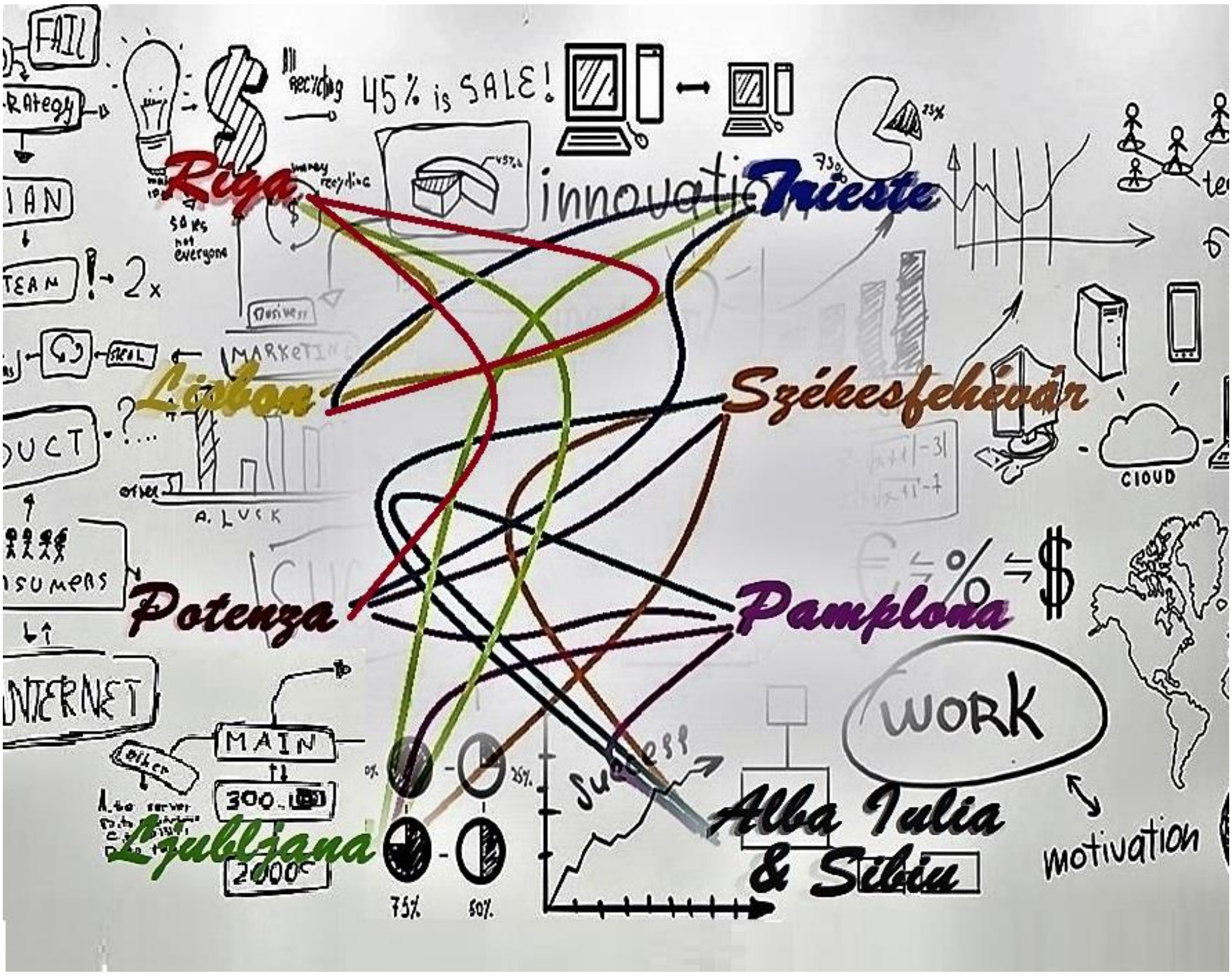
Peer Reviews Joint Report



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Section 1: Introduction and Overview

Introduction

This report is composed by 4 sections and an Appendix. The "Introduction and Overview" section aims, after a synthetic description of the structure of the Report and a Synopsis of the implemented Field Visits, to point to the high heterogeneity of the CRE: HUB project's reference area regarding a number of dimensions and, first of all, definition and maturity of the CC sector and sub-sectors, strategic focuses and development constraints.

The "Comparative Analysis" section is based on a Comparative Analysis of the 8 Peer Review's Findings and Recommendations on 8 topics (Awareness Raising and Motivation; Regional Strategy; Education, Skills and Capacity Building; Favourable Business Environment; Access to Finance; Administrative and Technical Issues; Partnerships and Networking; Internationalization).

The third section, "CCI's policies impact indicators: a first proposal" attempt to connect the dimensions/ latent factors, related to the different areas of the strategic development of the CCIs, to a series of qualitative-quantitative indicators related to the impact of CCIs' policies. Therefore, this section also represents a first phase of identification and collection of potential indicators.

The fourth section contains a series of observations on the main results and other observations of a more general nature.

The table below summarizes the main information on the Field Visit concerning Peer Reviews.

In the fourth column participants also include representatives of the partners who, as Regional Government Departments, RDAs or research institutes or universities, are involved in defining the policies of their region, as shown in the Comparative Analysis of Checklist "Partnerships and networking" section (see the Appendix). Secondly, as stated in Policy Handbook on "How to strategically use the EU support programmes, including Structural Funds, to foster the potential of culture for local, regional and national development and the spill-over effects on the wider economy?", published by The Working Group of EU Member States Experts (Open Method Of Coordination) on Cultural and Creative Industries in the framework of European Agenda of Culture: "*CCIs are by nature inter-disciplinary, they combine culture on one hand, economy on the other and many other connected areas as education, innovation etc. Therefore, it is crucial to get all different stakeholders from the government, business community and non-governmental sector together to create an integrated strategy for the CCIs*."

Table 1.1 - Synopsis of the implemented Field Visits

Hosting Partner	Peer Review Date	Team of Experts	Number of Participating Stakeholders & Policy–Makers Representatives[1]	Number of individual Interviews
PP1	8–9/11/2017	Ms. **Denize Ponomarjova,** University of Latvia (Partner of the CreHub project); Mr. **Kaspars Steinbergs**, External CCI Expert, Director of study program, guest lecturer at University of Economics and Culture (EKA) in	20	15

[1] http://s3platform.jrc.ec.europa.eu/documents/20182/84453/120420_CCI_Policy_Handbook_(FINAL).pdf

		Riga (Latvia); Mr. **Franco Scolari**, General Director of Pordenone’s Technology Park, Friuli Venezia Giulia Region, (Italy)		
PP2	20-21/06/2017	Mr**. Damjan Kavaš**, Senior Researcher, Institute for Economic Research, Ljubljana (Slovenia) Ms. **Nika Murovec**, Research Fellow, Institute for Economic Research, Ljubljana (Slovenia) Mr. **António Miguel Areias Dias Amaral**, Assistant Professor at the Instituto superior Técnico – Technical University of Lisbon, Research Associate at the Center for Innovation, Technology and Policy Research, Lisbon, (Portugal)	19	5
PP3	5-6/10/2017	Mr. **András Lévai**, Freelancer & Creative industries researcher, Budapest, (Hungary) Mr. **Csaba Jakab**, Independent Expert (Planning and Analysis), Székesfehervár (Hungary) Ms. **Nuria Álvarez Ajuria** – Culture Technician at The Govenrment of Navarra, Pamplona (Spain) Ms. **Nancy Tarjenian**, External CCI Expert & Head of Industrial Transformation Cluster AIN, Pamplona (Spain)	7	N/a
PP4	21-22/11/2017	Mr. **Roberto Linzalone**, Professor with Temporary Appointment, University of Basilicata (Italy); President and founder of the Institute for Knowledge Asset Management - IKAM; Mr. **Ionut Tata**, President and Senior Consultant of Iceberg Consultancy for Strategic Management, Founder and Chairman of The Innovation and Technology Cluster, Brasov (Romania) Mr **Ioan Levitchi**, Expert and Head of Office RDA Centru, Alba, Romania	21	N/a
PP5	7-8 /09/2017	Mr. **Damjan Kavaš**, Senior Researcher, Institute for Economic Research (Slovenia) Mr. **António Miguel Areias Dias Amaral**, Technical University of Lisbon, Center for Innovation, Technology and Policy Research (Portugal)	12	10
PP6	30-31 /10/2017	Mr. **Roberto Linzalone**, Professor with	22	10

		Temporary Appointment, University of Basilicata (Italy); President and founder of the Institute for Knowledge Asset Management - IKAM; Mr. **Ionut Tata**, President and Senior Consultant of Iceberg Consultancy for Strategic Management, Founder and Chairman of The Innovation and Technology Cluster, Brasov (Romania) Mr **Ioan Levitchi**, Expert and Head of Office RDA Centru, Alba, Romania		
PP7	2-3 /10/2017	Mr. **Adrian Larripa** bigD Design and Innovation Consultancy, Pamplona, Navarra (Spain); Mr. **Javier Martín**, MLMR Architecture Consultancy, Pamplona, Navarra (Spain); Mr. **Ildikó Rózsás**, KAPTÁR National Youth Service Nonprofit Ltd., Székesfehérvár (Hungary); Mr **Lévai András**, Application Engineer at RTL Magyarország, Budapest (Hungary)	23	9
PP8	24-25 /10/2017	Ms. **Lilita Sparane**, Head of the Creative Industries Division, Ministry of Culture, Riga (Latvia) Mr. **Franco Scolari,** General Director of Pordenone's Technology Park, Pordenone, Friuli Venezia Giulia Region (Italy)	15	9

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Short Introduction to the Peer Reviews Joint Report

CRE:HUB AF foresees that at the end of action of mutual assessment and learning and on field evaluations, Friuli Venetia Giulia Autonomous Region with the technical support of University of Latvia will deliver a joint peer review report. Based on peer review actions' results, the pool of visiting experts together with the interreg TWT will outline a common system of monitoring and evaluation of CCI policies.

The new common monitoring system will be tested in phase 2 of the project. Based on peer review assessment and mutual learning action and the suggestions in its own peer review report, each region details a first version of the action plan. The Action Plan focus on how to improve its regional policy/instrument to support the creation of SME, to adopt lessons learnt/good practices from the cooperation and to implement the joint monitoring / evaluation system of the supporting framework for CCI.

Overview

The reference area of the partnership of the CRE: HUB project is very heterogeneous about several dimensions and, first of all, the definition and maturity of the Cultural and Creative sector and the related development constraints to overcome, as we can see in the two following tables.

Table 1.2 - Definition of CCIs

Partner	Definition of CCIs
PP1	There is **no official definition of the CCI** in Basilicata Region and in Italy until December 2017. RIS3 refers to the report "I am culture" (Io sono Cultura) on CCIs prepared by the Symbola Foundation and Unioncamere (Union of Chambers of Commerce)[2].
PP2	There is no official definition of the CCI in the FVG and in Italy until December 2017[3].
PP3	Romania follows the definition of CCI sector formulated within the **Creative Europe program (EC 2011)**. CCIs, besides the traditional arts sectors (performing arts, visual arts, cultural heritage–including the public sector), include film/DVD/video, television and radio, video games, new media, music, books and press. CIs include architecture and design as well as subsectors such as graphic & fashion design or advertising.
PP4	The sector is defined via the **National Development and Territorial Development Concept** considering the following activities as part of the creative sector: electronic and printed press; advertising and promotion industry; film and video; SW and digital games development; construction; book publishing; music; performing, fine, industrial and popular arts); design and fashion design; artistic and antique market; craftsmanship.
PP5	Based on **UK's experience** a first CCIs definition was introduced in policy documents in 2005 and since then it has been grounded on several official sources. Very recent **Ministry of Culture policy documents** includes a clear CCI definition[4]. Even if **CCI Sectors** are clearly defined and Ministry of Culture' statistics are available, however the **current definition** is **not widely accepted** among all the stakeholders, even Ministries.
PP6	**No common definition of the CCI has been yet adopted at the national or regional level**. Navarra keeps working towards a **common definition of CCIs** sector in the sense of the **UNESCO definition.** As a starting point, the working definition subsumed Cultural Heritage, Film Production & audio-visuals, Books & press publishing, Architecture and Communication subsectors. The CCIs sector is sufficiently described with general and structural indicators[5].
PP7	The national strategy National Program for Culture 2014-2017 (NPK 2014-2107) set cultural and creative industries separately. Creative industries are defined by the « Green Paper - Unlocking the potential of cultural and creative industries» and are focused on design and architecture. Because CCIs' sectoral challenges are not addressed completely and

2 In December 2017 the Stability Law for 2018 introduced eventually the legal qualification for cultural and creative industries. In Italian law definition are included all companies or individuals involved in the conception, creation, production, development, dissemination, conservation, research and the enhancement of the management of cultural products. The latter are understood to be goods, services and intellectual works related to literature, music, the visual arts, applied arts, live performances, cinematography and audio-visuals, archives, libraries and museums, as well as cultural heritage and innovation processes connected to it.

3 See note 1.

4 [Creative industries involve] "activities, based on individual and collective creativity, skills and talents, which by way of generating and utilizing intellectual property, are able to increase welfare and create jobs. Creative industries generate, develop, produce, utilize, display, disseminate, and preserve products of economic, cultural and/or recreational value".

5 However, there are some missing indicators, like the *networking intensity* (business/productive partnerships) among the companies, as companies with no interactions are far from being a sector.

	comprehensively by NPK 2014-2017, **CREHUB project and Center for Creativity started to use KMU Forschung Austria and VVA's study definition** of the CCI sector[6].
PP8	The CC sector is defined by 3 components (cultural sector; cultural industries; creative activities). **Statistics Portugal** advanced in CC activities' definition, combining cultural domains (cultural practices, activities, products focused in artistic expressions) and cultural practices (several phases of cultural products' production). The 10 domains covered by the **Culture Satellite Account** are: Heritage; Archives; Libraries; Books&press; Visual and Performing arts; Audiovisual & Multimedia; Architecture; Advertising; Inter-disciplinary.

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CCIs maturity/potential, resources (human resources; sources of financing) endowment degree and issues (brain-drain and talent-drain; local market size) often relates to be a central/self-governing/autonomous region in administrative-economic terms (Lisbon Metropolitan Area; Ljubljana Urban Region; Navarra Region; Friuli Venezia Giulia Region) or not (Basilicata Region; Centru Region; Central Transdanubian Region), let say from the Centre-Periphery gradient.

Issues and constraint are often connected to the regional economic vocation, as in some areas the Gross Value-Added share of secondary sector (Transdanubian Region, Navarra) and/or some branches (Centru Region) are significantly higher than the national ones.

All these elements and factors just mentioned are correlated and determine the relevance of the CCIs in the different territorial contexts, as shown in the table below.

