

"Policies for Cultural CREative Industries: the HUB for Innovative Regional Development" (CRE:HUB)

Cultural and Creative Industries JOINT REPORT





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1. Introduction

Despite the fact that cultural and creative industries (CCIs) are a relatively new concept in the European Union (EU), they appeared at the beginning of the 21st century in most countries. The role of CCIs serves as an important driving element in economic and innovation development.

Within the scope of the EU, CCIs are considered as a source of both cultural and economic value. In recent years, significant work has been done to establish CCIs as an integral part of Europe's society and economy and has been a source of employment, growth and prosperity. However, its potential in terms of culture and artistic creativity to trigger innovation in other sectors of the economy, society as a whole and for the well-being of individuals has not yet been fully recognised.¹ There are various estimations of the economic performances of CCIs. According to the Ernst & Young analysis, CCIs employed more than 7 million people in the EU and accounted for 4.2% of the EU's GDP in 2014.² Alternatively, Eurostat has estimated that over 8 million people (3.7% of the total workers) in the EU were employed in a cultural sector in 2016.³

The CCIs JOINT Report was developed within the project "Policies for Cultural CREative Industries: the HUB for Innovative Regional Development" (CRE:HUB) which is implemented under the Europe Interreg Programme. The overall objective of the CRE:HUB project is to improve programmes for Investment for Growth and Jobs (TO3) of eight European project regions in order to support the creation and development of new small and medium-sized enterprises (SMEs) in the CCIs sector at regional and national levels through fruitful cooperation among regions with different level of capacities and experiences in CCIs supporting policies. Thus, CRE:HUB responds to the European Commission's strategy to boost growth and jobs in CCIs.⁴ The project started in April 2016 and is implemented in two phases. The first phase will continue until September 2018 and second will be from October 2018 to September 2020.

This study was coordinated and prepared by the **University of Latvia** (LV) in partnership with other CRE:HUB project partners: project leader – **Basilicata Region** (IT), and partners – **Autonomous Region Friuli Venezia Giulia** (IT), **Regional Development Agency Centru** (RO), **Central Transdanubian Regional Innovation Agency Non-profit Ltd.** (HU), **University of Latvia** (LV), **Culture, Sport and Youth department of the Government of Navarre** (ES), **Regional Development Agency of the Ljubljana Urban Region** (SI) and **ADIST- Association for the Development of IST Técnico Lisbon** (PT).

The JOINT Report was elaborated on the basis of the State of the Art Reports conducted by project partners and authors' own research, it presents an analysis of CCIs in eight project regions:

- Basilicata Region (Italy, IT)
- Autonomous Region Friuli Venezia Giulia (Italy, IT)

¹ Council of the European Union (2015), *Council conclusions on cultural and creative crossovers to stimulate innovation, economic sustainability and social inclusion* (2015/C 172/04), Official Journal of the European Union, C 172/13, 27.5.2015

² Ernst and Young (2014), *Creating Growth / Measuring cultural and creative markets in the EU*. Available at: [http://www.ey.com/Publication/vwLUAssets/Measuring_cultural_and_creative_markets_in_the_EU/\\$FILE/Creating-Growth.pdf](http://www.ey.com/Publication/vwLUAssets/Measuring_cultural_and_creative_markets_in_the_EU/$FILE/Creating-Growth.pdf) (accessed on 12.01.2017)

³ Eurostat (2016), *Cultural statistics 2016*. Available at: <http://ec.europa.eu/eurostat/documents/3217494/7551543/KS-04-15-737-EN-N.pdf/648072f3-63c4-47d8-905a-6fdc742b8605>

⁴ European Commission (2012), *Commission launches strategy to boost growth and jobs in cultural and creative sectors*, Press Release, IP/12/1012. Available at: http://europa.eu/rapid/press-release_IP-12-1012_en.htm



- Centru Region (Romania, RO)
- Central Transdanubia (Hungary, HU)
- Latvia (the whole country, LV)
- Navarre Region (Spain, ES)
- Ljubljana Urban Region (Slovenia, SL)
- Lisbon Metropolitan Area (Portugal, PT)

The report provides an overview of the status of the CCIs in the project area by comparing the definitions and sub-sectors of CCIs.⁵ It gives an evaluation of the primary common challenges and opportunities that participating regions are facing using the SWOT method and a Matrix of Barriers & Solutions form evaluated by each project region.

