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Deutsch-Italienisches Zentrum für den Europäischen Dialog

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How to put culture at work
for a more resilient economy
and society?
Policy insights from German
and Italian creative cities

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Abstract*

Italy and Germany are two major cultural powerhouses in Europe, both characterised by a recent history of unified countries where a diverse set of culturally vibrant cities managed to flourish. Cities like Berlin, Dresden, Florence and Venice, to name just a few, have given birth to philosophers, writers and artists of all kind who still represent the backbone of Europe's artistic heritage, cultural history and creative expression. Nevertheless, this also means that both countries are likely to be strongly affected by the COVID-19 pandemic, which has disrupted the cultural life and tourism dynamics of many European cities. How can Italian and German cities build on their shared cultural traits to foster both intercultural dialogue and creative economies, but mostly to rebuild confidence and cohesion in this new uncertain scenario? How can they help reshape the 'Creative City' concept? This article illustrates data from the European Commission's Cultural and Creative Cities Monitor to identify specialisation and complementary areas of development in German and Italian cities as an evidence base to promote partnerships between the two countries. It also provides the rationale for speeding up this kind of cooperation: pre-COVID evidence and timely data coming from Google search well exemplify the unprecedented effects that the pandemic might have on cultural employment and tourism, calling for an urgent, and yet coordinated, European policy response. Finally, it

offers inputs to conceive a cities-led European policy response that Germany has the opportunity to boot under its 2020 Presidency of the Council of the EU.

How to put culture at work for a more resilient economy and society?

Policy insights from German and Italian creative cities

1. Introduction

Germany and Italy are two major cultural hotspots whose cultural history is rooted in the art, architecture, film, literature, and philosophy that have come to life throughout the centuries. Many cities reflect the variety of cultures and lifestyles that have developed in the two countries, giving rise to popular urban tourism destinations (Florence, Venice, Berlin, Cologne ...) as well as to culture-led economic activities that strongly contribute – in terms of enterprises, value added and employment shares – to Europe's cultural economy.

The COVID-19 pandemic, however, has strongly affected cultural operators and activities. Confinement measures first and restrictions to travels and visit then have almost entirely disrupted the basic principle of most cultural sectors' business model: the possibility to have a public in presence. This is true also for culture's related value chains among which, notably, tourism.

Governments at all levels have proven their capacity to react. At the very start of the pandemic, Italy pioneered the adoption of exceptional safety measures and of economic support policies including some specific ones targeting cultural and creative sectors (CCS). Germany adopted a very much ambitious corona emergency aid package for self-employed and small businesses worth 50 billion euros. In addition to that, during the confinement period Chancellor Angela Merkel openly ensured the federal government's support to artists

and Germany's cultural life as a crucial component of people's lives "to better understand the past and look at the future with new eyes"¹. More recently, the State Minister for Cultural and Media Affairs Monika Grütters has expressed her support towards the Members of the European Parliament's proposal to address part of the Recovery Fund to CCS. Many regional and local governments have also adopted local support plans, often including CCS-specific measures².

In addition to the emergency measures, creativity, transnational cooperation and peer-exchanges remain cru-

1 See Angela Merkel's speech at: https://www.youtube.com/watch?v=OT5Vx54XnOo&feature=emb_logo

2 See Montalto, V., Sacco, P. L., Alberti, V., Panella, F., Saisana, M., *European Cultural and Creative Cities in COVID-19 times: Jobs at risk and the policy response*, EUR 30249 EN, Publications Office of the European Union, Luxembourg, 2020, ISBN 978-92-76-19433-0, doi:10.2760/624051, JRC120876. https://publications.jrc.ec.europa.eu/repository/bitstream/JRC120876/kjna30249enn_1.pdf

cial for the cultural sector to survive and keep the European project alive. Cultural institutions can help promote democratic values and foster mutual understanding, thus fostering the Europeans' sense of belonging, trust and cohesion in such uncertain times, while artists and creative talents can help conceive and design a different world, able to cohabit with the current pandemic and the risk of future ones. The pandemic is also an opportunity to make the contribution of culture to major societal challenges – from educational poverty to the development of more resilient and sustainable cities to climate change³ – much more visible and shared. In the specific case of Germany and Italy, there are clear complementary areas that can help foster cross-border

