

COMPANY AND UNIVERSITY ARCHIVES: A POSITIVE COOPERATION FOR PRESERVATION AND RESEARCH

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As the title implies, this paper deals with the extremely useful results that can derive to all concerned from interrelations between universities and the business world. It presents the development and conclusion of the stages done at INA's Historical Archives by two university students, in compliance with a recent reform on education. Describing the events that accompanied the formation of two funds, the Author highlights the importance of preparing an analytical inventory to make a valuable tool available to researchers.

Descriptors (ATLANTI)

Standards (9)

Company archives ought to be viewed as the outcome of the manifold types of activities carried on worldwide and in the course of time they bear witness to the resourceful spirit of any Country as well as to the progresses and achievements in all fields of activity.

An attentive scrutiny of the dynamics of documents accumulation brings to light the existing interrelations with the working society.

Let's however proceed by degrees: the jobs on demand, at least as far as Italy is concerned, are increasingly more specialized and high school educational programs are being progressively adjusted to meet these new requirements. As a matter of fact, in 2003 Italian legislators passed a reform to lengthen the minimum obligatory school education and to introduce qualified courses allowing a quicker recruitment of diploma holders to fill suitable positions in the various industrial or commercial branches of activity. Something similar is occurring with regard to university education with the introduction of the so-called *Lauree brevi* (courses of curtailed duration) and with the promotion of closer contacts between students and their potential employers of the private sector.

By necessity, these novel circumstances for university students make way for two tiers of possible activity: on the one side there is the research targeted to the cycle of

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studies undertaken which includes direct field experience and implies establishing close contacts with the professionals actually doing the work. On the other side the activity is rather more far-reaching and surely more interesting for us of the archival world as it concerns the positive potentialities inherent to the interrelations between archival formation and business archives, as well as between archives and research in the widest sense.

Let me explain what I mean. The first activity represents the tie between the two milieus of university and of employment and it is targeted at offering qualified human resources ready to enter the production cycle immediately, it is therefore an organizational framework that produces beneficial results for the economic world that, in turn, considers it a rewarding system and therefore often supports it.

The second activity, instead, involves a series of interrelations that may well be comprised in the first one but are liable to be overridden as soon as a wide-spectrum research becomes advisable or imperative.

By saying wide-spectrum research I mean the advantages deriving to the university, as an institution, thanks to the investigation of archival documents.

In point of fact it is necessary to stress that, for the purpose of new researches specially in particular fields, the accessibility of previous and contemporary studies preserved in sectorial archives is of utmost importance.

Scientific in-depth studies with the involvement of university research structures are feasible only when there exist trustworthy "containers" of all past discoveries. Such "containers" are obviously the archives of companies and they are well aware of the advantage of preserving their records, useful for researches, in the best possible manner.

The range of companies is naturally extremely wide and, by way of example, I will just mention pharmaceutical producers (for medical researches), food industries (for nutritional researches), insurance companies (assessment of morbidity and mortality rates), building contractors (for research on new materials). It is important to remember that often researches cover manifold angles and require consultation of a number of "containers", therefore archives must be subject to ever more advanced sets of rules apt to guarantee the wholeness of their preservation in space and time. In fact, considering the globalization of research and the cultural exchanges among research frameworks worldwide, ensuring uncontaminated transmission is a must and by this concept I do not merely intend protecting the authenticity of data, but also making sure that such data cannot be consulted by unidentified entities.

At this point I would emphasize the importance of the high professional level required of archivists in handling personal data that are subject to maximum protection, suffice it to mention the research carried on in the medical sector.

Here in Italy we have reason to be grateful to the ruling political class which gave deserved credit to the scientific reasoning and technical deductions submitted by our colleagues of the public archives. In the wake of the arguments presented by those archival experts, the Code of Conduct (2004) regulating the handling of personal data for historical purposes and the Code on Cultural Goods and Environment (2003)

were assimilated in the Code on protection of personal data: truly an enormous progress.

It must in fact be emphasized that, at long last and without doubt, documents are considered cultural goods and as such are protected. In this manner the guarantee covering them provides sanctions as well as penalties in case of grave defaults, see for instance the provisions of article 171 of the Code of Conduct (2004).