Due to the lack of comparative data on economic contribution of CCIs across the project area (NUTS 2 level), Eurostat data on “cultural activity” was used to analyse the tendencies of cultural employment, enterprises and turnover at the national level of the project regions between 2011 and 2016. This data was obtained based on the methodology framework proposed within the ESSnet-Culture Final Report.⁶

Moreover, the profiles on the CCIs characteristics (key overview of the CCIs situation, main sub-sectors, policy instruments and key stakeholders) of each project region are provided at the NUTS 2 level (in the case of Ljubljana Urban Region (SL), which coincides with the statistical region Central Slovenia (*Osrednjeslovenska*), the data was applied at the NUTS 3 level). Additionally, a collection of 16 good practices across project area is presented.

In the project context, CCIs represent highly innovative SMEs. Their promotion can effectively increase regional competitiveness and job creation capacity as underlined in strategic documents of participating project regions, such as Operational Programmes, National Development Plans, Smart Specialization Strategies (RIS3) and others. Table 1 presents policy instruments addressed in the CRE:HUB project area. Despite the dynamic and innovative fields of action, CCIs encounter difficulties in accessing credit, building effective partnerships, extending their activity to other countries and lack resources in enhancing their competitiveness in the global market.

This Joint CCIs Report is meant to facilitate deeper analysis and insight into potential policy initiatives in the field of CCIs among the project’s partner regions.

⁵ The term CCIs is used interchangeably in the CRE:HUB project and this report with “cultural and creative sectors”.

⁶ Bina, V., Chantepie, P., Derooin, V. et al. (2012), *ESSnet-CULTURE, European Statistical System Network on Culture, Final Report*, Luxembourg. Available at: http://ec.europa.eu/assets/eac/culture/library/reports/ess-net-report_en.pdf



Table 1. Policy instruments addressed by the CRE:HUB project partners

Region	Policy instrument
Basilicata Region (Italy)	ERDF Operational Programme Basilicata 2014–2020 Thematic Objective (TO 3): Competitiveness of SMEs
Autonomous Region Friuli Venezia Giulia (Italy)	ERDF Regional Operational Programme Friuli Venezia Giulia 2014–2020 Action 2.1 (TO 3; IP 3a): Actions to foster creation of new firms and development of existing ones by providing incubation services (promotion of SMEs competitiveness)
Centru Region (Romania)	Regional Operational Program 2014–2020 Priority axis 1 (TO 1, PI 1.1.): Promoting innovation in enterprises via support entities for innovation & technology transfer in respect to the Regional RIS3; Priority axis 2 (TO 3, PI 2.1., 2.2.): Improving the competitiveness of SMEs; Priority axis 4 (TO 6, TO9, TO 10, PI 4.2., 4.3., 4.4): Supporting sustainable urban development; Priority axis 5 (TO 6; PI 5.1., 5.2.): Improving the urban environment and conservation, protection and sustainable use of cultural heritage; Priority axis 7 (TO 7, PI 7.1.): Diversification of local economies through sustainable tourism development
Central Transdanubia (Hungary)	Economic Development and Innovation Operative Program (GINOP) Priority: Fostering competitiveness of SMEs
Latvia	Operational Programme “Growth and Employment” 2014–2020 TO 3: Enhancing the competitiveness of SMEs
Navarre Region (Spain)	Navarre ERDF 2014–2020 Operational Programme Objective 3: SMEs competitiveness, IP 3.4. support SMEs for growing in regional, national and international markets as well as in innovation processes
Ljubljana Urban Region (Slovenia)	Operational Programme for the Implementation of the EU Cohesion Policy 2014–2020 Priority axis 2.3.: Dynamic and competitive entrepreneurship for green economic growth with two specific objectives. Specific objective 1: Enhance the total early-stage entrepreneurial activity, particularly start-up enterprises; Specific objective 2: Increase of value added in SMEs
Lisbon Metropolitan Area (Portugal)	Lisbon Region Operational Program 2014–2020 – POR Lisboa 2020 Priority: SMEs competitiveness

