

COMPAGNIA
di San Paolo

PLANNING GUIDELINES

for 2009 – 2012

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1. Preface

A four-year vision

It has been said that a real crisis is such a rare occurrence, it is impossible to pass up. Certainly this is not a concept to be taken at face value, particularly from where we stand today, at a crossroads of the financial crisis that has swept the world since the summer of 2007, when a major Foundation, the Compagnia di San Paolo, is called to draw up a plan of activities for the next four years. And yet, it is not a concept devoid of foundation. Indeed, in a time of crisis institutions have the chance to ponder and redesign their strategies, to reflect on the reasons and the methods that guide their actions. In a crisis a passive stance is tantamount to a standstill, while an effort to understand the dynamics afoot leads to change and a new vision for the future.

In 2008 the Compagnia di San Paolo underwent considerable changes, with the renewal of its Governing Bodies and a more active participation of the Management Board (for the first time organized into thematic committees). The Planning Guidelines for 2009-2012 have been drawn up in the light of both the natural adjustment process that follows any change in governance, and by the urgent challenges – real challenges – that the crisis had harshly laid before us, from ensuring the profitability of our assets to the rethinking of our institutional priorities. The following pages bear witness to what could best be described as “being in the midst of the crisis while looking ahead well past the crisis”.

In the main areas of reference for the Compagnia, the crisis has added up to long-term processes and structural shortcomings that have come into full view and that require our full attention. Piedmont is still evolving from its original highly skilled manufacturing vocation and in the Turin area this had translated into a sort of Fordist model. It is encouraging to see that there is more afoot than a mere de-industrialisation process (the post-manufacturing model is coming loose at the seams, no matter how favourable the context), but its pace is a different matter, which reflects on the time required here to consolidate development factors compared to the regions we are competing with. This is due to both endogenous reasons, often related to deep-rooted structural issues from the past, and to Piedmont’s disadvantaged position when it comes to national spending in the crucial sectors that support development

policies. The Compagnia cannot, in and by itself, turn this situation around, but it can play an important role, that makes it all the more relevant to focus our actions on rethinking development processes and providing new momentum. In this sense, important contributions can also come from the role of the Compagnia as a major shareholder in the original Banking Group it issued from, as well as a stakeholder in the economic development of this territory.

This document will show that the Compagnia has held fast to its core values – autonomy, long-term vision, professionalism, encouraging development, proactiveness, welcoming cooperation, an international dimension – on which the priorities for the next four years are solidly based: social issues first and foremost, and the conditions for recovery in a context of renewal of processes and organizations. Overall, this document builds on several guidelines that the Compagnia had adopted for the past four-year programming, that are now innovatively reinterpreted and accompanied by a new operational approach and a new balance among priorities from different sectors and areas of intervention.

Aims and Objectives

The Planning Guidelines for 2009-2012 outline some of our main objectives (as a way to illustrate more complex aims, long-term lines of action and policies) inspiring the Compagnia's actions, which, in turn, are justified and explained in view of the aims they pursue. People (protection, autonomy, opportunities), local society (relations, pluralism, quality of life) and sustainable development (creativity, skills, innovation) lie at the heart of the Compagnia's vision, that could be broken down in the following points, not as mere statements of principle but as the key to understand the methods and the contents of the programming laid down for each sector and across sectors.

- *Development as an objective and as a criterion.* As laid down in the Charter, the Compagnia pursues “aims of public interest and social use, in order to foster the civil, cultural and economic development of the community in which it operates.” The tenets of this mission have always guided our actions, and today, in the light of the current difficulties, have acquired even greater paramountcy in leading the way and pointing us in certain directions. Our focus on development has highlighted its complexity, showing that economic development is, undoubtedly, rooted in a capital that is financial and physical or infrastructural to being with, but it is also human, social, and relational, it is a capital that is

made of knowledge, the true engine of development in today's society. For this reason the Compagnia has geared its mission towards pre-competitive factors that influence medium- and long-term development, made all the more necessary by the ongoing struggle in the Italian North-West to overcome historical hurdles and inadequate infrastructural networks. At a time when resources are drying up fast, recession is looming large, and the locals pay the price of global economic processes that sweep away jobs and income, this long-term view must be accompanied by a greater focus on the actual, measurable effects that our actions generate in terms of development in our areas of reference. This does not entail choosing one sector over another. Sustainable development can be triggered by scientific and technological initiatives as well as by cultural and social ones. For this reason in the last few years the Compagnia has often underscored (and will continue to do so in the future) the fact that health and culture should not be viewed as sectors that only generate costs, but as a driving force for development. Going one step further and turning these statements of principle into action requires a "measuring" system, a system of indicators, a number of assessment criteria to support the staff in selecting or planning projects and initiatives according to their actual impact in terms of local development.

- *Sustainability and social cohesion.* In order to pursue development as one of our priority objective, a more comprehensive investigation can contribute to better putting into focus its nature and needs. The Compagnia believes that sustainable development and cohesion can interact constructively and bring about a number of accomplishments, as with non-profit operations at economic level, better social and cultural quality of life, accessibility to the job market and the possibility to express creativity for as many people as possible. Social cohesion can be built – and is often perceived – through local networks that bring together various interests and foster dialogue among the players. It is a complex, local and relational process and as such, it can be triggered or supported by Foundations. And yet, in the Compagnia's view, social cohesion is not only a prerequisite for development, nor is development regarded exclusively as a means to make resources available to serve social cohesion, in spite of being inextricably interwoven in our operating values. As a result, when assessing a project, the Compagnia will be looking primarily at its social effectiveness, its technical and economic viability, and the capacity to engender development. At the same time, the serious environmental and energy crisis will need to be closely monitored to

determine the medium-term sustainability of current economic processes, and this too will become a crucial element to define the concept of development itself.

- *Nurturing the human capital and a system of skills.* Schooling, education, advanced training and fine professional skills represent for the Compagnia a set of crucial factors for social and human development. Across all fields of activity, at all levels, the Compagnia attaches great relevance to education, to be sustained by supporting existing institutions and, when deemed appropriate, by creating new learning opportunities. In this field special emphasis is placed on equal access to education and its quality, on integration into the European and international dimension, on experimentation, and on the connection between education, research, and professional skills. These are the criteria that will guide the Compagnia in project selection, in the belief that education is a fundamental resource for the full development of the individual in a social context, as well as a crucial asset to ensure economic competitiveness, particularly when education contributes to the establishment of a system of skills (scientific, academic, professional, cultural, artistic, entrepreneurial) that is one of the most coveted assets in contemporary urban economies.

- *The ability to work at more than one level.* The Compagnia operates on various scales, allocating resources to each level in order to achieve an articulated set of objectives, according to a “g-local” approach – that is, taking a global point of view on (apparently) local issues and bringing local needs and interests onto the international scene. The concept can be summed up in the notion that we need to bring Turin (and the Italian North-West) into the world, and to bring the world to Turin (and the Italian North-West). From a geographical point of view, the Compagnia’s scope of action can be summarized as follows: *Turin* as an international mobility hub (for people, capital, ideas, experimentation); *Piedmont* and the *Italian North West* as a regional platform with a European vocation, where stalled processes need to be jump-started; *Europe* as the target for local networking aspirations and as an institutional beacon, where Italy, through the Compagnia, contributes to philanthropy and the advancement of civil society; the *global scene*, where the Compagnia participates not only in cooperation for development but also as Italy’s most active Foundation on the Transatlantic stage, aiming to shape a more responsible West and a culture for development that is shared and sustainable. In this framework the multi-scale dimension is fully integrated: each level is connected to the others, that in turn benefit from its added value. So that, for example,

European and Transatlantic networks has led to the establishment in Turin of an Expertise Centre specialized in Euro-Mediterranean relations, and an empowerment program designed in Europe for youth living in the suburbs and implemented locally by the Foundation has brought to Turin some of the European network's leading figures, while the pattern has been adopted by other Italian cities, supported by the Compagnia. Lastly, as outlined in the conclusion of this document, there is the need to put "the local scene in a global context", that is to say to enable local operators to expand their scope of action in order to compete in the open field for resources that transcend the local dimension.