Table 1.3 - Relevance of CCIs

Partner	Relevance of CCIs
PP1	CCIs are at the **emerging stage.**
PP2	CCIs are of **high economic importance** and they play a re**levant role in societal and cultural development**.
PP3	Centru Region has a **good potential** (polycentric urban structure; cultural assets; educational basis and CCIs' success stories). However, some relevant c*onstraints* need to be overcome as a **weak local market** for CCIs' products and services and the imbalance linked to the **preponderance of the ICT**.
PP4	The region is characterized by a presence of a relevant **traditional manufacturing sector**. The presence of multinationals, local SMEs and CC assets (crafts, cultural heritage, protected areas) indicates a **potential for the development of creativity-driven manufacturing sub-sectors** (industrial design etc.). The CCIs sector is a quite new reality with the IT, acting as a lever for the regional CC system.
PP5	Even though **Latvian CC sector** significantly advanced in the decade, even in terms of employment and active enterprises shares, it is **still** to be considered **developing** from a series of points of view. A polycentric cultural and creative territorial structure, not just focused on Riga and its region, is emerging.
PP6	The region looks to have **assets** and potential to make CCIs an economic pillar and an engine of job creation. Nevertheless, it seems an area with a **high potential and a**

[6] "Boosting the competitiveness of cultural and creative industries for growth and jobs (EASME/COSME/2015/003) FINAL REPORT", study written on behalf of Executive Agency for SMEs (EASME) by KMU Forschung Austria and VVA, June 2016.

	(relative) low performance. The sector is still in a phase, although advanced, of **emergence**.
PP7	Ljubljana urban region is the Slovenian region with the **biggest concentration of knowledge and creative potential**, being also the most developed in economic terms (the country's economic centre). Creative industries concentrate in LUR, where 42 % of all Slovene CCI SMEs are located and around 60% of all Slovenia's cultural workers, events and infrastructures concentrate.
PP8	**Lisbon Metropolitan Area concentrates 45,6% of enterprises and 50,8% of employees working in CCIs in Portugal.** The 5 largest CCIs in LMA, in GVA terms, are: books & press, AV and multimedia, inter-disciplinary (arts & crafts inciuded), Advertising and performing arts. CCIs are recognized as a key driver of development and collaborate with traditional sectors: architecture (health, trade, energy & environment (E&E), maritime economy); design (E&E, trade); social media, visual arts and web (ICT, advertising; tourism).

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The national division of powers within the different levels (central level; regional level; intermediate level; local level) and particularly regional administrative/legislative competences and powers represent a significant dimension regarding policy-making and the criticalities to which it is subjected. From this point of view, the range in the partnership is very strong. Navarra Region is one of the 4 self-governing regions of Spain (Navarre has its own fiscal system) while, on the contrary, Centru region and Central Transdanubian Region are respectively a development region and a (former) statistical region without regional authorities and legal personality and few or no attributions.

As it was stressed at the beginning of the current paragraph, the CRE:HUB reference areas heterogeneity also reflects in the level of detail, diversity of objectives and diversity of focuses of regional strategies. In this respect it can be said that the focus definition (or not) depends on CCIs strategy**.** It also requires **adequate mapping** and statistically defined CCIs. There are different needs in CCIs **sub-sectors** about financing, equipment, internationalization, space requirements, innovativeness, size, etc. Understanding the characteristics of CCIs and its various sub-sectors is essential for an effective policymaking. Furthermore, it is equally important the dialogue and cooperation across different policy areas.

Table 1.4 - Description of Peer Review focuses

Partner	Peer Review Focus Synthetic Description
PP1	The review focuses on: analysis of the **Regional Strategy**, its **priorities and planned activities** to foster development of CCIs; analysis of activities implemented so far. As CCIs are at the emerging phase, Strategy's activities are analysed in **comparison with CCIs' state of the art**.
PP2	In the context of ERDF ROP TO3 IP.3a measure (provision of dedicated incubation services fostering new CCIs firms' creation and development of existing ones), the Review focused on: regional incubators' **service catalogue** for CCIs; **selection criteria** approved by the ERDF ROP Monitoring Committee; the **selection of CC areas** to support.
PP3	The review concentrated on how to gain **new perspectives on how** Centru Region can **improve the ROP** so that CCIs are better supported. Specific topics

	where: CCIs financing projects; **stakeholders' involvement**; **financing** programs improvement
PP4	**Methods** Székesfehérvár city is designing and implementing in order **to organize calls** and **select SMEs start-up** projects, with focus on CCIs development in the context of the ECoC 2023 program's application process.
PP5	The review concentrated on an **evaluation of Roadmap goals** and the related activities to achieve them. The **evaluation of Roadmap's activities feasibility and suitability** to achieve the goals constituted the core of peer review focus.
PP6	In order to foster a Strategic Alignment of Public Policies, bettering CCIs' support and leverage to affect related activities and jobs, two key element were analysed: the Law **that regulates the activities and interactions** among economic and non-economic stakeholders; the **supporting actions implementation Program**.
PP7	**To** understand how to support CCI sector by f**ocus**ing on **services and programs** defined in (national/regional/local) strategies and being **coherent with OMC Working Group Policy Handbook on CCIs**' development framework[7]. Identification of services/ programs **crucial for the Regional Creative Economy Centre (RCKE) and the (new) Centre for Creativity (CZK)** operating on the national level**.** How to design regional support **to operate recommendations and**, at the same time, to reach the **Roadmap objectives**.
PP8	The review is centred on how to improve support to CCIs, access current strategies and strategies to strength emerging and existing CCIs. Specific topics considered are: **CCIs co-financing** and **self-financing**; the **role of regional incubator;** the **perception** of CCIs entrepreneurs **on** the existing **financial incentives**.

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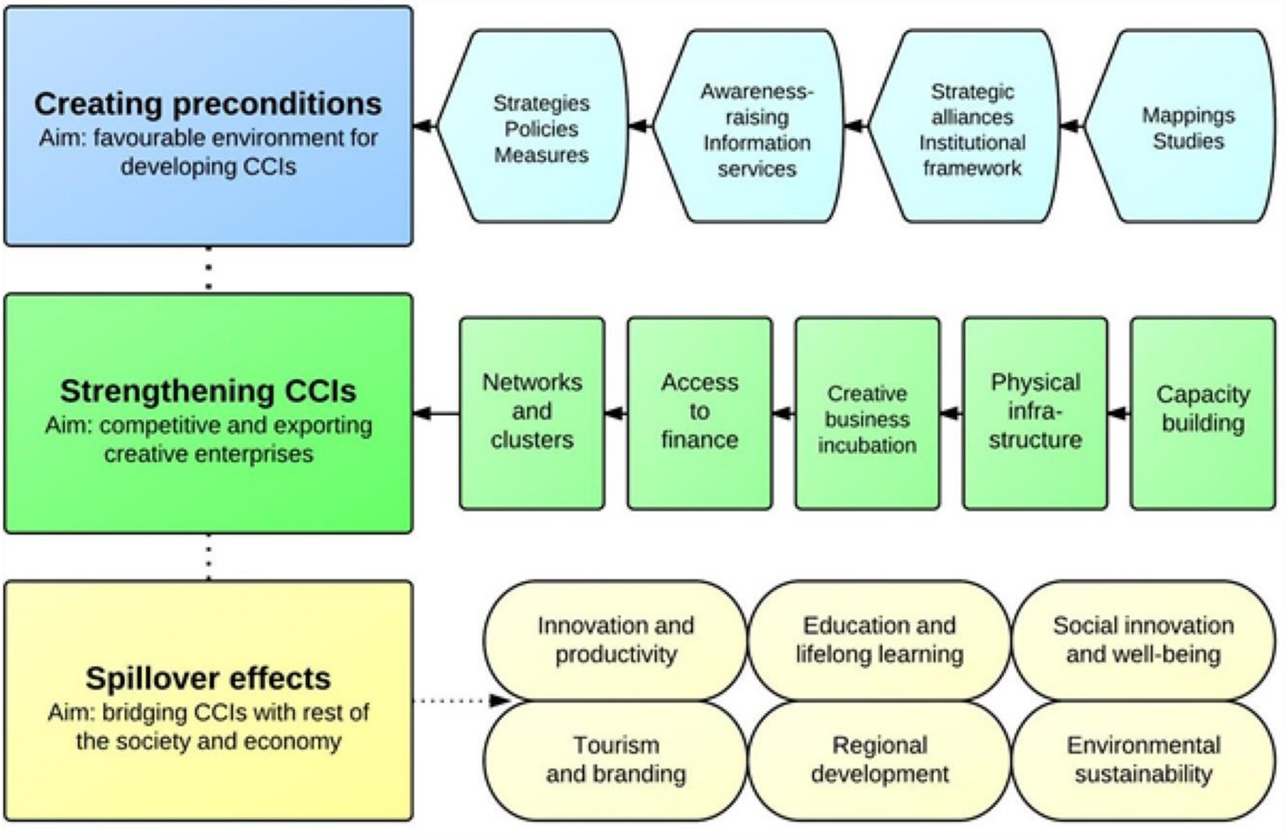
[7] Creating (Pre)Conditions; Strengthening CCIs; Spill over Effects.

Section 2: Comparative Analysis

In this section, the sequence of the single themes, from the Regional Strategy to the Internationalization, differs from the Depth Assessment Reports sequence. The sequence of the individual themes follows the diagram presented in the figure below.

Figure 1 – Framework for Developing Cultural and Creative Industries



Source: OMC Working Group on CCIs, 2012

Each of the following 8 sub-sections present 2 Comparative Tables on Key Findings and Recommendations for the 8 Project Partners, aiming to identify themes/key words/ "common" latent dimensions around which part of the key findings and recommendations can be grouped.

2.1 Awareness Rising and Motivation

Partner	Key Findings
PP1	**Awareness level about CCIs is low as CCIs are at the emerging phase**. Cultural heritage and architecture relate to CCIs only to some extent; the term "design" is applied to furniture industry, notwithstanding its potential (industrial design; packaging; publishing). The concept of CCIs is used in an unclear way in the Regional Strategy but in the meantime **awareness of CCIs is rising** due **Matera 2019 activities**

PP2	Low awareness represents a problem. **Traditional industries are not aware** about the benefits of cooperation with CCIs firms and have low confidence on them. Furthermore, part of **the CCI (especially crafts) is not aware about their potential** and related business opportunities. Over the past 5 years, several conferences have been held. CCIs support now is included in strategic and operational documents. Nevertheless, the **importance of CCIs is still not broadly recognised**.
PP3	Unlike in other regions (Bucharest, NW), **creatives are not aware** of success stories (entrepreneurs, artists, etc.) they can relate to and emulate. The region administrative subdivision and the related cultural divide hinders the cooperation between CCIs regional communities and actors; additionally, **creative communities are small and change quickly** members due to high mobility. Moreover regional/county level **decision makers show low interest** as hard infrastructure developments seems to have, from an old-school development perspective, a higher political return then CCIs.
PP4	**Low awareness about CCI** as only expert people seems aware of the CCIs size and structure and the interlinked opportunities. **The ECoC2023 candidacy should be an awareness pillar**, as the art concept of 2023's **events** concerns areas from visual art to gastronomy. Moreover, in 2022 there will be celebrations (800th Golden Bull anniversary; 1050th anniversary of Székesfehérvár foundation). **Multi-arts festival** Valley of Arts promotes CCIs (folklore activities and identity; local handmade products); another awareness-rising event is the FEZEN music Festival in Székesfehérvár, a key meeting place for CCIs actors in Hungary. No specific motivation and incentive system for CCIs in place.
PP5	Latvia's Government is **committed to promote CCIs awareness** in the country; Ministry of Culture coordinates various activities (platforms; creativity week) with different sectoral players. **Traditional industries' businesses** are **unaware** about benefits of cooperation and have **low confidence** on CCIs to bring benefits in common projects. On the other hand, **some CCIs (crafts) are not aware** about their cultural and creative potential.
PP6	The **awareness** regarding the CCI sector with its societal and economic impact is **still low** in Navarre. **First actions** of governmental and non-governmental actors **are being undertaken**, e.g. the 1st CCIs fair MERKATUA (Government of Navarre) in 2017 or the inclusion of CCIs in the RIS3 of Navarre as well as specifically in the regional specialization strategy of Southern Navarre (Consorcio EDER).
PP7	In Ljubljana there are awareness rising activities, motivation and incentives related to CCI development. Moreover, **several motivated stakeholders** with good ideas are presents. Nevertheless, **sometimes communication between stakeholders is difficult**.
PP8	Despite the wide recognition of CCIs' positive impact on societal issues, **to evaluate CCIs social contribution is difficult**. As CCIs are clearly defined as a priority in regional RIS3, a mixed-**platform**, **integrating public/private institutions** (media and other players) and promoting an attitudinal change concerning the CCIs actual economic value, is **missing**.

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A common trait, relative to the most important findings on the topic "Awareness Rising and Motivation", is that of **lack of awareness** (potential and business opportunities), **if not of "self-confidence**", of many sectors of the ICC (first and foremost crafts). This "endogenous" mistrust / unconsciousness is **coupled with the**

"exogenous" one originated **by**: a) "hard" or **traditional sectors** of the secondary sector, in particular the manufacturing sector, towards the CCIs[8]; b) **policy-makers**. Likely these two trust gaps are self-reinforcing. The two project areas that do not seem to fit into this representation are Navarra Region and Lubljana Urban Region.

Important expectations on the leverage- effect of festivals, events and the process of participation in the ECoC (Basilicata Region; Central Transdanubian Region).

