



2013-2016

Multiannual
Planning Guidelines

Compagnia di San Paolo

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Planning Guidelines
2013-2016

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There is room for greater efficiency and innovation on the local scale and this potential should be tapped to benefit the community as a whole.

Fostering development.

The Planning Guidelines that the Compagnia di San Paolo is called to draw up in early 2013 – as the economic crisis enters its fifth consecutive year – contains elements there are particularly delicate. No one can tell which scenario will characterize future developments of our projects. There is not much room for optimism: in Italy the crisis has highlighted alarming deficiencies that call for a rethinking of

the national system. The dire conditions of Italy's public finances – that reflects on the Sectors in which the Compagnia operates – is only one aspect of this pervasive dysfunctionality.

The situation in the geographical areas in which the Compagnia generally operates – the North-West of Italy – is not much more encouraging: even in these traditionally rich areas development has been lagging for quite some time. And yet it is the job of the Compagnia to identify the drivers for recovery. If pointing the way towards the

light at the end of the tunnel can reflect positively on the local territory, it is also true that the transformations afoot are taking place on a global scale and their impact and their effects cannot be significantly controlled or influenced by any efforts that the Foundation may put in place. Nevertheless, there is room for greater efficiency and innovation on the local scale and this potential should be tapped to benefit the community as a whole.

Flexibility and clarity.

If the current scenario calls for caution in setting objectives and expected outcomes, the Compagnia can still point the way towards common paths that will lead the local community and the relevant stakeholders forward. Flexibility is essential at a time like this, when the future holds many surprises – possibly not only for the worse.

It is one of the Compagnia's responsibilities to define common objectives and to make available the resources and the instruments required to achieve them.





The city of Turin:
the nerve center
of the activities of
Compagnia di San
Paolo.

In the face of acute uncertainty, concrete signs of stability and confidence can boost the capacity of the community to find a way out of the crisis.

An agent for development.

At the start of the new 2013-2016 mandate, the Compagnia confirms its intention to be an agent for development. This vocation, that is typical of European Foundations, has

characterized the Compagnia more markedly since its reorganization as a philanthropic Foundation in 1992, building on the traditional mission of the San Paolo institute for the promotion of economic and social development.

Today, 450 years since it was originally established, the Compagnia operates with the maturity acquired in more than 20 years of activity as a Foundation, as a reliable partner for organized civil society and institutions as well as a philanthropic entrepreneur with innovative ambitions. In addition to supporting actions that benefit the community, the Compagnia also engages in project proposals that are submitted to local players to be implemented jointly through coalitions and collaborative networks.

It is not the Compagnia's task to take decisions that rest ultimately with public institutions, but it can contribute actively to the public debate over development strategies and future prospects in specific sectors by meeting with civil society and the local institutions to promote the exchange of ideas.

Lastly the Compagnia is directly involved in the governance of several institutions for which it bears co-responsibility in defending the interests of the community.

Being an agent for development entails the adoption of a mid-term vision and an inclination to focus on structural factors.

the Compagnia can facilitate adjustments and changes that are necessary to weather the storm of this long crisis. Welfare-type



Over the past four years the economic crisis has tested the resilience of this approach, as the Compagnia was faced with social emergencies that required immediate attention.

Our approach has remained critical but constructive: at a time when the very concept of emergency needs to be redefined

measures and temporary, one-off solutions will not find their place on the Compagnia's agenda. In the midst of the crisis, the buzzword for development is change.



2013: an important anniversary for the Compagnia.

An idea of local development.

The kind of development championed by the Compagnia is not an abstract, general concept but a concrete idea resting on a number of key elements

that were identified in the past and that are made more relevant by the grim economic scenario. These include the belief that development is generated through

far-reaching policies which may translate into sector-specific measures, but which cannot be limited by a compartmentalized approach;

that personal responsibility and proactiveness and a willingness to accept innovation and change are the *sine qua non* to trigger a positive process both within institutions and organizations



and on a personal level; that the local dimension is no longer enough: it is essential to reach out across local boundaries and to gain competitiveness also on the international scene. In turn, competitiveness calls for solidarity across the board

to create opportunities and to ensure adequate assistance. Lastly, the ultimate challenge lies in rethinking and recreating employment as a cornerstone of our economies, as an instrument towards individual autonomy and responsibility. These principles are integrated by national priorities that also apply to the geographical areas of

reference of the Compagnia and that call for specific measures to address general and structural issues. These include creating opportunities for young people, for women and families with children in the face of depressing demographic trends and the *cul-de-sac* of social mobility. It is also essential to invest in intellectual assets and knowledge – research, education,

culture, creativity – as drivers for human and economic growth on a national scale. Women's empowerment calls for special attention:

it is the Compagnia's belief that women's contribution is one of the few invaluable assets still available in this country at all levels,

and as such it should be counted on to find a way out of the crisis in every sector of activity, especially those that require skills and a sense of responsibility.

As noted these are aspects that the Compagnia can contribute to emphasizing and promoting, but it is a fact that by itself the Foundation cannot make a significant difference. And yet, these are the challenges the Compagnia sets out to face. A detailed analysis of the instruments and the limitations to implement our strategies will be presented in the following sections of this document.



Quality of migrant integration: one of the priorities for the next four years.

**The local community:
proximity and networks.**

The concept of “community” as a reference to a specific territorial

dimension has always featured prominently throughout the Compagnia di San Paolo’s history, as sanctioned in its Charter which

provides greater freedom of action compared to other Foundations of banking origin.

Since its inception the Compagnia has exercised this latitude to engage on several fronts in its geographical areas of reference, concentrating its efforts on Italy's North-West and Turin. As a result the Compagnia has come to view the local dimension as part of a wider network on a national and international scale.

The Compagnia's initiatives abroad have also contributed to assisting local players in reaching out to Europe and the world, to establish new relations and to gain access to useful resources.

Clearly the Compagnia will continue to work in this direction. It is much easier to identify a geographical area on a map than to define its socio-economic boundaries based on relations on a variable scale: for this reason the activity of the Compagnia in the next four years will continue along the same lines.

Focus on the North-West.

In order to foster local development by taking advantage of opportunities that are available on a larger scale the Compagnia will encourage closer cooperation and integration between Turin and Genoa, between Piedmont and Liguria. Studies and research programs will focus on the conditions that would help to create systemic added value in Italy's North-West and to close the gap with other parts of Europe. In this sense

also through collaborations with other Foundations of banking origin along shared strategic guidelines. The themes that would lend themselves to a collaborative approach include *Smart cities* and technology applied to large urban settlements (possibly through EU funding); science and technology; cultural infrastructures and shared management solutions for cultural institutions.



the Compagnia will promote cooperation to bring together government, economic and academic stakeholders

Collaborative strategies have become essential in the current economic scenario and in spite of the difficulties that the creation of such synergies entail - and



Cooperation and integration between Turin and Genoa for new development opportunities.

that should take into account the decisions of the relevant policy-makers - the Compagnia will support this approach in the next four years.

Any other initiative, including those concerning the Naples area, will be carefully evaluated and geared towards the achievement of very clear objectives in specific

sectors. Similarly the Compagnia will continue to collaborate with the Foundation for the South to implement actions in the South of Italy.

Planning Guidelines 2013-2016: contents.

