic policies and the creation of new economies for cultural enterprises (Viesti, 2005). Some of these economies encompass national policies, as is the case with decisions related to public funds supporting culture. However, a number of external economies have been developed at a territorial level: from the competitive enhancement of cities to improved links between enterprises and research; adding value to cultural and touristic resources, as well as improved accessibility to them. More than ever, in order to re-launch culture, Italy needs the activation of good locally-targeted policies (Santagata, 2009), which at the same time foster its community's engagement (Bowen et al, 2010).

On the other hand, the territorial origins of a culture – of goods and services associated with culture – do not follow standard patterns but, after a random start, organize themselves around a system of agglomeration cultures (Scott, 1995). Following this track, historical cities, districts, creativity production chains, together with the movie industry and technological innovations, gained a longtime legacy of assembling knowledge and expertise (Santagata, 2009). The context conditions in which cultural enterprises operate constitute an essential factor of their competitiveness (Palmi, 2010). In the literature, there is wide documentation on how external economies, generated from different contexts in which enterprises operate, may significantly increase their competitiveness, while diseconomies may decrease it (Mollica, 2005). This happens because of multiple factors: the presence of other enterprises and infrastructures, the quality of related services, the production factors available through the surrounding territory, and the quality of public institutions (Viesti, 2005). This is the case of creativity districts and production chains supported by regional agencies. However, interactions between external economies-diseconomies and enterprise performances are spread across all territories. It is therefore assertable that local government institutions play a meta-organizational role in the strategic development of policies (Palmi, 2010), and it is appropriate to investigate the organizational tools that help territories increase their competitiveness and their community engagement (Bowen et al, 2010).

In the last years there has been a major change in the way Film Commissions (FCs) work in Italy: they are turning from service agencies into drivers for the cinema supply chain (Palmi & Salvemini, 2013). Such a change is the result of the ongoing evolution of a state-controlled industry to a new kind of industrial cooperation and solidarity. On the one hand, state in-

tervention policies to support cinema have been diminishing in the past few years with a significant decrease of government expenditure on culture. On the other hand, some people have been organizing new forms of horizontal subsidiarity to support cultural activities in general and the cinema industry in particular (Rushton, 2008; Salvemini & Delmestri, 2000). In the absence of any adequate policies of national intervention, Italy is witnessing the creation of new territorial developed economies which increase the competitiveness of the cultural system and attract investments to its territory (Cappetta, Carlone & Salvemini, 2005). We can also say that local authorities act as meta-organizers to promote development strategies and therefore, in practical terms, we can investigate the organizational tools which territories use in order to increase their competitiveness (Palmi, 2010).

Set up only within the last decade, Film Commissions are becoming more and more important for the multimedia sector in Italy and for the feature film industry. FCs are traditionally considered territorial attraction agencies that act by making the territorial potentialities operate systematically, bringing cinema and audiovisual productions – and through them, promoting the territory as well. Therefore, on the one hand they aim to benefit from the production economically; on the other hand, they try to capitalize on the territory image promotion, thanks to the ability of audiovisual products to function as tourist attraction factors. At present, however, these agencies are also becoming financial backers for cinema, in large part because there exist national and international funds designed for productions, with indirect and sometimes direct enterprise risk taking. In this paper we examine in depth the case of the Apulia Film Commission, because it is an illuminating case of Italian excellence at an international level (Palmi & Salvemini, 2013).

Purpose and hypotheses

This research is focused on the Apulian cinema experience and aims at demonstrating how the creative film industry is increasingly playing a primary role thanks to the Apulia Film Commission, the regional agency established with the main purpose of drawing movie and audiovisual productions to the Apulian region. This work aims to show how essential the role of the Apulia Film Commission (AFC) is becoming in terms of increased competitiveness of the cultural system and how, thanks to its activities, the Apulian creative film industries chain is fostering its presence, as well as its economic outcomes on the territory. The research starts from a general overview of AFC from its creation to now. Later, the most innovative aspects will be introduced with regard to particular structures, coordination mechanisms, reputation and relationships, autonomous functioning and alliances that

strengthen community engagement. The research hypotheses can be summarized as follows:

- 1) FCs act as drivers for creative film industries in the Apulian territory, thanks to a good reputation for the creation of shared value.
- 2) Planning adequate organizational models is very important, as is having coordination mechanisms, with regard to context specificity.
- 3) Film funds and support tools (e.g. festivals, networks) create value, development and community engagement.

The aim is to prove the enunciated hypotheses.

Research design, methodology and approach

The methodology is an in-depth analysis of the Apulian region case using empirical facts of the territorial contexts (Yin, 1994). A focus on the Apulia Film Commission (AFC), established in 2007, is of foremost importance because this institution has already been mentioned as a case of excellence and absolute novelty both nationally and internationally (Palmi & Salvemini, 2013). The employed methodology is the in-depth case analysis (Yin, 1994), which is consistent with the exploratory nature of this research. For the surveyed case, and through a semi-structured questionnaire, interviews were held to the top management (president and/or chief executive and/or management secretary) of the AFC. All the data were gathered in a summarizing chart (table 8 in the annex) showing their main coordination mechanisms, resources, structures and processes: legal status, membership to institutions, presence of networks, structured data (Board of directors, members, appointments, number of partners), financial resources (quotas, film fund, financing tranches), and every useful bit of information which represents the services' supply process.

In order to carry out this research, with regard to the survey on the establishment of the cinema production chain and the development of the creative film industries, the research team examined AFC's production guide. It is comprised of a database and, upon request through registration and a password, it is available online. Updated daily, it includes 161 operators: 144 companies/firms and 17 professionals. Companies and professionals can be searched by name and geographic position (according to Apulian provinces: Bari, Lecce, Brindisi, Taranto, BAT-Barletta, Andria, and Trani). The research team got its own account, registered as "Università del

Salento", and downloaded the list of existing companies, divided by sectors. Subsequently, the research team requested access to the local chambers of commerce in order to examine the balance sheets relevant to company analyses. These data, which will be presented shortly, show that over the last few years, despite adverse economic conditions, audiovisual Apulian companies kept their market positions, and sometimes their business grew because of the AFC, therefore pushing employment across its territory. This had significant outcomes, both direct and indirect, in the improvement of information and in creating relational capital, because of its good reputation at a national and international level. As regards the creation of the data set and the so-called "company dashboard", please see the paragraph on creative film industries below.