- *Gender and generations.* It is widely recognized, both in theory and in practice, that economic growth and women's participation in the job market are closely related factors. It is also a fact that Italy is lagging behind in Europe on matters like women's occupation, disparity of salary between men and women, the small number of women in positions of power and the excessive number of women working under atypical contracts. This fact cannot be disjointed from the fact that Italy is losing ground on the international scene. This issue has been discussed over and over again in many different contexts, but has failed to produce any actual policy improvement. Several indicators show that the area of reference in which the Compagnia operates fares markedly better than the national average, but gender equality on the workplace remains a priority, not based on affirmative action but on the assessment of actual skills and merit. This is the kind of equality that can foster economic growth and development in general in the global regions of the world. In parallel, greater attention should be paid to the younger generations: too often they are the victims of the selfishness of those who came before, which results in a waste of talent that is entirely unacceptable. Gender equality and the younger generations will be the *fil rouge* across the Compagnia's policies, in an effort to turn into "normal" something that is too often dismissed as out of kilter, irrelevant or simply negligible. Therefore the Compagnia will not set up any special programme or project, but will adopt this attitude as a staple of its everyday activities, making it one of the objectives or evaluation criteria for all our projects and in all our fields of interest.

Operating criteria

These guidelines are the result of extensive discussion between the Council Boards and the Consiglio Generale, as well as within the various Bodies that make up the backbone of the Compagnia, with the staff actively contributing to the debate. The operating criteria that have

emerged cut across all our sectors of activity, an aspect that acquires special weight at a time when resources are shrinking. These criteria were already enunciated in the Planning Guidelines for 2009.

- *Concentration and Selectivity.* The funds to be allocated by the Compagnia, while far from negligible, are grossly insufficient compared to the fields of intervention. Therefore the ability to select and to concentrate resources is essential to “make a difference” and to ensure that our actions contribute effectively to implementing change. The Bodies and the Offices of the Compagnia that are in charge of managing funds will be called to ensure that our everyday activity attains minimum thresholds to reach a critical mass. This entails the ability to work closely with the other main actors, public and private alike; to encourage and support the consolidation and the integration of the actors of civil society, also in order to create a critical mass and to diversify funding sources. It will also require the ability to abandon certain fields or sectors to give more weight to strategic ones. It is also for this reason that the Compagnia is constantly open to systematic partnerships with other Foundations, as witnessed by its active participation in several Foundations Networks in Europe (EFC, NEF), in Italy (ACRI), and in Piedmont. The Compagnia is also interested in establishing ad-hoc or long-term partnerships with other institutions for systematic co-funding initiatives, while attaching more and more relevance to the number of actual recipients and to the systemic nature of the changes that the grants contribute to putting in place.

- *Completion and sustainability.* In the light of the need for careful selection, the completion of ongoing initiatives undertaken by the Compagnia appears to be among the best criteria to be adopted – while keeping an eye on their economic and functional sustainability, and on the ability of such initiatives to last over time and to produce positive effects without relying exclusively on the support provided by the Compagnia.

- *Pluralism and openness.* Also with a view to concentrating efforts as illustrated above, a Foundation, which is an expression of social pluralism, should adopt a pluralistic approach in its grant-making policy, in order to free up and to create new opportunities whenever possible. Therefore, while adhering to the operating principles of concentration/selection and completion/sustainability, the Compagnia remains open to the possibility of accepting a (somewhat limited) number of unsolicited projects, that have not been agreed with other leading players, like “curiosity-driven” proposals in the field of science, or new forms of

creativity in the cultural field creativity, or experimental practices to tackle emerging issues in the social field.

- *Subsidiarity and competition.* The Compagnia is wary of the possibility that any of its initiatives may hinder the correct functioning of the competitive laws of the market. In parallel, the Compagnia will make sure that the line into public funding is never crossed: discussions, cooperation and the pooling of resources with public institutions shall prevent the use of grants merely as a replacement for missing ordinary public funds.

- *Evaluation as a guiding criterion.* All of the above will essentially translate into the adoption of innovative selection tools for incoming projects through an ex-ante evaluation, but will also reflect in greater proactiveness on the part of the Compagnia in several sectors. Ongoing evaluation and monitoring are also essential, as is an ex-post evaluation that will be part of the staff's everyday activity, as well as on the work of thematic committees and the Evaluation Board. In fact, this is nothing new, because the Compagnia has devised over time various monitoring and ex-post evaluation tools that are put in place since the projects' very inception. The tools and the methods to be adopted shall be in line with the areas of intervention and the objectives identified on a case-by-case basis, without overlooking the costs of the evaluation. In order to make a difference, the evaluation process will need to be turned into a learning process generating feedback that will serve to fine-tune the selection criteria upstream and to enhance the skills of the whole of the Compagnia's "system".

Resources and organization

It is highly likely that the Compagnia's available funding for the period 2009-2012 will be considerably lower than in the previous four years. This reduction will require adjustments to be made in terms of priorities and objectives as outlined in this document, based on the actual funds available for each year. Annual planning guidelines will therefore serve to reconcile broad guidelines with the actual funds available. As mentioned earlier with reference to "concentration and selectivity", this process will inevitably lead to painful decisions – choosing between sectors, and between projects per sector - and yet it will also make for the growth of stronger actors and more substantial projects.

The rules governing the Compagnia's grant-making policy approved by the Consiglio Generale in 2009 put into clear focus the issue of investments closely connected to the

Compagnia's institutional mission ("mission-related investments"), regulating their use and clarifying that their potential impact on returns must be compensated through a proportional reduction in grant allocations. This model, made even more relevant by the current economic downturn, will be applied first in the framework of the Housing Program, as described in the second chapter of these Guidelines.

The institutional areas of interest, as laid down in the Compagnia's Charter, have been a clear reference in drawing up our Planning Guidelines. Nevertheless, as this document will show, while remaining mostly independent, these areas are becoming more and more integrated, an aspect that will be analysed in greater detail in the fifth chapter of these Guidelines, illustrating the intersections and the cross-cutting approach adopted by the Compagnia in its activity. These are the principles that have inspired our planning for the four years to come, and that are also at the root of the decisions adopted by the Management Committee in its session on June 15h, 2009 concerning the Compagnia's internal organization. Reducing operating costs and therefore the cost of labour compared to the volume of institutional activity will make it unlikely for the Foundation to increase its staff, that has however significantly expanded over the past few years. However, for a complex organization keenly interested in using and expanding knowledge and generating resources and services that meet the needs of society, human resources are a key output factor, the primary source of added value. Therefore now more than ever it is paramount to put to good use the fine human resources engaged in the activities of the Foundation, encouraging their efforts to achieve ever greater effectiveness and efficiency based on a leaner vertical structure, with shifts from support to institutional activities to promote greater integration among the various offices and providing opportunities for the development of their skills through greater project responsibility – including more emphasis on monitoring in administrative and other matters – and also, clearly, through in-house and external training.

2. The social sector: values and policies

Foreword

In the midst of a serious long-term economic downturn, that will inevitably have repercussions on the quality of life of large groups of the population, the Compagnia di San Paolo believes in *protection* and *emancipation* as the two guiding principles of its actions in the social sector. The seriousness of the situation calls for a more targeted allocation of funding. For this reason the Compagnia sets out to plan social funding allocations for the next four years according to an integrated approach among its specialized bodies (therefore not only in terms of direct funding, but also through the involvement of its Instrumental Bodies, the Funds for Voluntary Work, Progetto Sud (*Project South*), with the aim of reaching maximum funding efficiency and ensuring the quality of the sponsored projects.