3 See for instance the report 'World Cities Culture Forum, *Culture and Climate Change, 2019*', showing how 14 world cities have integrated culture in their policy response to climate change. http://www.worldcitiescultureforum.com/assets/others/WCCF_Report_June_28_FINAL_v4.pdf.

cooperation and peer learning, given the excellent performance of many cities on both sides on cultural and/or creativity-related aspects – a capital that we cannot afford to waste.

To illustrate in more details these points, the remaining sections are structured as follows. First, we provide evidence of Germany's and Italy's major contribution to Europe's cultural economy and life, using both Eurostat's data and the European Commission's Cultural and Creative Cities Monitor benchmarking tool (Section 2). Second, we offer a closer look at the performance of Cultural and Creative Cities in both countries to identify areas that could enhance city-to-city cooperation (Section 3). Third, we illustrate the potential effects of the pandemic on CCS and cities, using both pre-COVID evidence from Eurostat and search data from Google Trends as an impact proxy, to show why peer-support and exchange is the

more urgent now than ever (Section 4). In the last section, we offer insights on the opportunity to enhance cooperation as a potential legacy of the German semester of the EU and building on existing cross-border assets such as the German-Italian Centre for the European Dialogue, Villa Vigoni (Section 5).

2. Germany and Italy as vibrant cultural centres, leading Europe's creative economy

Culture and creativity are key elements for German and Italian economy and society. Italy and Germany (together with France) are the European countries in EU-27 counting **the highest number of enterprises in the cultural sectors** (181 442 in Italy and 136 786 in Germany). Cultural enterprises represent 5.5% and 4.9%, in Germany and Italy respectively, of the total number of enterprises in non-financial business

economy, vis-à-vis a European average share of 5.1%. At the same time, Germany has the largest cultural sector in value added terms (29.9 %), followed by France (19.2 %) and Italy (11.2 %). **Germany and Italy alone account for more than 40 % of the total value added and for a similar share of the total turnover in the EU-27's cultural sector⁴.**

The two countries together count **2.5 million cultural workers** (1 677 000 persons in Germany and 834 500 in Italy), corresponding to **a third of European cultural employment** and 3.6% of Italian and 4% of German total employment (vs. a European average of 3.7%)⁵.

Italy and Germany are also important **trade partners**: in the EU-27, **Germany represents the second export market for cultural goods for Italy (14%), af-**

4 Data refer to 2017. Source: Eurostat (online data codes: cult_ent_num and cult_ent_val)

5 Data refer to 2017. Source: Eurostat (online code cult_emp_sex).

ter France (42%); while Germany is the main import market for Italy for cultural goods (35%), followed by France (25%)⁶.

Finally yet importantly, both countries are major tourist destinations: in 2019, they totalled about 437 million tourist overnight stays each, after Spain and France, with Italy being particularly successful at attracting foreigners (220 662 684 foreign overnight stays, after Spain, vs. 89 260 847 in Germany)⁷.

The key role played by CCS in Italian and German economies and lifestyles is confirmed by the high number of cultural and creative cities featured in the Cultural and Creative Cities Monitor⁸ (hereafter: the Monitor) and – in most cases – their

6 Data refer to 2018. Source: Eurostat (online code: cult_trd_prt).

7 Source: Eurostat (online code: tour_occ_ninat).

8 Montalto V., Tacao Moura C. J., Alberti V., Panella F., Saisana M., *The Cultural and Creative Cities Monitor. 2019 edition*, EUR 29797 EN, Publications Office of the European Union, Luxembourg, 2019, ISBN 978-92-76-08807-3, doi:10.2760/257371, JRC117336.

