



# Creative and Cultural industries in Lombardy

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www.milanosmartcity.org



## Some facts about Italy, Lombardy, Milan's metropolitan area and the city of Milan





	ITALY	THE LOMBARDY REGION	THE METROPOLITAN AREA	THE CITY OF MILAN
Territory (s.Km)	301,334	23,870	1,578	182
Population	60,626,442	9,973,397	3,156,694	1,324,110
Density (s.m)	197	417	1999	7.272
Average income (p/y)	11,787 €	15,502 €	17,726 €	21.013 €

- The city of Milan is the second-most populous city in Italy.
- With a 2010 GDP estimated at €132.5 billion, the province of Milan generates approximately 9% of the national GDP;
- the economy of the Lombardy region generates approximately 21% of the Italy's GDP (or an estimated € 325 billion in 2010).
- Unemplyment rates in Lombardy: year 2011=5.8%; year 2012=7.8%; year 2013=8.3%

## The city of Milan



- Its business district hosts the Stock Exchange (the main one in Italy) and the headquarters of the largest national banks and companies. The city is a major world fashion and design capital.
- Thanks to its important museums, theatres and landmarks (including the Milan Cathedral, the fifth largest cathedral in the world) Milan attracts over 6 million annual visitors.
- It hosts numerous cultural institutions and universities, with approx. 190,000 enrolled students, i.e. 11 percent of the national total.
- The city is also well known for several international events and fairs, including Milan Fashion Week and the Milan Furniture Fair, and will host the 2015 Universal Exposition.







## Ccis: used definition

CIRCLES	SECTORS	SUB- SECTORS	CHARACTERISTICS				
TS	Visual arts	Crafts Paintings - Sculpture - Photography	Non industrial activities.     Output are prototypes and "potentially copyrighted works" (i.e.				
D D	Performing arts	Theatre - Dance - Circus - Festivals.	these works have a high density of creation that would be eligible to copyright but they are however not systematically				
CORE ARTS FIELD	Heritage	Museums – Libraries - Archaeological sites - Archives.	copyrighted, as it is the case for most craft works, so performing arts productions and visual arts, etc).				
	Film and Video		Industrial activities aimed at massive reproduction.				
ES FIL	Television and radio		Outputs are based on copyright.				
CIRCLE 1: CULTURAL INDUSTRIE	Video games						
	Music	Recorded music market – Live music performances – revenues of collecting societies in the music sector					
	Books and press	Book publishing - Magazine and press publishing					
AND	Design	Fashion design, graphic design, interior design, product design	Activities are not necessarily industrial, and may be prototypes.				
60	Architecture		Although outputs are based on copyright, they may include				
CIRCLE 2: CREATIVE INDUSTRIES ACTIVITIES	Advertising		other intellectual property inputs (trademark for instance).     The use of creativity (creative skills and creative people originating in the arts field and in the field of cultural industries) is essential to the performances of these non cultural sectors.				

Source: HEA 2006 - "The Economy of Culture in Europe" p. 56





## Enterprises and workers by sector of activity

CCI circles	CCI sectors	ATECO 2007	Enterprises	Employees
	heritage	47792	449	661,69
		79901	292	846,16
		79902	214	231,12
		90030	3684	4599,69
		91010	100	511,57
		91020	10	33,01
		91030	14	31,76
		91040	23	163,41
core arts	heritage Total		4786	7078,41
field	performing arts	85520	301	465,28
		90010	2389	4009,06
		90020	895	1582,57
		90040	73	564,27
	performing arts Total	6621,18		
	visual arts	74201	2393	3131,88
		74202	390	925,16
	visual arts Total		2783	4057,04
	core arts field Total		11227	17756,63
	advertising	70210	2266	4262,87
		73110	3759	13020,85
	advertising Total		6025	17283,72
	architecture	71110	16270	18678,09
creative		71122	1652	9778,09
industries		71123	11578	13420,3
	architecture Total		29500	41876,48
	design	74101	2494	6053,11
		74102	3200	4679,69
		74103	1716	2245,79
		74109	957	1271,73
	14250,32			
	creative industries To	tal	43892	73410,52