The current internal organization of the Compagnia di San Paolo coincides, to a large extent, with the Sectors identified by its Charter and by Law 488/01 as priority areas of action. Since significant innovations have been introduced in terms of internal organization and planning, one of the tasks to be performed over the next four years may consist in providing greater uniformity between the language used in the Foundation's Charter, the language of the law and the one used in the everyday activity of the Compagnia. The Sectors that make up the Compagnia's structure - that correspond to the sections of this document - include *Research and Advanced Education* (further divided into *Scientific and Technological Research, and Economic, Legal, Social and Historical-polytologic Sciences*), *Health, Art and the Artistic Heritage,*

The Sectors that make up the Compagnia's structure include *Research and Advanced Education, Health, Art and the Artistic Heritage, Cultural Activities, and Social Policy.*

Cultural Activities, and Social policy. This structure has now consolidated into set practices and expressions and, notwithstanding occasional overlaps and shortcomings, it will be maintained in the future. However, this sector-based

structure may be integrated by a reorganisation of activities based on subject matters, thus overcoming the concept of "Sector" altogether. This will happen over the next four years through a number of dedicated programs that will be managed by



This does not entail rigid boundaries or a clear-cut separation between the Sectors: flexibility is essential to deal with complex issues.

joint working groups from different Sectors of the Compagnia according to set deadlines and procedures. In some cases specific budgets will be made available and the activities will be coordinated by individual Sectors. Three cases in point are already in the offing: *Torino e le*



The Museum of
the *Resistenza*:
promoting the
cultural heritage.

Alpi, a program on the connections
between mountain and urban areas;
Essere bambini for the promotion of
better living conditions, socialization

and education of children; *il Polo
torinese della Memoria del '900*, a vast
cultural project for the conservation
of documentary sources and the

communication of the social,
economic, and political history of Turin
and Piedmont in the last century.

Research and Advanced Education.

In the next four years the Compagnia will support scientific research in its many facets, while encouraging the pooling of resources to ensure the effectiveness of each action. The challenges in this Sector are numerous and include: supporting cross-sector projects and working groups of international relevance as well as research communities and institutions in the geographical areas of reference; more direct focus on specific sectors of activity while keeping the pulse of relevant novelties; promoting contact between fundamental and applied, translational and application-driven research; connecting local programs to the European scientific agenda; coordinating support to academic institutions,

the Compagnia's Operating Bodies and other non-University entities. Additionally other objectives will be pursued, including the promotion

These objectives are best pursued on a European scale: meeting European standards will facilitate the identification of local strengths and weaknesses, open new perspectives, and attract additional funding.



of new management models for research institutions, the creation of professional opportunities for young researchers,

To this end, the expression "Scientific Research" comprises any investigative process carried out according to international scientific standards, regardless of

**the increase of didactic
quality especially in Advanced
Education.**



**Scientific and
Technological
Research.**

**Economic, Legal,
Social, International,
Historical and
Polylogic Sciences.**

The two operating
Units of the *Scientific
Research* Sector.

the actual sector of activity. Within the Compagnia's organization there are two Sectors devoted specifically to research: one operates in

Scientific and Technological Research and the other in *Economic, Legal, Social, International and Historical-polylogic Sciences*.

The latter is also in charge of programs relating to international relations and internationalisation.

Scientific and Technological Research.

In 2013-16 support to Scientific Research will be one of the Compagnia's priorities,

particularly as regards the connection between basic and applied research and projects

in which that connection is more likely to foster economic and social development. More specifically the Compagnia will focus on local sectors of research that are relevant to the European agenda, also in terms of resources that are made available by the EU institutions.

Biomedical and Natural Sciences.

The scientific areas identified as key for this four-year plan include *nanotechnologies*, *advanced materials* and *biotechnologies* on the one hand; *biomedicine* and its many applications on the other. In different sectors of research

the Compagnia aims to promote, through its competent Operating Bodies and through Agreements

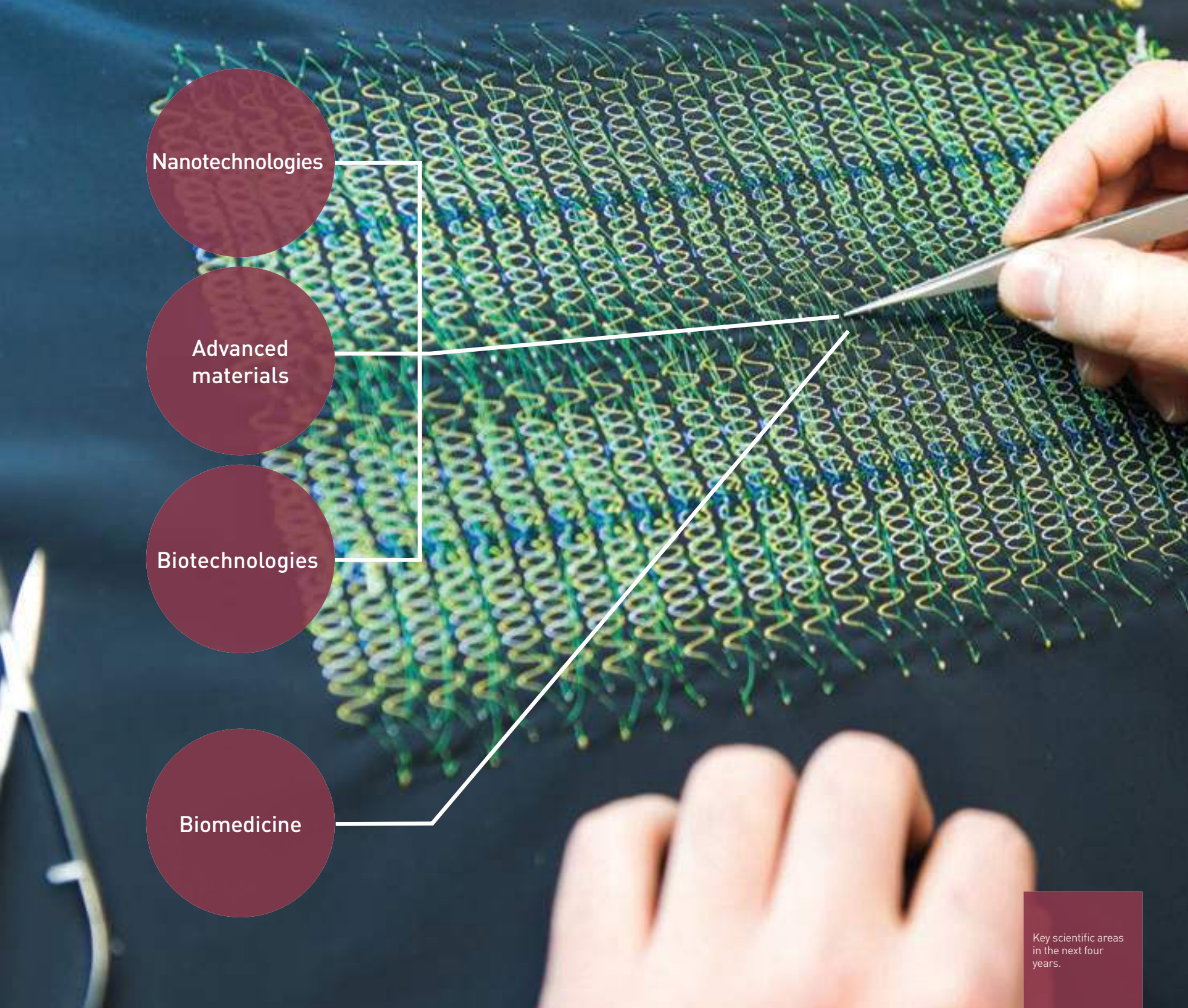
Agri-food.