Partner	Recommendations
PP1	To organize **events for different stakeholders and society** (e.g.: Basilicata Design Week); to establish a special annual award for ideas or companies from CCIs; (To organize to apply for the right) other international events after Matera2019.
PP2	To develop, as stated in the Roadmap, a **Multifunctional Regional Web Platform (MRWP)** encouraging matching, cooperation, co-creation and giving visibility to CCIs promotional and sectoral events. MFRP will also provide information (above all to crafts) on calls, funding, stakeholder's initiatives (CCICs; sector associations), training opportunities, workshops, etc. **To organize few large-scale (inter-sectoral and inter-generational) events connecting freely & informally businesses, artists, designers, culture and entertainment, public administrators, potential funders,** etc. To promote the value of culture to tourism, health and other sectors is needed (quantifying and promote CCIs' achievements and good practices), in order also to raise the regional "brand" of CCIs by promotion materials, dissemination of results of mappings and studies.
PP3	To create **a regional platform** (association, cluster, working group or web platform) to foster CCIs communities' cooperation, to promote role models and good practices, to identify common goals/projects to tackle common needs/problems. To organize workshops to allow local creatives to meet and network; to organize "**cross sectors" workshops with traditional industries** (added value; innovation). To develop **community-building initiatives** (through Community-Led Local Development, or through other ROP-matching measures). To develop (RDA) proper and medium-long term **strategic animation activities** focused on: trust-building: info flows activation within stakeholders**.**
PP4	To support and expand by a **niched strategy the impact of existing arts/music festivals** avoiding competition with other large-scale festivals. To promote debates, consultation and **co-creation processes along** the preparation process for the **ECoC 2023**, also disseminating CRE:HUB project ideas.
PP5	To deliver **few large-scale creative events** (campaigns; awareness generation initiatives) involving possibly the whole region (not only in Riga). To develop a **Multifunctional Web Platform** (matching, cooperation, co-creation)[9]. To create a Design/CIs centre to carry out **cross-industry connections**, data collection, info's gathering and sharing with sectoral / inter-sectoral players. It would give visibility to promotional/sectoral events and would provide info (calls, funding, CCICs/sectoral association initiatives, training, etc.).
PP6	To create a stimulating, vibrant, CCI's ecosystem/environment both at macro-level (Urban planning) and micro-level (enterprises setting the **definition of a standard for Cultural/Creative workplace**s) **investing in workplaces and city districts/area**, to attract youngsters and creatives. **To renovate dismissed public buildings** to use them for CCIs'

[8] Many companies, i.e, lack the understanding of the added value of design and how it could raise the market value of their products and services.
[9] The re-organisation and enhancement of an existing platform FOLD could constitute an opportunity.

	laboratories, exhibits, events.
PP7	**To set-up an extensive and participated program** of small activities and happenings likely coordinated by a single entity such as the CZK **leading,** after some time, **to a social mindset change and so awareness of the CCI's value** (business and social development). To organize **information programs** promoting the strategy in the educational area to increase the residents' awareness. To involve yet operating organizations working in the CCI for the implementation of the CZK programme.
PP8	Policy frameworks should include **capacity-building** modules to make CCI professionals able **to cooperate/work in multi-disciplinary environments**. To enlarge the **informative base of CCI policie**s by an enhanced collaboration between policy areas. **To exploit** in a smart way already **established networks, communities**, start-up gathering **places**, incubators to disseminate the information about available opportunities/funding sources for CCIs entrepreneurship development, for business contacts expansion and export activities.

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The recommended actions focus on two themes: i) the creation of physical (urban areas and spaces), associative, corporate or virtual **multi-disciplinary/multifunctional platforms** that favour the structuring of the creative community; ii) the co-planning of **a path of inter-sectorial events and activities** (large or small) attended by (communities and networks of) creatives, public / residents, businesses and other public and private stakeholders.

2.2 Regional Strategy

Partner	Key Findings
PP1	Scope of *the regional strategy for CCIs is not clear enough* and to some degree excludes some CCIs. Inconsistency in the definition of CCIs among the various strategic documents. There are 3 priority CCIs (tourism, design and creative industries serving production sectors).
PP2	There are strategic documents at the national level, but **there is no comprehensive CCIs strategy at regional level**. FVG AR's **RIS3 considers as specialization area the area "Culture, Creativity and Tourism**". FVG AR's RIS3 also focuses on the promotion of new innovative entrepreneurship by the support of innovative start-ups as well as enterprises.
PP3	Centru Region's RIS3 considers "IT sector and creative industries" as area of specialisation and the same area is described in the Regional Development Strategy 2014-2020 in the socio-economic analysis section. Anyway, *at **intermediate** level (counties) and **municipal level strategies and projects are patchy*** and therefore structured and significant results are missing at regional level.
PP4	At national level the Economic Development and Innovation Operative Program (GINOP) covers the competitiveness of SMEs, including the creative sectors. **No specific strategy focusing on SMEs/start-ups in CC sector** exists in the region**.** Most of the **statistical data** and indicators analysed is **for** the whole of **Hungary**, not for the region (or city, as relevant for specific scope the peer review). The linkage of GINOP with regional

	document can be reinforced.
PP5	Some broad and fragmented initiatives exist at the national level, but **no solid and targeted strategy** seems to be defined. CCIs are treated as generic SMEs. Targeted policies are, notwithstanding, under discussion and development. There is a strategy to develop CCI under the Ministry of Culture, but there are no specific financial measures focusing on the support of CCIs.[10]
PP6	The Strategic Plan for Culture in its strategic line on CCIs development presents positive elements in contents and methodology as the **participatory approach** (SP aims, objectives and presentations), the Strategic Plan's tree structure Roots, Diagnosis, Challenges and goal, Maintenance (Participation; **Roots;** Visions; networks; Underlying concepts; **Diagnosis**; Axes-**challenges;** Gender approach; Youngers; Claims (**Maintenance**))
PP7	The national **strategy, established with the involvement of decision-makers**, set cultural and creative industries separately. Creative industries are focused on design and architecture with an emphasis on competitive production. Among others it introduces design management in public institutions and **links stakeholders in the CCIs development**. The strategy describes the creative industry concept, it shows specific players and sets yearly financial resources, but it does not adress sectoral challenges completely and comprehensively. The strategy should better specify financial resources timing of disbursement and distribution by key areas.
PP8	Even if there is no separate CCIs Strategy, CCIs are well represented in the LMA strategy, expression of a **2-layer system (regional and national) of strategic documents**. National Action Plan 14-20 includes the key domain “Creative media and cultural industries” and RIS3 strategy includes CCIs among innovative sectors. Moreover, Lisbon economic policy focus on the development of **Strategic Clusters** in 4 sectors, including Creative Economy.

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From the analysis of the Comparative Table on Key Findings regarding Regional Strategies, a great deal of heterogeneity emerges along two main dimensions. One dimension regards the presence (LMA, Navarra Region, Ljubljana Metropolitan Region) or not (FVG AR; Central Transdanubian Region) of a Regional Strategy. The other dimension concerns the consistency between the definitions adopted of CCIs, the information base, the main strategic sectors and the different administrative-territorial levels. For some partners (Basilicata Region, Centru Region, Central Transdanubian Region) the consistency level should be improved.

Again, the Metropolitan Area of Lisbon and Navarra Region show a good integration of the Strategy for the CCIs in the general strategic framework of development that also reflects the good level of integration of the relevant documents. In these cases, you can observe that the integration of the Strategy is associated with the adoption of a participatory approach in its construction.

The strenght of the link between CCIs and the regional innovation strategies for smart specialisation (RIS3) is varying across CRE:HUB partnership. CCIs represent a priority area in some regions (Basilicata Region, FVR

[10]See ANNEX 2 (CHECKLIST; Questions 1.1 and 1.6.

Autonoumus Region, Lisbon Metropoitan Area), in other regions CCIs are linked to a limited extent with RIS3 (Ljubljana Urban Region, Central Transdanubian Region) and in some cases the link is missing (Navarra Region, Latvia).

Partner	Recommendations
PP1	The **definition of CCIs must be clarified** in order to use a unique definition of concerned CCIs sectors in action plans. Precise and broader scope of CCIs sectors would help to adjust policy action.
PP2	**To perform adequate CCIs' analysis and mapping** (CCIs role in the economic process, CCIs influence on policies, main actors, CCIs needs, existing policy measures, characteristics of sectors and subsectors, legal framework). Secondly, to prepare a comprehensive strategy based on **partnership approach**. To strengthen **coordination and integration among regional policy instruments** and measures (and potentially synergic) for CCIs.
PP3	**To re-focus the strategy giving relevance, in addition to ICT, also to the other CCIs**. The same should apply to corporate/enterprise level selecting other sectors' viable companies. To consider the creation a technology transfer centre and to represent, in the tenders/applications of the ROP 2014-2020, the specific regional CCIs needs, in particular CCIs' SMEs needs. ***Counties should have commonly adopted parts*** *within the regional CCI strategy, sections which can depict the lowest common denominator when it comes to envision regional CCI development and objectives.*
PP4	**To better align** the implementation of **new projects** (first goal of the Economic Development and Innovation Operative Program) **with ECoC 2023 target**, especially in candidacy preparation phase, including the idea of a cultural district. To perform an **assessment of** unique, distinctive and not replicable **local CCI assets** (e.g.: cultural heritage or manufacturing industry related assets).
PP5	N/a
PP6	To perform a preliminary analysis aimed at identifying Navarre's cultural and creative8 strategic (to say unique, distinctive, not replicable) assets. To updated and better focus SWOT analysis. To implement a **Socio-Economic Business Plan**, as investments in CCIs development have to be driven by the Social Return on Investment (SROI).
PP7	In order to prepare comprehensive CCIs Strategy at the national /regional level **adequate CCIs' analysis and mapping should be carried out** and its preparation should be based on a partnership approach. Coordination and integration among national and regional policy instruments/measures for CCIs are essential. Afterwards, to get all actors fully acquainted with Strategy's elements and goals, a **Communication Plan should be adopted**.
PP8	To define defined steps and instruments needed **to support** further **development of the multi-disciplinarity** and to realize the potential added value CCIs can provide to other (manufacturing) traditional sectors. To develop CCIs' **development strategies going beyond** the current programming horizon (2014-**2020**).

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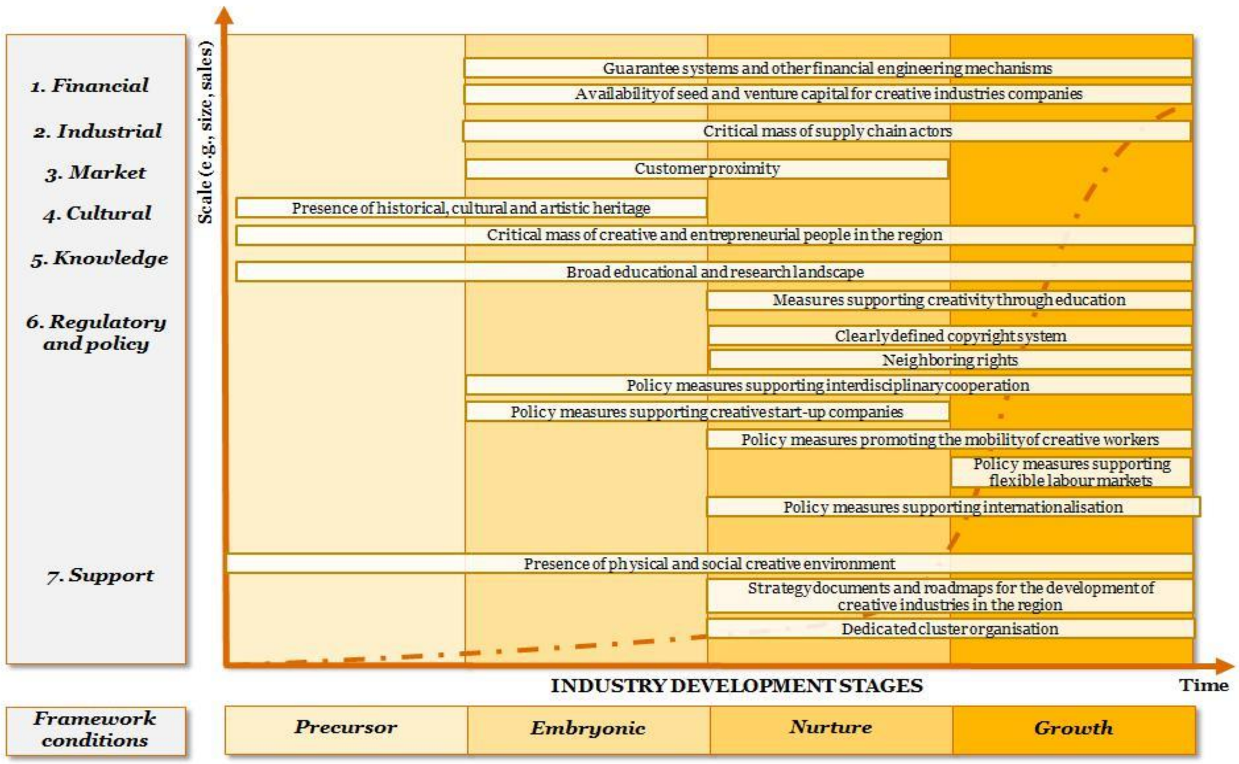
Even the Recommendations can be grouped, in first instance, around two themes. The first theme is that of **refocusing the strategy**, where the focus adjustment requires a **mapping / redefinition / enlargement of CC sectors** of interest (Basilicata Region, FVG AR, Centru Region) **or** the mapping of local strategic (unique, distinctive, not replicable) **assets** (Navarra Region, Central Transdanubian Region).

The second theme is that of a greater **integration and coordination of the Regional Strategy with the other policy instruments**, without neglecting the socio-economic repercussions, but above all with the planning (ROPs or planning related to strategic objectives such as the ECoC). The topic of better communication and dissemination (above all the strategy) concerns above all the Ljubljana urban region.

Figure 2: Mapping of identified framework conditions for creative industries



Source: Creative industries Analysis of industry-specific framework conditions relevant for the development of world-class clusters, 2013.

Adequate (comprehensive) framework conditions and policy measures cannot solve all the challenges of CCIs on their own; their presence can significantly accelerate the development of CCIs. There is no generic ("one-size-fits-all approach") in terms CCIs strategy that must be applied as what works in one region does not necessarily have to work in another one. Moreover, there is no kind of "ultimate fix" as a lot contextual factors (including historical, economic, demographic, cultural and other developments) determine the success of the applied policy measures and framework conditions set. Implementation of policy measures will require cooperation between policy makers. Therefore – as the Recommendations' second theme states - coordination and integration among different regional policy instruments and measures should be strengthened. There are different potential policy measures that could be considered indirect policy measures for CCIs: innovation support; support for training and education; regeneration of cities (urban policy); promotion of entrepreneurship in rural areas; promotion of innovative SMEs (start-ups); tourism[11], etcetera[12].