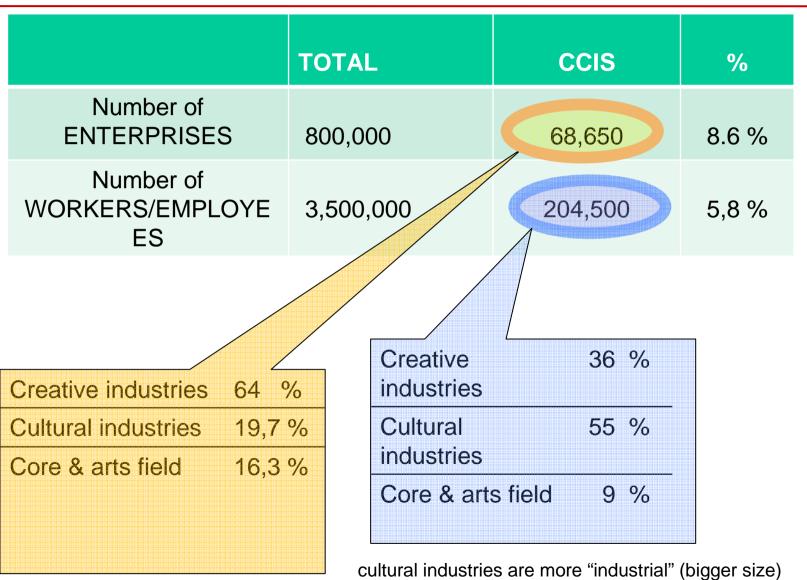
CCI circles	CCI sectors	ATECO 2007	Enterprises	Employees				
	books and press	18110	14	462,24				
		18120	2416	19061,47				
		18130	817	4675,48				
		18140	300	2334,37				
		47610	431	3503,4				
		47791	48	62,95				
		58110	456	2995,53				
		58130	62	3734,43				
		58140	849	7674,13				
		58190	195	562,73				
		63910	120	272,47				
	books and press Total		5708	45339,2				
	film and video	59110	927	4396,89				
		59120	216	595,9				
cultural		59130	48	339,09				
industries		59140	81	1595,75				
	film and video Total	1272	6927,63					
	music	18200	80	460,59				
		47630	158	281,65				
		59201	251	702,23				
		59202	20	76,17				
		59203	40	41,91				
	music Total		549	1562,55				
	television and radio	60100	120	660,44				
		60200	98	7278,77				
	television and radio Total		218	7939,21				
	videogames and software	58210	4	22				
		62010	4772	48928,81				
		63120	311	1253,93				
		63990	679	1454,36				
	videogames and software Total 5766							
	cultural industries Total 13513							
	TOTAL		68632	204594,84				
	IOIAL		00032	204334,04				

Source: Data adapted from ASIA 2010 (Istat)

## Data analysis







- books and press
- videogames and software



#### Turnover



#### Number of enterprises (a.v. and %) by turnover class and CCI sector

					turno	ver size	class					
CCI sectors	na	01	02	03	04	05	06	07	08	09-14	Total	
core arts field	0,1%	6,4%	5,2%	2,4%	1,2%	0,6%	0,2%	0,1%	0,1%	0,0%	16,4%	
(enterprises number a.v.)	92	4381	3590	1621	832	434	143	70	36	28	11227	100,0%
heritage	43	1964	1562	651	307	156	58	26	8	11	4786	42,6%
performing arts	27	1594	1048	431	269	161	56	31	25	16	3658	32,6%
visual arts	22	823	980	539	256	117	29	13	3	1	2783	24,8%
creative industries	0,4%	17,6%	23,7%	11,3%	5,8%	3,1%	1,0%	0,5%	0,2%	0,3%	64,0%	
(enterprises number a.v.)	244	12096	16232	7777	3980	2131	682	352	169	229	43892	100,0%
advertising	121	1265	1545	992	714	618	345	184	94	147	6025	13,7%
architecture	73	8292	11635	5463	2589	1031	207	94	52	64	29500	67,2%
design	50	2539	3052	1322	677	482	130	74	23	18	8367	19,1%
cultural industries	0,5%	3,1%	4,1%	3,5%	2,3%	2,6%	1,4%	1,0%	0,6%	0,7%	19,7%	
(enterprises number a.v.)	336	2120	2782	2396	1556	1788	979	669	390	497	13513	100,0%
books and press	164	711	733	735	786	1057	622	407	225	268	5708	42,2%
film and video	28	317	316	172	111	138	58	42	42	48	1272	9,4%
music	13	149	127	82	62	53	21	17	6	19	549	4,1%
television and radio	5	33	45	28	22	22	12	18	12	21	218	1,6%
videogames and software	126	910	1561	1379	575	518	266	185	105	141	5766	42,7%
TOTAL	1,0%	27,1%	32,9%	17,2%	9,3%	6,3%	2,6%	1,6%	0,9%	1,1%	100,0%	
(enterprises number a.v.)	672	18597	22604	11794	6368	4353	1804	1091	595	754	68632	