The agri-food sector, which is relatively new for the Compagnia,



with Universities, the creation of interdisciplinary and inter-institutional platforms. This approach is not only essential to ensure adequate funding, but it also facilitates cooperation between researchers and provides new opportunities for synergies between research and the business world.

has gained greater relevance for the local community in recent years and as such it appears particularly promising in terms of developments, opening up new and significant opportunities for local production. Issues like food security, production quality, and sustainable environmental impact require adequate technologies, integrated and inter-disciplinary approaches, the convergence of



Nanotechnologies

Advanced
materials

Biotechnologies

Biomedicine

Key scientific areas
in the next four
years.

production and research - the latter holding a remarkable potential on a larger scale, since these are

global issues. The 2015 Expo in Milan will certainly generate more interest on agri-food activities and

competences in which Piedmont is a leader.

Energy and Smart Technologies.

Priority will be given to projects that integrate energy, ICT and transports, where ICT will be key to identifying innovative solutions to solve cross-cutting problems.

environment, which is open to local operators to facilitate collaboration between research, advanced education and the business world.

Smart technologies and their applications are also closely connected to the theme of energy. The *Smart city* project should promote economic growth, create opportunities, improve the lifestyle

The aim is creating a local pool of competences that not only provide applications to benefit the local community, but that are competitive also at EU level and, as such, that are eligible for EU funds.



In this sense the Compagnia will continue to support the project, started in 2012, for the creation of Turin's Energy Center for advanced research on energy saving and the quality of energy and the

of local communities and the quality of services, encourage social participation, ensure mobility and environmental quality.

In this context two Operating Bodies of the Compagnia - Istituto Superiore Mario Boella (ISMB) and SiTI - are called to be major players on ICT and territorial systems respectively.

Popularization of science.

Improving scientific literacy among the general population, especially young people; extending public debate to include scientific matters; enhancing the role of science in society: these are the objectives of the Compagnia with regard to the popularization of science. In order to maximise efficiency and effectiveness the Compagnia will

**promote greater integration
in science popularization
across the Turin urban area**

together with adequate evaluation procedures. Innovative solutions to promote scientific knowledge online



Activities at "Xké
(Why) - The Curiosity
Lab".

will also be considered (for example, similar to TED conferences).

Xké? (Why?) - The Curiosity Lab - the

Center for the Promotion of Science
- will continue to operate towards
integrating formal and informal

education for compulsory school
students.

Economic, Legal, Social, International, Historical and Polylogic Sciences.

In the vast field of Social and Economic Sciences the Compagnia is engaged in the creation of a regional research system in line with European standards, that would provide opportunities for integration, shared objectives and economies of scale to academic institutions and independent centers, like the Compagnia's Operating Bodies in the Sector of Research.

In this Sector the Compagnia's action could be significant enough to make a difference,

but the instruments to be used are as crucial as the themes to be selected. In the next four years the Compagnia will therefore continue to support innovation across the overall system.

Aggregation and research hubs.

In the past four years, as stated in the previous Planning Guidelines, the Compagnia worked towards



establishing three hubs that bring together relevant players and projects in Turin that concern Global Studies, European Studies, and Legal Studies. A fourth emerging area of relevance is Urban and Regional Policy. The next four years will serve to consolidate those hubs not with a view to maintaining the *status quo*, but to assess their

strengths and weaknesses in order to understand which area still holds potential for growth and which, instead, has reached its natural conclusion. Today the Global and European Studies centers bring together qualified local players and have managed to move their first steps on the international scene, also thanks to the access to international

networks gained through the Compagnia. The players involved, engaged in *Advanced Education* and *Scientific Research*, aspire to be part of international policy-making networks that require a European dimension. The challenges may appear daunting, particularly from a relatively peripheral site as Turin: in this sense the Compagnia will contribute its experience



Global
Studies

European
Studies

Legal
Studies

The three Areas
of research in
*Social and Economic
Sciences.*

on the international scene, thus facilitating access for research centers located in the geographical area of reference - especially Turin

and Genoa - to major initiatives along the North-South (esp. the Mediterranean) and East-West axes. The evolution of these

science hubs will be evaluated also in light of the changes in the cultural and structural organization of Collegio Carlo Alberto.

The Legal Studies hub has consolidated into a center for advanced education and research on comparative and EU law, and on the relations between the law, economics, and institutions at global level. In the next four years closer

connected to the City of Turin that currently do not appear viable and that the Compagnia will contribute to redesigning. The second is orienting the activity of research centers on applied research, policy evaluation, strategic planning, project management towards the creation of a smart environment in Turin and in Piedmont that is appealing to



integration with the University of Turin will aim to create study programs that will train professional figures who will be more at ease in an international context. As regards the hub on urban and regional policy two objectives have been set that the Compagnia can contribute to achieving. One is the clear definition of the relations between the various players involved in this theme - including entities

start-ups in business and research. Local appeal and dynamism also depend on the quality of debate, the availability of organized and accessible information, and proactive environments oriented towards local development.

As was the case in recent years, the Compagnia will bring to bear its capacity - that is still quite rare in Italy - to be an interlocutor and a partner for major European and American Foundations and as such it will search for, analyse, and possibly generate best practices on a vast scale.

International Organizations.

In the next four years the Compagnia will continue to support the UN Organizations that are headquartered in Turin. Interestingly, the educational mission of UNSSC, ILO, UNICRI - and to some extent ETF - further consolidates Turin's vocation in this sector. With a view to maintaining its support to the agencies based at the UN campus in Turin

in the future the Compagnia will work to bring additional subjects to this site.

In this sense it would be essential for the national and the local systems to maximise their appeal



UN Organizations in Turin: reaching out to attract international players.
Photo by Davide Bellucca/UNSSC

in terms of costs and and to show a willingness to take on multi-annual commitments. It should be noted that

support to International Organizations and their expansion in the Turin area would also call for greater interaction

with local players: to this end specific instruments should be set up.

Cross-sector initiatives: Agreements and Operating Bodies.

Agreements with Universities.

Agreements with Universities have brought the Compagnia's grant-making to a new level, leaving behind the somewhat limiting practice of applications on the part of Universities for specific projects that prevented long-term planning and an organized pursuit of priorities. Today, in the face of decreasing public funding, grants could be channeled into assisting Universities to achieve excellence in specialized fields. The main objectives to be pursued by the Compagnia in the framework of the Agreements in the next four years are:

- rethinking Advanced Education and training in Research (PhD programs, Master programs) to increase efficiency and effectiveness (e.g., through inter-University partnerships in other geographical areas of reference for the Compagnia, like Genoa) so as to better reflect the needs of the production system. Important insights will come from a review of PhD programs based on occupational data 5-10 years after graduation;

- further consolidating the capacity to participate in calls for proposals for research co-funding, as was the case with the University of Turin and Eastern Piedmont. The main objective should remain increasing the competitiveness of research teams when competing for public (especially EU) funds, also by selecting themes that reflect the social challenges identified as key by the EU;
- evaluating a more structured collaboration with the University of Genoa and the local research community;
- dynamic review of the criteria contained in call notices to





Portico and inner courtyard of the 18th c. seat of the Turin University.

assign funding for research in the framework of the Agreements, by evaluating *ex post* the results of past calls. The review will

focus on relevant themes and it will encourage the participation of younger project leaders, particularly women. The criteria

should also include the minimum size of a project depending on the area of activity;

- internationalization of Universities through mobility programs for students and faculty members, to and from other institutions and Universities of excellence; similar

- effective IT and management solutions;
- creating library systems that are functional, integrated, and connected to relevant public and private databases;
- coordinating the activities under the Agreements with those carried



programs may also extend to the administrative staff - particularly executive and managerial staff - to gain experience in international administrative University standards; special emphasis will continue to be placed on improving internal organization - as was the case with the first edition of the Agreements - to support the adoption of more

out by the Operating Bodies (in which the Turin University and Polytechnic are directly involved). This coordination aims to find solutions to outstanding issues - like remuneration for researchers working at Universities - but, most significantly, it aims to develop shared strategies to attract funds for research and scholars from abroad, also through the establishment of hosting institutions.