2.3 Education, Skills and Capacity Building

Partner	Key Findings
PP1	Study programs offered by UNIBAS provide education in relation to creative industries for **tourism and to some extent creative industries serving production sectors** (1st and 3rdCCIs priority sector of Regional Strategy). There is a **lack of education on design** and UNIBAS degree of internationalization is low.
PP2	Education in the CCI sector is part of secondary and tertiary education, but the disciplines concerning **CCIs are represented at the higher education level in few sector**s (architecture, performing arts and cultural heritage). **Students lack adequate business skills** (management, financing, business models, presentation) and so CCIs are lacking business skills.
PP3	**Brain- and talent-drain** phenomenon is a relevant issue. Excepting Sibiu, cultural entrepreneurship is not yet a viable alternative to other entrepreneurial ventures. A polycentric but rigid educational system causes **quali-quantitative mismatches concerning skills demand/offer** (high unemployment). Higher education institutes try to focus even on creative competences. Main (higher) educational branches are: Arts & Performing Arts; Heritage&Conversation; IT engineering; Computing; Communication; Publishing.
PP4	L**ack of universities or other higher education institutions** except small branches (mainly IT science) of some Universities from Budapest. **Young talents drain process** and return process of mature workers.
PP5	Concerning education **there are initiatives** (Demola Network) regarding university-industry connection contributing to the innovation ecosystem sustainability. There is a **need for** competence building and **more academia-industry connection**, focused on generating knowledge addressing CCIs needs as the new born **study program on CI management**. **Entrepreneurs/workers** engaged with CCIs still **lack business skills** to embrace firm growth and internationalization's challenges.[13]
PP6	CCIs labour market **main challenge is the development of Business management roles and competences**, and attraction of young and talented providers and workers, enterprises. **Skills gap relates also to Public Administration:** there is no specific skill in data collection, elaboration, reporting regarding the CCI in Navarre. Administrative skills and competences as well as Project & Program Management competences are not sufficiently developed. To map the Cultural and Creative existing core competences in order to track and monitor the education and training needs of CCI's firms. To set-up initiatives to mix and combine CC competences (cross-cultural learning) in more complex

[11] The researchers note that tourism and creative industries share many characteristics — both sectors are fragmented, dynamic, numerically dominated by SMEs, micro–businesses and sole traders.
[12] The traditional dichotomy between autonomy of culture and creativity and culture markets leads to the current policy-making's de facto standard: the arts and culture being funded by culture ministries/regional and local Directions and the cultural markets/creatives industries being governed by economic ministries/regional and local Directions.
[13] See ANNEX 2 (CHECKLIST); Questions 2.1.

	products/services.
PP7	Education in the CCI sector is part of secondary and tertiary education, but **the disciplines concerning CCIs are represented in few sectors at the higher level** as design. **Students** and **entrepreneurs/workers** engaged with CCIs **lack adequate business skills** (management, financing, business models, presentation). There is a widespread **need for competence building and** more **academia-industry connections.**
PP8	Despite a **concentration of higher education** (H.E.) institutes, **private and state research centers and laboratories, S&T parks and regional infrastructures** (creative hubs, incubators, co-working spaces, etc.) relevant for CCIs businesses, the **gap between H.E. and enterprises** remain due to low levels of collaboration and a limited efficiency of technology transfer. A **disconnection** between cultural structures and **education impairs the link arts-schools** and compounds with **underfunding of VET on technical disciplines** coupled with a stagnant labour market. VET investments are planned on the next 3-5 yrs.

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Key findings focus on the topic of **quali-quantitative mismatches concerning skills demand/offer**, where the educational offer influences the supply of skills. Often the educational offer does not cover all the CCIs (Basilicata Region, FVG AR, Centru Region, Central Transdanubian Region) and / or covers some levels (FVG AR, Central Transdanubian Region, Lisbon Metropolitan Area, Lubljana Urban Region). A transversal mis-match concerns the **inadequate supply of profiles with entrepreneurial skills** (FVG AR, Centru Region, Lisbon metropolitan Area, Latvia, Lubljana Urban Region). One of the main effects of mismatches is the brain- and talent-drain, often accentuated by the center-periphery dynamics (Centru Region, Central Transdanubian Region)[14]. Another factor reinforcing these mismatches that should not be overlooked is the presence of **skill gaps affecting the Public Administration** (Navarra Region, Ljubljana Urban Region).

Partner	Recommendations
PP1	**To develop design education collaboration** in the region ideas and Open Design School should be continued after 2019. The launch of an annual Design Week. The development of **new joint study programs related to CCIs with universities in Italy and abroad** (preferably in English). **New courses** on digitalisation of cultural heritage, virtual and augmented reality for architecture, collaboration between IT sector, culture and tourism, VE in film and audio-visual media
PP2	**To integrate economics** (e.g. accounting, corporate management, setting up a business) **into education programmes for creative professions**. To strengthen connections between universities, business environment and its support structures. **To identify skills generic** across all sectors and skills **crucial** for the sectors/sub-sectors (job-specific). To **close the gap between the business world and the CCIs** it is advisable: to increase the knowledge of "traditional" managers about CCIs' inclusion and their impact on business; to increase involved CCIs' managerial and business knowledge; to build networking and interdisciplinary cooperation' capacity.
PP3	Higher education funding and programs should be balanced/integrated with

[14]The Common SWOT Analysis Table highlights that one of the most common obstacles for the creative idea commercialization or development of already existing business for professionals within the CCI is a lack of management skills.

	actions/programs focused on primary (basic creative skills) **and secondary** (entrepreneurship and creative skills) **levels**, **VET**, **life-long learning** and **non-formal education** (encouraging skills not formed primarily for cultural entrepreneurship). **To develop urban locations' attractiveness** (structures, recreational and incoming services) for creative professionals. To develop local identities, initiatives and to use EU funds (scholarships) able to enhance "coming home" programs. To create more **stable ecosystem** involving different actors (education; business; local autonomies) **to generate innovative ideas**.
PP4	To establish **VE programmes focused on skills relevant for priority CCIs**. Regional Innovation Agency should establish a regional training and support programme following top methodologies (Flanders Districts of Creativity) and **covering in a bidirectional way SMEs and cultural initiatives**.
PP5	For what concerns the public administration, **to get a solid information base** by rigorous research on firm demography, industrial dynamics on CCIs and internationalization. To reinforce **programs on business and soft skills**. Universities should stimulate **intra academia collaborations** between students/researchers with engineering/design/tech skills and those with business sciences/economics/finance skills. To promote **academia-industry** connections.
PP6	To plan Education and Training projects to **develop Organization and Management skills especially for** business makers in the CCIs value chain (that is **Contractors**). A Contractor is capable to setup and manage the business (financial, commercial, market, organizational, administrative, logistic and managerial), while subcontracting and coordinating the producers/providers of culture and creative products/services.
PP7	Policies and programs for education within the CCI's sector should consider it as a **"moving target", given the change pace in** professional **competencies and fields of action**. (All) Educational programs should work on the **development of cross competencies useful to develop entrepreneurship and other capacities**. To work out scholarship schemes that make the profession attractive for couples and adults (start-ups and business-oriented classes). To deepen the understanding of **established professionals' educational needs**. To **adapt the up-stream CCIs' international knowledge to the local context** will help define required education skills and professional capacities. In the same perspective, public officials should constantly revisit their skills and capacities.
PP8	To raise awareness on a broad concept of innovation, providing CCIs professionals with the **needed skills-mix through customised capacity building programmes**. To develop **collaboration platforms between education and business sector** (e.g.: business incubators at universities; businesses representatives lecturing on everyday work's examples; business-focused multidisciplinary teams from different universities/ faculties) involving **creatives and technologies parks** to shorten the gap.

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The identification of the correct skill-mix is certainly one of the latent dimensions that emerge from a comparative reading of Recommendations. The need for a correct skill-mix declines in different ways in the individual Peer Review Reports, however it emerges ***the need to balance transversal skills with those job-specific*** (FVG AR), taking into account that ***training needs of the CCIs constitute in themselves a moving***

target (Ljubljana Urban Region), from which the desirability of their mapping and monitoring (FVG AR, Latvia). Starting ***from the primary education level, courses that develop the "learn to learn" competency***, which also allows the acquisition of specific entrepreneurial skills as in the training of Contractors in local markets (Navarra Region).
The second latent dimension is identifiable in the **creation of an educational ecosystem** that connects, through virtual platforms, local autonomies, educational institutions, traditional companies / entrepreneurs and creative businesses / entrepreneurs in the various phases of the life cycle. ***Ideal nodes or connection sites are "hybrids" like business incubators at the universities***. In this ecosystem perspective, the inclusion of the ***actors in the educational-entrepreneurial chain*** linked to ***VET, life-long learning*** and ***non-formal education*** should not be overlooked.

2.4 Administrative and Technical Issues

Partner	Key Findings
PP1	Many departments are dealing with different issues related to CCIs (financing, policy initiatives, support instruments, consultation, etc.). However, as the concept of CCIs is relatively new in the **area administration doesn't have a clear understanding of** needs, development possibilities and business models.
PP2	Regional Stakeholder Group stressed the relevance of the **administrative burden**, hampering the transition from self-employment to business creation. **Unfamiliarity with fiscal and regulatory guidelines** due to lack of expertise and dedicated resources is causing problems. Roadmap measures (service centres; expertise's mobility from established institutions to start-ups; temporary managers).
PP3	The **administrative division** of the region in 6 counties means that cultural projects' funding practices strongly vary across the region.
PP4	**The regions do not have competences** (even shared) **on cultural matters**. Financial resources are concentrated at national level and municipal level and most of the public policies, projects and initiatives of the regions are driven by NGOs
PP5	There is a favourable administrative environment in the country for CCI development thanks also to supporting National/regional level regulations. Registration procedures are quick/simplified even for micro enterprises and individual businesses[15].
PP6	Nowadays a **decisional support system** (process, methodology and outputs) for the CCIs' policies has not been set up; CCIs' data collection is quite recent. The imminent creation of two **Registers** (Artists and Professionals/Enterprises) represent a very useful administrative support that needs maintenance (regular data update, records' refreshment and enrichment) a query system (data base organization; definition of metadata; etc.).
PP7	The **communication and operational sinergy** between the government and the CCI sector needs development, particularly **with yet established CCIs businesses and professionals**. The legal environment enables the creation of businesses easily, but Slovenian business environment is still characterised by the **red-tape**. Previously few small projects, provided by the Regional Creative Economy Centre (RCKE), were supporting CCIs operatiional activities. To support CCIs, the Centre for Creativity (CZK)'s service framework, aside from

[15]See ANNEX 2 (CHECKLIST); Questions 6.1-6.3.

	the skill development, will assure specific support with individual mentors for entrants.
PP8	Despite a significant availability of programs, strategies and funding sources for innovation and development of business, CCI sector players are not familiar with administrative regulations due to **lack of expertise and experience** in a business field. **Insufficient** levels of structured **technical support** at regional level **for** the implementation and follow up of **entrepreneurial projects**.

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In general, CCIs in Europe are characterised by a predominance of small enterprises, representing 99% of EU businesses. Therefore CCIs are facing with the administrative burdens that are characterized for small companies. Tax and regulatory environment are crucial for the entrepreneurship and CCIs, dominated by micro and small companies, are very sensitive to the administrative and tax burdens.
However, the main findings related to a comparative analysis of the Administrative and Technical Issues show how the **capacity's gaps concerns both the CCIs** - therefore companies, freelancers and self-employed workers of the various sub-sectors - **as well as the public administrations** (Basilicata Region; Central Transdanubian Region; Lisbon Metropolitan Area) and other interested public bodies.
The latent dimension that seems to emerge is that of the **double-sided nature of administrative capacity** (building). In fact, the construction of skills should not only concern businesses, freelancers and self-employed workers (FVG AR), both in the start-up phase and in the mature phase (Ljubljana Urban Region), but also the public administrations at different levels of government. The capacity building of the public administrations is obviously influenced by the administrative structure and the competences of the different levels of government (Centru Region, Central Transdanubian Region).

Partner	Recommendations
PP1	To establish a **one stop shop/agency** for businesses of CCIs that should provide to companies / self-employed persons/ people who want to start a business, all-inclusive consulting.
PP2	Overview of existing legislation considering intrinsic characteristics of the CCIs. **Training/consulting of CCIs on regulatory and tax system** (legislation, problems, options, solutions). Overview of IPR system: state of the art, future, problems, solutions.
PP3	To Improve communication and know-how visibility among CCIs stakeholders and actors of the counties of the region. **To establish a common platform for providing support services** to CCIs possibly on regional basis. To **improve the cooperation** among the county-level CCICs. To encourage the adoption by all 12 regional counties and capitals of a **common funding framework and budge**t encouraging cross-county/city projects within the region.
PP4	To **create local grant schemes** for CCI start-ups and initiatives based on the *de minimis* funding rules and managed by the relevant municipalities but targeting the region. To have a clear definition of landmarks, KPIs and monitoring systems in the general planning framework, as it is unclear how progress will be measured, evaluated and reported to the stakeholders.
PP5	N/a
PP6	**To support programming** with the Logical Framework Approach. To apply **Evaluation models** to plan and drive the socio-economic creation of Value by (previously identified) socio-economic mechanisms to trigger. In order to do this, some "assumptions", lacking

	in the Roadmap, need identification and test. To design a **measurement and monitoring system. Decision Making Support Systems** should **support** the **Policy makers**.
PP7	**Improving private – public organism communication** for a correct development of a CCI's strategy. To take into consideration already stablished private initiatives, hubs, and spaces to bring cohesion, build on all existing capabilities and intensify collaboration with CZK (Centre for Creativity). To have **an online interface to present CCIs actors and get informed**. To create - or relate to a neutral existing agent- that can take on the CCI sector's leadership and act as main referral (broker?). **Administrative communications format optimized for Y, Z generations.** To communicate in an attractive way and properly design information platforms and administrative procedures for youth.
PP8	**Restructuring available support** could help CCI players to establish companies and to get funding for the early stages activities. Funding organizations should be competent **to determine the value of IPRs**, which is very important for this sector. **Extend equal conditions and rights** valid **for CCIs start-ups** over the years (normal practice – 5 years) of the start-ups life cycle.

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The comparative analysis of the recommendations shows a certain **dispersion about the proposed solutions / activities**. Regarding companies and private operators, one goes from the one-stop shop (Basilicata Region) to the **support services** of Training / consulting of CCIs on regulatory and tax systems (FVG AR), possibly through a common platform, to the creation of **local grant schemes targeting the region** (Transdanubian Central Region) and finally the creation of an **online interface** to present CCIs actors, private initiatives, hubs, and spaces and get informed (LUR). If we consider the public administration and in general the public subjects, a general theme of **planning, monitoring and public-private communication** emerge, addressed to the Y, Z generations (LUR). The programming will require specific tools (Logical Framework Approach, Decision Making Support System, etc.) and a strong coordination from below to align resources and objectives (Centru Region, Central Transdanubian Region).