Class 1: 0-19 thousand of euro; class 2: 20-49 th€; class 3: 50-99 th€; class 4: 100-199 th€; class 5: 200-499 th€; class 6: 500-999 th€; class 7: 1000-1999 th€; class 8: 2000-3999 th€; class 9: 4000-4999 th€; class 10: 5000-9999 th€; class 11: 10000-19999 th€; class 12: 20000-49999 th€; class 13: 50000-199999 th€; class 14: over 200000 th€.

#### Distribution in each CCI circle of enterprises by turnover size class (%)

		TURNOVER SIZE CLASS								
CCI SECTORS	01	02	03	04	05	06	07	08	09-14	
core arts field	39,34%	32,24%	14,56%	7,47%	3,90%	1,28%	0,63%	0,32%	0,25%	
creative industries	27,71%	37,19%	17,82%	9,12%	4,88%	1,56%	0,81%	0,39%	0,52%	
cultural industries	16,09%	21,11%	18,18%	11,81%	13,57%	7,43%	5,08%	2,96%	3,77%	
Total	27,36%	33,26%	17,35%	9,37%	6,41%	2,65%	1,61%	0,88%	1,11%	

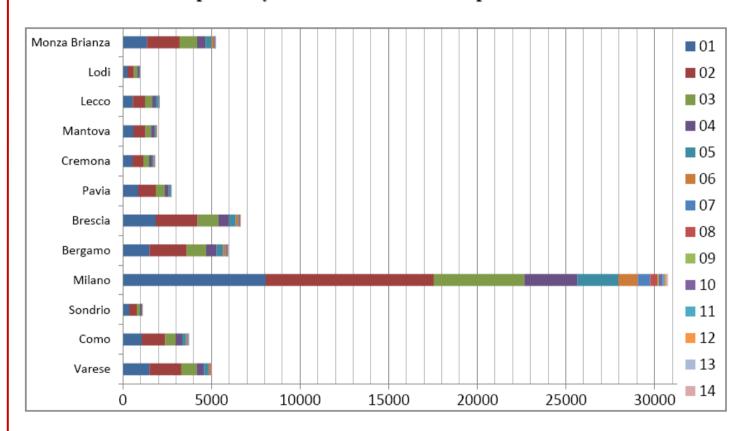
60,62% turnover lower than 50,000 Euro / year 5, 14% turnover over 500,000 Euro / year



#### Turnover



#### Number of enterprises by turnover size class and province





### Turnover



## Number of CCIs by worker size class and province



Provinces	1-9	10-19	20-49	50-249	>250	TOTAL CCIs
Varese	4958	63	22	10	0	5053
Como	3655	62	19	5	0	3741
Sondrio	1099	10	0	0	0	1109
Milano	29845	718	392	206	46	31207
Bergamo	5813	106	37	14	5	5975
Brescia	6559	79	37	11	3	6689
Pavia	2721	18	10	3	0	2752
Cremona	1777	26	10	5	0	1818
Mantova	1886	18	13	4	0	1921
Lecco	2035	25	12	1	0	2073
Lodi	981	7	6	0	1	995
Monza Brianza	5174	83	26	14	2	5299
TOTAL CCIs	66503	1215	584	273	57	68632