Evolutionary tendencies of the Film Commissions

From what has been described so far, we can infer that FCs were created to fulfill the following goals: to support and improve the local economy, promote tourism, market the region and promote the culture. These goals are all referable to fields in which regions have been planning strategies, developing destinations for a long time, acting as meta-organizers in the territory through top-down actions that integrate with bottom-up boosts. Actually, these are subjects for which the Italian Constitution assigns regions a central role, on the basis of reference leading principles and a suitable national coordinating authority. The latest regional legislation shows there is an increasing awareness, and probably an actual will, to play a direct role in the creation or growth of FCs¹. In addition to regional centrality, a second remarkable aspect concerning the need of a common destination is the centrality of cultural policies. In the United States, where cinema has been a strong industrial and economic reality for many decades, FCs are organized as superstructures with steady connections inside the departments for culture, tourism and economic promotion. Conversely, in Italy FCs usually depend only on departments for culture. As cultural policies do not often benefit from the same available funding and attention enjoyed by other sectors, this can be a major hindrance. It is certainly true that without strong coordination with the policies for economic and tourist development of territories, the FCs' activities would be marginal or paralyzed; what is therefore urgent and desirable is the convergence of regional policies for culture, tourism and economy towards actions aimed at supporting the audiovisual

¹ Among the most remarkable legislative measures, we find: Law of Regione Autonoma Friuli-Venezia Giulia, 6 November 2006, nr. 21; Law of Regione Liguria, 3 May 2006, nr. 10; Law of Regione Autonoma Sardegna 20 settembre 2006, n. 15; Law of Regione Lazio, 28 April 2006, nr. 4.

media supply chain. Moreover, the outlook, knowledge and tools through which FCs must refer to audiovisual productions are those concerning production and cultural promotion. As far as all that is concerned, it is better to discuss the efforts regions are making to seek and adjust efficacious criteria and tools for the selective financing of cultural productions, in order to increase also the spin-offs and positive effects for the overall territorial system, in addition to the intrinsic cultural value of the project. For the same reason, Italian regions and their coordinating authority took on precise commitments for the creation and consolidation of the *Osservatorio dello Spettacolo e della Cultura* ("Show Business and Culture Observatory"), which are and will become more and more the fundamental tools to monitor and understand the social and economic importance of cultural investments. They are useful for FCs as well.

Therefore, on the one hand the regional level is certainly the most suitable to regulate the activity and functions of FCs. On the other hand, it is important to underline the coordination exigencies on a national level. The confrontation between the State and regions that may happen in the near future about the new law system for cinema and audiovisual media will be an important occasion to define the role of FCs better, thus giving special emphasis and stimulus on their work to relaunch the government intervention in favour of cinema and audiovisual productions. Also, it would be important to define a minimum service package that FCs undertake to offer, identifying, at the same time, quality standards for promotional and informative tools in order to guarantee national and international productions competitive locations and qualified operators. Actually, the opportunity and need to promote excellent talents in their territories urged numerous FCs to differentiate and expand their mission.

Another important tool to qualify the work of regions and FCs is the study of a productions' direct and indirect economic impacts on a territory. According to research by the *Associazione Nazionale delle Industrie Cinematografiche* (ANICA, "National Association of Cinema Industries")², from 2003 to 2010 regions allocated 116 million euros in favour of cinema and audiovisual activities. In four years' time (2006-2009) financial resources quintupled. In 2009 the budget almost reached 30 million euros (29.6), 40% of which was

estimated to be in support of cinema. Recently, there has been more and more intervention from regions to financially support this sector. They have also been playing an important substitute role for the progressive cutbacks in national public resources³. Actually, film funds are conceived of as spending accelerators in the territory and are set up for three main reasons: cultural, social and economic; the last of which is linked both with the direct employment aspect – through the recruitment of local workers – and with the indirect one – thanks to the subsequent spin-offs for supporting local activities and for the tourist sector (Di Cesare & Rech, 2007). So far, the only FC that has systematically measured its own performances as regards the direct economic impacts in the territory has been the AFC: the average index value for the years 2007-2011 has been 6.1, which means that each euro spent has returned 6.1 euros in direct spillovers (Fondazione Rosselli, 2011).

The ongoing trend shows more and more that FCs play the role of administrator of regional funds supporting local cinema and audiovisual productions. The funds are used to promote creativity and talents living in the region but also to generically attract "external" audiovisual production. Territorial marketing and support for creativity do not necessarily clash, however, they are two different themes which presuppose suitable strategies and specific criteria for the evaluation of projects and results. As regards the search for new talents and the enhancement of cultural heritage and identities – fields that cannot be measured, but indirectly show the competitive ability of territories – it is desirable that both the search and the sharing of the best practices should be set up in a short time. This promotion of the territory is realized also thanks to festivals, promotion and support tools for the creation of value, development and consent, all of which reflect positive effects in terms of direct spin-off of consumption in the territories. In every region where you can find Italian FCs there are film festivals, sometimes more than one, that are supported and sponsored by FCs. In some cases, as in the Apulian regions, their FCs are directly in charge of the festival organization and management. The case of the Bari International Film Festival (Bif&st), which is organized by the AFC, has remarkable performances. In seven years' time (2009-2015) it has reached an audience of 73,000 people and

"FILM COMMISSIONS WERE CREATED TO SUPPORT AND IMPROVE THE LOCAL ECONOMY, PROMOTE TOURISM, MARKET THE REGION AND PROMOTE THE CULTURE"

2 ANICA research project "Mappatura degli strumenti di sostegno regionale al cinema". The first presentation entitled "Evoluzione dei fondi regionali per il cinema e l'audiovisivo: vincoli ed opportunità" took place on the occasion of the *Mostra del Cinema* in Venice on the 8 September 2010.

3 The allocation of the *Fondo Unico per lo Spettacolo* (FUS) ("Sole Fund for the Show Business") in 2011, on the same level of the previous year's one, is equal to 90 million euros per year, available as (internal and external) tax credit until 2013.

involves the whole city with remarkable direct and indirect expense spin-offs⁴. Finally, the film funds tool holds a prominent position. Between 2003 and 2013, 10 out of 16 FCs in Italy got one of these funds and, in some cases, in addition to the national one there is also a fund supporting international productions. It is the case with the AFC, which was created in May 2012.

Apulia Film Commission: structures and processes

The FCs in Italy show a certain uniformity as far as structures are concerned. They have easy and functional hierarchic models, with few levels and few roles. The FCs that are internally larger are organized by projects. The organizational structure is composed of two parts: the current, continuous and permanent "production" part structured through functions, and another temporary part. The project-structure seems to suit the sector, as there are several types of projects: single non-repetitive activities aimed at achieving a goal in a certain period of time and carried out by using the combined effort of a resource pool (Tosi & Pilati, 2008). The projects are unique in nature; they can actually be similar but never the same because there is always something different: the goals, the realization times, the project team composition, the project leader, or the users. In an organization that works by using projects, individuals are assigned to one or more project teams, which are set up and stay until the end of the project. An interesting exception is the Apulia Film Commission (AFC) that has got a divisional structure and some organizational aspects which are best to highlight.