The Cultural and Creative Cities Monitor in a snapshot

Launched in July 2017, the Cultural and Creative Cities Monitor is a novel benchmarking tool designed and developed by the Joint Research Centre of the European Commission. It consists of an interactive online tool¹ and a number of accompanying policy and technical documents and infographics that illustrate the methodology and key findings². Its aim is to monitor and assess the relative performance of 'Cultural and Creative Cities' in Europe that have similar population, income and employment levels, using both quantitative indicators and qualitative information.

The 2019 edition – which is one of the 65 actions proposed by the Euro-

1 <https://composite-indicators.jrc.ec.europa.eu/cultural-creative-cities-monitor/cultural-creative-cities>

2 All documents and raw data are fully accessible at this link: <https://composite-indicators.jrc.ec.europa.eu/cultural-creative-cities-monitor/docs-and-data>

pean Framework for Action on Cultural Heritage³ – presents an updated portrait of the cultural and creative resources in an enriched sample of 190 cities in 30 European countries (the EU-27 plus Norway, Switzerland and UK). They were selected on the basis of their proven engagement in the promotion of culture and creativity – thus, being included in the Monitor is in itself an acknowledgement of these cities' efforts in this domain. The sample includes European Capitals of Culture (or shortlisted ones), UNESCO Creative cities and cities hosting regularly at least two international cultural festivals.

The Monitor's quantitative information is captured through **29 indicators** that cover nine policy dimensions reflecting three major facets of a city's cultural and socio-economic vitality:

3 https://ec.europa.eu/culture/content/european-framework-action-cultural-heritage_en

- **Cultural Vibrancy** measures a city's cultural 'pulse' in terms of cultural infrastructure and participation in culture;

- **Creative Economy** captures the extent to which the cultural and creative sectors contribute to a city's economy in terms of employment, job creation and innovation;

- **Enabling Environment** identifies the tangible and intangible assets that help cities attract creative talent and stimulate cultural engagement.

The cities' score on these three dimensions are then aggregated in an overall synthetic index of performance: the **Cultural and Creative Cities (C3) Index**.

The qualitative component includes highlights of cities' creative economy strategies or best practices in the field of cultural management to illustrate and complement the quantitative evidence, both on the cities' individual pages of the online tool and in the policy report.

Since October 2020, a new Policy Tracker further enriches the qualitative component of the Monitor. The Policy Tracker enables any interested user to browse more than 170 city-level policy measures put in place during the COVID-19 lockdown period to support local Cultural and Creative Sectors.

To enhance peer learning, cities have been grouped in 15 different socio-demographic groups based on similar population, employment rate and income per capita. For instance, cities belong to one of the following population groups: XXL, if having more than 1 million inhabitants; XL, if having between 500 000 and 1 million inhabitants; L, if hosting between 250 000 and 500 000 inhabitants; and S-M, if hosting between 50 000 and 250 000 inhabitants.

excellent performance on the Monitor's indicators. The Monitor includes a diversified sample of 36 cities from Germany and Italy (18 each), meaning that the two countries together represent approximately 20% of all the 190 cities from 30 European countries included.

3. Cultural and creative cities: common and complementary areas of specialisation

In the Cultural and Creative Cities Monitor, eight Italian and German cities occupy the top five positions in their respective population size groups (see previous Box for more details). In particular, Munich, Karlsruhe and Weimar all rank 2nd on the Cultural and Creative Cities (C3) Index in their respective population groups (XXL, L and S-M), with Berlin reaching the 2nd position, after Munich, at national level, and the 5th at European level, in the XXL population

group. Stuttgart conquers the 5th position among the XL cities, while Heidelberg comes 3rd among S-M cities. In Italy, Milan, Florence and Venice take the 4th, 1st and 3rd position on the C3 Index, in their population groups (XXL and L).