Source: Application Form of the CRE:HUB project, eight regional Roadmaps (developed by project partners) and authors own research



2. Overview of the CCIs situation and main challenges

2.1. Economic indicators of the regions

The CRE:HUB project represents seven different regions from six countries (Italy (IT), Romania (RO), Hungary (HU), Spain (ES), Slovenia (SL) and Portugal (PT)) and one statistical region covering a whole country, namely Latvia (LV), which is classified as a single NUTS 2 region due to the small population number.

Chapter 2.1. focuses on the demographic and economic indicators such as population, area, density, GDP, unemployment and innovation performances at the regional level (NUTS 2) based on the regional CRE:HUB State of the Art Reports, data at the Eurostat databases and Regional Innovation Scoreboard reports. For the Ljubljana Urban Region (SL), which coincides with the *Osrednjeslovenska* statistical region (Central Slovenia), data at the NUTS 3 level were applied, if possible. In case of the data shortage, variables of *Zahodna Slovenija* (Western Slovenia, NUTS 2 level) were analysed. More detailed description about each of the project region is provided in [Chapter 3](#).

Table 2. Overview of project regions – population, total area and density

	Population (2016)		Total area (km ²)		Density (inhabitants/ km ²) (2016)	
	of region, million	% of country	of region, thousand	% of country	of region	of country
Basilicata (IT)	0.57	0.9	9 995	3.3	57	201
AR FVG (IT)	1.22	2.0	7 862	2.6	155	
Centru (RO)	2.34	11.9	34 100	14.3	69	83
Central Transdan. (HU)	1.06	10.8	11 112	11.9	96	106
Latvia (LV)	1.96	n/a	64 573	n/a	30	
Navarre (ES)	over 0.64	1.3	10 391	2.0	62	93
LUR (SL)	over 0.50	26.0	2 334	10.0	229	101
LMA (PT)	2.82	27.0	3 015	3.3	932	112

Source: Overview of the regions developed based on the Eurostat database;⁷ regional reports (CRE:HUB State of the Art) elaborated by project partners as well as the Regional Innovation Scoreboard 2017 ⁸

AR FVG- Autonomous Region Friuli Venezia Giulia, LUR-Ljubljana Urban Region, LMA-Lisbon Metropolitan Area

The total area of the project regions makes up 143 603 thousand km² (3.29% of the total EU territory) and is populated by over 11 million inhabitants (2.18% of the total EU population) as of 2016. Population size of each region varies from over 0.5 to 2.81 million, where the least populated regions are Latvia and Basilicata (IT), and the most are Lisbon Metropolitan Area (PT) and Ljubljana Urban Region (SL), showing higher density than the whole regions' country (see Table 2). This high density within the Lisbon Metropolitan Area and Ljubljana Urban Region is