Born in 2004⁵ but operative since 2007, the AFC is a foundation with five founder members: the Apulia Region, the cities of Bari, Brindisi and Lecce, and the Lecce Province, which became part of it after dissolving the *Salento Film Fund*. The governance is based on four structures: (1) a Board of Directors, composed of the five founder member representatives; (2) the Partners' Meeting that meet twice a year to make strategic decisions; (3) the Auditors' College, composed of three members; (4) the Director and his/her office staff. From the structural point of view, it has got an interesting divisional form with three "cineport" hubs, next to the supply chain's clusters of Bari, Lecce and Foggia. They gave up the function specialization criterion and adopted the geographical areas specialization criterion (Tosi & Pilati, 2008). The structural advantages of the divisional macrostructure are: the possibility to identify a single person in charge for each province (geographical area) and the ease with which you can

have different and suitable behaviours targeted at each productive or territorial reality. Limitations can be the increase of resources that carry out the same functions, thus increasing costs as well, and the possible communication difficulties between the different departments, which tend to behave like autonomous firms. As regards the AFC, the typical negative effects of the divisional structure do not occur because the headquarters in Bari (the regional capital where there are also the AFC's administrative headquarters) combine a series of centrally managed functions, such as administration, human resources management and the products and services departments.

At the present time, five people working at AFC have a permanent contract, and are helped by 35 collaborators⁶. The goals every FC shares are: (1) promoting the artistic, environmental and cultural heritage, together with the professional and technical talents present in the territory in order to attract national and international cinema and audiovisual productions; (2) providing assistance to get authorizations, permissions and contracts to shoot films in Apulia; and (3) promoting coordination activities with other Italian and foreign FCs to favour cooperation forms, like co-productions in the film and audiovisual industry. The AFC, for instance, lays emphasis on the collaboration between the countries bordering the Mediterranean Sea. Moreover, in the AFC's statute establishes the aim of (4) supporting the production and distribution of cinema and audiovisual works realized in the region, both through the creation of a film fund and through the promotion of the products made in Apulia during the most important national and international film festivals, but also to participate in the creation of resources and professionals in the sector. The statute provides also (5) the possibility to produce directly: the first positive experiment of this kind was the realization of the feature film *La nave dolce* directed by Daniele Vicari in 2012⁷ (Palmi & Salvemini, 2013).

The activities from 2007 to 2015 aimed to promote and diffuse the brand and the information concerning what the AFC was doing. This was done by creating a web portal and opening communication channels with the towns in the territory and with the regional office for the European representation in Brussels. They did the following: created a database with the information about the best Apulian locations, specialized technicians and creative film industries available in the territory (and made production guide); created a cinema-tourist guide book about Apulia; participated in the main Italian and international film festivals (Venice, Berlin, Cannes) where the Apulian productions were promoted; and helped pass regulations to set up the Apulia Film Fund. The AFC activated easy and clear processes, usually standardized

4 For more information, see www.apuliafilmcommission.it

5 By the *Legge Regionale* ("Regional Law") nr. 6/2004.

6 They work mainly for the organization of Bari International Film Festival (Bif&st).

7 Coproduced with Indigo Film, Rai Cinema and Skandal Production.

“APULIA FILM COMMISSION PROJECT CAPACITIES OVER ITS TERRITORY HAVE BEEN INCREASINGLY INVOLVING ITS SURROUNDING COMMUNITY, ALLOWING AN INTENSE DEVELOPMENT OF RELATIONAL CAPITAL AND COMMUNITY ENGAGEMENT”

and based on precise criteria in order to measure the quality of the productions to finance. The allocation of grants – aimed at supporting the production and post-production costs in order to attract direct and indirect investments in the audiovisual sector – has actually been one of its most remarkable activities. In the first part of the AFC's life there was the definition of a series of specific requirements to get a grant: 30% of the hired staff had to be living in Apulia and the sum spent on the Apulian territory had to be at least the equivalent of 150% of the grant. The financial resources for that fund were more than a million euros for an overall financing of 22 film projects (five for the first session with a contribution of 230,000 euros and 17 for the second session). Among the other activities it is worth remembering the “Apulia Audiovisual Workshops” – seminar workshops with professors and students coming from all over Europe, and the *Progetto Memoria*, which supported short films and documentaries focused on places and characters of the regional history, the management of *Circuiti d'autore* (seasons of authorial films), among others.

In pursuing this aim, AFC has successfully connected with several national and international networks to strengthen its “social capital”. This expression has been sometimes used as a synonym of *civicness* (Helliwell & Putnam, 1995), of trust (Granovetter, 1985), and of “cultural rules not written in clear characters” (Fukuyama, 1995); however, overtime it has reached an ever widening meaning, thereby embracing diverse cultural, political, infrastructural and environmental dimensions. Social capital is identified as a set of values, regulations and social relations allowing each individual to pursue collective behaviours, thus representing a kind of facilitator in transmitting knowledge. Therefore, AFC project capacities over its territory have been increasingly involving its surrounding community, allowing an intense development of relational capital and community engagement (Bowen et al, 2010).

From the focus on the AFC and as regards processes, we can deduce that the difficulty in standardizing is typical of the service supply process, commonly regarded as non-static, which highly varies depending on the situation. Moreover, the process is contextual: the service is enjoyed by the customer only where and when it is produced (just in time production). There is no chance to “substitute” the faulty service, as it can be done with products, where it is possible withhold

goods for a while and to check their quality, possibly replacing them. This kind of process makes control activities barely useful, except in the final stage: quality must be produced by the operators directly and their chiefs cannot prevent a “faulty” product from arriving at the user; this remark stresses the importance of the human resources that have been used. Another characteristic of this kind of process is the customer's participation in the supply process, thus affecting the result considerably. The customer does not perceive only the quality of the final supplied service but also the quality of the whole supply process (quality of the process, not only of the product). Finally, the role played by human resources is vitally important because the quality of a service highly depends on the supplier's professionalism. From this point of view, the AFC enjoys a good reputation. A quality indicator can be the way employees and collaborators are hired: public notice with a selection based on professionalism and technical skills (see table 8 in the annex).

Creative film industries in Apulia: evolution tendencies

It is now necessary to cover the Apulian audiovisual production chain. Apulian creative film industries are quite small, so much so that they could be defined as “pocket companies”. However, within the diverse and scattered creativity economy, recent studies have shown how the Apulian audiovisual sector is one of the most developed and robust (Palmi, 2013). It is particularly interesting within the Apulian creative district because of the balance between its *exploration* and *exploitation* activities, explained as respectively being the capacity of research and the exploration of new creative opportunities, transferring and incorporating them into new creativeness within products and processes (March, 1991).