In any case, apart from this strong deterrent, it is important that everybody should realize the inestimable value of documents, that is the preciousness of the historical memory they represent.

Particularly in Italy people's feelings cannot but be stirred by cultural goods. Just as we would not remain indifferent if we were to witness an attempt to create havoc in a picture gallery, in a church with its works of art or in a square surrounded by ancient and glorious buildings, we shall feel the same emotion if confronted by the possibility of damage to or loss of archives that belong to the national cultural patrimony and that represent a valuable source to carry on researches for the common good.

What we really do hope for is succeeding to have a uniform legislation worldwide to regulate such an important and delicate sector. This kind of development is also favored by the International Council of Archives that more than once made known its accord with such an initiative.

This is one first angle of the interrelation between universities and archives and it is a crucial one considering the immediate common good resulting from any progresses of research.

In addition, there is yet another possibility for cooperation as far as archival techniques are concerned, as previously mentioned.

Being the person in charge of the historical archives of INA (Istituto Nazionale delle Assicurazioni) a company belonging to the Generali Group, I have had the opportunity to test successfully this second possibility of cooperation and of activities integration.

For the sake of precision, before analyzing this second case it is necessary to say that also the first case is not extraneous to the insurance world. Suffice it to mention that, in order to assess new tariffs, companies must take into due consideration the old ones.

It may be objected that such a type of research is based mainly on the acquisition of statistic and demographic calculations but, even in such circumstances, there is room for a fine interrelation with the spacious world of university research which afterwards finds corroboration in a bulky documentary series.

The small but interesting Beneduce Fund, preserved in INA's historical archives represents an absolutely indisputable proof of what I am saying.

The papers left by Beneduce, who was the first and only Managing Councilor of INA, include an important section devoted to tariffs assessments.

The Public Body INA had just been established to carry on the monopoly of life insurance and Beneduce, a most talented actuary whom Minister Nitti appointed to give a novel imprint to the insurance market, by necessity had to compare rates – foreign rates above all – in order to take no dangerous chance and propose life premiums based on scientific calculations.

Those were times when insurance companies and mutual associations were going bankrupt almost daily while Assicurazioni Generali – nowadays the leading Company of our Group – operated on Austrian territory, therefore there were no sound Italian companies that could be relied upon to guarantee a correct management of life savings.

The sound cultural background of Beneduce is fully corroborated by the documents preserved, specially by those included in series II and in series VII.

Besides these two interesting and targeted series, in order to reassert the concept of cultural interrelations among Institutions – solely with reference to the insurance milieu – I would mention the minutes of some Board of Directors' meetings recording talks of cooperation with a significant number of Universities.

As a memento dedicated to the venue chosen this year for our convention, I would mention the scholarships for the University of Trieste which were approved during INA's Board of Directors meetings held on October 15, 1925, on February 26, 1927 and on December 22, 1927. Also to be mentioned are the scholarships for the Institute of commercial studies "Fondazione Revoltella of Trieste approved during the meetings held on September 11, 1923 and on September 6, 1924.

In addition, in 1961 INA funded the first Gerontology Professorship at the University of Florence.

Such interesting initiative – which confirms the strong interrelations with the academic world – was carried through by means of a Covenant with the University.

Moreover INA campaigned to promote the financial support to gerontological education among all insurance companies and ANIA.

In those years there was no general awareness of the practical advantage of systematic studies on mortality and morbidity but, on the other hand, insurance companies needed to calculate premiums on the basis of reliable data surpassing, embracing and explaining the normal statistical data relevant to mortality and morbidity of the population, in this case the Italian population.

The importance of such an initiative may well be gauged by the fact that in subsequent years gerontology was the subject of a number of highly scientific meetings as proven by the many medical-statistical studies produced on those occasions.

Thus Beneduce's statement (he was an actuary, not a physician) applies to this situation quite effectively: an insured in good health is a good insured.

Examining more in detail one practical phase, it must be said that cooperation between universities and the insurance industry is realized also by means of a new tool: stages as provided for by the recent education reform which sets out that before their

final examination students are to do a number of hours of training on the subject matter of their studies. Such stages are agreed upon in the Covenant between the suitable company and the university.