Operating Bodies in the Sector of Research.

As this four-year term begins, the priorities of the Operating Bodies established by the Compagnia in partnership with the Turin University and Polytechnic in the field of Research around 15 years ago remain largely unchanged. The Operating Bodies include Istituto Superiore Mario Boella (ICT and applications thereof), SiTI (complex territorial systems), Collegio Carlo Alberto Foundation (Economics and Social Sciences), Human Genetics Foundation (Human Genetics and Life Sciences). Regardless of their area of activity, their size and legal form, the Operating Bodies are required to:

- operate in their specific area of action according to European standards, generating and refreshing



competences and skills, with an eye towards younger researchers;
- develop activities that translate into innovation, also on a local scale;

- contribute to increasing the capacity of the local system to attract additional funds for research;
encourage, promote and support

innovation with public and private entities and partners across the local area;

- contribute to the internationalization of the local research system by becoming part of international mobility networks for researchers also as hosting institutions;
- implement the actions above in a cooperative manner, together with other local players, without forsaking each Body's autonomy.

The Operating Bodies are intended to implement the general objectives that are set by the Compagnia in collaboration with the partners who participate in their governance.

For example, they hold the potential to increase the appeal of the local research community by acting as hosting institutions, institutes of advanced studies, schools of excellence. To this end, their potential can be maximised through an intelligent partnership with Universities by building of

the capacity to reconcile research, economic and social needs. In this sense it should be noted that since 2012 the objectives and the resources of the Operating Bodies above - like those of the more ancient Ufficio Pio, the Foundation for School, and Fondazione 1563 - are governed by an objective-driven approach that entails adherence to the Compagnia's own objectives. However, in the next four years some changes may be introduced to the activity of the Operating Bodies and their mission may also be redefined. In the four years to come the Compagnia will carefully evaluate partnerships, objectives, strategies and future prospects concerning its Operating Bodies, particularly as regards their governance, funding, organization, and relations with the local research community - particularly academic institutions.



In the local research community the Operating Bodies function as partners and suppliers of resources in a system that should become more closely integrated.

each Operating Body's strengths - including organizational flexibility, an inter-disciplinary approach and

All the actions undertaken by the Compagnia will be coordinated with the Regional Department for Health Protection and Healthcare.

Health.

In the next four years the Compagnia's action in the Sector of Health and Healthcare will be characterized by a highly selective approach and special emphasis will be placed on scientific activities, particularly translational research. A careful monitoring of evolving trends may also lead to a revision of the areas of interest, some of which may be abandoned in case they are deemed no longer viable. The scope of the issues at hand is such that the Compagnia cannot afford a generalist approach. Eligible projects will be required to focus on a specific geographical area - particularly the hospital trusts in Turin - and on selected themes - innovative management and organizational solutions related to the introduction of innovative technologies or equipment. Priority

will be given to projects targeting early childhood. All the actions undertaken by the Compagnia - both in terms of planning and funding - will be coordinated with the Regional Department for Health Protection and Healthcare.

Acquisition of equipment for research, diagnosis and care.

The structural modernization of hospital trusts is essential to increase

A centralized technology assessment is crucial for the adoption and the implementation of complex measures

and the selection and collocation of technical equipment should be integrated to optimize utilization and maintenance. Eligible applications for grants concerning technological innovation will therefore be expected to contain a clear description of correct



the overall quality of healthcare and it is key to improving the relationship with citizens/patients.

use, accessibility of technology and estimated needs based on existing facilities and staff.



**Acquisition of equipment for
research, diagnosis and care.**

**New management and
organizational solutions.**

Targeted support
and selected projects
in the *Health Sector*.

New management and organizational solutions.

The Compagnia will encourage projects on new decisional and organizational solutions for the regional Health System. Local Health Authorities need to acquire more advanced planning skills and the

capacity to evaluate performance and results both economically and in terms of service quality. In this sense ICT is crucial to improve accessibility to services (waiting time, management and planning instruments, adequate solutions). The system requires a major

rationalization effort in order to ensure interoperability, efficiency and control. The Compagnia will not engage in projects of a general scope, but may evaluate feasibility studies and experimental projects also through its Operating Bodies.

The Compagnia believes that the Cultural Heritage can be an essential driver to enhance the economic performance of Italy and the North-West at a time of increasing international competition.

Art and Culture.