Scope, methodological tools and results of the empirical enquiry

Taking into consideration the purpose of measuring the creation and dissemination of the economic and social wealth of the Apulian film sector – largely

because of FCs' role as a development driver – the research team has conducted an empirical analysis on the economical/financial evaluations of resident companies operating in the relevant region. Research themes are based on a specific methodology of deduction analyses, established on sample definition techniques, and a methodology of data gathering and processing, pursuing knowledge information purposes, already set in advance (Horrigan, 1965; Brief & Lawson, 1992). The research period was focused between 2010 and 2013, while the survey technique used was the index balance analysis, which is considered an appropriate tool to monitor companies' capacity to create and distribute "economical-social value", suitable to ensure preservation of capital over time and an apt sharing of context (Foulke, 1961; Nissim & Penman, 2001; Caputo & Di Cagno, 2008; Venturelli, 2012; Dell'Atti & Turco, 2015).

In particular, such analysis is divided into the following phases:

- a) identification of the universe to be surveyed and its segmentation into activity classes;
- b) definition of company samples, whose balance sheets must undergo a balance analysis;
- c) processing of aggregated balance sheets and of average balance sheets broken down by company category;
- d) re-classification of average balance sheets according to financial criteria of assets and the added value of income statements;
- e) identification of "dashboard parameters" to be calculated;
- f) research results broken down by relevant company categories.

The total number of examined companies, as reported by the AFC production guide, comprises of 161 units, which have been divided into three macro-categories according to each specific activity: producing only movies; service and supporting operations (authoring, graphics, recording, video and audio post production, cameras and shooting equipment, special effects, set construction, costumes and casting, other services); collateral services (catering, accommodation, transportation, security, etc.). In more detail, gathered data show a strong presence of production support companies in Apulia, which account for 50% of the studied universe, while movie production companies account 30% of the entire production chain. The remaining 20% is referred to as collateral companies (figure 1).

A greater territorial concentration of movie companies emerges across the Bari and Barletta-Andria-Trani provinces, where 55% of observed companies reside. Taranto and Brindisi show a lesser number of companies, 6% and 7%, respectively (figure 2).

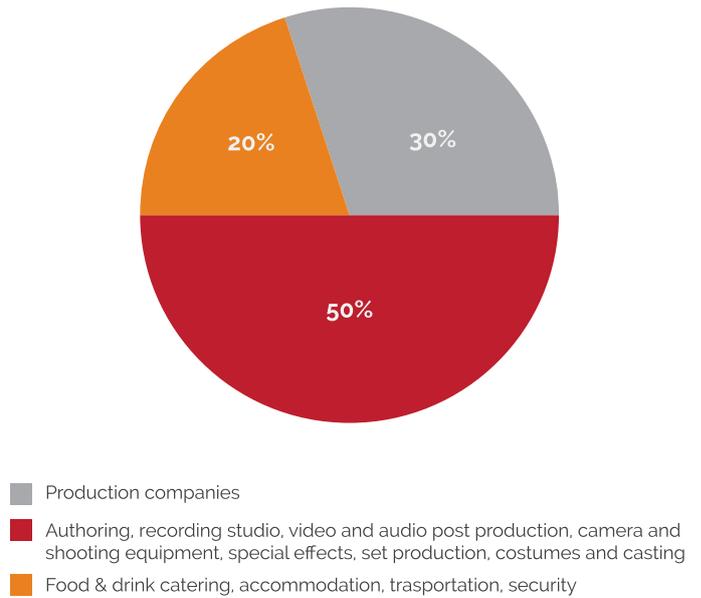


FIGURE 1. TOTAL DISTRIBUTION OF COMPANIES, PER CATEGORY (% , 2013)

Source: Authors' own elaboration based on data from AFC (n.d.).

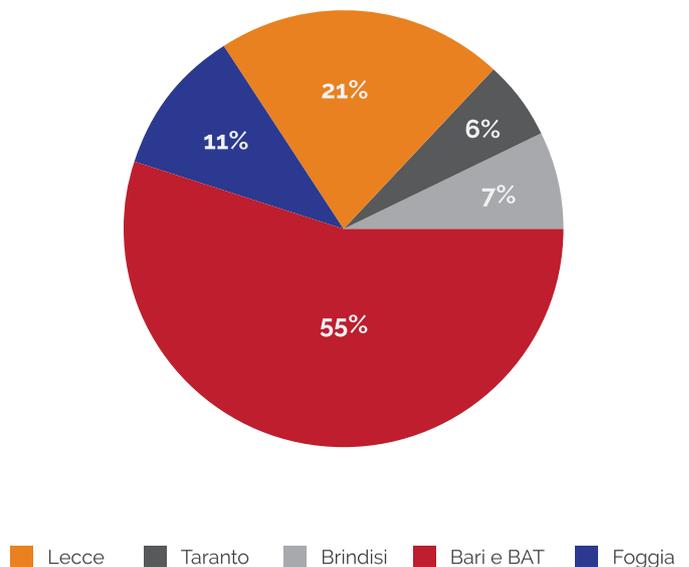


FIGURE 2. TOTAL OF COMPANIES' DISTRIBUTION, PER APULIAN PROVINCE (% , 2013)

Source: Authors' own elaboration based on data from AFC (n.d.).

Regarding the legal structure of companies, the analysis has shown that most of the examined companies operate as partnerships, while there is a limited number of them operating as individual enterprises (figure 3).

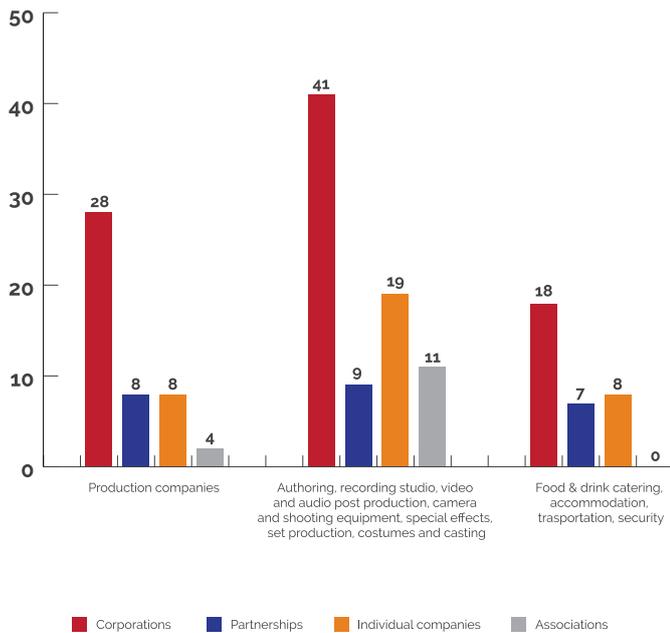


FIGURE 3. THE LEGAL STRUCTURE OF COMPANIES, PER CATEGORY (2013)

Source: Authors' own elaboration based on data from AFC (n.d.).