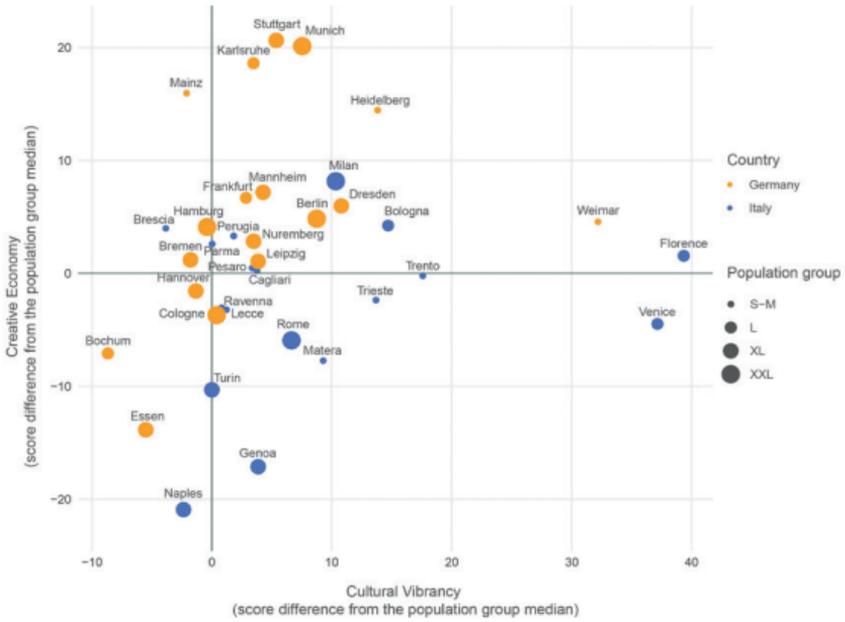
Table 1. Top five cities on the C3 Index by population groups

Cultural and Creative Cities (C3) Index		
Ranks for XXL cities	Country	City
1	FR	Paris
2	DE	Munich
3	UK	London
4	IT	Milan
5	DE	Berlin
Ranks for XL cities	Country	City
1	DK	Copenhagen
2	PT	Lisbon
3	SE	Stockholm
4	IE	Dublin
5	DE	Stuttgart

Cultural and Creative Cities (C3) Index		
Ranks for L cities	Country	City
1	IT	Florence
2	DE	Karlsruhe
3	IT	Venice
4	UK	Bristol
5	EE	Tallinn
Ranks for S-M cities	Country	City
1	SE	Lund
2	DE	Weimar
3	DE	Heidelberg
4	IE	Cork
5	EE	Tartu

Source: Own elaboration from the Cultural and Creative Cities Monitor, 2019 edition – European Commission's Joint Research Centre.

By analysing the performance of Cultural and Creative Cities in the two countries beyond the overall aggregate score (i.e. index level), different



Pp 16-17: Figure 1. German and Italian cities' performance on Cultural Vibrancy and Creative Economy

Source: Own elaboration from the Cultural and Creative Cities Monitor, 2019 edition – European Commission's Joint Research Centre.

Note: The x and y axes depict the difference between each city's score on Cultural Vibrancy and Creative Economy and the median value of each city's respective population group. This means that the cities close to '0' have a score close to the median value. Conversely, the scores of cities in the positive / negative quadrants of the graph are above / below the median value.

specialisations emerge. German cities clearly do much better on Creative Economy indicators, whilst Italian cities are generally better characterised by high or very high levels of Cultural Vibrancy. However, there are exceptions: Milan, for example, is similarly strong on Cultural Vibrancy and Creative Economy (and, similarly, Bologna), while Weimar is considerably stronger on Cultural Vibrancy than on Creative Economy.

Cooperation and peer-learning building upon similar or complementary areas of specialisation might help support the already good trade relations that link the two countries. Maintaining well-functioning cultural trade relations would be for instance crucial to preserve culture-related jobs despite the COVID-19 crisis⁹. Cooperative work can also help

9 On the positive impact of international trade on jobs, see for instance OECD, *Policy Priorities for International Trade and Jobs*, Paris, 2012.

enact changes to make the sectors more sustainable and resilient to shocks based on novel cultural event formats or business models that have been experimented during the confinement period¹⁰.