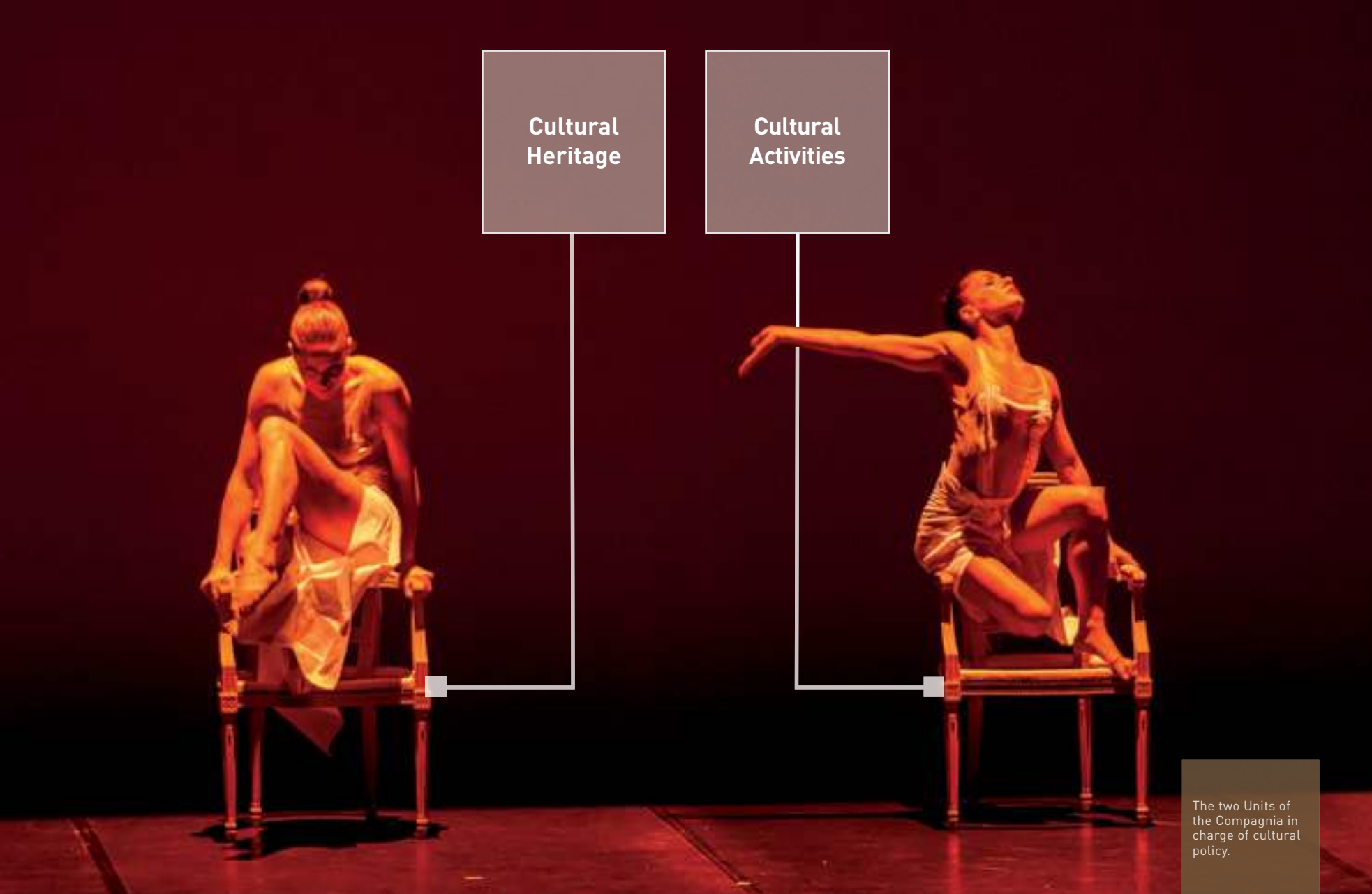


In the period 2013-16 the Compagnia will continue to operate for the promotion of the Historical and Artistic Heritage and to support Cultural Activities along the same lines that have been identified in the past, ensuring at least continuity of funding. The Compagnia believes that, in addition to its intrinsic value as a growth factor for individuals and the community, the Cultural Heritage - either handed down from the past or generated by contemporary creativity - can be an essential driver to enhance the economic performance of Italy and the North-West at a time of increasing

international competition. This will not translate into indiscriminate support, that will depend on the quality of the cultural projects and initiatives to be organised. As in the past, the Compagnia will adopt a selective approach according to a structural procedure that is essential in the current economic scenario. In this sense the Compagnia will not engage in activities that may be deserving but that have a limited impact - in scope or time, like one-off conferences, events or exhibitions - that are devoid of innovative features or that fall outside of the Compagnia's programs in this field.

Innovation in cultural management.

In the current economic scenario the cultural management solutions used in the past appear inadequate to meet emerging needs. Transparency, efficiency, sustainability, self-funding, diversification of funding sources, the role of private entities - also of a non-for-profit nature - have become priorities that require a comprehensive rethinking of the existing cultural systems. In this sense the Compagnia is open to testing experimental solutions and processes for institutional and organizational reform, not only within individual institutions but within the system as a whole. Large cultural players in the Turin area - in whose



Cultural
Heritage

Cultural
Activities

The two Units of
the Compagnia in
charge of cultural
policy.

governance the Compagnia is directly engaged - will also need to embrace strategic planning to take stock of existing criticalities and to overcome a state of permanent emergency in favor of a more long-term approach. In general, the Compagnia will support actions that aim to adopt a systemic approach and that provide concrete solutions.

**Striking a new balance
between the center and the
periphery is also a priority to
mobilize latent energies**

and to extend the pool of potential beneficiaries. Similarly, as regards the restructuring of the Sector, young cultural entrepreneurship, start-ups and their sustainability will continue to be a priority, as will be the

creation of cultural production and/or distribution networks.

The Compagnia di San Paolo is engaged in this Sector through two operating Units that will collaborate more closely in the next four years: the Cultural Heritage and Cultural Activities Units.

Art and Culture: Historical and Artistic Heritage.

The promotion of the Historical and Artistic Heritage across the regional territory can become a powerful tourist attraction both nationally and internationally and open up employment opportunities. In the next four years activities will center on the 16th–18th c. heritage that characterizes the landscape of Turin, Piedmont and Liguria.

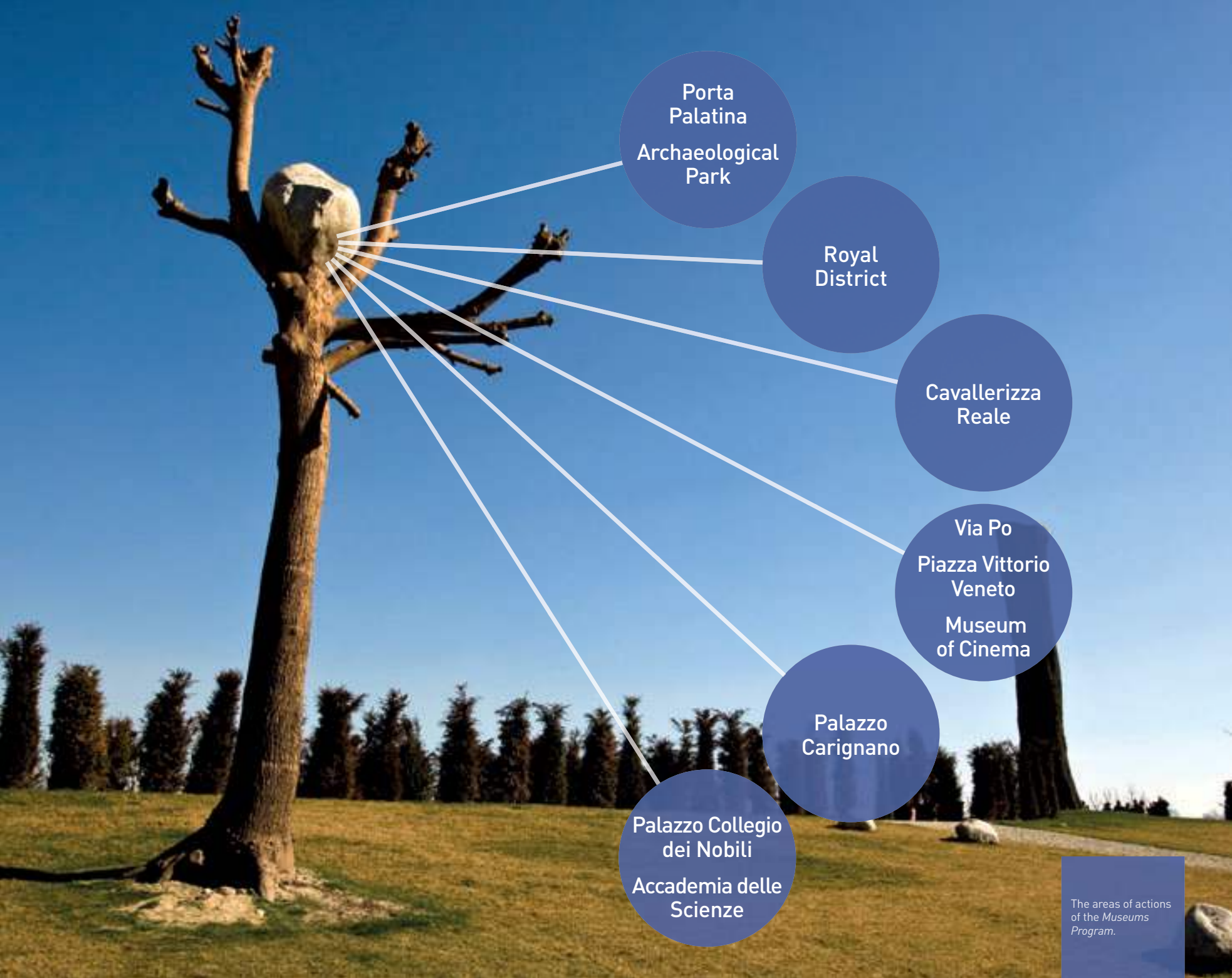
Baroque art and culture and the Museums Program.