The preferred legal structure is the capital stock corporation, especially in the provinces of Bari-BAT, where there are 47 corporations over a total of 87. Associations are less common, as shown by the category analyses and by the province chart (figure 4).

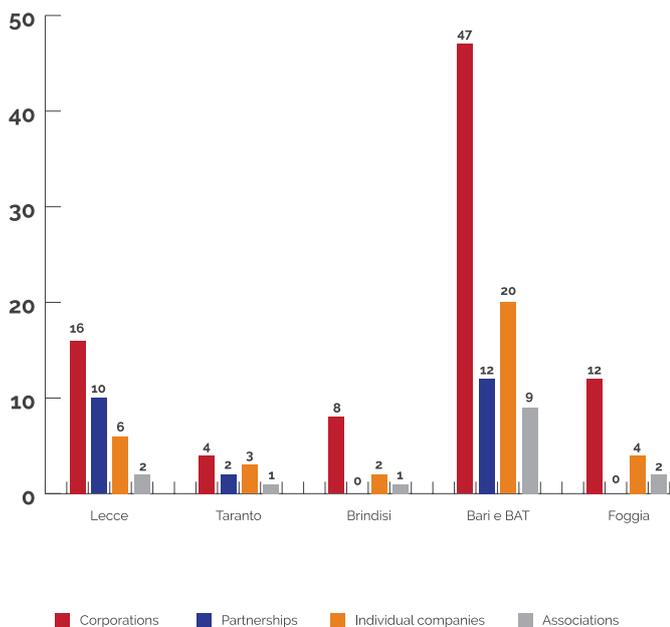


FIGURE 4. THE LEGAL STRUCTURE OF COMPANIES, PER APULIAN PROVINCE (2013)

Source: Authors' own elaboration based on data from AFC (n.d.).

The observed sample has been defined only in relation to capital stock corporations providing balance sheets, which in Italy are available for the public at the Enterprise Registry. Taking this into consideration, the examined sample is comprised of 44 companies. Among these, 41% are movie production companies, 39% are companies operating service and support activities (authoring, graphics, recording, video and audio post production, cameras and shooting equipment, special effects, set construction, costumes and casting) and 20% by companies involved in collateral activities and indirect productions (catering, accommodation, transportation and security) (figure 5).

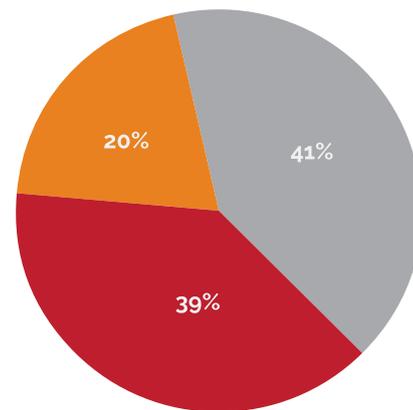


FIGURE 5. SURVEY SAMPLE DISTRIBUTION, PER CATEGORY (% , 2013)

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Source: Authors' own elaboration based on data from AFC (n.d.).

The distribution of the sample by province shows and confirms the predominant presence of the Bari-BAT district, which encompasses around 68% of examined companies, while the province of Lecce accounts for 14%, followed by Foggia with 9%. Brindisi and Taranto, on the other hand, show 5% and 4%, respectively. Following an operational plan, an index analysis was conducted on a total of 138 balance sheets provided by the local Chambers of Commerce, Industry, Crafts and Agriculture (CCIAA). Their distribution, by year and category of operations, brings 27 balance sheets for the year 2010; 37 in 2011; 35 in 2012; 39 in 2013 (figure 6). In particular, across the examined years, most of the observed balances refer to companies supporting production activities, while there is a small number of companies operating collateral activities.

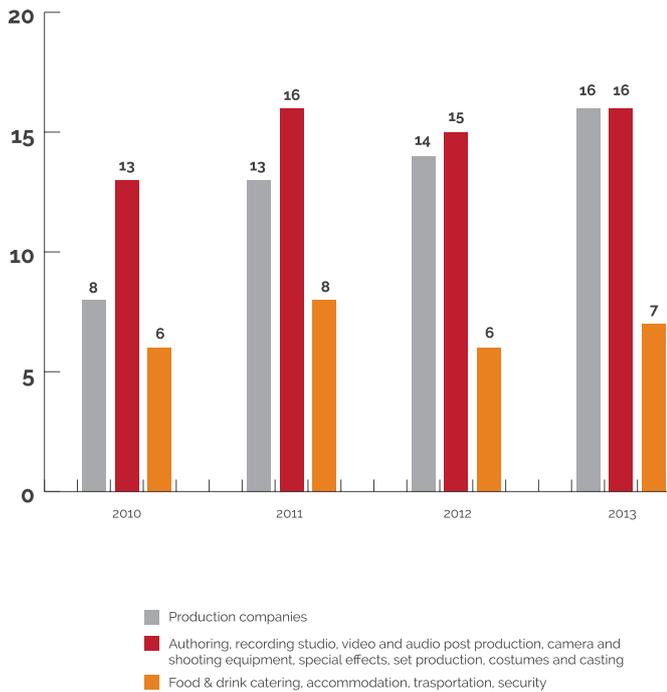


FIGURE 6. DISTRIBUTION OF THE NUMBER OF BALANCE SHEETS, EXAMINED PER CATEGORY AND SURVEY YEAR
 Source: Authors' own elaboration based on official balance sheets⁸.

Liquidity values of examined balance sheets, aggregated by geographical areas and activity sector, have been gathered and processed in order to yield "average" liquidity balances, on which there has been

a re-classification using the "financial criteria" configuration regarding their assets and the "added value" for their income statements (Chen & Lin, 2003; Fridson & Alvarez, 2011). In particular, the re-classification of asset balance sheets according to financial criteria allows an analysis of the pace at which investments generate returns in cash, representing the companies' structural situation, as well as the composition of sources. This helps evaluate the exact correlation between financial sources and company investments. With regard to the re-classification of the income statements, the valued-added configuration has the advantage of showing the wealth created by companies, the way it is distributed throughout diverse actors who took part to its accomplishment, and the way those actors have been compensated. Subsequent economical-financial indexes, deemed suitable to respond to this survey request, are synthesized in table 1.

Financial analysis results

The first considered index in the evaluation of the assets/financial structure of the observed companies is the "self-sourced fixed assets" index (net assets/fixed assets), signifying the capacity of their capital to cover fixed assets.