A stage of this type has been carried on also at the Historical Archives of INA. In fact, in accordance with the law, INA signed a Covenant with the University of Tuscia where there is a Faculty for the Preservation of Cultural Goods with specialization in the archival field. Thus the reform of education has permitted to start a most successful process to practise in daily work the theories learned during university studies.

The Covenant signed with the Tuscia University has permitted to two students (the young ladies names are Miss Scivola and Miss Galasso) to make a stage of 500 hours at INA. In this manner the cooperation had the first immediate result of allowing these two students to verify the practical application of the theories acquired during their academic studies.

That was not all, however, at the end of the cooperation there was a second result.

If on the one hand at the end of their stages the two students were awarded their much longed for degrees, on the other hand INA has now two archival funds in good order and complete of analytical inventory so that from now on researchers can rely on a new and most useful tool for their in-depth studies.

The two funds – I like to cite them because they are constantly booked for consultation – are the so called *Cinquantesenario* (the first fifty years of activity) and the *INA-Casa* (INA's housing project).

The first one marks the birth of the Historical Archives because one of the cultural initiatives promoted by INA to celebrate its fiftieth anniversary was the realization of an historical section of the archives in order to host a vast mass of documents up to then scattered and very much at risk of getting lost forever.

As a matter of fact, a warning of such a danger was clearly spelt in a questionnaire accompanied by a circular letter signed by the then General Manager Casali (1957-1966) which was sent to all active and retired employees of INA. It must be highlighted that the most interesting point of that message was the will to spread awareness of a potential – and therefore to be avoided – threat of losing the historical memory of INA.

Thus, as I have just said, personnel in service and retirees were asked to let INA have any documentary materials in their possession which would serve to set up the first *tranche* of the Historical Archives.

More specifically the questionnaire requested to give oral testimonies where possible and to return documents, mementos and whatever else could be useful.

At present this fund has reached the final stage of reorganization and has been newly inventoried (I refer to the scientific work done in cooperation with the Tuscia University student) and a few series included in it have been considered as open because other materials could be added in time.

As regards any such additions, I like to make two rather emblematic examples.

The first one being the possibility that the heirs of old insureds might donate policies issued in particular circumstances and of which no specimen is included in the fund. There have even been cases of donors accompanying the deposit with a picture of the person who had owned the object itself.

The second one being the circumstance, rather often resorted to, of purchases made on antiques markets.

This approach allows to enrich some particular series, or one may also call them collections, like that of posters (in their immediacy of communication they portray the work of experts of poster art of various historical periods like Dudovich, Codognato, Metlicovitz, Ballario) or of other printed materials: just imagine the multitude of leaflets, brochures and gadgets produced during INA's lifetime (for instance the money-boxes in the form of a small house or of an alarm clock remain among the childhood memories of the generations of the Forties and Fifties).

For this motive this fund may be considered as a museum collection not devoid, however, of interesting and fundamental mementos of the initial years of activity of the company. The most important evidence is represented by the series devoted to the top management members who first run the company (Presidents, General Managers, Members of the Boards of Directors).

Let's now consider the *INA-Casa* Fund which, unlike the *Cinquantenario* Fund, has become part of the documentary patrimony of INA's Historical Archives in a rather troubled manner.

As a consequence of that its numbering is erratic and its acquisition – occurred at different times – has determined a fragmentariness of the documents.

The first deposit of six folders was regularly received by the Historical Archives at a time when the technical and administrative management of the real estate assets owned by INA was carried on by an internal structure.

The second deposit of seven folders became part of the documentary patrimony of INA's Historical Archives as a consequence of an agreement reached between INA, the Lazio Archival Superintendence and UNIM¹, in compliance with the Consolidation Act which at the time governed the keeping of public archives as well as of any private archives certified as having significant historical (nowadays cultural) interest.

I like to mention another peculiarity attached to this second deposit, upon observation of the title pages, our university trainee noticed that there was a double numbering, the explanation of this is that the second numbering was given for organizational purposes by the outsourcing company engaged by INA to preserve the documentary materials.