big and medium size companies concentrated in Milan





#### Number of CCIs' employees by worker size class of enterprises and province

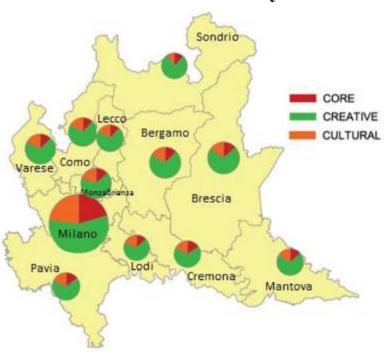
Provinces	1-9	10-19	20-49	50-249	>250	TOTAL EMPL.
Varese	6821	841	583	909	1	9155
Como	5099	821	550	626	ı	7095
Sondrio	1424	132	-	1	1	1556
Milano	42443	9124	11639	20624	45791	129620
Bergamo	8158	1358	1077	1400	2079	14072
Brescia	9139	1058	1077	1287	1484	14045
Pavia	3466	233	330	186	-	4215
Cremona	2443	348	238	329	1	3358
Mantova	2578	233	390	480	-	3682
Lecco	2842	308	340	50	1	3540
Lodi	1305	97	187	-	1062	2651
Monza Brianza	7121	1061	732	1683	1009	11606
TOTAL EMPL.	92840	15613	17144	27573	51425	204595

45 % are employees in MICRO INDUSTRIES (less than 9 employees) 53 % are employed in SMALL INDUSTRIES (less than 20 employees) 25% are employed in BIG companies





#### Distribution of CCIs by CCI circle and by province



CCIs enterprises and employees are concentrated in Milan representing

- 10,36 % of CCIs enterprises on total enterprises
- 7.19% of CCIs workers on total workers (3% at EU level)

#### **Distribution of CCIs by altimetry**

Altimetry	Popolation	CORE	CREATIVE CULTURA		CCIs	Employees	Total	Total
	at 2011	enterprise	enterprises	enterprises		in CCIs	enterprises	employees
Mountain	11%	6%	9%	5%	8%	4%	9%	13%
Hill	21%	16%	21%	17%	20%	14%	21%	22%
Plain	68%	78%	69%	78%	72%	82%	69%	65%
Total	100%	100%	100%	100%	100%	100%	100%	100%



## Camera Nazionale della Moda Italiana's Fashion events



- 2.000 journalists both italian and coming from 40 different countries of the world
- **15.000** buyers and fashion operators

MILANO MODA <i>UOMO</i>	11 - 15 January 2014 21 - 24 June 2014
MILANO MODA DONNA	19 – 25 February 2014 17 – 23 September 2014
MILANO MODA DESIGN	7 - 13 April 2014
MILANO MODA MAIN	9 January – 8 February 2014 12 June – 19 July 2014





## **Fashion and Figures**



	2008	2009	2010	2011	2012	2013	2014 1st sem Prevision
Total Turnover (million €)	66.498	56.524	60.198	63.809	60.364	58.855	
% Variation	-4,0%	-15%	6,5%	6,0%	-5,4%	-2,5%	3,5%
Export (million €)	40.544	33.093	37.339	42.604	43.371	45.105	
% Variation	-4,2%	-18,4%	12,8%	14,1%	1,8%	4,0%	7,0%
Import (million €)	24.609	21.842	25.060	28.655	26.357	26.090	
% Variation	-3,6%	-11,2%	14,7%	14,3%	-8,0%	-1,0%	4,5%
International Income Balance (million €)	15.935	11.175	11.790	13.949	17.014	19.015	
Production % variation	-3,0%	-12,5%	6,5%	-6,6%	-9,4%		
Employment	775	698	685	654	640		
Companies	about 80.000			about 70.000			
					Camera l	Nazionale dell	a Moda Italiana



## Design week (fair exhibition)



## Design week (fair exhibition)

2,500 exhibitors

**350,000** visitors

**160** representative countries

400 events

12 locations/design districts for "fuori salone"