The result of this index, according to its value, takes a different meaning:

- > 1, the balance of assets is excellent, meaning the company invests with their own sources both fixed assets and partially net assets;

Balance sheet analysis indexes

Financial indexes

Index of self-sourced fixed assets = net assets/ fixed assets

Index of global coverage of fixed assets = net assets + consolidated liabilities/fixed assets

Primary liquidity index = differed assets + immediate assets/current liabilities

Economical-revenue indexes

Evolution of turnover

Evolution of cost of labour

Impact index of labour factor on turnover = cost of labour/turnover*100

Impact index of labour factor on added value=cost of labour/added value*100

ROE= net income/net Assets*100

ROI = operating profits (Earnings before interest and taxes [EBIT]/total of investments*100)

TABLE 1. BALANCE SHEET ANALYSIS INDEXES

Source: Authors' own elaboration based on official balance sheets.

8 In Italy the official balance sheets are those deposited at the Companies Register of the Local Chamber of Commerce..

- = 1, the balance of assets is good, meaning fixed assets are totally financed with their own sources;
- < 1, the balance of assets needs attention, as fixed assets are also financed with medium-long term debts, or short term debts which may generate further financial unbalances. If the index is < 1, further conditions may be classified:

- ◊ > 0.70, the situation is rather satisfactory;
- ◊ between 0.50 and 0.70, further analysis and monitoring is needed;
- ◊ between 0.33 and 0.50, a dangerous situation is ahead;
- ◊ < 0.33, a heavily unbalanced situation is in place.

With reference to the performed analyses, the results of such an index, determined for each activity category, are shown in table 2.

Analyzing the changes detailed above, there is an adequate level of fixed assets coverage, using self-sourced liquidities to support such investments. There were some critical situations in the last examined year, demanding a close monitoring of such fluctuating data to preserve a balanced and functional financial structure.

Another financial index is the "Index of global coverage of fixed assets" (net assets + consolidated liabilities/fixed assets), showing the capacity of a company's capital and of medium-long term debts to cover fixed assets. As regards the above index typology, there are some threshold values to be observed

in order to evaluate the company situation, which are:

- > 1.50, meaning the situation is balanced and motivated by a good company solidity;
- > 1, the situation is excellent, because there is a correct and timely use of medium-long term financial sources;
- = 1, all fixed assets are financed by fixed capital;
- < 1, there is a financial unbalance in place, the size of which depends on the shifting fluctuation from standard value (1), because a part of fixed assets are also financed by short term debts.

See the results for this index in table 3. In this case, it is possible to observe a positive index trend, confirming adequate financing policies of fixed capital. Critical figures are only relevant to the last year, where we can observe a reduction of the total financial coverage of fixed assets.

As regards asset analysis, the state of short term liquidity has been measured through the "primary liquidity index" (differed assets + immediate assets/current liabilities), meaning the ability of a company to face current liabilities with short term liquidity. In this type of index, the following threshold values are to be considered in order to evaluate the company situation:

- > 1, the situation is exceptional;
- = 1, the situation is excellent;
- Value between 0.50 and 1, the situation is acceptable, but some short term liquidity problems may arise;

Type of company	2010	2011	2012	2013
Production companies	0.97	1.24	1.30	0.40
Authoring, graphics, recording, video and audio post production, cameras and shooting equipment, special effects, set construction, costumes and casting	1.62	1.69	1.72	1.71
Catering, accommodation, transportation and security	1.21	0.55	0.67	0.47

TABLE 2. INDEX OF FIXED ASSETS SELF-SOURCING, PER YEAR

Source: Authors' own elaboration based on data from AFC (n.d.).

Type of company	2010	2011	2012	2013
Production companies	1.05	1.59	1.49	0.45
Authoring, graphics, recording, video and audio post production, cameras and shooting equipment, special effects, set construction, costumes and casting	1.81	1.87	1.92	1.85
Catering, accommodation, transportation and security	1.46	0.96	0.96	0.99

TABLE 3. INDEX OF FIXED ASSETS GLOBAL ALLOCATION, PER YEAR

Source: Authors' own elaboration based on data from AFC (n.d.).

- Value between 0.33 and 0.50, the situation is slightly unbalanced, but not yet difficult;
- < 0.33, the company has a heavily unbalanced situation.

With reference to the above parameters, results show the following liquidity situation:

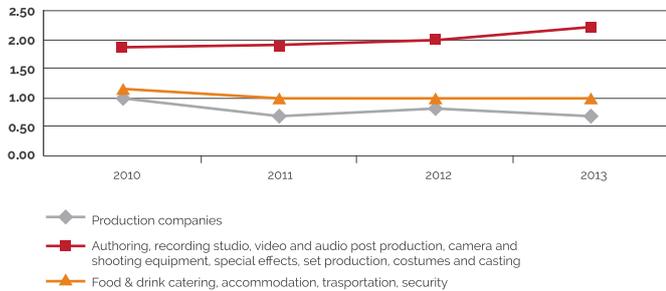


FIGURE 7. PRIMARY LIQUIDITY INDEX, PER YEAR

Source: Authors' own elaboration based on official balance sheets.

The trend of the above index allows useful reflections on the examined companies' capacity to adequately face short term operations by accessing diverse types of credit with convenient, economical liquidity conditions. Some concern may arise with reference to production companies, where the average size, being smaller than 1, determines the need to follow and monitor implementation modalities of productive arrangements in relation to their financial profile, deriving from said arrangements.

Economic analysis results

Within such an analysis, there has been an initial evaluation of the absolute aggregated turnover trend and the relevant cost of labour, as well as the impact of this latter factor over revenues and added value. Said indexes show the impact that various entrepreneurial initiatives generate on value creation and on employment openings. The choice of taking into consideration the added value, obtained by deducting external purchasing costs of production factors from production value (without considering costs related to the latter – labour, capital and technical factors), allows an analysis of wealth distribution processes gained through the examined enterprise's economic conduct. The relevant results are highlighted in figures 8 and 9, and tables 4 and 5.

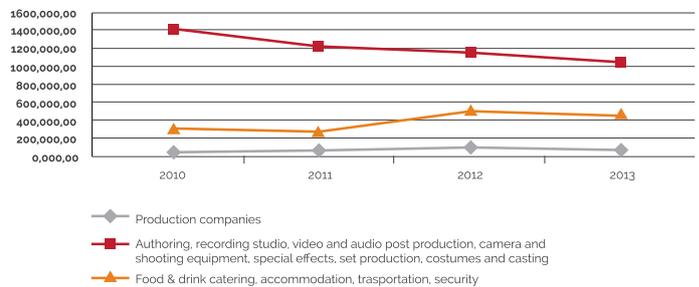


FIGURE 8. TURNOVER EVOLUTION, PER YEAR (IN EUROS)

Source: Authors' own elaboration based on official balance sheets.