2.5 Favourable Business Environment

Partner	Key Findings
PP1	There are **not many business support organizations/instruments**; **none** of them **is specifically dedicated to CCIs**. Some private initiatives targeting also CC companies.
PP2	Presence of R&D centres of international standing; **FVG is one of the most dynamic Italian regions in research and innovation**; Clusters, science & technology parks, incubators and other innovation hubs are present and act as business support instruments. **Support organisations are not specialised in the support to CCIs** with the exception of design. Business organizations are not supporting CCIs actively, but the situation should improve.
PP3	A large stake of CCIs' output and turnover come (depends) from IT services meant for export. The **top-heavy logic of the IT(C)** sub-sector often **negatively affects the quality of services to local CC companies**. High operating cost, business mortality and 3-year log cycles represent a constraint in terms of resources, so in Romania only 3 business incubators were granted from 2007-2013 EU Funds in Romania and the **first incubator in**

	Centru Region will be set up in 2018 (ICT, renewables, aeronautics).
PP4	The **business environment** seems to be **among the most competitive** in the country, with above average living standard. The most relevant CCIs' subsectors (RIS3) are **SW development, IT and computer services**. Business support organizations are linked to CCICs of the three counties. Four **Industry clusters** are present (IT; environmental science; health and pharmaceuticals), together with innovation drivers **but no intermediary organizations**.
PP5	The **business environment** is **among the most attractive**, as Latvia ranks at the 19th position (so in the top-20) among 190 countries in the World Bank's annual report "Ease of Doing Business" report (2018 ed.). However, **few support organisations and instruments focus on CCIs**; the only specific support is the Creative Industries Business Incubator[16]. Even **intermediary organisations are missing** to trigger bottom-up dynamics.
PP6	**Political and administrative commitment** to the development of the CCI. The size of the region is suited for a **strategy oriented toward quality and differentiation**, so niche of market and product with a strong identity. The presence of **business support organizations and incubators** (Centro Europeo de Empresas e Innovación de Navarra) is **not** balanced by the presence of **intermediary organisations**.
PP7	The economic and legal provisions make it possible to set up a business fast, but **business environment** is **still unfavourable**, especially **for small and micro business**. This criticallity adds up with a small domestic market and past economic crisis effects and fuels Slovenia's considerable brain-drain. At present, there is no proposal, plan or solution to **brain- and talent-drain** as valuable, creative workforce is flowing into larger European cities. **Center for Creativity** will provide **mentoring, knowledge-enhancing and support services for start-ups**.
PP8	Lisbon has a **network of 13 business incubators plus creative hubs, maker-spaces, 4 fab labs, co-working places**. Startup Lisboa, the municipality flagship project for entrepreneurship and start-ups support, oversees the **Innovation Centre of Mouraria, a creative incubator** hosting up to 50 projects/creative companies[17]. **Lispolis**, Technological Centre of Lisbon, supports innovative companies' incoming and growth; his **strategy[18]** focus on internationalization, investment, entrepreneurship, knowledge and networks and **aims to create an "Innovation Hub"** for anchor actors and strategic projects. There are developed criteria to support on a 50/50 basis, CCIs/technology collaboration.

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A series of indications emerge from the comparative analysis of the presence of a Favourable Business Environment. The first is the strong **variability of the presence of CCIs-focused support organizations / instruments**, with the exclusion of **IT**. Their presence seems to be relevant only in a minority part of the partnership (Ljubljana Urban Region; Lisbon Metropolitan Area). A strong **industrial vocation or specialization** in some industrial sub-sectors (Centru Region, Central Transdanubian Region, Ljubljana Urban Region) can be an opportunity or a deterrent (ambivalence) factor. Another element considered necessary

[16] See ANNEX 2 (CHECKLIST); Questions 3.2, 3.3, 3.7.
[17] Design, media, fashion, music, tile work, jewels.
[18] "Lispolis: a new strategic ambition"(2013).

are the **intermediary organisations**, which **are** however **absent or almost** in various contexts (Navarra Region, Central Transdanubian Region, Basilicata Region, FVG AR, Latvia).

Partner	Recommendations
PP1	To create **specific support rules and incubation calls for CC companies. To support private initiatives already providing services** to CCIs like co-working places. To set up specific support instruments for the most important CCIs.
PP2	To **specialise one of FVG incubators in CCIs support** (incubation services as Tallinn Creative Incubator); to develop (proposed and missing) facilities (innovation and cultural experimentations centres, fab-labs nets, co-working places, Web platforms of co-creation and collaboration). To promote CCIs' regeneration and place-making role in FVG cities.
PP3	To set-up a dedicated organization who could mentor, start-up and spin-off companies (**CCI incubator "from idea to market"**). (Second-best solution) To set-up a **"Mentor programme"** designed by RDA to involve mentors from industry/business. To implement programs focused on **social enterprises connected to CCIs sectors** in order to improve local entrepreneurial culture and expertise. To increase **local CCICs role** (training; awareness raising; etc.) in order to develop a local market for the regions CCI products and services via exhibitions, markets, networking events
PP4	**To connect** the Ministry of Regional Development and **EU Funds planning of calls** for SMEs start-up projects **to** the **strategies of the local industrie**s. To increase the level of **participated project design**, involving actors from **CCIs and traditional sectors**.
PP5	To identify some objective top-down endeavours to stimulate **bottom-up dynamics** able **to consolidate CCI community** and establish associations[19].
PP6	To increase the awareness and the commitment to co-working and co-production. To inform and **promote** about **networking and intra-industry collaborations**. To monitor the "Networking level" through the **Network Analysis**. To **promote intermediary entities** creation.
PP7	**Proximity to the public administration and proximity to the society** To host CCIs in favourable business&social environments, part of the city development. To locate **Incubators, accelerators, creative hubs within the city** (urban regeneration option) to showcase, to engage and create a collective mindset about CCIs. To promote the **empowerment by cross – sectorial collaboration** helping CCIs estimate ROI and KPI's to entice companies to "buy" services and start collaborations, also by Public-Private pilot programs. To develop a system that **tracks and records CCIs contribution** to the economy. To communicate **best-case studies** ("flags"). To let government development departments to experience CCIs' contribution to programs. To establish an open and collaborative **network between creative places**. To devise actions/policies (scholarships, dedicated young talent housing) to r**etain and attract talented individuals / startups / companies,** encouraging them to stay and empower them to perform better. To introduce **tax incentives for CC start-ups**.
PP8	To **coordinate the actors supporting CCI business development** and to evaluate the real cost vs benefit results. To set-up a project of **consolidation and specialization of the numerous bodies**. To set-up **an accelerator with KPI** as SWOT Analysis points to a lack of follow up after the start-up phase (several incubators&parks, but no one is focused in

[19] See ANNEX 2 (CHECKLIST); Questions 3.3.

	acceleration, crucial for CCI). It is advisable: to make an international alliance of local subsidiary with, e.g., ABC accelerator from Slovenia or scale-up with some Italian entity; **to assign funds and resources to Lispolis strategic Agenda**, focalising also on the growth ("innovation Hub") and not only start-ups.

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The recommendations are in line with the observed strong variability in the provision of dedicated (intermediate) structures and organizations. A first theme is the **creation or specialization of dedicated structures**: dedicated incubators (Centru Region), the specialization of existing ones (FVG AR, Central Transdanubian Region, LMA) and the creation of accelerators (LMA). In this soft incubation perspective lies the creation of mentoring programs or actions (Centru Region). A second theme around which a part of the recommendations can be grouped is that of **consolidation, coordination, creation of connections** between: CCIs, actors and entities supporting businesses, the public administration and society (LUR; LMA). This is **in order to create an ecosystem** really favourable and attractive for cultural and creative enterprises able to generate hybridizations, such as **participated project design** between different sectors (Central Transdanubian Region) and the mix between social enterprises and CCIs (Centru Region). The improvement of the business environment passes through **promotion and communication actions** to increase the level of knowledge (and therefore of trust) of the manufacturing sectors and non-creative services (LRU) and the networking degree between the different creative sub-sectors (Navarra Region). It can be observed that this last group of recommendations overlaps with awareness and networking themes, as the creation of a favourable businesses environment involve also these dimensions.

2.6 Access to Finance

Partner	Key Findings
PP1	There are **no financial instruments** in the region designed especially **for** the development of **CCIs**. **ERDF ROP plans to foster the development of new products and services** (vouchers; support for R&D development and technological innovations; support for research and new business models). Few applications in a major national financing project in the tourist sector for South Italy likely shows insufficient sectorial business activity and/or **insufficient knowledge and skills of local companies**.
PP2	Access of CCIs to financing in FVG AR is limited as in other countries/regions. CCIs still have **insufficient capacity to attract investments** (poor ability to promote/enhance entrepreneurial projects). Credit sector lacks businesses valuation models for CCIs both for fixed assets (intangible assets) and revenues (services quantification). Access to credit is hampered by: **fragmented and intricate information** on funding and financing, **procedural intricacies,** inadequate targeting. There are some **"horizontal" initiatives**[20] and **incentives are targeting some CCIs**[21].
PP3	**Except for a few investments in IT**, startups, angel, private or venture investment in the regions **focus**ed **on CCIs is close to inexistent**. Outside the ICT sector, other CCIs – in

[20] Funder35; CARIGO and CRT Foundations.
[21] Performing Arts and Visual Arts; Cinema and Audiovisual.

	particular culture – can found f**unding possibilities depending on the county and municipality**. No general ways can be identified, local solutions are flourishing.
PP4	Financial support for SMEs (CCIs SMEs included) is managed by central government; no local funding available under de minimis schemes, or equivalent. **Regional and local funding is targeting public infrastructures**, some of them aligned with the ECoC 2023 programme. No information provided on CCIs financing instruments available from banks.
PP5	**CCIs** have a difficult access to financial assets, due to **ineffectiveness to attract investments** (poor ability to promote/enhance entrepreneurial projects) in a marketing logic. Access to credit is hampered by: **information asymmetry, procedural intricacies and inadequate targeting**. **Banks lack businesses valuation models** adapted to CCIs, both for fixed assets (intangible assets) and revenues (provided services).
PP6	**The** typical **issue of access to finance for CCI** enterprises also **exists** in Navarre, private as well as public. A range of public support instrumets include public calls to finance innovative projects, **tax incentives for cultural sponsorship**, and a **TAX incentive for filmmakers** that affects the film industry, a subsector with high cross-sectoral impact concerning CC and non-CC industries.
PP7	CCIs in Slovenia are facing **lack of appropriate funding opportunities**, nevertheless CCIs are made up of several **diverse sub-sectors**, and so it is difficult to talk about them as a single entity. The problem of access to finance is closely linked to the fact that the CCIs in Slovenia/Europe suffers from a lack of middle-sized firms. There is **need for further analysis** on access to finance of Slovene CCIs, because no comprehensive analysis has been produced. In the future Centre fof Creativity (CZK) will try to support CCIs with the financial and mentor's support in in the framework of its five-year budget.
PP8	Lisbon and Tagus Valley Region' ROP 2014–2020 (**POR Lisboa 2020**) is the financial instrument to support regional development. There are planned investments in SMEs competitiveness targeting internationalization, innovation and R&D (RIS3 identify CCIs as a priority). In 2015 Portugal has introduced **entrepreneurship vouchers**, aiming to support sectors with strong growth potential, including CCSs and/or knowledge-, science- and technology-based companies, namely in the application of R&D results to goods and services production.

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The comparative analysis of key-findings related to Access to Finance highlights at least three points of common interest. The first point relates to the inexistence or **almost-inexistence of dedicated private financial instruments and** / or significant private **funding** flows to CCIs, if we exclude ICT (Centru Region, Central Transdanubian Region) and in some cases the audio-visual sector (FVG AR; Lisbon Metropolitan Area)[22].

The sometimes relevant and targeted presence of **public funding** (Navarra, FVG AR) which, however, **only in one case** (Ljubljana Urban Region) is **somehow coupled with a strategy**. Significant amount of funding for priority areas for 2014-2020, but unclear opportunity for CCI to apply (Lisbon Metropolitan Area).

[22] The mainstream investors are more interested in certain sub-sectors of cultural and creative industries that promise greater profitability in terms of market growth and a speedier return on investment: film/media, games, creative services with a digital dimension or based on specific software like video games.

Finally, **information gaps** on available instruments and financial flows often **compound with capacity gaps** in terms of attracting funds[23] and their provision (businesses valuation models for CCIs' assets and revenues)[24].

Partner	Recommendations
PP1	The main stakeholders (public agencies; regional government etc.) responsible for CCIs should organize **informative events** about available financing and **courses on project application preparation for CCIs.**
PP2	Training of CCIs and awareness raising among lenders and investors on the particularities of CCIs, to say **improving CCIs' financing skills** by training/mentoring/consulting. It is important **to present alternative financial opportunities** as equity finance (venture capital, business angels and seed capital) and crowdfunding. To strengthen existing funding opportunities and introducing new ones: public authorities must **stimulate private investment and promote PPPs benefiting CCIs** SMEs, (grants, guarantee mechanisms, equity financing and crowdfunding). It is important **to simplify existing financing instrument** and extend the eligibility to CCIs. **Financial support should be combined with training, mentoring** and internationalization.
PP3	**To market to investors CCIs potential**, investment opportunities and incentives. To establish a regional business angel network (e.g. teaching investors with free investment capacities) and/or co-investment fund. To sustain a regional **information system on up-to-date financial possibilities** and their requirements. To establish an acceleration/incubation program for CC startups to create deal-flow towards investors**.**
PP4	To **concentrate fiscal/financial incentives**, as well support services, around the strategy for the European Capital of Culture programme.
PP5	**To improve CCIs' financing skill** (training, mentoring, consulting). **To introduce/promote alternative financing** (equity finance; crowdfunding). **To improve investor and lenders CCIs' awareness/understanding** (joint events, public support, good practices) and market intelligence (case studies, success stories, ROIs). **Public administrations should stimulate private investment** and promote **PPPs** (grants, guarantee mechanisms) To simplify existing financing instrument and **extend the eligibility** to CCIs. To combine **financial support with other measures** (training, mentoring, internationalization).
PP6	Any financing plan should be made functional to and subsumed by a **Strategic Plan** (Financing is then strictly related to Programming), as a SP **assure the projects sequencing** (considering their importance and impacts) and exclude financial distribution. To concentrate financial resources rather than to distribute in order to achieve critical mass on Strategic Program's priority subsectors.
PP7	To create a **successful entrepreneurship ecosystem to correctly articulate funding** – as funding cannot be the solution, just a catalyst - and resources **for the whole cycle CCIs** Startups will have to go through, avoiding the well-known concept of "Dead Valley Curve". To allow the Centre for Creativity to support **crowdfunding initiatives**. The

[23] The Common SWOT Analysis Table highlights that the sector of creative industries in the partner regions is mainly built from small businesses (self-employed persons, micro and small business) showing low level of internationalization, difficulties in attraction of investments due to the insufficient capacity in knowledge, experience and resourses (both human and financial). CCIs, SMEs encounter difficulties in accessing the funds they need to finance their activities, both in terms of credit and equity. While this is a common challenge for SMEs in general, the situation is significantly worse for those working in the cultural and creative sectors
[24]Due to the intrinsic characteristics of the CCIs (lack of physical assets, dependence on intangible assets, the consequent lack of collateral and highly uncertain market demand), creative small businesses are facing difficulties in seeking finance from banks.

	Creative Center should make a monitoring system about the projects to have a vision for the 6th year. The budget of the Centre for Creativity should contain **a "low hanging fruit" project(s)** to gain a quick win and further support from the government.
PP8	**To design special calls** for CCI SMEs and start-ups **producing spill overs on traditional sectors** with the aim to improve the regional innovation ecosystem. To recognise, describe **and monitor Good Practices in** all stages of the **CCI enterprise life cycle**, in order to evaluate CCIs' development trends in the light of supporting programmes' investments. To include **incremental scores/evaluation criteria** in public call for funding "rewarding" bidders' partnership with CCIs or bidders purchase of CCIs start ups' products and services.