The Compagnia will focus its attention on the promotion of the Historical and Artistic Heritage of large urban centers, particularly Turin and Genoa. In Turin, the *Museums Program* that started in 2000 with extensive funding will reach its conclusion in 2013-16.

It is a complex program to restore the palaces that were symbols of power and culture under the Savoy rule,

that aims to give the city center a new face. Priorities include the “Royal District” and Palazzo dei Nobili, which are closely related to the transfer of the Galleria Sabauda collections in the Manica Lunga wing of the Royal Palace so as to allow the restoration of the Egyptian Museum. The Compagnia, in partnership with the Soprintendenze and the City of Turin, aims to ensure that the new seat of Galleria Sabauda is completed by 2014 and the reorganization of the Egyptian Museum - that will take up the State-owned portion of Palazzo dei Nobili - is completed by 2016.

In Turin’s Baroque center the Compagnia will promote the new Program of studies on Baroque, managed by Fondazione 1563, one of the Compagnia’s Operating Bodies that is also in charge of the Foundation’s Historical Archives. As regards additional restoration projects eligible for grants, the Foundation will focus in particular on Baroque palaces. In line with this strategy, the Compagnia will devote its attention to the Royal Residences, particularly the Venaria Reale Estate. Leaving the task of creating efficient connections between the Royal Residences to promote tourism to the competent decision-makers, the Compagnia will focus on individual and more targeted projects. Smaller investments will be made for additional projects across the regional area in Piedmont and Liguria, particularly in the city of Genoa.



Porta
Palatina
Archaeological
Park

Royal
District

Cavallerizza
Reale

Via Po
Piazza Vittorio
Veneto
Museum
of Cinema

Palazzo
Carignano

Palazzo Collegio
dei Nobili
Accademia delle
Scienze

The areas of actions
of the *Museums
Program*.

Projects for the local Historical and Artistic Heritage.

As regards the Historical and Natural Heritage of Piedmont, following the projects carried out

in the Susa and Lanzo Valleys the Compagnia will consider other regional areas, like Canavese. Thanks to those “area programs” the Compagnia aims to increase

awareness of the local natural, architectural and artistic heritage also within the local communities while promoting tourism on a larger scale.

In order to succeed this effort must be accompanied by a close collaboration with local public authorities and associations and in general with the local population: this would ensure not only the success of the actions to be undertaken (restoration projects, cultural initiatives), but their duration and promotion over time. Schools may also play an active role, through the participation of the Foundation for School. The regional territory - smaller towns, agricultural districts, mountain areas - may be the ideal ground to test new solutions that bring together cultural restoration and local development

In this sense symbolically relevant projects may be supported through a transparent selection process,

to promote experimental collaborations between public, voluntary and market operators on projects that aim to attract resources and investments for the benefit of the community and that promote cultural entrepreneurship in its widest sense.

Access to museums and the Historical and Artistic Heritage.

Public recognition of the Artistic Heritage as a strategic asset that defines identities and promotes dialogue remains one of the Compagnia's direct objectives. Therefore the Foundation will support actions that promote access to the Artistic Heritage, particularly concerning projects that have benefitted from the Compagnia's support in the past. In this sense special emphasis will be placed on museums as educational and communication drivers through

exchanges with training agencies.

The Foundation for School, an Operating Body of the Compagnia, will also be involved by virtue of its experience in the field of education. Voluntary and non-profit initiatives to ensure access to the Artistic Heritage will also be supported, as well as projects that aim to attract audience groups that are less inclined or less prepared to appreciate the Cultural Heritage.



Contemporary art and “creative professions”.

In the next four years the Compagnia will work on the theme of “Creative professions” which has proved rather delicate - in terms of



Exhibition room
in the Museum of
Risorgimento.

avoiding slipping into the pitfalls of fleeting trends or unrealistic expectations - but that has shown so far a remarkable potential. The Compagnia will continue to support

avant-garde art experiences, mainly by encouraging creativity through training and the exchange of experiences. A specific line of work will consist in promoting housing-

related projects (also with reference to social housing), urban quality and expressing creativity through new art forms that benefit the social community.

Art and Culture: Cultural Activities.

Culture as a value, culture as a factor. Defining an effective and concrete strategy for Cultural Activities is one of the Compagnia's objectives for the period 2013-16, continuing with methodologies and experiences that have been tested in the past while engaging in new challenges.

As in the past, the Compagnia will operate through a number of instruments. These include, in particular, the allocation of funds to cultural institutions based in the areas of reference in which the Compagnia is involved either directly or through Fondazione 1563. In order to be effective this type of initiatives should be accompanied by parallel actions carried out by the competent public institutions. The Compagnia cannot make up for inefficiencies or support heavily indebted institutions. Rationalization can be promoted

through convergence, aggregation and sharing of services: this is the only viable option in the current economic scenario to reorganize the system while safeguarding the quality of Cultural Activities and opening new opportunities for innovation.

Secondly, in recent years the Compagnia has relied more markedly on the "call for proposals" - a selective instrument that will be further refined and expanded. Calls and similar competitive instruments will target specific sectors:

**the promotion of creativity,
books and reading, the
performing arts and live
performances.**

This approach aims to encourage aggregation to support even smaller initiatives that are organized across the territory and that would otherwise not be feasible. It also contributes to increasing quality and promoting collaboration.

Thirdly, the Compagnia supports the institutions in charge of the conservation and the promotion of the Historical Memory and the Cultural Heritage, particularly concerning books and archives. The Compagnia will continue to support these institutions through a selective approach and to encourage mergers or at least synergies and integration to better allow them to respond to emerging cultural needs. In this sense the Compagnia will support the "Polo del Novecento" (Center for the 20th century) program on the memory of the 20th century and the preservation of documentation on the social, economic and political history of Turin and Piedmont.

New venues and new forms of culture: libraries and the digital media.

In Italy and abroad encouraging signs seem to indicate that libraries - traditional venues of culture - are



The art and creativity of street performers.

making a comeback. The Compagnia's attention towards the conservation and the accessibility of archival and book collections will translate into support to projects that promote libraries as places for cultural socializing and creativity. Digital technology is in general an important component in these projects and it is only one example of the pervasive

presence of digital tools, language and environments in contemporary culture. The performing arts, cinema and visual arts intersect with digital technology and represent one of the most innovative aspects of contemporary culture as well as a promising sector for young people. Creative-technological incubators are still much in need, as are occasions

for qualified training, showcasing and meeting, preferably on an international level, to bring together skills, knowledge and sensitivities and to reach out to a new public. The Compagnia will be engaged in these activities with an eye towards high quality and project objectives.