As I have just said, the documentary materials are preserved in outsourcing and, upon request of the concerned office, they are transported to INA for consultation.

¹ Company that acquired all of INA's real estate excluding such properties as were tied up in the technical reserves or necessary for the INA Group operations. In July 1998, following a Takeover Bid on the totality of its shares, UNIM was acquired by the Pirelli Group.

The third deposit of 29 folders – which represents the actual architectonic appendix – became part of the documentary patrimony of INA's Historical Archives on expiry of the usual period of preservation in storage.

As regards the said appendix, it must be stressed that its rearrangement, carried out during the stage, means that the cultural community can now consult drawings, tracings, plans and working papers inclusive of exchanges of letters with first rate architects. What we have here is a “cross-section” of the *INA-Casa* Project reflecting a synthesis of the building activities carried on the whole national territory. In fact, even though at the time these documentary materials were utilized by individuals engaged by INA and by its associated companies, still they can give the exact idea of the activities carried on under the *INA-Casa* Project.

Here I like to remind you that the Fanfani Plan is the greatest urbanization plan ever realized in Italy and, to this date still unequalled as to the number of persons involved in it.

After having analyzed the contents of the fund, it has been decided to proceed to a new numbering of all the folders so as to achieve, for each section, a single increasing number.

In this manner the new archival marking permits to confer continuity to the fund and permits an organic approach to the documentary materials to consulting scholars.

As we have seen, the Company-University cooperation has produced excellent results, above all because it succeeded in helping the two students to compare theories and practical application, a work that led to the creation of a fundamental tool for research: an inventory.

Secondly, that working method has permitted to the students to scrutinize in depth the contents of the documents included in their training program.

As a matter of fact through detailed analysis, document after document, the resulting product is useful to research on the one hand and, on the other hand, fundamental for historical in depth studies.

Additionally, the student assigned to the *INA-Casa* Fund, by investigating in detail into every feature and leaving no circumstances go unobserved, has succeeded in reconstructing the birth and the subsequent stages of the project.

To start with, she read all documents in a perfunctory manner in order to get an overall knowledge of the subject matter, afterwards she organized a meticulous analysis with extremely rewarding results.

What I just said above calls for an explanation: before this research the Project had a different historical arrangement in time as far as its genesis, as may be inferred from a study done by architect Nicoloso.

According to that study the initial idea of the action to be taken would date back to 1939 while the practical realization started in 1947. These dates, however, have been found to be imprecise as they were surmised in lack of an analytic inventory, the tool we now have.

At present, in the light of our student's latest investigations, it is possible to date back to 1930 the "intellectual" birth of the project. In fact we must refer to an interview granted by Puggioni² on 21st September 1947, in the course of which he states that the impending housing crisis is not a new problem and indicates that he had been mulling over that crucial question already in 1930 as a young officer at INA, but that he had postponed sorting it out because in the subsequent years the housing situation had recorded some kind of improvement, even though in reality the demand for lodgings had never effectively tallied with the number of new constructions.

The examples given stand to prove how any synergy between Universities and companies historical archives is apt to yield significant results. Obviously the Covenant must set out clearly the expected goals to be reached through cooperation between the signatories, i.e. practical results for the company and better academic formation for the university students.

As regards the first tier of activity examined at the beginning of this presentation, it is in the very nature of archives to serve as research fields for universities.

The insurance industry represents the clearest evidence of this special role of archives. Great importance is in fact attached by companies to maintaining their memory because of the knowledge it can impart.

Such a presupposition leads to reflect on the need to invest in modern technology to ensure the protection and duration of data, but this is a situation shared by the whole industrial world and I have already talked about it.

Summary

In Italia la scuola secondaria si sta adeguando alle nuove esigenze del mondo del lavoro che è proteso verso una ricerca di personale sempre più specializzato; prova ne è la riforma attuata che prevede l'innalzamento dell'età minima scolastica e la possibilità di conseguire diplomi specialistici per un inserimento più immediato nell'attività produttiva. A livello universitario si assiste in un certo senso ad un fenomeno simile con le lauree brevi e, durante i corsi, con l'instaurare un rapporto più stretto con le Aziende del settore privato.