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The comparative analysis of the Recommendations highlights three themes/issues common to several partners. The first issue is related to the **mutual reinforcement**, in terms of capacity and information available, **of the** applicant **CCIs and of the lenders of funds** (Basilicata Region, FVG AR, Centru Region) by training / mentoring / consulting and information system on up-to-date financial possibilities in the case of the CCIs. In the case of lenders, **public authorities** must **stimulate private investment and** promote **PPPs** benefiting CCIs' SMEs.

The second topic is related to the **concentration / non-dispersion of funds** (Central Transdanubian Region, Navarra Region).

The construction or strengthening of an **ecosystem that allows the articulation of funding** (private and/or public) (FVG AR, Ljubljana Urban Region, Lisbon Metropolitan Area) is the theme that in some way subsumes the others.

2.7 Partnerships and Networking

Partner	Key Findings
PP1	The **degree of partnership and networking differs in each of CCIs** in the region. In film industry and architecture, the cooperation within associations and companies in joint projects is satisfactory. Preparation for **Matera2019 - European Capital of Culture** is fostering collaboration and partnerships between different players of CCIs
PP2	Despite existing **partnerships between the stakeholders and industrial clusters** (agribusiness; engineering; maritime technologies; "smart health"), the **lack of networking capacity** of the CCIs represents a barrier both in developing a solid business model and in their internationalization processes. **FVG AR** has strengthened its **role in fostering partnership** between CCI stakeholders.
PP3	**Lack of a common regional policy** regarding cultural development and promotion due to the administrative division of competences in the region**.**
PP4	Regional Innovation Agency acts as a think tank and project vehicle. **CCIs value chain are managed and led by public authorities** and institutions (delivering projects, culture, art

	or education); a small number of private actors delivers cultural and creative content. 2 IT clusters are operative and **new clustering initiatives** are just discussed[25].
PP5	The **CCI community is not solid and established** yet. CCIs are not yet organized as an Association. The environment and resources seem to be a sufficient for a mobilization of actors and collective action towards CCIs, but some **top-down endeavours are needed** to stimulate stronger bottom-up dynamics[26].
PP6	The regional authority has started to **map and register both the artist and the enterprises operating in the region**. Subsectors are identified but the structure of interactions between companies along the value chain is missing. Young **associations representing and promoting** on voluntary basis **one or more subsectors** are growing an collaborating also with regional government.
PP7	The lack of a clear definition of Creative and Cultural Industries results in a lack of precise data of the real GDP and makes it difficult to account **the mass of professionals belonging to them**. Disaggregated **professional associations should network** and consider the possibility of partnership and clustering to achieve the gain of mass. Between the Ministry and the Creativity Centre, the liaison is tight, **but other actors of the sector do not feel included** into the overlaying development vision concerning CCIs and the use of the amount earmarked for it.
PP8	Several structures were recently developed in LMA to support regional innovation system (incubators, accelerators, research centres) and next steps are defined for **connecting sectors where CCI play a unified role** in the partners' value chain. ADDICT is an association playing the major (national) role in cluster development. A **CCI cluster** was created in 2017

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Some focuses emerge from the comparative analysis on the partnership and networking theme. The first is the **existence of a critical mass / concentration** enough to trigger and support, with targeted interventions by public actors, networking and partnership processes that develop from below (Navarra Region; Ljubljana Urban Region; Lisbon Metropolitan Area) through the creation of registry, the creation of associations promoting and representing sub-sectors and professionals and the extension of already started processes and initiatives. In other contexts, the situation is **intermediate** and public intervention must be more incisive, perhaps leveraging drivers like the ECoC (FVG AR, Basilicata Region), or managing value chains in a top-down logic and creating clusters[27].

The second point is that of the existence or absence of creative clusters (Central Transdanubian Region; Lisbin Metropolitan Area) where the importance of an **urban context** (focus) should be considered as much

[25] A recent action initiated and led by CTRIA (KDRIÜ) was the establishment of the **6C Creative Industry Cluster** in the city of Székesfehérvár at the end of 2017. This cluster fosters the creation of a network of cultural innovators and their coordinated collaboration (including the collaboration in the international context), as well as the promotion innovative products in the area.

[26] See also ANNEX 2 (CHECKLIST); Questions 4.4.

[27] As the Coomon SWOT Analysis Table highlists in the CRE:HUB project's reference area there is in average an insufficient cooperation between different parties from government, business, NGO, professional associations, local universities. Some steps have been done to improve local cooperation level and the CRE:HUB project brings stakeholders together on one table.

the presence of a regional **system for innovation** (incubators, accelerators, research centres) that must harmonize with CCIs.

Partner	Recommendations
PP1	To narrow the **focus on specific areas of CCIs for clustering** (Roadmap suggests the creation of CCI Cluster) as cultural tourism + cultural heritage, design or film/audio-visual industry. To develop and support **incubators and co-working spaces** fostering cross-sectoral collaboration and partnerships; to held **public events** for networking, exchanging ideas etc.
PP2	It is crucial to get **all different stakeholders** (government, business community and non-governmental sector) together to create an **Integrated Strategy** for the CCIs. To strengthen partnerships/networking by: formal (Institutional) cooperation as working groups and CCI Council; informal cooperation where **Interaction platforms** could develop the "supply chain" (see Roadmap). To set up specialised organisations.
PP3	To set-up : **co-working spaces; networking workshops for various CCIs** (fashion; cultural tourism). To establish (RDA resources; public resources) a multiannual funding to allow **regular (intra-regional) networking events and activities**. To analyse the feasibility of a **CCIs' regional cluster** gathering counties assets, specialities and actors all along the value chain, promoting (internationalization) activities and synergies with other regions complementing the value chain and fostering innovative activities. To create **a common framework, regional budget and funding mechanism** encouraging cross-county/city projects, via the financial contribution of key stakeholders. To create a working group, strategy and tools to aggregate development, promotion and commercial efforts among Region's cultural actors.
PP4	To encourage and guide the emergence of smaller scale clustering/networking projects (**creative district/quarter initiatives; makers' communities and spaces** on outskirts). To set up a complete **list of companies and NGOs** acting in the CCIs.
PP5	To get together government, business community and NGOs to create an integrated strategy for the CCIs **collaboration/interconnection** with traditional industries, **allowing the use of Design Thinking** (and other methods) for innovative products and services. To **promote public awareness and discussion** on the socioeconomic importance of CCIs.
PP6	To incentive **the creation of firms acting as "Business catalyser/coordinator"** in the CCI's Value chain for SMEs and micro enterprises. Those firms integrate contributions of the individuals or micro-firms and provide to the market single products and/or macro events/products. The organizational model/role correspond to the General Contractor. A reference model is the Finnish KAAPELI https://www.kaapelitehdas.fi/.
PP7	**To gain CCIs critical mass and identify a centralized agent i**n order to: gain negotiation power allowing the co-development with public administrations of funding programs, new policies, etc.; be perceived as valuable on the eyes of the public administration and the economic tissue. **To build CCIs ecosystem by identifying all the possible stakeholders/agents** that might benefit from achieving a critical mass and want to belong to a CCI ecosystem. To map CCIs to understand CCI's needs and expectations through participatory methods. **To widen and strengthen partnerships around the Centre for Creativity** by activating a process of listening to all the experiences on the territory**.**
PP8	To coordinate the actors by a project of **consolidation and specialization** of the numerous bodies. To evaluate the real cost vs benefit results and to develop key

	performance indicators (KPI) to validate the efficiency of the whole system (Startup Lisboa, Iniciativa Lisboa). As there is a lack of follow up after the start- up phase, an **accelerator** with KPI can be a good investment. To look at the experience of the **European Network of Creative Hubs**, supporting the development and networking of creative hubs across Europe and beyond (http://creativehubs.eu/).

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The comparative analysis of the recommendations on the theme "Partnerships and Networking" highlights some dimensions or, better, key words.

The first is that of **structures, platforms and events** for networking: co-working and makers spaces and districts (Basilicata Region, Centru Region, Central Transdanubian Region); networking events and activities (Basilicata Region, Centru Region, Central Transdanubian Region).

The second one refers **to identify / list** (all the possible) **stakeholders / agents** (Centru Region, Central Transdanubian Region, LUR).

The third is the **identification of the catalyser / coordinator** of the network that can be a project of consolidation and specialization of the numerous bodies (LMA), an entity (LUR), a business acting as a General Contractor (Navarre Region) or a first step towards regional coordination (Centru Region).

2.8 Internationalization

Partner	Key Findings
PP1	CCIs represent only 1.5% of the overall regional export. CCIs is by large represented by furniture and clothing industry. There are not any regional support instruments to foster export of CCIs. **Regional agencies' internationalization activities do not have a focus on CCIs.** Study programs, even if focusing on culture, cultural heritage, architecture, archaeology and tourism, are not available for international students (thus excluding education export). Main barriers are: **lack of knowledge and skills for external markets**, language barriers; **no enough instruments and tools** for internationalization (e.g., support for participation in trade fairs, markets, training and consulting events).
PP2	Despite a quite high trade internationalization of the CCI SMEs in FVG (the ratio between regional CCIs exports and total regional exports ranks third at national level) nevertheless **CCI are dependent on local relational network**, are small and usually **lack expertise and information about potential foreign markets**. The regional chamber system manages some **tools for internationalization** (vouchers; B2B; overseas missions; special projects) but they are **designed for SMEs in general**.
PP3	Low positioning on the global value chains. While most of its CCI turnover is generated by exports, the region is still delivering **low added-value services** (BPO, etc.) and products. Notwithstanding Sibiu gained a reputation as an international destination (2007 ECoC) incoming **tourism in the region is mainly domestic**. Banking sector and financial services not sufficiently developed to support the CCIs internationalization.
PP4	**Central Transdanubian Regional Innovation Agenc**y Non-profit brings regional actors

	together with partners from other European regions (national and international cooperation) - facilitating, promoting and supporting the participation in international/EU and domestic networks - or simply boost export/import of CCI products (support for internationalisation and exports; education, training and consulting; financial incentives. i.e. export credit guarantees etc.).
PP5	**CCIs' internationalization is not a priority**. There are **no dedicated support instruments** for CCIs' internationalisation directly. The only financial incentive specific for CCI sectors is available within Altum, a state-owned development finance institution.
PP6	CCIs of Navarre are characterized by desirable (reduced size of the region) and possible but **low internationalization level**. Notwhistanding aspects enabling the crucial enteering in new markets (access to the Euroregion; closeness to international borders) CCIs enterprises face important gaps such as **lack of: resources to invest and travel, knowledge of foreign languages, international contacts**. Gov. of Navarre provides an **internationalization service** and participate to CPT (Working group of the Pyrenees).
PP7	Despite a favourable framework (public commitment, incentives, etc.) the **internationalization level is low**. The actors of CCI sector are **working on their own**. Some of them have national partner but mostly they focus on the domestic market.
PP8	LMA's policy makers appreciate **local organisations assisting** CCIs' representatives in **internationalization and export** activities. **LMA's assets in incoming internationalisation** are: a developed network of infra-structures for arts, culture and sport; expertise in organization of large national and international events (for example, Websummit 2017); a cultural tourism dynamism. **Fragmentation** in the CCI sector makes **positioning in the international market complex and costly**. CCI representatives are having difficulties finding entry points, identifying partners and funding opportunities assigned for export.

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The comparative analysis on the theme of Internationalization highlights how the theme is not very developed in the project partnership's reference areas. There are no documents dedicated to the internationalization of the CCIs and, on average, there are **instruments and structures for the internationalization of SMEs** in general, but Regional agencies' internationalization **activities do not have a focus on CCIs** (BR, FVG RA and CTR). In this way support structures are backing just some-subsectors linked to industrial design, IT, audio-visual.

CCIs **lack knowledge and skills for external markets, language barriers** prevent business and professionals from from extending significantly activities beyond the national market (Basilicata Region; FVG Autonoums Region; Navarra)[28]. Even in the most structured situations, fragmentation in the CCI makes positioning in the international market complex and costly. **CCI representatives are having difficulty finding entry points, identifying partners and funding opportunities** assigned for export. The interest in favouring **incoming internationalization seems to prevail**, even when not explicit, and the interest for the internal market is prevalent even in the most structured situations (Ljubljana Urban Region; Lisbon Metropolitan Area).

Partner	Recommendations

[28] See also the Common SWOT Analysis Table.

PP1	To foster development of cultural tourism and services' export (film industry, expertise in cultural heritage, archaeology) as well export of the publishing industry. Main public actors should provide an **integrated support** (*training; consulting; participation in trade events abroad; incubation of CCIs start-ups export-oriented*) **for CC businesses to foster service export and internationalization.**
PP2	In addition to the tools and initiatives proposed in the Roadmap, specific tools could be provided such as training activities and programmes for CCIs and intermediaries, **industry–to–industry dialogue**, scouting missions and market intelligence, and **collective representation in international fairs**. The **role of the CCIs in the internationalization strategy** (general or culture-specific) **must be identified**.
PP3	To launch **investor events** to promote the regional CCIs strengths, using local CCICs international connections and **developing matching activities**. To carry out events and awareness actions towards local banks and finance providers concerning the local CCIs' potential, and to trigger a reflection on more **suitable financial schemes** (e.g. guarantee funds, export subsidisation, micro loans etc.). Regional administration should create **ad hoc international events** and identify networks and programs to take part in collaboration with other clusters/entities. To leverage on 'Dracula phenomena' to make tourism support the local cultural and creative activities.
PP4	To cooperate with regions whose cities that will have had the title of ECoC, (Sibiu, Matera) to improve the chances for gaining the title and boost **overall level of international CCI exchanges.**
PP5	N/a
PP6	**To promote and support connections** (J-V, exchanges, co-productions, etc.) within foreign enterprises; CCIs and commercial HUBs (fairs, commercial agencies, international cultural consumption networks). To **support key expertise and products** (even outside the CCIs) because of their attracting power.
PP7	To build a **specific brand in the startup world**, representing **Ljubljana as an attractive and affordable environment for creatives**. To devise how to build on existing international connections of CCI's young entrepreneurs and Start Ups and foster new connections by the public administration. To exploit the **Internationalization double nature of Outside – In and Inside – out process** mixing classical tools and new (**youth connections; social networks**). A worldwide campaign could help Slovenia.
PP8	To consider **CCIs' specificities** while designing support programs (funding; export) to ensure CCIs benefit from networking opportunities and infrastructures. Policy-makers/private stakeholders should consider **CCIs support structures not only a good solution** to create peer-to-peer connections, to ensure mobility/networking, to build international ties/new partnership, **but** also as **active players** and partners to attract FIs as well as to promote CCI across borders. To adopt a law similar to the Italian «Start-Up Visa», **to attract extra-UE investors** and to allow **long term residence and work visa**.