4. A potential at stake? Culture, creativity and tourism under the lens of the COVID-19 pandemic

While a high provision of cultural enterprises and workers can help cities thrive, by attracting visitors, investments and talents, this also means a higher exposure to the shock caused by the outbreak of COVID-19 and consequent restrictive measures. Under the

10 See, for instance, examples from Bologna, Milan, Mannheim and Berlin in the report Montalto, V., Sacco, P. L., Alberti, V., Panella, F., Saisana, M., *European Cultural and Creative Cities in COVID-19 times: Jobs at risk and the policy response*, EUR 30249 EN, Publications Office of the European Union, Luxembourg, 2020, ISBN 978-92-76-19433-0, doi:10.2760/624051, JRC120876. (pp. 18-19)

extraordinary circumstances imposed by the COVID-19 pandemic, this asset can become a double-edged sword. Cultural jobs are in fact particularly at risk because of the sector's high level of structural fragmentation as well as its reliance upon live events and institutions open to the public. With the introduction of lockdown measures, cultural activities have been mandatorily cancelled or closed to the public in many EU countries. After the confinement period, many of them have been considerably reduced in size. In addition to that, cultural workers are at risk of major income losses because they may fall through the cracks of existing social protection systems more than other types of workers: in the 27 EU member states, on average, **32% of them are self-employed, compared to 14% in overall employment.** Non-standard workers such as the self-employed are not only at higher risk of losing their

job and/or income, but also are likely to have no alternative sources of income or medical insurances.

As regards the potential effects of the COVID-19 pandemic on Germany's and Italy's cultural economies, two aspects deserve specific attention: first, the particularly high amount of self-employed workers in cultural employment (well above the European average in both countries); and, second, the high shares of arts and tourism jobs on total jobs on most of the German and Italian cities under analysis.

In **Italy**, the percentage of self-employed persons in **cultural employment** is in fact almost three times the proportion of self-employed workers in total employment (**60% vs. 22% in total employment**). In **Germany**, the difference is even higher (**53% vs. 9% in total employment**).

Arts and tourism jobs shares are particularly high in **Venice, Florence and Milan** (approximately 60%, 50% and

40%, respectively), among the cities the Italian top the rankings; while in Germany, arts and tourism jobs represent around one third of total jobs in **Hamburg, Frankfurt, Bremen and Weimar**.

Cities with more cultural workers will likely need to dedicate more efforts to the development of specific mitigation and response measures to support both workers and organisations in the sector and to re-store that cultural vitality for which most of these cities are best known for.

In terms of tourism, the COVID-19 crisis is having a major impact around the world and throughout Europe, with cities likely to be the hardest-hit. To show this, we looked at search trends for a *keyword* ('city tour') and a *topic* (Rural Tourism) using Google Trends data (refer to the box on Google Trends data for a more detailed explanation). This approach allowed us to notice a sharp decrease in Google searches for 'city tour' as compared to

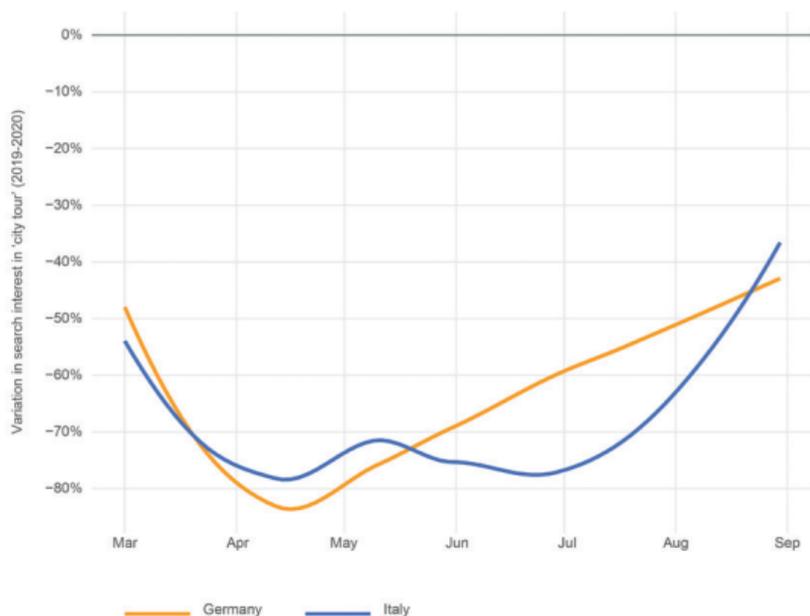
2019. Between March and July, the interest for the keywords 'city tour' dropped by 65% in Germany and by 69% in Italy, on average. Despite a partial recovery, the search volume in both countries remains significantly lower compared to 2019 (-39% Germany; -31% Italy).