The objectives illustrated in this chapter are inspired by considerations on an economic crisis of almost unprecedented proportions, the social consequences of which are made worse by existing structural problems and complex medium-term processes of a multi-dimensional nature. All these factors further weaken social cohesion, as is clear from the signs that can already be perceived in Italy, generating new needs and bringing to the fore old ones, against the backdrop of an ageing population, significant migratory flows, and a welfare system undergoing a difficult transition.

This is why the objectives of the Compagnia in the social field reflect assessments and choices that are clearly multi-annual by their own nature. Notwithstanding the crisis that broke out in 2008, the social vulnerability of mid- and lower classes is a structural fact that requires medium-term countermeasures. Similarly, the unbridled and almost unmanageable proliferation of subjects and procedures in matters of welfare – from European funds to the national system, from regional and local policies to the local private sector, not to mention budding market niches – calls for a more rational and integrated approach, starting at the local level, a process that would benefit from the support of institutions like the Compagnia.

These general considerations, that will later be analysed in greater detail to better plan our actions, serve to guide the Compagnia's effort to promote greater integration and a more

rational use of funds. They will clearly influence the Compagnia's own direct or shared actions, inspired by the Foundation itself, where the search for experimental solutions and the development of pilot projects – necessarily on a small scale – will combine with a growing focus on reaching significant numbers and a critical mass, which almost inevitably calls for partnerships. The Compagnia's actions in this field will remain geared towards generating value, as opposed to the mere provision of assistance, so as to contribute to fostering autonomy, creating opportunities, encouraging self-aid and the personal and collective acceptance of responsibility.

People and families in distress. Support, guidance, creation of opportunities.

One of our priority lines of action is the commitment to contribute to alleviating the effects of the economic downturn on people and families in distress.

The concept of new social vulnerability, already included in the Compagnia's projects, will remain a strategic priority, particularly in order to help those who do not normally benefit from welfare and public assistance. These include households and individuals whose life is suddenly shaken by an "unexpected event", like prolonged illness, divorce, or job loss. The latter requires special attention because of its complex effects that call for complex answers. Social safety nets – whose rethinking is generating heated debate – often prove inadequate or partially effective. The action of the Compagnia and its Instrumental Bodies can provide an integrated answer, sharing responsibility and coordinating its efforts with the providers of public assistance and with the beneficiaries of such initiatives. A particularly relevant contribution can come from the Ufficio Pio, which operates directly to support people in distress, and which has set up a number of targeted projects to tackle new forms of poverty and social vulnerability. These synergic efforts and the direct contribution of selected private welfare institutions, with whom to share projects and working methods, will lead to a reflection on how best to support households and individuals falling outside of the welfare system's scope, for whom the loss of income entails a considerable risk of impoverishment, with consequences that often prove disruptive.

It will be important to promote actions that go beyond passive solidarity, opting instead for actively engaging these people to get back on their feet and plan their work life anew. Re-training initiatives, enabling workers to move from sectors and positions particularly exposed

to the economic crisis toward new fields that offer greater opportunities for employment, represents a particularly interesting option, that will require adequate instruments.

Emancipation and education. Network and system approaches.

In order for the head of the family or the person in charge to acquire new skills that would help restore an active role in life and the acceptance of one's responsibilities, new sectors may be explored in addition to the ones already identified, provided that adequate resources are available, while the areas of interest that remain relevant will be confirmed:

- **home-based care** as the tool of choice to reach out to non-self-sufficient people as an alternative to hospitalization, also in the light of new developments in home-based care;
- **pathways to social autonomy**, to help vulnerable subjects overcome their critical situation.

But other issues - some new, some already present in embryonic form in projects already undertaken - may be included in the Foundation's mid-term planning guidelines, namely:

- policies to **invest in minors' education**, starting with crèches and continuing through kindergarten, primary and secondary school. Significantly, these schools are more and more often called to perform a role that is no longer only educational, but extends to various social issues (integration of foreign minors, premature school leaving, bullying, relations with the family), resulting in a functional overload and a stress that should be eased;
- greater attention should be devoted to issues that remain largely neglected, like **urban safety and the quality of public spaces**, in order to restore the territory for the benefit of the community through regeneration, revamping and other activities that may bring people back to these places, so that the urban space is perceived as a place to nurture social relations and inclusion rather than conflict;
- guidance for women in the delicate phases that precede and follow childbirth; and, still targeting **parents**, the issue of adoption/foster care;
- the experimentation, jointly with other institutional sectors of the Compagnia, of integrated and systemic action programmes to tackle problems that characterize specific areas, particularly urban districts at risk, where no initiative will be effective unless it entails

multiple, simultaneous or sequential actions of **urban, environmental, social, cultural, and educational regeneration** (the slogan could be “**adottiamo un territorio**” - let’s adopt a territory”).

In parallel, the efforts that have been channelled in the past few years into **social innovation projects**, focused on urgent issues where the Compagnia plays a pro-active and propelling role, will require consolidation, integration and refining. The identification of new areas of reference and the experimentation of new operating methods, implemented through these projects, reflect the innovation and experimentation objectives that the Compagnia has chosen to pursue. However they must be measured against the need to generate effects on a larger scale, as outlined in the Preface. These activities include:

- **mental distress**, with the network project “Il Bandolo” (“The Way Out”);
- former **convicts** with projects “Logos” and “Nomis”, to promote their integration and the social inclusion of young foreign offenders;
- **microcredit**, now at the end of its testing phase and requiring a more rational organization at regional level (throughout Piedmont) and a new, selective application in other contexts;
- **youth empowerment**, with project YEPP - Youth Empowerment Partnership Programme, an operating model that has been exported to other Italian regions in the framework of a European action network;
- **violence against women**, with project Approdo (“Haven”);
- **assistance and support to the victims of crimes** with project Dafne;
- **transport of oncologic patients** who need to undergo hospital therapies, with project “Tandem”.

These experiments – each corresponding to a project sponsored by the Compagnia, while taking different forms – will need to evolve in time and to provide a more integrated response, actively pursuing financial independence so as not to rely entirely on the Compagnia’s funding to continue their activities.

In the light of the growing relevance and the cross-cutting nature of the housing issue that has emerged in recent years, the Compagnia has confirmed its commitment in this sector through the **Housing Program**, allocating funds to start or to support experimental actions (new housing facilities for youth, mutual assistance housing facilities for women with children and the elderly) and working jointly to provide a regional “Social Real Estate Fund”, in cooperation with public institutions and other banking foundations of Piedmont for the purpose of providing rent-control housing solutions. This was the first example of a *mission-related investment* implemented through the Investment Regulation Act adopted by the Compagnia, that will provide the financial basis for the project. As regards the tools to be used, the Compagnia will strive to ensure that the largest possible number of people in need can benefit from this initiatives. This objective requires systematic monitoring and constant evaluations to maximize the benefits for the final beneficiaries and to prevent the scattering of resources. This principle will be adopted also for all other social policy projects, each according to the most appropriate technical arrangements.

Supporting local solidarity networks: community philanthropy

Community social responsibility: this is the objective pursued by the Compagnia to encourage a **culture of generosity and widespread philanthropy**, by making its resources and its skills available to potential donors. Selected actions will be supported for the establishment of networks and partnerships among local social and economic operators. In order to foster the participation of professional associations and other potential donors, the Compagnia shall allocate funds to organize training initiatives and the dissemination of best practices. Lastly, the Compagnia will ensure the continuity of donations on behalf of families and individuals, true to its historical tradition. As regards territorial philanthropy, the Compagnia will participate in the establishment of new Community Foundations in the areas of reference, supporting but not exerting too much pressure on potential local actors. All efforts on the part of **Community Foundations** to acquire more professional skills will also be encouraged. Great emphasis will be placed on the quality and effectiveness of fundraising activities and the ability to activate additional resources issued from their area of reference.