Type of company	2010	2011	2012	2013
Production companies	12.19	12.61	20.33	19.49
Authoring, graphics, recording, video and audio post production, cameras and shooting equipment, special effects, set construction, costumes and casting	9.90	9.75	11.66	18.82
Catering, accommodation, transportation and security	28.44	21.24	24.19	18.51

TABLE 4. INDEX OF LABOUR IMPACT FACTOR, PER YEAR (%)

Source: Authors' own elaboration based on official balance sheets.

Type of company	2010	2011	2012	2013
Production companies	55.43	89.78	78.17	52.72
Authoring, graphics, recording, video and audio post production, cameras and shooting equipment, special effects, set construction, costumes and casting	35.35	27.99	38.74	51.43
Catering, accommodation, transportation and security	53.49	49.82	56.91	52.77

TABLE 5. IMPACT INDEX OF LABOUR FACTOR ON ADDED VALUE, PER YEAR (%)

Source: Authors' own elaboration based on official balance sheets.

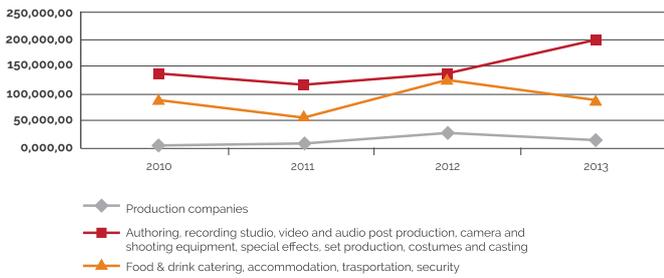


FIGURE 9. LABOUR COST EVOLUTION, PER YEAR (IN EUROS)

Source: Authors' own elaboration based on official balance sheets.

Based on the above charted aggregated data, the crucial importance of the labour factor within the process of creating and distributing generated value is clear. This circumstance reaches high peaks with reference to production companies' areas of interest. The observed quantitative dimension, and its evolution dynamics across the examined period of time, allow us to positively appreciate the outcomes generated by the creation of value seen from an employment standpoint. This is clearly confirmed by analyzing how the created wealth has been distributed, where the labour factor plays a fundamental role in this apportionment (table 5). The importance of these latter data are thus clear in order to steer regional economic policies; this is all the more significant across the current scenario, evidenced by a progressive decrease of public funds aimed at easing entrepreneurial initiatives. Upon conclusion of this economic survey, it is interesting to define revenue-generating indexes. We look in more detail at the "Return On Equity" (ROE, net income/net assets*100), meaning the profitability capacity of invested capital, in terms of generated revenue, used in order to evaluate how convenient is to invest in a company. In order to evaluate such an index best, together with the convenience of investing in risk capital, it is appropriate to compare it with the profits generated by alternative, low risk investments, such as BOTs (Ordinary Treasury Bills), CCTs (the main Italian Treasury Bonds), bank deposits, etc. A favourable

dimension of the above mentioned index, besides the above quantification, is represented by risk profiles which distinguish the operations of any economic enterprise (the so-called "risk premium"). It is noteworthy that this latter element varies from sector to sector, based on relevant features. In the examined case, the following outcomes have arisen:

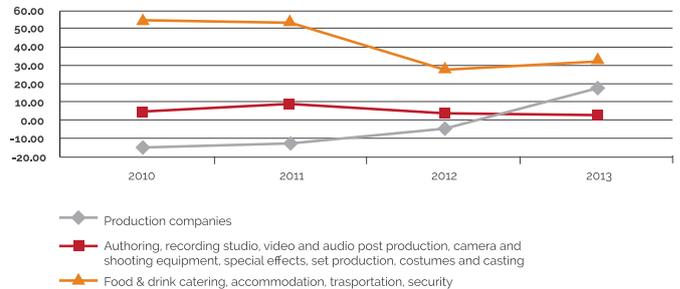


FIGURE 10. RETURN ON EQUITY, PER YEAR (ROE, %)

Source: Authors' own elaboration based on official balance sheets.

Production companies were characterized by a negative trend over the 2010-2012 period of time, while later on there was a recovery from the preceding year's economic activity. The collateral companies' sector shows a positive, albeit reduced, profitability (with the exception of 2011 fiscal year). The revenue situation of the examined sectors requires a close monitoring of internal trends to check the company's functionality. On the other hand, a decisively positive trend may be observed in the collateral sectors (catering, accommodation, transportation and security), where it is possible to observe highly competitive value dynamics, showing the implementation of the technical-productive combination performed by examined companies.

Finally, there has been an evaluation of profitability values of the entire invested capital through "Return On Investment" (ROI, operating profits (EBIT)/total of investments*100). It shows the ROI of ordinary operations (not including interests and taxes, and independently from results of extra-ordinary operations)

Type of company	2010	2011	2012	2013
Production companies	-2.97	-4.98	1.83	3.61
Authoring, graphics, recording, video and audio post production, cameras and shooting equipment, special effects, set construction, costumes and casting	4.16	9.17	2.67	3.14
Catering, accommodation, transportation and security	18.74	13.54	14.69	11.17

TABLE 6. RETURN ON INVESTMENT, PER YEAR (ROI, %)

Source: Authors' own elaboration based on official balance sheets.

compared with the total of operated investments. In terms of company strategy, the ROI index is used by companies to compare their results with competitors, in order to better evaluate the performance of their ordinary operations, and thereby identify possible critical or favorable points. The study of such an index led to the results in table 6.

The above index confirms that production companies do not show adequate profits if compared with invested capital. This necessitates the implementation of management policies aimed at strengthening company process efficiency in order to create value. The same situation is to be seen across the supporting film companies, where it appears necessary to monitor operational profiles of each activity, in order to optimize their economic management. On the other hand, data relevant to collateral services companies (catering, accommodation, transportation and security) show a positive trend.

As a final point, the study conducted on small "pocket industries" in the Apulian audiovisual sectors how an essentially stable profile of the relevant production chain, with adequate employment rates, so as to confirm Apulia Film Commission's indirectly favourable impact on its territory. This has been achieved despite the unfavorable economic conditions, a national and international economic crisis, which characterized the analyzed years.

Conclusions

Film Commissions traditionally play four main roles: promotion, assistance, training and enhancement of local professional figures (Salvemini, 2009). In Italy there has recently been an organizational change of FCs. Government support for the film industry has been reduced but new forms of horizontal subsidiarity are arising (Rushton, 2008). In the absence of adequate national policies, new economies are being created at the regional level which increase the competitiveness of the cultural system and attract new investments in the territory. In this process, the role of FCs is growing and, through regional financing and the establishment of special film funds, they are playing a leading role as drivers for the productions in a triad of actors composed of the *state*, *Film Commissions* and *(private) producers* (Palmi & Salvemini, 2013). All this is actually strengthening the role of FCs, supporting creative film industries and creating community engagement (Bowen et al, 2010).