Conversely, the interest level for rural tourism, both in Germany and Italy, reached the same level of mid-May 2019, and climbed up to surpass 2019 in both countries in June and July (+32% Germany; +46% Italy). This suggests that German and Italian citizens seem to favour destinations which might be perceived as safer and showed hesitance towards city-based tourism. This might be considered as an immediate reaction and it is difficult to make predictions on whether such trends will be reflected in a redistribution of tourism flows across urban and rural areas. Nevertheless, the current shift of interest is likely to have an asymmetric impact on the tourism sector.

Google Trends data

Google Trends provides data and insights on users' searches on Google search engine. The platform allows users to extract data on a random representative sample of searches based on *keywords* or *topics*. *Keywords* identify the actual search terms used by users to perform a search. *Topics* represent an aggregate of semantically similar search terms identified by the search engine. *Topics* are constant over all translations, as they include the relevant search terms in each language, while *keywords* identify the actual search terms used by users to perform a search.

We opted to use the 'city tour' keyword to identify trends related to tourists' interest for city-based tourism as no topic has been identified capturing the same information across Germany and Italy.



Pp 24-25: Figure 2. Variation in search interest in 'city tour' between 2020 and 2019 in Germany and Italy

Note: The reference period goes from 1 March to 30 August.

Looking at the top-performing cities in Germany and Italy in terms of tourist overnight stays, as portrayed by the Cultural and Creative Cities Monitor¹¹,

11 Frankfurt, Weimar, Munich, Heidelberg and Berlin (Germany); Florence, Venice, Ravenna, Rome and Pesaro (Italy).

search interest considerably decreased. In this case, we looked at the volume of searches by German residents for the top Italian cities, and at the volume of searches by Italian residents for the top German cities. Between March and August, for example, searches dropped by 61%, 38% and 44% for Frankfurt, Munich and Berlin respectively as compared to 2019. Italian cities also suffered, with Florence and Rome recording the greatest hits in the country (-42% and -37% respectively) and other Italian cities of art showing an important decrease in search interest ranging from -18% (Ravenna) to -28% (Venice)¹².

12 This approach has some limitations as the topics used to perform the analysis only include the cities' names, and this might generate noise in the data. A further step in the analysis allowed verifying that searches for cities include topics inked to travel, accommodation and sightseeing. Therefore, despite not being comparable to official statistics in terms of reliability, this analysis provides an initial insight on the interest towards German and Italian cities.