Participating in development: international cooperation and immigrants

In the field of **international cooperation** the commitment of the Compagnia will be channelled into consolidating the actions envisaged under the **Foundations 4 Africa** multi-annual programme, already under way and jointly sponsored with other foundations in Senegal and Uganda. Several factors have come into play in this instance: the foundations' active role in planning and implementing actions set up with Italian NGOs and their local partners; the integration of economic emancipation policies with humanitarian and social goals; the strengthening of the local spirit of enterprise; the promotion of the role that immigrants' associations can play in fostering the development of their community of origin. Moreover, a complex guidance, monitoring and evaluation system has been put in place jointly with all the partners. Over the next four years, this pattern could be adopted elsewhere, provided the necessary conditions are met.

The "**Training for Development**" initiative will continue, to provide junior executives in Southern Countries or Countries in transition the opportunity to acquire specific technical and professional skills to be used in their Country of origin. In this sector the Compagnia will also support other actions that are synergic and complementary to the two already undertaken directly.

The focus on **immigrants** will be geared towards the inclusion of young generations and second generation immigrants, through actions in school and the implementation of active citizenship practices, with the aim of promoting the presence of immigrant youth as a propelling drive for the development of the whole community. Another area of interest will target immigrant groups hit by the economic downturn and unable to access the social safety nets, in order to provide support and particularly to invest in education.

Economies of scale and competence: supporting cooperation

As regards the approach to be adopted, in line with the principles illustrated in the foreword the Compagnia intends to promote **commonality of purpose and aggregation** among different players in order to consolidate the social welfare network that is necessary to achieve the objectives of cohesion and integration. The difficulty of working jointly to pursue shared objectives **through a participatory approach** in spite of differences in the role, the rules, and the tools available to each of the subjects involved is mitigated by the awareness that this choral effort will benefit from the added value issued from each partner's values, expertise

and experience. In other words, the potential embedded in our welfare system shall be enhanced while creating tighter bonds among the various actors: public institutions, the third-sector, Commissions and Service Centres for Voluntary Work, and foundations. This is the spirit that has inspired the Compagnia to redesign the social master plans of Turin and Genoa.

Optimizing the potential of the law: relations with voluntary work

The Compagnia, like other Banking Foundations, takes part in the **Special Funds for Voluntary Work** initiative (art. 15, Law 266/91). These are funds managed by Regional Management Committees that allocate resources to a Service Centre to support and to legitimate the activity of Voluntary Associations. In the next four years the Compagnia will strive to improve the voluntary work system and to overcome its shortcomings, supporting this process both directly and through its representatives in the Management Committees. Available funding, which is now shrinking, requires the pursuit of synergies and the creation of networks among the relevant actors in order to engage in more rationally organized projects and to create economies of scale. Special attention will be devoted to the ongoing work of the Provincial Working Tables in Piedmont, based on the declarations of intent endorsed by the Fund's Management Committee, the Service Centres, the Foundations, and public bodies for the establishment of experimental projects shared by all the partners.

Communication will play a key role: today's voluntary work crisis requires innovative approaches to reach out and encourage participation, particularly among the youth, retirees and active elderly.

As regards Service Centres, an assessments of their performance would be highly recommended in order to improve and possibly to re-direct their activity. This area, like other thematic areas, will benefit from cooperation within the National Advisory Council of Management Committees with a view to strengthening dialogue between the Forum and the Service Centres National Coordinating Body.

The Compagnia will also work on the implementation of the Memorandum of Understanding between ACRI (the Association of Italian Banking Foundations and Savings Banks) and the Third Sector/Voluntary Work Forum. Issued from the Memorandum is **Progetto Sud (Project South)**, a project to promote the development of civil society and the third sector in the Italian South. In this sense a Foundation for the South has been established whose

members include the Compagnia di San Paolo. The annual funds earmarked pursuant to the Memorandum shall be partly allocated to the Foundation for the South, partly to the Service Centre for Voluntary Work in the Mezzogiorno, and partly to actions supporting voluntary work in the South. The Compagnia will also play an active role in the **Fondazione per il Sud (Foundation for the South)** and in this context it would be advisable to coordinate activities carried out by the various sectors of the Compagnia supporting projects in the Mezzogiorno and the Foundation itself.

3. Research, education, health: innovation models and practices

Foreword

Supporting research, education and health remains, also in the current economic downturn, one of the Compagnia's key priorities, in the belief that advancements in basic and applied research are and will be essential in triggering the process of recovery. Therefore in 2009 the funds allocated to the statutory fields of action of Scientific, economic, and legal research, Education, and Health, have remained relevant and consistent, a strategic approach that the Compagnia intends to pursue also in the next four years.

Nevertheless, the possibility that total funding might be reduced pursuant to future developments in the global economy calls for a more rational selection procedure: first, through the identification of the research/training fields and sectors in which the Compagnia intends to invest, so as to prevent a scattering of resources, secondly by choosing projects within the fields and sectors themselves, so as to reward quality and efficiency based on an analysis of the actual results achieved.

Over the past few years the Compagnia has supported institutions engaged in research activities or the dissemination of scientific research rather than sponsoring single initiatives, with a progressive reduction of funds available for "spontaneous" projects. This reflects the need for coordination among the initiatives undertaken by the Compagnia, as well as between the Compagnia and the other players in key areas of reference, from Regione Piemonte to the University, to Business Operators and other Foundations. To this end a draft project is taking shape to create a "techno-sciences platform" (the name is clearly provisional). Over the next four years the Compagnia sets out to conclusively identify the sectors and the methods that would ensure closer cooperation between the Compagnia and the institutions listed above, so as to pool resources and to reach a critical mass that would allow the funding of projects with positive effects on territorial development. However this shall not lead to an overlap between the new entity and existing research facilities: on the contrary, this initiative will benefit from available funding in full respect of the partners' autonomy and, as regards the Compagnia, in direct connection with its Instrumental Bodies.

Scientific and Technological Research

Over the past four years the role played by the Compagnia in scientific and technological research has consistently increased, particularly in projects that bring together basic and applied research and that contribute to the territorial development of the areas of reference. Relevant sectors include Information and Communication Technologies, Nanotechnologies, and Research on Territorial Systems. In the four years to come the Compagnia intends to devote special attention to these sectors, both directly and through existing Instrumental Bodies. At the same time the Compagnia will work to establish closer connections with the Instrumental Bodies set up in partnership with the University and the Turin Polytechnic, that will be expected to draw up a multi-annual plan. Funding by the Compagnia shall be subject to adherence to the plan, to be assessed annually.

As regards **Information and Communication Technologies**, the Compagnia has been operating – and will operate in the future - exclusively through the **Istituto Superiore Mario Boella** and its laboratories, that work closely with leading international centres and also participate in several European projects. The Istituto has achieved remarkable levels of excellence and it is also the recipient of large funds from other sources, thanks to its participation in national and European projects, most notably in the field of research on satellite navigation and localization. Its ability to attract external funding has led to a steady reduction in the Compagnia's allocations that have now fallen below 50% of its budget, a percentage that shall be taken as the objective for the four years to come.

In the field of **nanotechnologies** – a cross-cutting sector connected, on the one hand, to the study of the structure of matter and to the science of materials, and, on the other, edging towards research in life sciences – the Compagnia operates by supporting university departments and other qualified research institutions. In the next four years the Foundation shall further consolidate its commitment, promoting greater coordination among ongoing research projects and allocating greater funds compared to the past.