Promotion is still the main activity involving territorial marketing (Salvemini, 2009). In the most structured FCs, promotion becomes a real territory sale, where the region is packaged as a product that productions can exploit, and its characteristics are like the ones a marketing mix requires (for example in Torino FC, BLS Südtirol, Friuli Venezia Giulia FC, AFC). It is carried out with tools that are now spread all over the world: participations in film festivals, direct marketing, and familiarization with trip organization for producers and managers. The assistance role is FCs' most specific activity realized when the territory use is optimized with all its components. As for training, FCs are increasingly working for it in different ways and they also deal with the retraining of audiovisual sector local professionals (with professional courses, seminars and workshops). Finally, one of FCs' usual activities is the enhancement of local professional figures. The enhancement of local professional figures is carried out through the production guide, and this research showed that every FC realized it. In addition to these traditional functions, there is also the "financial backer" which is carried out through the film funds managed by FCs, as it has been fully explained. This research showed both the increasing leading role of FCs in Italy in

order to improve the competitiveness of the system and their active contribution as a driver to strengthen the feature film supply chain.

In particular, the following working hypotheses listed in the introduction were accurately verified:

1) The role of Film Commissions as a driver for the cinema supply chain in a specific territory, thanks to a good reputation for the creation of shared value.

It was possible to notice that a decade after the start of their first experiences in Italy, Apulia Film Commission have now taken a prominent role in the development of the film supply chain thanks to the reputation they have been able to earn (Ebbbers & Wijnberg, 2012). In the eight years since its creation, the AFC has been able to attract more than 227 productions: 90 theatrical, 20 Film TV, 45 short TV; 58 documentary, 14 others (see table 7). Pillars of Italian film history have worked with AFC, such as Ermanno Olmi and Gianni Amelio, and important directors like Sergio Rubini, Ferzan Ozpetek, Daniele Vicari, Daniele Cipri, Paul Haggis. They have supported emerging talent such as Pippo Mezzapesa and Davide Barletti, Federico Rizzo and Simone Salvemini. And international stars such as Sophie Marceau, Monica Bellucci, Valeria Golino, Toni

"FILM COMMISSIONS IN ITALY PLAY AN INCREASINGLY LEADING ROLE IN IMPROVING THE COMPETITIVENESS OF THE SYSTEM AND HELP STRENGTHEN THE FEATURE FILM SUPPLY CHAIN"

Servillo, Elio Germano, Rutger Hauer have been working on Apulian sets. It has also been shown that, despite the unfavorable economic conditions and thanks to the Apulia Film Commission, over the last years the creative film industries have grown, increasing business with new productions drawn over the territory by FCs. In this regard, a clear signal was the increase of employees in the examined companies, according to the data extracted from Apulia Film Commission database. Moreover, recent studies on the Puglia Creative district (Palmi, 2013) showed a positive balance between *exploration* and *exploitation* activities (March, 1991), and the presence of *knowledge gatekeepers* (Alaric, Longhop & Thomas, 2008), in particular across the audio-video industry.

2) The importance of the ability to plan adequate organizational models and coordination mechanisms, with regard to context specificity.

It was possible to show the effectiveness of easy functional structures and project-oriented structures. As regards the Apulia Film Commission, we verified the usefulness of a divisional structure oriented around two "cineport" hubs focused on the productive supply chains' clusters of the three most important cities of Apulia Region (Bari, its capital, Lecce, in the Salento area and Foggia in the Capitulate area).

3) The use of film funds and support tools (e.g. festivals, networks) for the creation of value, development and community engagement.

We analyzed the prevalence of film funds, above all in the regions that were not used to attracting productions. It is remarkable, for instance, that Roma and Lazio FCs do not have a film fund as they have well-known locations that are required at the international

level. Therefore, they do not need to attract productions through financial support. However, this situation often compels productions, even the Roman ones, to ask for support elsewhere: they address the FCs provided with financial support in addition to all the other kinds of support. We verified also the importance of film festivals in the territory aimed at creating value, development and approval. Moreover, it was briefly underlined the positive impact of the Bari film festival called Buffest, organized by the AFC. We explained (in the "Structures and processes" section) that the AFC has been successfully connecting with several national and international networks to strengthen its "social capital". Social capital is identified as a set of values, regulations and social relations allowing each individual to pursue collective behaviors, thus representing a kind of facilitator in transmitting knowledge. Therefore, AFC project capacities over its territory have increasingly involved its surrounding community, allowing an intense development of relational capital and community engagement (Bowen et al, 2010).

Years	Production	Theatrical	TV film	Short film	Documentary	Other
2007	10	4	1	2	3	-
2008	18	5	-	7	5	1
2009	36	13	2	5	15	1
2010	19	5	3	3	7	1
2011	22	8	2	2	9	1
2012	28	11	2	7	6	2
2013	47	23	3	8	8	5
2014	47	21	7	11	5	3

TABLE 7. APULIA FILM COMMISSION PRODUCTIONS (2007- 2014)

Source: Source: Authors' own elaboration based on data from AFC (n.d.).

ANNEX

Operative start		2007
Legal status		Foundation
Membership in institutions		Elfin, Cineraria
Company structure	Board of Directors	Yes
	Members	5
	Allowance	2
	Appointed assignments	Region President; Partners meeting; Board of Directors; Board of Directors: Director
Financial resources		1,400,000 euro
	Number of associates	26
	Quota	0.15/0.20 euro per inhabitant
	Balance sheet management	Online
Fund	Support fund	Yes
	Fund typology	Grant
	Fund amount	2,550,000 euro
	Tranche	2 funds per desk; 2 funds with 3 fixed terms
	Minimum % local workers	-
	Minimum number of shooting days	-
	% investment in the territory	-
Activities	% Film typologies	35% feature films; 34% documentary; 20% short films; 8% TV series; 4% other
	Foreign productions	Yes
	Film festival	Yes
	Collateral activities	Yes
	Cineport	Yes
	Tenders of competitions	Yes
Human resources	Permanent employees	5
	Collaborators	35
	Contracts	Temporary Italian Contract (so called Co.co.pro)
	Men	14
	Women	23
	Average age	35/45
	Kind of hiring	Public competition
Promotion and communication	Portal	Yes
	Newsletter	Yes
	Social network	Yes
	Press office	Yes
	Production guide	Yes

TABLE 8. BASIC INFORMATION ABOUT THE APULIA FILM COMMISSION

Source: Authors' own elaboration based on data from AFC (n.d.).

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