## Salone del Mobile



Year	Italian exhibitors	Non-Italian exhibitors	Total exhibitors	Net exhibit area (sq.m)	Italian visitors	Non-Italian visitors	Total visitors	Public	Journalists	Export (thousands of Euros)
2013	953	316	1.269	142.209,0	92.674	193.024	285.698	38.395	5.721	
2012	965	290	1.255	143.131,5	103.791	188.579	292.370	39.279	5.725	7.800.851,85
2011	1.020	263	1.283	142.776,25	104.519	177.964	282.483	32.870	5.313	7.731.921,81
2010	1.044	282	1.326	142.586,5	130.882	166.578	297.460	32.103	5.110	7.387.962,33
2009	1.080	290	1.370	149.871,0	124.544	153.456	278.000	30.000	5.385	7.513.454,84
2008	1.068	230	1.298	152.207,0	138.203	210.249	348.452	30.373	4.968	9.619.668,94
2007	1.097	208	1.305	150.453,5	105.621	165.203	270.824	37.962	4.520	9.763.642,28
2006	1.155	219	1.374	151.009,0	99.747	123.391	223.138	21.312	4.128	9.083.036,64
2005	1.239	224	1.463	144.643,0	91.697	100.728	192.425	20.605	4.012	8.691.901,09
2004	1.271	227	1.498	142.277,0	92.894	96.761	189.655	17.235	3.752	9.007.286,87
2003	1.228	251	1.479	144.605,0	89.187	82.333	171.520	15.039	3.263	8.865.439,84
2002	1.220	214	1.434	144.257,0	99.629	86.142	185.771	20.337	3.196	9.394.304,20
2001	1.230	249	1.479	149.199,0	93.495	80.021	173.516	13.150	2.695	9.579.621,90
2000	1.249	222	1.471	144.506,0	89.128	76.125	165.253'	19.621	2.834	9.246.995,58
1999	1.277	230	1.507	146.201,5	91.790	70.765	162.555	19.118	2.251	7.999.465,14
1998	1.219	242	1.461	142.321,0	91.053	69.544	160.597		2.004	7.922.700,56
1997	1.189	159	1.348	124.301,0	93.821	65.411	159.232		2.009	7.701.484,99
1996	1.234	123	1.357	123.161,0	92.257	61.489	153.746		1.467	7.185.576,97
1995	1.222	91	1.313	118.269,5	92.058	58.561	150.619		1.263	7.045.225,26
1994	1.217	69	1.286	114.723,5	91.130	58.880	150.010		1.365	5.598.131,19
1993	1.209	127	1.336	118.051.0	97.207	50.250	147.457		1.603	1.673.432,14
1992	1.502	140	1.642	129.498,0	94.191	53.675	147.866		1.303	3.730.700,97
1991	1.701	258	1.959	144.103,0	94.410	52.911	147.321		1.356	3.544.631,78
1989	1.767	-	1.767	118.085,0	90.462	57.841	148.303		1.284	3.235.005,65
1988	1.894	244	2.138	133.745,0	81.846	53,560	135.406		1.088	2.822.562,28
1987	1.907	•	1.907	115.139,0	81.440	55.844	137.284		1.231	2.414.711,22
1986	2.136	236	2.372	132.972,0	76.859	41.728	118.587		1.041	2.224.676,12
1985	2.067	-	2.067	117.336,0	97.537	42.754	140.291		548	1.779.703,14
1984	2.149	169	2.318	130,421,0	115.125	39.756	154.881		822	1.795.019,07
1983	2.076		2.076	114.554,0	103.580	36.549	140.129		741	1.551.014.47
1982	1.949	141	2.090	118.179.0	101.725	34.508	136.233		587	1.383.203.40
1981	2.046	_	2.046	117.277,0	99.790	33.625	133.415		511	1.226.366,48
1980	1.931	103	2.034	116.322,0	90.028	32.713	122.741		293	967.073,21
1979	2.072		2.072	111.763,0	94.193	32.921	127.114			845.762,91
1978	1.986	71	2.057	110.705,0	88.567	27.340	115.907			603.527,13
1977	1.984	-	1.984	102.335,0	83.364	23.912	107.276			437.818,96
1976	1.771	82	1.853	97.264,0	74.981	21.177	96.158			292.128,12
1975	1.936		1.936	98.725,0	55.018	15.387	70.405		13	162.169,94

### Fuori salone







## Needs of Lombardy's private and public subjects in the field of CCIs



#### The most important factors to sustain CCIs are:

- > the development of networks of relationships 37%
- ➤ the access to (bank) credit (24%)
- ➤ the marketing capacity (to improve sales and marketing skills) 17 %)

(Source: survey on perceived needs among Lombardy's private and public subjects in the field of CCI by L. Fossi and V. Necco for Ccalps www.ccalps.eu -June 2012).