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The comparative analysis of the Recommendations regarding the theme "internationalisation" highlights three focuses common to several partners.

The first concern the need to develop **integrated services** for the *Out-Coming Internationaliation*, including export services. Integrated services include training; consulting; scouting; participation to trade events and fairs; I2I; incubation of CC start-ups export- oriented (Basilicata Region; Friuli Venezia Giulia AR)[29].

The second focus concern the support of **cross-border networking connections** within: foreign enterprises, CCIs, commercial HUBs, investors (Navarra Region; Centru Region); creatives' mobility (Lisbon Metropolitan Area) and start-ups (Ljubljana Urban Region); cities/events (Central Trransdanubian Region).

The third focus relates to *Incoming Internationalization* by: **supporting key-expertise, products and characters** (Navarra Region; Central Trransdanubian Region); building a **territorial brand** as an attractive/affordable environment (Ljubljana Urban Region).

There are different proposal for horizontal Internationalization instruments[30] development in CRE:HUB regions as: support for training activities and programmes for CCIs and intermediaries (as CCICs); export advice and information; export finance or credit guarantee measures; promotional activities (e.g.: trade missions; supporting participation in exhibitions or trade fairs; etc.); support for platforms, clusters and networks; support for (pilot) projects.

[29] In 2010, the Green Paper "Unlocking the potential of cultural and creative industries" the European Commission (2010) stresses that CCIs, especially SMEs require support to establish contacts and to have their activities promoted abroad. In order to support the international reach of CCIs, specific tools such as industry–to–industry dialogue, scouting missions and market intelligence, and collective representation in international fairs could be provided. Furthermore, facilitating artistic exchanges with third countries is also important to stimulate cultural diversity.

[30] Internationalization instruments can be horizontal (CCIs internationalisation strategy) or/and sectoral (music, film, theatre or culture in general). Regarding the strategy there are few options: 1. A dedicated strategy for CCIs exports and/or internationalisation; an international strategy focusing broadly on the internationalisation of culture; a general export strategy including cultural and creative sectors; various measures and/or institutions supporting CCIs exports, mainly through a sector-based approach.

Section 3: CCI's policies impact indicators: a first proposal

The objective of this section is to connect the dimensions and / or latent factors related to the different areas of the strategic development of the CCIs and identified thanks to the Comparative Analysis carried out in the previous paragraph, to a series of qualitative-quantitative indicators related to the impact of policies for the development of CCIs.

This paragraph therefore wants to represent the connection with and the start of the process of identifying a Common Monitoring System of CRE:HUB partnership' policies .

3.1 The possible dimensions around which to develop a Common Monitoring System

The matching between the themes and their main characteristics \ latent dimensions is first and foremost a hopefully complete collation phase of potentially interesting indicators for monitoring the CRE:HUB policies, and, in a second sense, an exercise in dissemination of the results of the project "CREA.RE creative regions" in the INTERREG IVC programme, a project that had in the partnership the KEA, responsible and main author of the Deliverable of reference for the compilation of the underlying Table that combines the characteristics\latent dimensions with a set of possible indicators, both qualitative and quantitative.

It should however be noted that the exercise of selection of the impact indicators of the most appropriate policies will have to consider two elements:

a) the maturity stage of the cultural and creative enterprises sector, as it obviously contributes to the identification of the objectives of policies that can be very different if we consider a situation of relative "maturity" of the sector or, on the contrary, a situation in which the sector is in a phase of emergence or first development;

b) a policy, if well-articulated and potentially effective, envisages not only final objectives, but also intermediate objectives of short and long term with respect to its horizon. These objectives have a structurally different position along the policy implementation period and therefore indicators relative to objectives placed in different phases cannot compete for the selection.

Table 3.1 – Themes, Common Dimensions/Actions and proposed Indicators

	COMMON LATENT DIMENSIONS/ ACTIONS to ENFORCE/IMPLEMENT	INDICATORS
Awareness Raising and Motivation	**Increase the Confidence (of creative communities) to Gain Trust**	Number of cross-sectoral events/workshops open or close to traditional industries; Existence of a Multifunctional Regional Platform (matching, cooperation, co-creation; adv. on promotional and sectoral events, etc.); Number of local community building initiatives (LDLL)
Regional Strategy	**(Sub-) Sectors Mapping**	Completion of initial mapping of CCIs' local needs (by sub-sector); identification of characteristics / features by sub-sectors of interest

	To Strengthen Public-Public Private Partnership for Policies	Stakeholders' involvement in the management and planning process; Number of new non-CCIs' policy documents integrating CCIs as a new priority (e.g. culture, innovation, tourism, entrepreneurship policies); Development of cooperation platform between policy departments for strategic level discussions and agenda development for CCIs' policy
Education, Skills and Capacity Building	**New Educational Paths for a Creative Entrepreneurship**	Number of new courses on CC topics; Number of New Curricula on CC subjects; Number of Curricula on CC subjects with educational modules for economics and business; Training modules for Public Administration dedicated to CCS
		SMEs: ((Number) Types of advice services tuned on the beneficiaries' needs (business advice, legal advice; support specific skills, etc.). Enhanced knowledge and skills of beneficiaries for business competence; (Number) new skill development measures. Number of CC businesses moving from "incubation" to "dis-incubation" since the measure started; Presence of a cooperation network/platform along the education-businesses chain linked to VET, life-long learning and non-formal education
Administrative and Technical Issues	**The double-side of Capacity Building**	Expertise in culture within authorities (# of executives); Development of Decision and Planning dedicated methodologies; # of dedicated meetings CCIs/P.A. of the cooperation platform/s per year; # of newly established one stop shops/agency/support services for CCIs; # of hours of lectures provided per beneficiary (fiscal legislation; etc.)
Favourable Business Environment	**Urban areas and spaces for Creative Communities**	Availability of space for creative businesses (m^2 made available); Ratio between 'Surface available' (e.g. m^2) and 'Occupation of the surface by beneficiaries'; Increased Access to broadband lines/ ICT infrastructures and services; Increase of investment in workplaces or city districts/area or buildings renovation
	Dedicated organizations and structures for CCI	New CCIs Incubator; New CCIs accelerator; # of intermediary organisations; # of CCIs-focused support organizations/offices
Access to Finance	**Creativity-friendly Financial Schemes and Creativity-friendly Lenders**	Number of "ad hoc" Financial Schemes; New financial services marketed; Number of Financial Schemes Beneficiaries/Users; Increase of investments into CCIs (since the launch of the

		support measure); Increase of lending towards CCIs (since the launch of the lenders' capacity measure); Existence of an Agreement and/or PPP for CCIs funding;
Partnerships and Networking	**CC Businesses Connectivity**	Existence of a list of CCIs businesses and/or professionals; Number of co-working spaces and/or makers' spaces and/or creative districts created since the launch of the measure; Number and types of collaborative networks/clusters developed; Number and quality of new B2B partnerships or contracts developed by beneficiaries
Internationalization	**The bidirectional (in-out) nature of Internationalisation**	Existence of CCI's role in Internationalization Strategy; a dedicated strategy for exports in CCS; List of high-attraction expertise and products; Number of connections (exchanges, co-productions, joint-ventures etc.) with foreign business; Number of "dedicated" tools for internationalization; Increase or set up of support schemes for international; Increase or set up of support for showcases, festivals, fairs, trade missions, other export-related events/ activities.

Section 4: General Considerations

The joint analysis of Peer Reviews had to consider a series of elements, contextual to the reference area of the partnership of CRE: HUB. First, the environmental conditions, the context, which constitute the initial conditions which must consider the different initiatives and policy measures. The Initial Conditions, as observed and stressed in the Cultural and Creative Industries - JOINT REPORT, were quite different in the partnership.

This diversity in the state of the art of the different regional realities is reflected in the focus of Strategies for the development of the cultural and creative sector, focuses ranging from the priorities and planned activities to the incubators' services catalogue, from calls' selection criteria to projects/programs financing and stakeholders' involvement, etcetera.

The same high heterogeneity manifested itself in the main findings and recommendations of the experts, as diversity concerning each theme compounded with different interpretations of certain themes by experts' teams and with different backgrounds of the experts, resuting in different analytical approaches.

Despite this strong overall heterogeneity, the comparative analysis was found to be effective to identify 2/3 focuses / key words / "common" latent dimensions for each of the Main Findings and Recommendations. They are summarized in the table below.

Table 4.1 – Synopsis of Key Findings and Reccomendations by Theme

	Main Findings	Reccomendations
Awareness Raising and Motivation	**"Endogenous" lack of "self-confidence" & "Exogenous" mistrust** (manufacturing sector, policy-makers); **High expectations on the leverage** of events; **small** and **ever-changing creative communities**	Physical/associative / virtual **platforms**; **strategic paths co-planning of inter-sectorial events** involving creative communities, citizens, businesses, public stakeholders
Regional Strategy	Strategy **Presence/Absence**; **Consistency** (between CCIs definitions informative base, strategic sectors, administrative-territorial levels); **Participatory approach**	**Refocusing** the strategy (mapping, redefinition, CCS enlargement, mapping of local strategic assets**)**; **Integration and Coordination** (with other policy instruments and strategic planning)
Education, Skills and Capacity Building	**Quali-quantitative mismatches** (educational offer levels, profiles with entrepreneurial skills, P.A. skill gaps); **Brain-and talent-drain**	**To balance transversal and job-specific skills**; **to map and monitor (VET) needs**; **to develop the "learn to learn" key-competency** **To create an educational ecosystem**[31] **whose ideal nodes are "hybrids"** (e.g.: business incubators at the universities)**, including** in the **school-work chain actors** linked to **VET, LLL** and **non-formal education.**

[31] Local autonomies, educational institutions, traditional/creative companies and entrepreneurs.

Administrative and Technical Issues	**Double-sided capacity-gap** concerning both the CCIs as well as the public administrations	*Enterprises, professionals* **To reinforce Adminstrative Skills** (one-stop shop, training / consulting /mentoring platform) **and visibility** towards the public administration. *Public administration* **To get specific tools** *(planning)*, **coordination from below** *(monitoring)* **and communication formats creative – friendly**
Favourable Business Environment	**Missing CCIs-focused Support** (organizations and instruments)**;** **Ambivalent role of Industrial vocation** **Intermediary organisations needed but almost absent**	**To create** (new) **or specialize** (existing) **dedicated structures**. **To consolidate, coordinate, create connections** (to generate **hybridizations**; to increase the level of **knowledge/trust** and the CCIs' **networking degree**)
Access to Finance	**Inexistent (or almost) tailored private financial instruments and flows** **Public funding patchily relevant** and/or **well targeted** **Compounded gaps: information gap and capacity gap**	**Mutual reinforcement of** CCIs and lenders **capacity/information** **Funds concentration/non-dispersion** and **projects' sequencing** **To construct or strengthen financial ecosystems articulating** private/public **funding along** CCIs **businesses' life-cycle**
Partnerships and Networking	Enough critical mass / concentration let **networking and partnership processes** to **develop from below**. In intermediate contexts a more incisive **public intervention can leverage on drivers (ECoC), manage value chains or create clusters** The **urban context (focus)** is **as much relevant as** the presence of **(CCIs-friendly) systems for innovation** (incubators, accelerators, research centres)	**To create structures (co-working, makers' spaces, districts), platforms** and networking **events and activities** **To identify/list** (all the possible) stakeholders/**operators (businesses and professionals)** **To create/identify a catalyser / coordinator** (consolidation or specialization project, entity, general contractor, regional coordination initiative)
Internationalization	**Neither strategies nor structures** for the CCIs' internationalization **Regional Agencies' internationalization activities** do not have a focus on CCIs There is a **lack of knowledge and skills** (language) **for external markets** **Fragmentation** and **difficult to find entry points, partners and funding** Focus on **incoming internationalization** (and domestic market) **prevails**	**To integrate services support for out-comig internationalisation** (including services for export) To support **Cross-border networking** (foreign enterprises-CCIs-commercial HUBs- investors'; creatives and start-ups; cities/events) **To support incoming internationaliza-tion** trough key expertises, products and characters, a **territorial brand**

Cultural and creative industries (CCI) in project CRE:HUB region. represent an opportunity as these industries are developing faster (or contract less) than other segments of the national economy in the most project area. It however appears that potential of CCI is not yet fully exploited. While some EU regions have been very good at tapping into this extraordinary potential, to promote socio-economic development - including using EU Structural Funds -, it however appears that many others have not been making most of this potential. The joint report highlights that, to make this potential explicit, considering the different characteristics and levels of maturity of the cultural and creative sector in the partnership area, a series of existing but disconnected resources must be put in place and a series of constraints and barriers should be weakened.

The lack of comparability in data analysis used to support creative strategies, their inconsistent definitions and applications of creative industries classifications, makes it difficult to truly assess the relative contribution creative industries make to urban, regional and national economies. The report highlighted the quite diffuse requirement to refocus the strategies trough mapping, redefinition, priority CCSs enlargement, mapping of local strategic assets.

Despite the differences in the definition and scope of CCI, the core idea of the term remains the same in the project regions – by combining traditional cultural industries (film, music, performing art) with new creative sectors (architecture, design, fashion, ICT). At a more peripheral level, many other industries rely on content production for their own development and are therefore to some extent interdependent with CCIs. They include among others tourism and the new technologies sector. The report indicates that business environment must be made more favourable to support those kinds of dynamics, in particular through the creation, consolidation and coordination of connections to generate hybridization and cross-sector fertilization and knowledge/trust. Furthermore, the construction or strengthening of a financial ecosystem articulating private/public funding along CCIs businesses’ life-cycle would also be beneficial.

In the CRE:HUB project region the same tendency is observed as in the EU: CCIs are mostly bound to the urban environment due to the better developed infrastructure, communication and higher concentration of human resources, cooperation opportunities. The joint report highlights that a balance must be sought between the "citizen" nature of a significant part of cultural and creative activities and often peri-urban presence of (CCIs-friendly?) structures for innovation (incubators, accelerators, research centres).

Linking culture and creative industries as well as other economic sectors is the driver of innovation also in those branches of the economy where investing in research and development is low, e.g. in traditional sectors and services. But, as highlighted in this report, a double barrier, represented by “endogenous” lack of self-confidence" and exogenous mistrust, must be overcome through appropriate initiatives and tools.

It is therefore likely that future creative strategies will require a more sophisticated and realistic consideration of the role of the creative industries within the knowledge economy, including a deeper understanding of the innovation and production linkages between the creative industries and other sectors of the (not-so-new) knowledge economy. In terms of knowledge economy, the report (see also Table 2 of Appendix), highlights that a fundamental prerequisite that is currently lacking in most of the project area is the presence of a suitable and adequate supply of human resources for cultural and creative enterprises.