5. Unity is strength

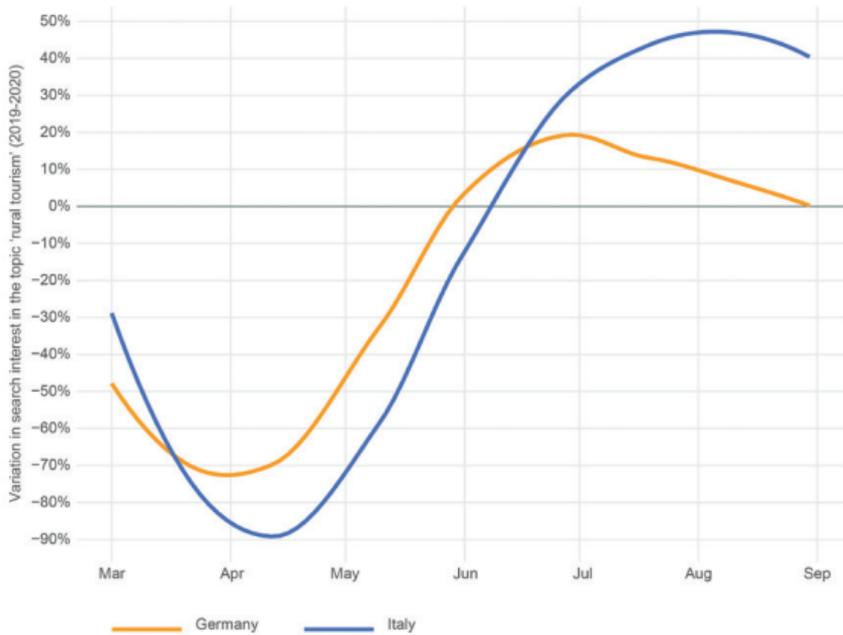
The pandemic has shown, once more, how culture is much more than a legacy from the past. Particularly in countries like Germany and Italy, culture significantly contributes to high value-added economies and cities' vitality and appeal. Facing effectively the sanitary crisis and its specific impact on CCS thus means preserving Europe's capacity to be innovative and attractive.

"Together Make Europe strong again", as the Germany Presidency has put it. The adoption of the Recovery Fund (750 billion euros) is the best single unit symbol in the entire history of the European Union, where both Italy and Germany played a key role. In such uncertain times, it is more important than ever that such a huge taxpayers' money envelop is spent in the most effective way. This means organising the response to economic shock also by bringing together

and mobilising partners with relevant knowledge and experience in terms of suffered impacts and capacity to react.

Cities – with their cultural organisations and workers – can join their forces both in order to get their voice heard, but also to disseminate best practices. City networks have long played an important role for peer learning, where to exchange information and good and bad experiences. City-to-city cooperation enables the joint preparation of projects or procedures, so that even very small city departments can profit from the organizational, human resources and financial strength of bigger ones. It also allows cities to take common action to achieve better results to face globally shared challenges.

In this paper, we have shown that both Germany's and Italy's culture importantly fuels their economies and international trade. In particular, the



Pp 28-29: Figure 3. Variation in search interest in 'rural tourism' between 2020 and 2019 in Germany and Italy

Source: Own elaboration based on Google Trends data.

Note: The reference period goes from 1 March to 30 August.

diversified sample of cities that have entered the Monitor confirms that various cities on both sides excel on the C3 Index, with similar or complementary vocation areas. Nevertheless, today,

one major challenge arises: how can we keep alive that culture and creativity that cities have long fought for in the race for innovation, attractiveness and competitiveness, while making sure that both culture and creativity are up to the sustainable development goals? In other words, the question is not simply 'how to back to normal' but how we can "achieve an accelerated, sustainable and digital transformation that is both forward-looking and based on values" (p. 8)¹³.

German and Italian cities together can become a vehicle of this view, by speeding up a peer exchange of policy knowledge and cultural practices, based on socio-economic similarities (e.g. population size, employment, income) and complementary strengths

13 'Together for Europe's recovery Programme for Germany's Presidency of the Council of the European Union' <https://www.eu2020.de/blob/2362036/e0312c50f910931819ab67f-630d15b2f/07-02-pdf-programm-en-data.pdf>

(culture / creativity). A coordinated response at city level would offer a wider ground to experiment, analyse results, and refine European policy approaches to support CCS, possibly with the assistance of existing cross-border assets such as the German-Italian Centre for the European Dialogue, Villa Vigoni and under the leadership of the current German Presidency of the Council of the EU. Working together should lay the groundwork to ensure that CCS are better able to respond to future challenges but also much more aware and capable of connecting their work – across the EU – to the broader Agenda 2030 goals.

Note/Notizen und Anmerkungen



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