Promoting non-discrimination can contribute to increasing employment opportunities and social protection, improving quality of life as well as economic and social conditions.

Social Policy.



citizenship and social restitution mechanisms. Another important theme will be the promotion of equal opportunities, which

of life and economic and social conditions.

This requires the Compagnia and its Operating Bodies to be open to dialogue and discussion with the beneficiaries, with project partners, relevant institutions and communities. This approach will preserve the scope of action and the lead role in specific social projects of private and public operators alike, favoring exchange and cooperation without forsaking responsibility. This will allow the Compagnia not only to build on the resources available but also to

In the next four years the Compagnia's first priority in the sector of *Social Policy* will be the centrality of the individual. The Foundation's actions will be guided not by welfarism but by pursuing empowerment, encouraging individuals to take on personal responsibilities, to rediscover and to exercise personal autonomy. In parallel these efforts also serve to help people feel that they belong to a community, with the ultimate goal of encouraging active

entails the removal of obstacles to economic, political and social participation for reasons of gender, religion and personal beliefs, ethnic origin, disability, age and sexual orientation. Through non-discrimination - which translates, for example, into granting access to common spaces, an independent life or the recognition of professional skills for women - employment and social protection can be enhanced, with an improvement of the quality

promote the growth and development of the beneficiaries and to contribute to popularizing *Social Policy* issues.

In this way the Compagnia will maximize its support beyond the mere financial level.

The Compagnia supports a rethinking of the welfare system for a reorganization of direct and indirect public funding.

There are a number of concerns



Non-discrimination
as a driver for
growth and social
progress.

today - identifying emerging social risks and target groups, extending and evaluating social services, covering rising costs with shrinking funds - that call for the restructuring of the overall system. Additionally, a bottom-up approach to social protection - known

as "Second welfare" - is emerging. It consists of neomutualism, low-cost services, corporate and contractual neowelfare, and a new generation of insurance products. These practices, that make up the "Second welfare", appear promising in terms

of self-organization of society and their capacity to mobilize resources and responsibilities: fields in which the Compagnia has always been active and in which it will continue to operate both to as a cultural promoter and as a source of funding.

Children first.

Priority themes also include early childhood (0-6 years) and new generations. The widely popular notion that many factors in human development - including replicating conditions of deprivation - are determined in the early phases of existence should lead to the development of specific policies also in areas that are economically more fortunate, like the North-West of Italy. Special attention will be given to families of children from socially and/or pathologically vulnerable households in order to support them in the care and socialization of children, in collaboration with educational, social and health services. Targeting early childhood means increasing opportunities for young women's access to the job market and professional growth - the social group that is more at risk of paying the highest price when faced with rising house chores and a lack of employment opportunities, particularly at a time of economic crisis.

Pathways towards autonomy and home-based care.

The Compagnia will continue to focus on projects that aim to restore personal autonomy instead of passive solidarity: this line of action is dictated also by the need to attenuate the effects of the crisis on the so-called "grey" groups of society -



people who are socially vulnerable - and to prevent the risk of falling into poverty by preserving the potential for personal recovery and making available instruments for a rebound.

The strategy will be implemented with a special eye towards the persisting crisis and the deterioration of the social context.

Vulnerability with reference to housing will be addressed through the Housing Program and the Real

Estate Investment Fund (*Fondo Abitare Sostenibile Piemonte*)

both in terms of employment and employability-entry in the job market, temporary work, retraining.

Also relevant in this context is home-based care as a way to preserve the quality of life of persons who are

facing difficulties at home, building on the relationships and personal references that protect their identity and sense of belonging.

Social innovation.

This label describes today the capacity of groups, movements or individuals to face new or persisting social problems and to trigger change in behavior through new ideas, practices, policies, relations and resources.



The housing issue is addressed through the Housing Program and the Real Estate Investment Fund.



The international scene provides evidence of the fact that they often lead to the creation of for-profit and non-profit social enterprises. In this sense the attention of the Compagnia will be focused on creating new professional skills and job openings for young people and to encourage social start-ups to be managed through territorial incubators. Training will be provided to educate on saving and responsible consumption, as well as to test “non-monetary” consumption and investment within selected social networks.

The enhancement of public spaces will also remain a priority, particularly with reference to ongoing projects in Turin. This theme is multifaceted and it is connected to both new housing

solutions and youth creativity, thus leaving ample room for integrated planning.

Cooperation for development and international networks.

Actions in this sector will be moving towards greater collaboration with other Foundations in order to achieve an adequate critical mass. Thanks to its experience

the Compagnia will participate actively in the ongoing challenge of rethinking the overall approach to these actions.

In addition to cooperation for development projects, the international dimension will also see the active participation of existing networks - as a source of best practices and larger-scale references and as a vehicle to ensuring greater visibility for the Compagnia's actions in the social sector.

Philanthropy and donations.

Local philanthropy (Community Foundations) and new fundraising initiatives have become all the more urgent and more challenging in the current economic scenario. The Compagnia will continue to assist existing Community Foundations in the North-West of Italy and to provide cultural and operational guidance to local partnerships established to create new such initiatives. In order to be supported by the Compagnia in the early days and possibly in their start-up phase, projects will need to be characterized by concreteness and sustainability. Research/project proposals to encourage donations may also be considered, especially if they include the practical testing of new philanthropy models.



Sharing social development goals with other Foundations and international networks.

Starting in 2013 the Compagnia di San Paolo and Ufficio Pio have been working on a fundraising program to support the activities of the latter, in order to gather

additional resources both through individual donations of any size and larger bequests. The program builds on the Community Foundation principles

that have traditionally characterized the Compagnia and Ufficio Pio since their inception.

Voluntary Work and public institutions.

The Compagnia will continue to support the activity of Third Sector / Voluntary Work entities that are essential to ensure social protection by

Actions will be coordinated with Ufficio Pio of the Compagnia di San Paolo, based on a clear organization of roles and responsibilities: Ufficio Pio will provide direct support to people and households, also in the form of projects, while grant-making

Evaluating network projects for social progress.

In 2013-16 ongoing social innovation projects will be evaluated: these are projects in which the Compagnia is involved in funding, in promotion and coordination activities and in facilitating connections between relevant subjects, to face complex themes in innovative and integrated ways. Mental disease, prisons and re-entry in society, youth empowerment are some of the fields in which the Compagnia has engaged in Turin. For some projects (e.g., under the Housing Program) it would advisable to extend their scope of action, while others will require the definition of exit strategies.

exploiting their full potential and favoring the creation of networks that bring together operators in the same field to encourage synergies and learning processes.



The promotion of networks and partnerships between organizations can be extremely useful if used with the appropriate instruments to achieve effectiveness and efficiencies that would otherwise remain unattainable.

and the coordination of network and social innovation projects will be performed by the Social Policy Sector. The need to further refine the partnership with public institutions will require efforts to define new terms of collaboration. The transformation of the socio-economic conditions and most significantly



the progressive shrinking of public funding require a new role for Public Administrations in social

matters that favors joint projects and co-management of social services together with civil society,

voluntary work organizations and market operators to ensure quality, sustainability and service efficiency.