In the field of **research on territorial systems** the Compagnia is present through **SiTI**, that has operated in four main directions: logistics, territorial management, environment and landscape, and operational support to the Compagnia's initiatives. This activity – carried out through centres and laboratories – touches upon several issues, from urban transformation and regeneration, to the safeguard of the landscape and the architectural heritage, the development of infrastructures and transport systems, and so on. Special relevance is attached to projects

like the one concerning Genoa's inner port facilities, the transport network in Turin's urban area, and the activity performed by Association Ithaca. In other cases a clearer line shall be drawn between applied research and projects/professional activities. In the next four years the Compagnia shall support SiTi's activity, promoting greater adherence to its original mission and greater focus on its most relevant sectors.

More reflection is required to define the Compagnia's role in the field of **research on energy and the energy-environment connection**. Regione Piemonte has approved a vast range of studies and actions in the field of alternative energy sources, on a much larger scale than the Compagnia's actual funding capacity. Consequently it will be necessary to evaluate carefully whether the possibility to cooperate with the Regione Piemonte still exists, also considering that initiatives in this field should be in line with the Region's plan and should focus on applied research. Any additional step would obviously be considered in the light of the establishment of the "techno-sciences platform".

Biomedical and Biotechnological Research

Another research field that the Compagnia intends to promote, in line with the actions undertaken in the past, concerns **life sciences** and specifically genetics, neuroscience, biomedical and biotechnological research. A considerable effort was put in the establishment of an Instrumental Body, founded jointly with the University and the Polytechnic, the Human Genetics Foundation (**HuGeF – Torino**), to which 20 million euros have been allocated. HuGeF shall become fully operational within the next four years, when research will begin in earnest, particularly in the fields of genetic variability related to human evolution, the genetics of cancer, immunogenetics, and molecular epidemiology.

The Compagnia shall closely follow the implementation of the **Neuroscience Programme**, mostly through the projects selected following the closing of the call in 2009, and it shall support the Centres operating in the areas in reference that have been set up or upgraded in the earlier phases of the Programme.

These two main lines of action may be accompanied by others concerning **biomedical research and biotechnologies**, with particular reference to the study of the causes of mortality and morbidity in the general population and the promotion of additional research in molecular biotechnology. In this sense greater cooperation efforts will be put in place with

Universities and other University-level institutions in Turin as well as in Genoa, while the establishment of a new Instrumental Body in this field has been ruled out and the possibility to integrate the agenda of existing bodies, particularly HuGeF and CBM, shall be carefully evaluated.

Health

Closely connected to these actions are the ones concerning the health sector, carried out by sponsoring several projects that mostly resulted in the purchase of innovative research, diagnosis and treatment equipment and, to a smaller but still relevant extent, in the study of new management models in healthcare. These are accompanied by smaller grants awarded in specialized areas (neurosurgery, transplants, emergency medicine) and the fight against diseases with a high social impact. Overall these actions, while unable to meet the actual needs of the health system in Turin and in Piedmont and significantly lower than the Regional budget earmarked for healthcare, have clearly contributed to the promotion of leading sectors of medicine and surgery by making up for a shortage of other funding.

In the next four years the Compagnia shall support initiatives aimed at promoting health as a right of individuals and the community, and the centrality of patients, who exercise the right to health and are responsible for how to pursue it as an objective. These initiatives are expected to be in line with regional guidelines and shall be organized jointly with Regione Piemonte and the Regional Healthcare Agency (AReSS). They will concern the purchase of **innovative research, diagnosis and treatment equipment**, support regional progress in the field of technology assessment (directly relevant also for the Compagnia's grant-making activity); the study of new **management models** in healthcare, also through the development of activity networks (whereby the expertise of Istituto Boella will be called into play); the development of global strategies in **emergency medicine**; primary and secondary prevention of diseases with a high social impact; and a cross-cutting connection of all the above with the actions undertaken in biomedical research and biotechnology.

Economic, political and legal research

In the field of economic research the Compagnia has been active for several years, particularly through one of its Instrumental Bodies, **Fondazione Collegio Carlo Alberto**, established jointly with the University of Turin. The Foundation operates through a close

connection between basic and applied research. Basic research is carried out by Fellows recruited on the international scene; a large portion of the funds allocated serves to organize post-doctoral courses at the University of Turin, that are then held at the Collegio. Applied research is mostly carried out by research centres or units currently working on the economy of innovation, welfare, the economy of households, the economy of labour, and European governance. The connection between basic and applied research has led to the drawing up of proposals that would influence local, national, and European policies.

The Compagnia intends to confirm its support to these activities and believes that the working method adopted in the field of economics should be systematically extended to other social and political science sectors, that will find in the Collegio their main – but not exclusive – referent. Special relevance will be attached in this sense to cooperation between the Collegio and other Research Centres, also connected to the University, and to the selection of Fellows. Italian and foreign experts will contribute to identifying topics that are strategically relevant to understand the changes afoot, for example migratory and demographic processes and socio-economic disparities. As regards the establishment or the participation of other research units or centres, they shall be characterized – as is already the case - by a very targeted scope of action based on a thematic rather than a disciplinary approach, so as to promote interdisciplinary and multidisciplinary research.

Legal research

The Compagnia intends to consolidate its role in legal research, particularly as regards comparative studies that are becoming more and more urgent in the light of the European integration process - a subject matter that has already found its place in the Compagnia's activity - and a growing awareness of the divergence characterizing the various legal systems on the international scene. Primary importance shall be attached to the study of the relation between **Community law and the national law of its Member States**, particularly with reference to the adoption of the Charter of Fundamental Rights and the adoption of the European Convention on Human Rights by each State at Constitutional level. In this sense it will be interesting to follow the process of unification of legal principles under way in EU Countries, but also to focus on the hurdles that still prevent the affirmation of a truly "Common" European Law.

Another interesting sector in Legal research is the search for adequate legal solutions to the **new problems issued from the economic trends and the advancements in scientific and technological research**, also in order to contribute to making regulations more rational and more uniform at supranational level.

University and Advanced Education and Training

An aspect closely entwined with scientific research in its broadest sense is university and advanced education, particularly in terms of grants allocated to sponsor doctoral and post-doctoral studies, Master courses and advanced school training. This is a field in which the Instrumental Bodies of the Compagnia are actively involved, while several specific actions have been undertaken to support certain departments or university-level institutions.

Multi-annual framework for cooperation agreements shall be drawn up by the end of 2009 – and then periodically updated – in the field of **university and advanced education** between the Compagnia and the Universities of Piedmont (University of Turin, Turin Polytechnic, University of Eastern Piedmont “Amedeo Avogadro”), as well as with the Universities located in other areas of reference. At the same time, support to initiatives falling outside of this framework will be brought to a close. Support to doctoral courses (focused on excellence and the promotion of sectors regarded as strategic by the Compagnia) and to other training activities, as well as to university facilities and infrastructures, will fall entirely within the scope of the agreements. The decision whether or not to include – in full or in part - research activities in this context shall be considered instead on a case-by-case and sector-by-sector basis.

As regards pre-university education the Compagnia has traditionally operated through one of its Instrumental Bodies, the **Fondazione per la Scuola (Foundation for School)**. The Foundation is committed to promoting school autonomy, operating with individual schools and offering services to all interested institutes, but also trying to set up school networks particularly in the North West of Italy. In this sense it encourages the establishment of “patterns” of action to support schools and teachers, using various tools including announcements of competition (e.g., the “Cento Scuole” competition). The Compagnia will continue to support these activities and the Foundation for School will be the instrument for the implementation of actions in the field of primary and secondary education.

In light of the considerations illustrated in the chapter on social policy, additional actions may be undertaken together with the school system in order to promote schooling among minors, from infancy throughout compulsory schooling, that may be developed jointly by various sectors of the Compagnia and the Foundation for School, also to ensure greater effectiveness in terms of integration of foreign minors and second generations.