#### **Guidelines for action policies and movement**

- 1.build stable and long-term cooperation platforms
- 2.evaluate the impact of the projects
- 3.encourage experimentation
- 4.encourage the hybridization between supply chains
- 5.make more dynamic the cultural identity of the territories
- 6.preserve and enhance the intangible assets and heritage
- 7.promote horizontal cooperation among social workers

(Source: report from IULM University of Milan on the system of cultural and creative industries in Lombardy- May 2011)



## Framework for policy

CCIs and convergence

В

C

CCIs and regional social inclusion

CCIs and regional dimension





## **CCIs and convergence:**



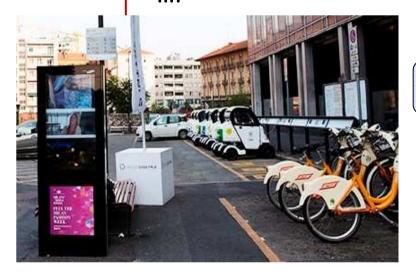
- ✓ Multiple Media Platform
- ✓ Culture
- ✓ Local communities
- √ Globalization process

**√**....



- ✓ Design
- ✓ Arts
- √ Films
- ✓ Advertising (i.e.: fashion weeks; design weeks)

**√**....



## Fluid econony allows CCIs to:

- Collaborate with one another
- ⇒ Share knowledge
- Cross fertilization
- 🗅 Co design / bottom up





## Framework for policy



CCIs and convergence

CCIs and regional social inclusion

CCIs and regional dimension



В

## CCIs and regional social inclusion: who reaps the benefit?

Access to: ➤ technological knowledge

- > information: sources and tools
- > fruition capacity
- ➤ Mobility
- > interdisciplinary approach
- > ...

Risk: exclusive Elites



we need to:

overcome the income level

⇒ look at quality of life and welfare

⇒ look at societal challenges

i.e: *silver economy*: active aging policies based on cultural activities



## Framework for policy

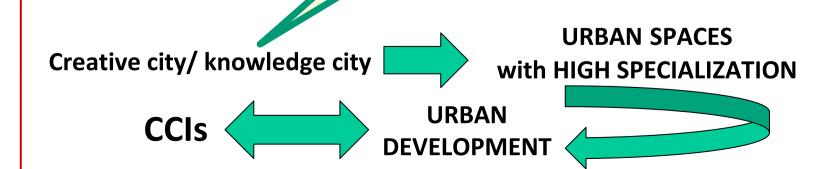
A CCIs and convergence
B CCIs and regional social inclusion
C CCIs and regional dimension





## Based on synergies among players:

- **❖** P.A.
- Universities / Research centers
- Enterproses: big / medium / micro
- ❖ Artisans → makers / digital manufacturing .
- ❖ Public and private spaces → urban development
- Public and private spaces
- Finance / venture /...
- **Creative talents**
- To made services





## Regional policy



#### 1991:

national law on industrial districts (law 317/1991) → regions have to define local industrial districts

The industrial districts are geographic areas with √ a high concentration of small firms specialized in the same productive sector, and √ the presence of institutions that can sustain

☐ Mineral processing (non metallic)