In vista dell'approfondimento scientifico le imprese hanno tutto l'interesse affinché la memoria, utile per la ricerca, sia mantenuta al meglio.

Gli esempi spaziano dalle industrie farmaceutiche (ricerca sulle malattie) a quelle alimentari (ricerche sulla nutrizione), dalle imprese di assicurazioni (studi sull'invecchiamento della popolazione) a quelle delle costruzioni (ricerche su nuovi materiali).

Il rapporto Università-Archivi ha quindi radici antiche.

² General Manager of INA from 1946 to 1951. University degree in Pure Mathematics and specialization in Actuarial Sciences and Statistics. Of all the works he produced worthy of mention is *Nuovissime Tavole Finanziarie (latest financial tables)*, 1939 used for many years in the insurance sector.

Un esempio - dedicato alla sede del convegno quest'anno - contenuto nell'Archivio Storico INA, Fondo verbali del Consiglio di Amministrazione: nelle sedute del 15 ottobre del 1925, del 26 febbraio 1927 e del 22 dicembre 1927 si approvano delle borse di studio per l'Università degli Studi di Trieste, ma anche l'11 settembre 1923 e il 6 settembre 1924, vengono erogate borse di studio per l'Istituto Superiore di studi commerciali "Fondazione Revoltella" sempre di Trieste.

Ma inoltre: nel 1961 nasce la prima Cattedra di Gerontologia presso l'Ateneo fiorentino.

Tale interessante iniziativa - che la dice lunga sui rapporti con il mondo accademico - è resa possibile dall'interessamento dell'INA che promuove, tra tutte le imprese di assicurazione e la stessa ANIA, il sostegno finanziario a questo insegnamento.

L'esame più dettagliato di un'attuale fase pratica porta all'esame della collaborazione tra Università e Impresa che avviene attraverso uno strumento nuovo, il tirocinio, nato con la recente riforma. Questa prevede l'obbligo di eseguire un numero di ore da svolgere presso un ente convenzionato con l'università.

Tale tipologia di collaborazione si è svolta anche presso l'INA-Gruppo Generali, il quale - seguendo le procedure previste dalla normativa - ha siglato una convenzione con l'ateneo della Tuscia. All'interno di questo esiste infatti una facoltà dedicata alla Conservazione dei Beni Culturali con specializzazione nel settore archivistico. L'incontro di tali esigenze ha permesso di iniziare, molto proficuamente, un rapporto per tradurre nella pratica lavorativa la teoria degli studi universitari.

Tale accordo ha consentito a due studentesse (la dott.ssa Scivola e la dott.ssa Galasso) di svolgere 500 ore di praticantato presso l'Istituto. La cooperazione si è tradotta, immediatamente, in una verifica sul campo di tutte le conoscenze acquisite durante il percorso di studi accademici ma non solo. Infatti, al termine del periodo, la collaborazione ha prodotto un duplice risultato.

Se da una lato ha consentito alle due allieve di arrivare alla laurea, dall'altro ha permesso all'Istituto Nazionale delle Assicurazioni di avere due fondi archivistici riordinati e dotati di un inventario analitico, in questo modo i ricercatori possono, oggi, contare su un nuovo strumento più mirato e più utile per gli approfondimenti.

Certamente la stessa Convenzione, sottoscritta da i due soggetti, deve rispecchiare l'obiettivo al quale tende la collaborazione fra il mondo del lavoro e quello della formazione accademica.

Gli esempi riportati nella relazione dimostrano come la sinergia tra Università e Archivi possa dare frutti importanti.

Per concludere: è nella natura stessa dell'archivio quella di essere strumento della ricerca universitaria.

Il settore assicurativo, forse, ne rappresenta la prova più immediata. L'interesse delle compagnie al mantenimento della memoria è molto sentito per lo studio che da questa ne può scaturire. Da tale presupposto ne discende l'altro dell'investimento sulle tecnologie per la durata delle informazioni, ma questo è interesse comune a tutto il mondo produttivo delle imprese.