This evolution also reflects on the role of the Compagnia itself in the local welfare system and with public institutions. The risk for the Compagnia, as for other Foundations of banking origin, is being called in to make up for cuts in public funding as an inevitable consequence of the economic crisis.

particularly - but not limited to - the Social Policy Sector. One of the priorities will be addressing the problems that characterize primary and secondary school in Italy, as highlighted in the PISA data. The definition of policies to overcome



Education, the social sphere and the Foundation for School.

The social effects of schooling on an individual's life are well-known: it is in school that an individual lays the groundwork for the future.

The Foundation for School will draw up a program focused on early childhood and adolescence that can be integrated with other programs run by Compagnia,

these shortcomings will rely on the expertise of entities supported by the Compagnia in early childhood education in Turin and on the competence of the Foundation for School in relevant fields, like scientific and civic education. The integration in school of minors from immigrant households and the management of inter-ethnic

classes pose other questions that, regardless of media sensationalism, have remained unanswered in Italy. In order to find a solution special attention should be given to developing the professional skills of the teaching staff, that need to be integrated with cultural anthropology and ethnopsychology. Moreover there is the need to support schools facing these processes not through emergency measures but by making available instruments that must become part of the background of every school master and teacher.

Funds for Voluntary Work and the Foundation for the South.

The decrease in the resources of Foundations of banking origin and the assessment of the actual needs of Voluntary Work associations point towards possible changes to the funding system envisaged by the law and several agreements between ACRI (the Association of Italian Foundations of Banking Origin and Savings Banks) and the Third Sector/ Voluntary Work representatives. Consequently measures should be taken by ACRI to promote a reorganization to maximize resources and to bring back the Service Centres



Education and schooling feature prominently among the Compagnia's priorities.

for Voluntary Work to their original function. An accurate evaluation of their functioning, their efficiency/ effectiveness and their impact on local Voluntary Work can provide

important insights into a future reform. The same applies to the Foundation for the South that benefits from the Compagnia's support for actions to be carried out in the

South of Italy. Collaboration between the Compagnia's Sectors and the Foundation will be pursued in the management of initiatives of common interest and competence.

The approach to governance: instruments and organization.

Grant allocation, procedures, Operating Bodies, mission-related investments.

The activity of any grant-making Foundation rests on a number of instruments that are defined over time. The reason for this multiplicity of instruments lies in the awareness that different objectives can be best pursued through different means. In line of principle the Compagnia di San Paolo can be regarded as a grant-making Foundation, but grants are not the only nor the main instruments through which the Compagnia di San Paolo operates. Support to projects that are designed and managed by third parties - public institutions and private non-profit operators - remains central. However,

in the next four years efforts will be put in place to adopt more structured procedures for funds allocation:

calls, competitions and guidelines will become prerequisites to access funding in specific sectors or areas. This approach entails a number of advantages: first, by allowing selection procedures to reflect the actual merit of each application; secondly, in addition to more effective

and the terms of the “agreement” with the participants, thus laying the groundwork for honest dialogue. There is another aspect that characterizes the Compagnia’s grant-making: co-financing. In general grant applications are required to entail at least the joint participation of the applicant institution, or a third party, in gathering the resources required for the project. Clearly this requirement may be adjusted depending on contexts and times. But co-participation not



communication strategies, it clarifies the proactive objectives pursued by the Compagnia, stating evaluation criteria

only serves to reduce the risks for the Compagnia by assessing the level of commitment generated by the



Partnering with the Turin Polytechnic through special Agreements.

project, it is also an incentive to attract resources from various sources – public, private, philanthropy, EU funds

- that may otherwise not be utilised. A significant development in the Compagnia's grant-making

practice was the Agreement - a sort of partnership signed with the Universities and with the City of Turin.

These are multiannual Agreements that rest on at least two factors: the relevance of the partners, hence the size of the funds at stake; and the organization of the partners that act as aggregators of semi-independent units. The need to regulate such relations through shared principles of governance and control has led to the definition of common practices and rules that take the form of Agreements, as a guarantee of structured relations and careful

project design, feasibility studies, coordination and evaluation of complex programs are activities that are carried out by the Compagnia while third parties are entrusted with the implementation of the actual project. This has proven a successful approach and it will therefore continue to be adopted in case the local systems appear unable to take new opportunities or to face new and urgent issues due to a lack of energies or skills. More frequently,

Ufficio Pio, the Foundation for School, Fondazione 1563 per l'Arte e la Cultura - that are in charge of activities using their own budgets, which are mainly provided by the Compagnia itself. The Operating Bodies are autonomous in their actions and their objectives reflect the Compagnia's mission and its vocation. The Operating Bodies that are active in the field of Research operate similarly, as illustrated above.

In addition to these instruments, the Compagnia has one more option to pursue its mission:

mission-related investments (MRI), an instrument that is widely used by Foundations of banking origin.



planning of resource allocation. From an operational point of view, in some cases the Compagnia has opted for direct engagement:

the context is so fragmented as to require the action of an external "federating subject" to achieve the relevant critical mass.

The Compagnia di San Paolo operates directly through its traditional Operating Bodies -

In general, MRIs are envisaged by a Foundation's charter as legitimate instruments to pursue statutory objectives. The Compagnia has allocated a (small) part of its assets to investments - within certain



An eye towards future generations through a careful management of the Compagnia's resources.

limitations in terms of risk profiles and turnover- that benefit the local community, also in the form of private equity or related to institutional activities. This kind of investments

bring together the obligation of the Foundation to safeguard its financial assets for future generations and the possibility to channel significant resources towards promoting

development in the areas of interest. In practice the Foundation invests in equity funds to support innovative companies, infrastructural or social housing funds.

Efficiency across the board.

The presentation of the guidelines for the next four years has highlighted a number of priority themes for the Turin area. The Compagnia is fully aware of the limited nature of its resources and competences, and of the scale of the problems it is called to tackle. It is also convinced that pluralism and effective collaboration can ensure dynamism at local level. However, pluralism does not mean fragmentation - which afflicts Italy and the Turin system alike. In order to be interesting for the Compagnia

a project will need to identify the right scale to ensure effectiveness, development and sustainability;

duplication is unacceptable, even when sponsored by authoritative entities; new initiatives must be carefully analyzed in terms of technical-economic sustainability (and exit strategies as well, for the Compagnia itself); in general the local system will benefit from a rethinking of practices and arrangements from the past and

the adoption of new missions and different formats. These priorities that apply to the local system will also be relevant to the Compagnia



in the evaluation of proposals, in association with other key issues like equal opportunities, opportunities for youth and environmental concerns.

The constant drive towards greater efficiency is a strong signal that the Compagnia sends out to its

potential partners also through the reorganization of the Foundation itself and its Operating Bodies and the streamlining of processes and procedures.

Several processes have already

been redesigned, including the introduction of an online application system for computerized processing and more accurate controls. Moreover in 2013 the Office Services Center will become fully operational: it is a joint service center for the Compagnia and the Operating Bodies that will deal with aspects for which economies of scale can truly make a difference, like purchases,



administration, maintenance and general services. This rationalization will allow the Compagnia and the Operating Bodies to further increase efficiencies: so far the rationalization process has borne fruit for the Compagnia, reaching its

natural limitations. If the expected margins will generate additional resources for institutional activities, the structure and the size of the staff - which have now reached an adequate functional level - will not be modified. On the contrary, a

careful management of turnover and the need for additional professional skills may, in the future, justify an expansion of the current headcount - that will be performed with an eye towards cost-efficiency.

Creative project:
The Mask Communication.

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