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Appendix

Table 1.A - Checklist Comparative Table

		PP1	PP2	PP3	PP4	PP5	PP6	PP7	PP8
1.	**Regional strategy**								
1.1	There is clear strategy for CCI, supported by specific objectives and indicators: - national level	NO	NO	YES	YES	NO	YES	NO	YES
	- regional level	NO	NO	YES	YES	NO	YES	NO	YES
1.2	Region has clearly defined its CCI sectors	NO	YES	YES	NO	YES	YES	NO	YES
1.3	Job creation appears as a priority in this strategy.	YES	N/a	YES	YES	YES	YES	NO	YES
1.4	Progress is regularly assessed against its objectives and measures outcomes	YES	N/a	N/a	N/a	NO	YES	NO	YES
1.5	Different sources of funding are employed to support the implementation of the	YES	N/a	YES	N/a	YES	YES	NO	YES

strategy.								
1.6 There is an SME/Start-ups strategy in CCI sector, supported by specific objectives and indicators (measures to sustain / boost creation of companies).	NO	NO but for all industries	N/a not specifically	NO	NO	YES	NO	YES BUT not precisely targeted
1.7 The different regional strategies are clearly coordinated, also with national and other levels.	YES	N/a	YES	N/a	N/a	YES	YES	YES
1.8 The regional strategy considers sustainable development objectives.	YES	N/a	YES	N/a	YES	YES	YES	NO
2. <u>Education, skills and capacity building</u>	**PP1**	**PP2**	**PP3**	**PP4**	**PP5**	**PP6**	**PP7**	**PP8**
2.1 There is an appropriate connection between universities and business environment: companies find the work force they need and students find the job they want	NO	NO	NO	N/a	YES	YES	YES but not sufficient	NO
2.2 The region provides instruments to support education in the CCI sector	NO	NO	N/a	NO	N/a	N/a	YES	YES but not sufficient
2.3 Demand and offer fit on the regional market (regional workers find jobs and regional companies find the necessary human resources, all this in the	NO	YES	NO	N/a	N/a	NO	NO	YES

region)								
2.4 Measures have been set up to limit the migration of the necessary workforce out of the regional territory.	NO	NO	N/a	NO	N/a	N/a	NO	YES
2.5 There is an equal opportunities policy regarding employment in the region.	YES	YES	N/a	N/a	N/a	N/a	YES	YES
3. <u>Favourable business environment</u>	**PP1**	**PP2**	**PP3**	**PP4**	**PP5**	**PP6**	**PP7**	**PP8**
3.1 The region has a clearly identified innovation anchor(s).	YES	YES	YES	YES	YES	YES	YES	YES
3.2 Clusters, accelerators, science parks and other innovation hubs are present and act as support instruments.	YES	YES	N/a Partly	N/a	YES	YES	YES	YES but
3.3 Intermediary organisations (such as Chambers of Commerce, Business Associations, innovation agencies ...) play an active role in fostering CCI in the territory.	YES	YES	N/a Partly	YES	NO	YES	YES	YES
3.4 Knowledge Providers (universities, research and innovation centres) cooperate / network efficiently with companies.	YES	YES	YES	NO	YES	YES	YES but not sufficient	NO
3.5 Existence of a diversified business environment (big/small/old/new companies).	YES	YES	YES	YES	YES	YES	YES	YES

3.6 Jobs in the CCI sector are available throughout the region's territory (as opposed to only in certain areas).	YES	YES	NO	N/a	YES	NO	NO	N/a
3.7 The business environment is active to support CCI.	NO	NO not enough	N/a partially	NO	YES	N/a	YES but not sufficient	YES but CCIs miss skills
3.8 Existence of private financial actors (venture capitalist, business angels, seed funds…).	YES	YES	N/a partially	NO	YES	NO	YES but not sufficient	YES
4. <u>Partnerships and networking</u>	**PP1**	**PP2**	**PP3**	**PP4**	**PP5**	**PP6**	**PP7**	**PP8**
4.1 The regional authority has an active role in fostering partnership between CCI stakeholders. (companies, clusters, innovation and research centres, universities)	YES	YES	YES	YES	YES	YES	YES but not sufficient	YES
4.2 The regional authority is itself involved in this partnership and works closely with existing stakeholders.	YES	YES	YES	NO	YES	YES	YES but not sufficient	YES
4.3 If applicable, the CRE:HUB partner has an active role/is involved in the existing partnerships between innovation stakeholders.	YES	YES	YES	YES	YES	YES	YES	YES

4.4 Involvement of other stakeholders such as Chamber of Commerce, trade unions, employment agencies in different projects, cooperation.	YES	YES	N/a	YES	YES	YES	YES	N/a
5. Access to finance	**PP1**	**PP2**	**PP3**	**PP4**	**PP5**	**PP6**	**PP7**	**PP8**
5.1 The financing for CCI businesses development is available and easily accessible from commercial banks.	NO	NO	N/a partially	NO	NO	N/a	NO	NO
5.2 Regional authorities are providing financial support for the CCI businesses development.	YES	YES	YES	NO	YES	YES	YES	YES
5.3 The regional authority has established schemes and/or instruments to support CCI companies that create jobs, through subsidies/taxes or other benefits.	YES	NO	NO	NO	NO	YES	YES	YES
5.4 The regional authority monitors the creations/disappearances in companies that receive public support through subsidies/taxes or other benefits.	YES	NO	N/a	NO	YES	N/a	NO not yet	YES
6. Administrative and technical issues	**PP1**	**PP2**	**PP3**	**PP4**	**PP5**	**PP6**	**PP7**	**PP8**
6.1 There aren't any administrative and technical barriers for CCI business development.	NO	NO	NO	NO	YES	NO	NO	NO
6.2 National/regional level regulations support the	YES	YES	N/a	YES	YES	YES	NO	YES

CCI development.			neutral					
6.3 Administrative burden for starting and running CCI businesses isn't too big even in the case of microenterprises and individual businesses.	NO	YES	N/a	YES	N/a	YES	NO	NO
7. Awareness rising and motivation	**PP1**	**PP2**	**PP3**	**PP4**	**PP5**	**PP6**	**PP7**	**PP8**
7.1 There are national/regional level public awareness rising activities related to CCI development.	YES	YES	N/a	YES	YES	YES	YES	YES
7.2 There is a clear definition for CCI in the country/region.	NO	NO	YES	NO	YES	YES	NO	YES
7.3 Motivation and incentives for CCI development.	YES	YES	N/a	N/a	YES	YES	YES	YES
8. Internationalization	**PP1**	**PP2**	**PP3**	**PP4**	**PP5**	**PP6**	**PP7**	**PP8**
8.1 Involvement of the region and/or CCI stakeholders in local/interregional, national, international cooperation projects/agreements.	YES	YES	N/a	YES	YES	YES	YES but not sufficient	YES
8.2 Education, training and consulting.	NO	NO	N/a	YES	NO	N/a	NO	YES
8.3 Financial incentives. i.e. export credit guarantees etc.	NO	YES	N/a	N/a	NO	NO	NO	YES
8.4 Motivation, support instruments and incentives for CCI businesses to go international.	NO	NO	N/a	N/a	NO	N/a	NO	YES

Considering the aggregates of positive, negative and non-available information, we can observe that: about 56% of the questions are answered positively, therefore features/elements referred to in the specific questions are present; about 28% of the questions received a negative answer, to say factors/statuses referred to in the questions are absent; for the 17% of topics infos were not available.
If we consider this distribution for the individual themes, it is observed that in 4 out of eight themes the presence of features / elements referred to in the specific questions is certain in less than 50% of the answers and in one case in less than a third of the answers.
Analysing the single themes, it is possible to identify themes were features/elements concentrate or are absent or the information is not available.

Table 2.A – Themes by presence of features/elements asked for

	YES	NO	N/a
Partnerships and networking	90,6%	3,1%	6,3%
Awareness rising and motivation	70,8%	16,7%	12,5%
Favourable business environment	70,3%	17,2%	12,5%
Regional strategy	54,2%	29,2%	16,7%
Access to finance	43,8%	43,8%	12,5%
Administrative and technical issues	41,7%	45,8%	12,5%
Internationalization	37,5%	37,5%	25,0%
Education, skills and capacity building	30,0%	37,5%	32,5%
TOTAL	***55,6%***	***27,8%***	***16,6%***

Education, skills and capacity building seems to be far under average regarding the presence of “necessary” features and elements, whith a particularly low presence of regional instruments to support education in CCI sector. Only in one case there are measures to limit workforce migration outside of regions, and this may be one of the reasons/casual factors of CCIs jobs’ demand/offer mismatch, as demand and offer of CCIs jobs fits only in 2 regions out of 8.
Also, internationalization, as similarly found in the Main Findings, presents a deficit situation relative to the presence of structural characteristics and elements. A third theme in wich there is a significant absence/low presence of features, elements and attitutes asked for is the Administrative and technical dimension. Access to financial resources confirms its intrinsic criticality also for the CCIs of the CRE: HUB partnership.

Analysis is particularly positive for the following single topics, where al least 7 regions out of 8, responded positively to questions regarding the presence of relevant features and elements:
3.1 *The region has a clearly identified innovation anchor(s).*
3.5 *Existence of a diversified business environment (big/small/old/new companies).*
4.1 *The regional authority has an active role in fostering partnership between CCI stakeholders. (companies, clusters, innovation and research centres, universities)*
4.2 *The regional authority is itself involved in this partnership and works closely with existing stakeholders.*
4.3 *If applicable, the CRE:HUB partner has an active role/is involved in the existing partnerships between innovation stakeholders*

5.2 *Regional authorities are providing financial support for the CCI businesses development.*
6.2 *National/regional level regulations support the CCI development.*
7.1 *There are national/regional level public awareness rising activities related to CCI development.*
8.1 *Involvement of the region and/or CCI stakeholders in local/interregional, national, international cooperation projects/agreements.*

For the following topics, 6 regions out of 8, responded positively to the related question:
1.3 *Job creation appears as a priority in this strategy.*
3.2 *Clusters, accelerators, science parks and other innovation hubs are present and act as support instruments.*
3.3 *Intermediary organisations (such as Chambers of Commerce, Business Associations, innovation agencies ...) play an active role in fostering CCI in the territory.*
3.4 *Knowledge Providers (universities, research and innovation centres) cooperate / network efficiently with companies.*
4.4 *Involvement of other stakeholders such as Chamber of Commerce, trade unions, employment agencies in different projects, cooperation.*
6.2 *National/regional level regulations support the CCI development.*
7.3 *Motivation and incentives for CCI development*.

The framework that is outlined by composing the above positive items, outlines a public sector active in providing support to the CCI sector, as a leverage for creating new jobs and with a focus on innovation and participatory approach. Particularly high is partnership and networking where public sector plays a vital role to create the necessary sinergies for the growth of CCI sector. The public support is both financial and in terms of creating favourable business environment.

The following questions received a positive reply only in 1 or 2 at most out of 8:
1.6 *There is an SME/Start-ups strategy in CCI sector, supported by specific objectives and indicators (measures to sustain / boost creation of companies).*
2.2 *The region provides instruments to support education in the CCI sector*
2.3 *Demand and offer fit on the regional market (regional workers find jobs and regional companies find the necessary human resources, all this in the region)*
2.4 *Measures have been set up to limit the migration of the necessary workforce out of the regional territory*.
3.7 *The business environment is active to support CCI.*
6.1 *There aren't any administrative and technical barriers for CCI business development.*
8.2 *Education, training and consulting.*
8.3 *Financial incentives. i.e. export credit guarantees etc.*
8.4 *Motivation, support instruments and incentives for CCI businesses to go international.*

The following question received 0 affermative replies:
5.1 *The financing for CCI businesses development is available and easily accessible from commercial banks.*

The following table shows the distribution of postitive, negative and N/a answer to all themes by partner.

Table 3.A - Overall distribution by partner

Basilicata Region	***Yes***	24
	No	16
	N/a	0
Friuli Venezia Giulia Autonoumus Region	***Yes***	21
	No	13
	N/a	5
Centru Region	***Yes***	5
	No	15
	N/a	20
Central Transdanubian Region	***Yes***	14
	No	14
	N/a	12
Latvia	***Yes***	24
	No	10
	N/a	6
Navarra Region	***yes***	27
	no	5
	N/a	8
Ljubljana Urban Region	***yes***	27
	no	3
	N/a	9
Lisbon Metropolitan Area	***yes***	31
	no	7
	N/a	2

The partner that registered the highest number of positive answers is Lisbon Metropolitan Area with 31 positive answers out of 40 questions (77%), followed by Ljubljana Urban Region and Navarra Region with 27 positive replies on as many topics. The situation with the highest opportunity of improvement concern Centru Region, where only 5 questions received a positive response and there is the highest rate of uncertainty with 20, let say half of the questions, left undecided because of information unavailability. The lowest uncertainty can be noticed in Basilicata Region, with zero answers left undecided (N/a), and in the Lisbon Metropolitan Area with 2 answers left undecided (N/a). Basilicata Region has also the highest number of negative answers (16 out of 40).

Regarding the analysis of the topics per partner, the following can be observed:
1. Regional strategy: particularly low is Centru Region, with zero positive answers, and particularly high are Navarra Region, with 9 out of 9 positive answers and Lisbon Metropolitan Area and Ljubljana Urban Region, with 8 and 7.

2. Education, skills and capacity building: Particularly low are Basilicata Region, with 4 out of 5 negative answers, and Latvia with 4 N/a.

3. Favourable business environment: 4 partners (Basilicata Region, Fvg Autonoumus Region, Latvia, Lisbon Metropolitan Area) are very high, with 6-7 positive answers out of 8, whereas Centru Region has only one positive answer.

4. Partnerships and networking: 4 partners (Basilicata Region, Fvg Autonoumus Region, Latvia, Navarra Region) are very high, with 4 positive answers out of 4, whereas Centru Region has zero positive answers.

5. Access to finance: Ljubljana Urban Region has the best situation, with 4 out of 4 positive answers, then Basilicata Region, Fvg Autonoumus Region, Lisbon Metropolitan Area has 3 positive answers and Centru Region only one, the most negative situation.

6. Administrative and technical issues: only Ljubljana Urban Region has a positive perception, with 3 out of 3 positive answers.

7. Awareness rising and motivation: 3 out of 3 positive answers are detected for Latvia, Navarra Region, Ljubljana Urban Region and Lisbon Metropolitan Area, whereas Centru Region has zero positive answers

8. Internationalization: it is particularly low for Basilicata Region (3 negative answers out of 4), Centru Region (4 N/a), Latvia (3 negative answers out of 4) and particulary high for Ljubljana Urban Region and Lisbon Metropolitan Area with 4 positive answers.