Dissemination of the culture of science and technology

One of the fields in which the Compagnia has become more and more active over the years is the dissemination of the culture of science and technology, where activities will continue in the future as well. Among the initiatives aimed at disseminating the culture of science to be undertaken in the next four years, particular relevance is attached to supporting **ESOF 2010**, the international Scientific Research and Communication Forum to be held in Turin in July 2010. Other initiatives that have already proved extremely valuable shall be carried out in Turin and Genoa. It is clear that providing correct information on research methods and results, on the potential for development and the prospects offered by technology, as well as on ethical and political implications will be crucial to promote the growth of culture and the progress of society in Italy. These initiatives call therefore for further strengthening, with a focus on quality, innovative tools, and their ability to generate long-term effects, also in terms of consolidating local potential and therefore supporting development.

Internationalization and International Studies

One of the fields to which the Compagnia has devoted special attention, particularly over the past four years, is internationalization within and outside Europe. The Compagnia has supported the development of the UN Centre in Turin, the establishment of the Centre for the Study of Federalism (Centro Studi sul Federalismo), and several institutions and think tanks working on European integration and the relations between Europe and other areas of the world. Furthermore the Compagnia has participated in several European networks and has partnered with numerous European and Transatlantic centres and institutes, thus becoming a point of reference for several foreign partners, with whom joint initiatives have been put in place. The Compagnia shall continue to support **European and international studies**, identifying research themes in greater detail, consolidating existing connections, and constantly working to bring to Turin initiatives and activities of a long-term nature with

existing and future partners through multiannual cooperation agreements. Another objective consists in fostering the development of academic and other centres in Turin and to assist them in gaining sufficient weight as to join European and international networks and projects, thus benefitting from partnerships and networks set up also thanks to the Compagnia. In this sense the need has emerged for the establishment of a "Centre of European Studies" to overcome current fragmentation in the field, and a centre for global/international studies that, jointly with the University, would perform a similar role in the field of international relations and area studies. Options will be considered to coordinate and to integrate these activities with the mission of the Collegio Carlo Alberto.

The overall strategic objective, beyond the sphere of international studies, is for the Compagnia to contribute to increasing Turin's **appeal** in the eyes of foreign researchers, targeting both senior scholars and young researchers participating in particularly important projects. Even today most of the Instrumental Bodies are engaged in research on an international scale, in close cooperation with several foreign partners, and internationalization is one of the main objectives pursued by the Collegio Carlo Alberto. The Compagnia intends to promote the establishment of such connections and to go one step further, considering the creation (possibly as an offspring of existing Bodies) of a "Centre for Advanced Studies" based on the Princeton model or Berlin's Wissenschaftskolleg, and others that have sprung up in the past few decades in Eastern Europe. The centre would welcome scholars from different Countries and different fields of learning. This project – whose financial viability shall be evaluated financially for the period covered by these guidelines – would consolidate Turin's presence on the international research scene, setting up long-lasting relations with the visiting scholars' institutions of origin and promoting a network of relations that will continue in time long after the end of their Turin experience.

4. A heritage of culture, arts, and creativity

Foreword

In the period 2009-2012 the Compagnia's institutional policies will be called to identify tools and resources that will ensure the continuation of the cultural development in the areas of reference, in spite of the critical economic and financial landscape. The Compagnia reaffirms its commitment to culture precisely to fulfil people's intellectual and spiritual needs and as an irreplaceable factor for the advancement of research and knowledge.

Similarly, the positive effects – direct and indirect alike - induced by the cultural activities on the socio-economic context will need to be carefully assessed, to evaluate existing and future problems and to pinpoint future opportunities. This is particularly true for Turin, a city that has become progressively livelier over the past few years and whose reputation has grown, also thanks to funding allocated to culture and cultural activities.

Starting from these premises, it seems appropriate to distinguish between the actions concerning the conservation and promotion of the cultural heritage on the one hand, and the support to culturally relevant initiatives on the other, with a view to eventually integrating the two.

The cultural heritage

The policy to be adopted by the Compagnia will be weighed against two factors: first, the quality of the cultural asset to be awarded funding, and its position within a coherent system for the cultural promotion of the territory; secondly, as a condition to ensure the effective planning of our actions, the availability of adequate historical-artistic information concerning the asset and its context, that may be developed through the support of the Compagnia.

Any opportunity for cooperation with public and private institutions will be regarded –as it has in the past – as a strategic factor in the implementation of Compagnia's investments in the conservation and the promotion of the historical and artistic heritage. The Foundation's proactive role will also lead to joint projects to be set up through synergic relations. Calls for proposals – both as a uniform means to allocate funds and, most significantly, as an effective tool to plan and define our actions - will be accompanied, whenever deemed appropriate, by

agreements and understandings with relevant institutions, as well as by other projects to be implemented directly.

As regards the **public heritage**, activities will continue to recover and to promote the historic town centres of Turin and Genoa and their museum districts, and the Savoy Residences, the system of forts, and industrial archaeology in Piedmont.

As regards the **religious heritage** of Turin and Genoa, the initiatives carried out in the past few years have concerned a considerable number of assets, all of the highest quality. The same attention shall now be devoted to adopting an integrated approach to the urban dimension, to include public spaces.

With reference to the assets scattered across the territory, that benefited from the Compagnia's funding over the past four years and were selected through calls for proposals, the **district-oriented tool**, tested in some Alpine Valleys of Piedmont, has proved more suitable to encourage the integration of various projects among themselves and with the territory. More far-reaching projects will still be adopted in the field of religious and decorative assets falling within the group of religious assets preserved in places of worship: experience has taught us that this group of assets is the one most exposed to the risk of dispersion or deterioration.

The preservation of the historical memory of the community is key to promote civil progress and culture. In this sense the Compagnia's objectives for 2009-2012 include the recovery and promotion of **archives and the archival heritage**. Thanks to the continuation of project *La manutenzione della memoria territoriale (Maintaining the Territorial Memory)*, in cooperation with the State Archives, it will be possible to save a wealth of documents from dispersion, to publish unknown material, to adopt new technological solution and to promote the professional update of archivists. Other projects will aim to make the system of sites and their management approaches more rational (*Casa degli Archivi* or House of the Archives in Turin), thus contributing to ensuring that the conservation and promotion of the heritage also leads to cultural promotion and organization. The connection between conservation and organization is an essential element of the Compagnia's role in this specific sector. In the same field, in Genoa, special emphasis will be placed on projects designed by institutions and associations that, as is the case with Palazzo Ducale, serve to facilitate a coordinated effort to

promote the local heritage and make it accessible, and that bring culture to public spaces, adopting targeted communication strategies in this sense.

Special attention will also be devoted to **Archives of Musical and Performing Records**, that shall become a reference in historical-musical research, with the aim of performing a critical analysis of the evidence of the most European phases in the local musical tradition, ideally resulting in the publication of musical, literary and figurative material. A similar effort could be undertaken related to existing records of audio and video material currently preserved by opera institutions.

The Compagnia's attention to the **bibliographical heritage** will continue to promote a more active role of libraries, to bring together their traditional vocation as repositories of learning and sites for research, in a renewed effort to promote this heritage also in new ways (therefore also with the aim to promote reading, as illustrated below). Additionally the Foundation will encourage the search for viable solutions to the problem of the shortage of storage facilities and limited areas for the public. In this field Turin's public library are a particularly interesting case.