			√the pr growth	esence of institutions that can	
1995-2001:			3,011		
Lombardy Region defines	21 industrial	districts wit	h a high sp	pecialization in these sectors:	
☐ Textiles , clothing	☐ goldsmithry			Mineral processing (non	
☐ Home furnishings	Food , agro-industry		☐ Toys		
☐ Leather, Footwear	Musical instruments		■Other industrial activities		
				☐Other non industrial activ	
2003-2005:					
16 districts with produc	tive specializat	ion in			
these sectors:				istricts of productive specializ	
☐ Production and processing of metals;			land areas/clusters that are charact		
☐ Textiles - silk - shoes - clothes —			✓ the presence of structured and quali		
accessories for clothing			product	ion systems,	
lacksquare Furniture and wood			√ with a	high level of competitiveness	
☐ Rubber and plastic			domestic and overseas markets.		
☐ Electrical, electronic and n	nedical		<b>ANNUMED IN</b>		
		4			
2003-2013:			The r	<b>neta districts are</b> temporary g	
6 META districts / cluster	AREAS		of co	mpanies	
1.Biotecnologie alimentari			√wh	ose core is made up of SME	
2.Biotecnologie non alimentar	i		comp	panies, institutions and researc	
3.Fashion			-	dations,	
4.Design			✓ with constraints percentage inter		
5.Nuovi materiali			- 7 VVIC	ir constraints percentage inter	

6.Information and communication technology

#### The districts of productive specialization are

□Other non industrial activities

land areas/clusters that are characterized by √ the presence of structured and qualified production systems,

✓ with a high level of competitiveness on the domestic and overseas markets.

#### The meta districts are temporary groupings of companies

- ✓ whose core is made up of SMEs, large companies, institutions and research foundations,
- ✓ with constraints percentage interests
- ✓ in the projects.

## Methodology



- ❖bottom up: public calls
- ❖check at Regional level
- **∜**list of :
- → industrial districts
- → districts with productive specialization
- → meta districts

financial help (very small) to launch district and meta districts

public calls for projects coming from districts and meta districts





## **Municipal Policy**





- building an ecosystem
- urban development of deprived areas / buildings
- > social inclusion
- > start ups
- attractiveness
- > P.P.P. (50% 50%)



- specialised private and public incubators
- Co working spaces and "Fab Lab"
- Public calls for
- digital divide / improvement
- start up
- international talents (return of talents)
- public buildings
- big, for incubators/creative hubs
- small, for cultural Associations/ micro enterprises

## Specialized incubators



❖ Polihub: start up district and incubators for ICT / web / high tech in partnership with Politechnic of Milan www.polihub.it





Fabriq: for start ups in the field of social innovation www.fabriq.eu





**❖OCA** (former "Ansaldo"): CCIs incubator

**❖ Via d'Azeglio**: incubator / accelerator for Makers

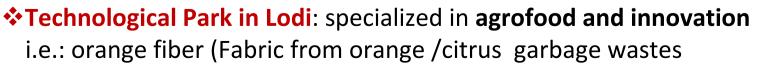
Arte e Messaggio ("Art and message"): training center and incubator for the sector of graphics and illustration



Quarenghi Center: specialized in dress making



**❖Speed Mi up**: specialized in **management**, in partnership with the Chamber of Commerce and Bocconi University <u>www.speedmiup.it</u>





#### **CRE A MI**



A significant architectural transformation in the "Porta Volta" area. This territory will host a network of realities destined to become the **Creative District of Milan.** 

The medium to long-term project is to give life to a settlement of technological and cultural production centers able to communicate with the systems of excellence at national and international level, featuring the presence of Feltrinelli palace, Fondazione Catella, MODAM among many others

The 3 key points will be:

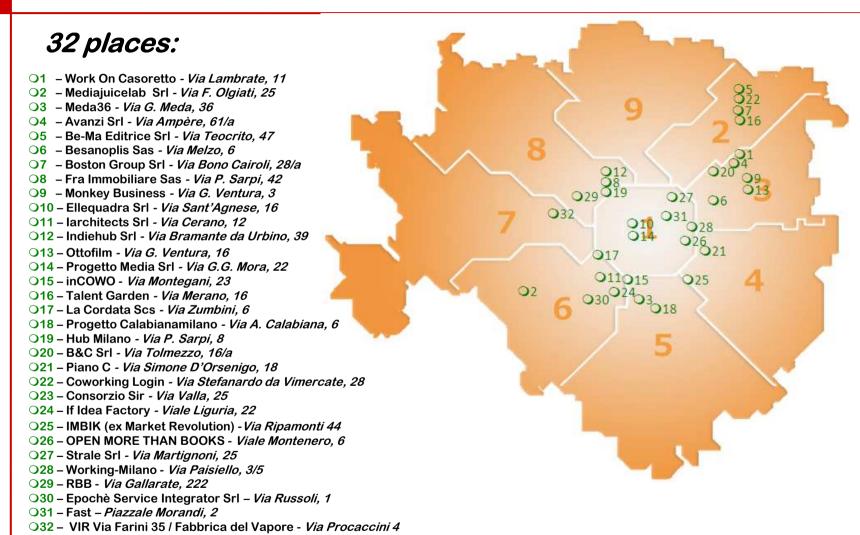
A) Viale Pasubio 14 – Expositive space;