The **Museum Programme**, started in 2000, will remain central to the Compagnia's activities in this sector. Since its inception the programme has aimed to undertake structural actions concerning existing museum facilities, to plan new display arrangements, and to promote campaigns to analyze and restore museum collections. At the same time it also contributed to establishing the concept of the *Museum District* in Turin's old town centre, the area from the Porte Palatine to Piazza Carignano that is generally regarded a museum system hinged on the life and the art collections of the House of Savoy. The programme is implemented in close cooperation with local and national institutions sharing the same values, and requires considerable joint financial, organizational and planning efforts. After starting the renovation of both the Egyptian Museum (and the Palazzo where the Museum is housed) and the Museum of the Italian Risorgimento (the first step to renovate Palazzo Carignano), now the Programme has focused on finding the appropriate site for the **Galleria Sabauda**, since its current venue at the Collegio dei Nobili has been included in the project for the new Egyptian Museum. Several options are being considered, according to a synergic approach that would ensure a more suitable site for the Museum and the promotion of the venue itself. To this end

an in-depth analysis shall be carried out, also in cooperation with other interested institutions, taking into account cultural, territorial, and financial factors.

In addition to the actions to be carried out under the Museum Programme, other initiatives will concern **other important museums** that function as cultural attractions for the area. The Compagnia shall confirm its support to museum-like experiences – or Interpretation Centres, as they are known – where different languages are used to document and to analyze the history of the Twentieth Century. Interesting examples in this sense are the *Museo diffuso della Resistenza* and the *National Museum of Cinema*. In Genoa the functional renovation of museum sites and their upgrading will accompany and integrate the recovery of architectural landmarks in the old town centre as well as of other prestigious museums.

The **landscape**, as a result of natural and man-made factors and their interaction, will be the object of policies aimed to establish a systemic integration of assets and territories. In general, large-scale actions to transform or recover vast areas do not fall within the Compagnia's range of action, because of their size or due to their public policy implications, while initiatives on a smaller scale and documentation and research activities appear more suitable. Therefore the Compagnia's work will focus on research on the historical, cultural, and naturalistic aspects that characterize these sites and environmental systems, in order to strike an ideal balance between recovery, preservation, and transformation. In this way the Compagnia intends to foster an operative knowledge of the landscape, starting with urban, rural, or natural examples or, as it is so often the case in Italy, with mixed ones.

Cultural Activities

Over the past four years the funds awarded to benefit cultural institutions of which the Compagnia is a member - and therefore actively involved in some capacity or other – have taken up in excess of one fourth of the overall expenditure in this sector. At a time when resources are shrinking, this scenario brings up a number of issues and, if confirmed, could have a negative impact on the remaining resources to be allocated to the rest of the system. This entails constant monitoring to ensure the efficiency of these institutions and even greater cost-effectiveness, encouraging collaboration and – whenever possible and appropriate – the integration of various functions or offices.

As regards other institutions and their projects, it must be stressed that in the Compagnia's view culture remains an important factor of civil cohabitation, as well as a trigger for economic development. It should also be considered that the reduction in public funding translates into an increased number of requests that are now addressed to foundations, while not necessarily implying greater project quality. Therefore the selection process will give preference to well-organised projects and special emphasis shall be placed once again on efficiency, to be achieved through cooperation and integration among the actions envisaged as well as the subjects involved. Just as important is ensuring that significant cultural initiatives do not disappear, something that would thwart the efforts put in place so far. The tools adopted to this day – calls, network projects, individual grants – have proved useful in selecting the activities deserving of the Compagnia's support, nevertheless it is urgent to adopt stricter selection criteria based on an assessment of project quality, feasibility and effectiveness, as well as – as is already the case – the applicant's administrative soundness and efficiency.

The **promotion of the cultural heritage** will greatly benefit from the creation of a network that brings together all the museums and connects them to their territory, a process in which exhibitions can be important. They shall be characterized by solid scientific foundations, the ability to disseminate information, and a clear vision. However, the cultural heritage can be promoted and made accessible in other ways too: first, local associations could work to ensure the maintenance and accessibility of cultural assets and sites; secondly, the cultural assets and sites could be part of larger cultural and communication products, in full respect of their conservation and dignity. Projects that put into play such resources – particularly cultural associations, which are the “software” component in the implementation of a district-wide mentality – shall receive particular attention.

Turin has acquired over the past few decades a reputation as a leading musical centre of international renown, as witnessed by the quality of the musical programmes organized in the city and by a rise in demand, thanks to a solid system of orchestras, institutions and associations both long-standing and more recently established. Investments in music remain therefore one of the Compagnia's priorities. In a more general sense, it is important to continue supporting activities concerning **theatre performances, musical theatre and musical performances, ballet, and cinema**, with their cross-breeds and contaminations,

notwithstanding the overall shrinkage of resources. They represent an important instrument not only to promote the legacy of the past, but also to foster the cultural advancement of large sections of the population, that show particular interest in the new languages of artistic communication. To this end the call for proposals has proved effective to perform a rigorous selection and to define an adequate planning across the territory, which remains one of the most effective tools to support the performing arts. The selection process shall give priority to proposals aimed to re-discover and to promote the valuable historical heritage, or to introduce innovative forms of art and projects to promote creativity, which more and more often today – in cinema but also elsewhere – relies on technological languages and digital forms of expression.

Special emphasis will be placed on projects geared towards **the promotion of books and reading**, in particular the Turin International Book Fair, as well as network projects, a task to be performed in line with national policies and that would become considerably more effective if the proposal to bring to Turin a chapter of the National Book Centre finally becomes true.

The Compagnia's cultural policy also envisages the conservation and the expansion of the legacy preserved by specific **cultural institutions**, a source of cultural wealth and a precious instrument to foster local development. In this sense grants will be allocated not only to implement individual projects, but to support, as is already the case, the institutional activity of subjects that pursue relevant statutory aims and quality, whose projects, tools, and results contribute to ensuring the quality of cultural activities as well as local and national research efforts. This support, particularly in times of crisis, allows these institutions to regularly perform their institutional activity, which has an intrinsic value that is often difficult to translate into annual projects.

In the period 2009-2012 the Compagnia will continue to **support artistic creativity**, particularly when it concerns the works of young artists. Overall funding is decreasing and therefore the resources to be earmarked for this purpose will be rather limited, and yet the Compagnia will sponsor projects that provide a platform for - or directly lead to the production of – signs, works and artistic creation, particularly when involving young artists active (but not necessarily resident) in the Compagnia's areas of reference.

More generally, the Compagnia will support the capacity of local actors to create “exportable” cultural products and to take active participation in networks extending beyond the local dimension, reconciling the sector’s specific aims with the more general objective of fostering economic and social development. A similar objective had been set, as regards the organization of exhibitions, for the Fondazione per l’Arte (Foundation for the Arts), but it is entirely possible to extend it to other sectors, especially when new forms of artistic production and the promotion of the historical heritage become closely entwined with the cultural world.

From the legacy of the Fondazione per l’Arte to humanities

In order to ensure greater efficiency, the Consiglio Generale approved the project to bring back the Fondazione per l’Arte into the Compagnia itself. Some of the Fondazione’s initiatives and their developments shall therefore be put on the Compagnia’s agenda in the field of arts and culture. Over the past four years the Fondazione per l’Arte has set up jointly with the Turin University and the “La Venaria Reale” Cultural Heritage Conservation and Restoration Centre Foundation a comprehensive **education and training programme** concerning the cultural heritage in its many facets, from conservation to restoration and management practices. Its implementation has led to the establishment of first- and second-level Master Courses and the first University Course in the *Conservation and Restoration of the Cultural Heritage*. These initiatives are in their very early stages and required particular care, especially in order to identify the most adequate tools to ensure their sustainable management, but they are certainly important and may soon extend beyond national boundaries onto the international scene, in cooperation with the UN system, in line with the Compagnia’s objective of encouraging a global approach.

The project for the establishment of a **Centre for the study and documentation of Baroque**, intended to “promote the study of the historical and artistic heritage from the late 16th to the early 19th century” was initiated by the Fondazione per l’Arte, that carried out an early feasibility study. It remains a very interesting initiative in the field of history and humanities on a European scale that would entail the creation of an extraordinary integrated and interdisciplinary centre, aimed to explore the European dimension of the literary, architectural, artistic, and musical components of such a unique age in the history of Turin and Piedmont. Its relevance would be greatly enhanced if it were to be headquartered in Venaria, in the restored Reggia, in a particularly apt context. However, the provisional project would require

a comprehensive re-evaluation to ensure a truly interdisciplinary approach and to identify in greater detail the foundations, the methods and the fields of activity and to assess its financial viability. If the project is implemented, the Centre will also offer an opportunity for the Compagnia to further define its role in the field of humanities and to acquire a more markedly international identity. To this end, the Centre will function as a research and service centre and a tool through which to promote and support new scientific undertakings, both “outgoing” (by enhancing existing relations, for example with the Collège de France) and “incoming”, attracting scholars who wish to operate in Italy, but in an eminently European dimension.

5. Intersections and future perspectives

The description of the activities to be carried out by the Compagnia has followed, also in its terminology, the general lines laid down in the Charter following the reorganization of the Foundation. Nevertheless, formal boundaries were at times forsaken in the name of a more or less marked push to innovate and to move beyond official definitions. This process has highlighted both the relatively outdated labels used in the Charter to identify the sectors of activity, and the artificial separation among the various areas.

The terms to indicate the sectors will be updated as part of the Charter revision undertaken by the Consiglio through the appointment of an ad-hoc Commission, also in order to reflect the considerable changes that have taken place in the Compagnia's areas of interest. However, no matter how comprehensive and updated, no list of the fields of activity would adequately reflect the complexity of the issues that a Foundation is called to tackle today, since most of the challenges that lay ahead are multi-dimensional in their nature. The complexity of these issues requires a complex response, made of interdisciplinary knowledge and know-how, and on a number of different tools and skills.

For the Compagnia this entails accepting the fact that inter-sector issues are not residual and cannot be used as a receptacle of minor projects falling short of any "discipline" labelling. They represent instead a significant opportunity for action and reflection, where work must be organized in order to provide adequate answers, through flexible forms of cooperation among the various sectors. This was one of the concepts that inspired the reorganization of the Foundation in June 2009, the implementation of which will coincide with the implementation of these planning guidelines. The Compagnia's organization into sectors, which remains in place, was devised to develop specific – or even specialist - skills and abilities, that retain all their relevance. But this new set-up should not prevent the overall acceptance of integrated projects made up of elements and aspirations of a cultural, social, educational, territorial nature and more. In order to deal with these projects appropriately, a joint approach will be adopted whenever possible, to better analyse and appreciate complex projects from the onset, and then possibly to manage and monitor the project and, if appropriate, to share the financial burden among several sectors.

Several inter-sector issues have been mentioned in the descriptions that have preceded, and others that failed to make their appearance today will certainly find their place over the next four years in the contexts in which we operate. However it would be useful to explicitly illustrate in this document some of the most important inter-sector fronts on which the Compagnia is already actively engaged, fully aware that the following is but the tip of the iceberg.

Art, culture, society, public spaces

Contemporary creativity often intentionally refers to a social dimension, that artists embrace in their work as a primary component. Conversely, there are social regeneration initiatives, actions intended to support minorities or disadvantages groups, and urban regeneration projects that put into play other expressive, artistic, and cultural elements. There is a widely recognized relation between public spaces and public art: the examples are endless, and some are part of the Compagnia's record. In the next four years inter-sector projects will be further encouraged to bring together a mix of artistic, cultural, social and educational values to be concentrated on individual areas exposed to the risk of deterioration. This is the sense of the statement to be found in the chapter on social policies, calling for “integrated and systemic action programmes to tackle problems that characterize specific areas, particularly urban districts at risk, where no initiative will be effective unless it entails multiple, simultaneous or sequential actions of **urban, environmental, social, cultural, and educational regeneration** (the slogan could be “**Adottiamo un territorio**” - let's adopt a territory”).

Inclusion, integration, education

The chapter on social policy, and in part the paragraph on education, presents issues – concerning the integration of foreigners, second-generations born in Italy from foreign parents, or more generally the social objectives of education – that call for inter-sector skills and tools, like “the inclusion of young generations and second generation immigrants, through actions in school and the implementation of active citizenship practices”, while implementing in a more general sense “policies to invest in minors' education, starting with crèches and continuing through kindergarten, primary and secondary school ... These schools are more and more often called to perform a role that is no longer only educational, but extends to various social issues (integration of foreign minors, premature school leaving, bullying,

relations with the family).” This requires a mix of different skills, all available within the Compagnia, but also the integrated action of Instrumental Bodies like the Fondazione per la Scuola and the Ufficio Pio, over a whole range of issues, including educational actions, social and welfare initiatives, cultural revamping, the regeneration of public spaces, as well as instruments to assess the effectiveness of the policies issued from a number of fields of learning, from cognitive science to education.

Possible intersections and shifting boundaries

The health sector has clear connections to biomedical and biotechnological research. But there are also welfare issues that come into play, for example when discussing innovative models for the provision of home-based care. Moreover, innovation in the management of local health authorities and hospitals entails the establishment of connections with welfare institutes, while the initiatives set up to deal with problems like mental distress can benefit from the Compagnia’s investments in neuroscience, a sector in which the research projects approved are markedly translational.

Sustainable development, listed among the objectives of reference, can be regarded and implemented effectively only through a far-reaching approach, where its sub-sections (for instance, sustainable mobility or sustainable housing) intersect with various traditional disciplines and areas of action, from ICT to architecture, from urban planning to energy, from economy to climatology.

There is, however, a conventional value to some divisions by theme area that generates heated debate, for example the line between social science and human sciences, with further sub-areas like historical social science, the relevance of political science, the hegemonic attitude of economic sciences and, today, of the cognitive or neuro-scientific approach to human behaviour. Setting up categories or bringing up new fences is not the Compagnia’s task, our focus must be on how to build on available internal and external skills in order to pursue the achievement of broad objectives. In this sense, great potential lies in connecting arts, cultural activities, science and technology, in order to promote the cultural heritage (which requires advanced museum and communication technologies), ensuring safeguard and restoration (where clearly technical and scientific skills issued from physics, chemistry, and biology play a major part), preserving documentation and providing accessibility (digital solutions are now

essential to catalogue assets in several fields). The same is true in artistic creation, where cutting-edge technology is gaining momentum, sometimes in applications that are pioneering in their inspiration. In all these cases, the ability to step beyond set boundaries is more than an option to better organize the Compagnia's human resources: it is a challenge to other players in the fields in which the Compagnia and its Instrumental Bodies operate to find new opportunities for partnerships, embrace new subjects, and develop new projects of a truly cross-cutting nature.

This is all the more urgent in the light of the choices made – more or less explicitly - by national and European institutions that provide funding for research. As outlined in the description of the thematic areas and in the introduction, the Compagnia is fully aware of the limited resources it can contribute to its areas of reference, allowing for levels of expenditure that are decidedly lower compared to the public sector (regional, national, or European). When a player is big enough to compete on a larger scale – be it national, European, or global – and to gain access to much bigger funding, there is hope that this will truly make a difference in fostering local development. Any sort of scientific or cultural protectionism, aimed to support local projects or subjects without considering their ability to compete at a higher level – in terms of co-funding, scientific performance, the ability to appeal to a larger area, participation in cross-border networks – would be ill-suited to serve the community in which we operate. The Compagnia's selection among a vast range of scientific, educational and cultural actions has been and will be guided by the need to invest in the development of strong projects or subjects, supporting them in their start-up phase with the patience that is typical of a Foundation with a long-term view, while adopting the timing and the methods that prevent the formation of exclusive bonds of dependence. From the very early stage, the local stage is always viewed against a global background. In this case too an inter-sector, interdisciplinary, and international approach may open up new chapters and remain, today and tomorrow, the true mark of the Compagnia di San Paolo.