B) Via Massimo d'Azeglio 3 – Creative hub for makers and auto producers



#### **COWORKING**





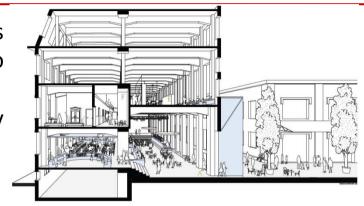
Vouchers for coworkers: up to 1,500 €

#### **EX ANSALDO**



ExAnsaldo is a new place that combines education, creativity, events, business, to develop a new regenerative economy.

It stimulates the creation of the creativity business and cultural brand f the city.





The **cultural offer** of this Public Cultural Industry intercepts the needs of the **district** and the **city**; it fits in the local context and at the same time it is positioned competitively in the **international** one.

Today the spaces of the former Ansaldo factory house:

- √ the Teatro La Scala laboratory,
- ✓ the Museo delle Culture designed by the architect David Chipperfield,
- ✓ the space for Colla puppets.

The project occupies 6.000 sm of the principal surface that overlooks via Tortona in the Navigli area. Other 9.000 mq could be used in the future.

### **EX ANSALDO**



>live shows (theatre, music, dance)
> screenings of audiovisual works



> installations, performing arts and site specific plastic projects



restaurantcoffee shop



> study space



> hostel



ciclofficina,Coffee bike



- > shop
- > books presentation



#### **EX ANSALDO**



Cultural and artistic activities create the **continuity among the making process and the final product.** 

So, the ex-Ansaldo becomes a place for incubation and coworking where every activity is connected to each other, to create products up to made.

> incubation ( warm up, 121, high density, BtoB)





> atelier > recording room



> co-working spaces (location and tutoring desk)



>public academy of arts



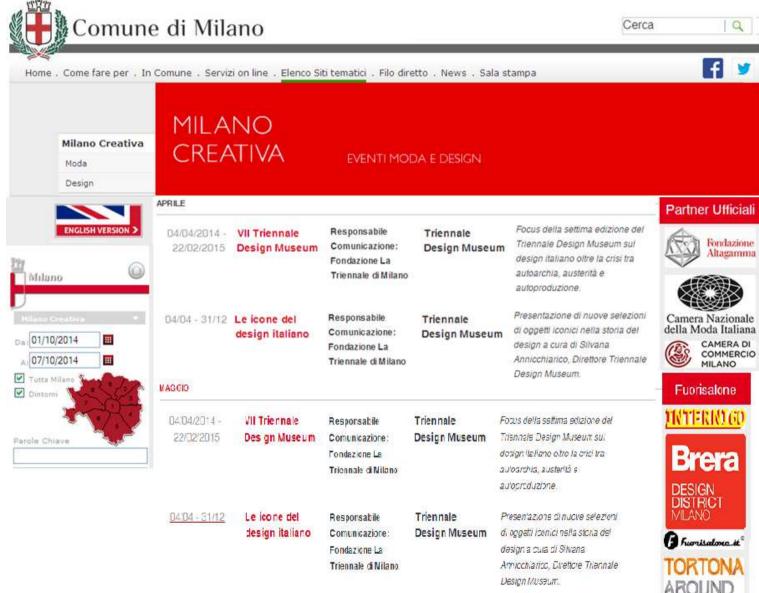
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#### **MILANO**



COL VIII/V











## Thank you for your attention

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