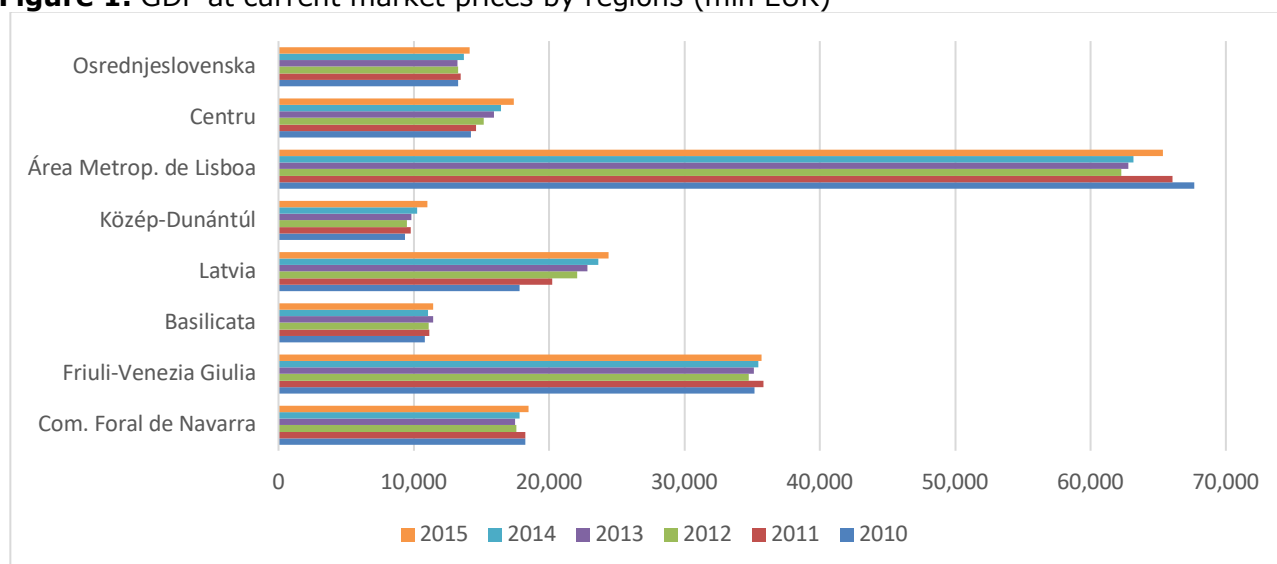
⁷ Eurostat, Regional statistics, Population, Table: demo_r_d2jan. Land cover and land use, landscape, Table: lan_lcv_ovw. Available at: <http://ec.europa.eu/eurostat/data/database>

⁸ Regional Innovation Scoreboard 2017, Regional profiles by country. Available at: http://ec.europa.eu/growth/industry/innovation/facts-figures/regional_en



explained by the capital cities (Lisbon and Ljubljana) being located within the regions that see a concentration of the country's economic, cultural and social activities. The same tendency is seen in Latvia (LV), where its capital city Riga, as a key driving force in the country's development and economic activity, is populated by around 32% of the total country population (2 109 persons per km², while total density of Latvia (LV) is 30 persons per km², as of 2015).⁹ The rest of the partner regions show slightly lower population densities than their national ones (see Table 2).

Figure 1. GDP at current market prices by regions (mln EUR)



Source: Eurostat (accessed 29.09.2017)

Table 3. GDP at current market prices by regions (mln EUR)

	2010	2011	2012	2013	2014	2015
Com. Foral de Navarra (ES)	18 257	18 221	17 573	17 481	17 833	18 485
Autonomous Region Friuli Venezia Giulia (IT)	35 169	35 844	34 746	35 106	35 438	35 669
Basilicata (IT)	10 797	11 129	11 081	11 404	11 037	11 449
Latvia (LV)	17 789	20 202	22 058	22 829	23 631	24 368
Közép-Dunántúl (HU)	9 340	9 781	9 491	9 836	10 264	10 993
Área Metrop. de Lisboa (PT)	67 653	66 073	62 276	62 791	63 194	65 344
Centru (RO)	14 224	14 617	15 152	15 941	16 454	17 368
Osrednjeslovenska (SL)*	13 288	13 479	13 284	13 232	13 706	14 145

Source: Eurostat (accessed 29.05.2017). From the national languages: *Közép-Dunántúl* - Central Transdanubia Region (HU); *Área Metropolitana de Lisboa* - Lisbon Metropolitan Area (PT); *Comunidad Foral de Navarra* - Navarre Region (ES). *Ljubljana Urban Region coincides with the *Osrednjeslovenska* statistical region (Central Slovenia, NUTS 3)

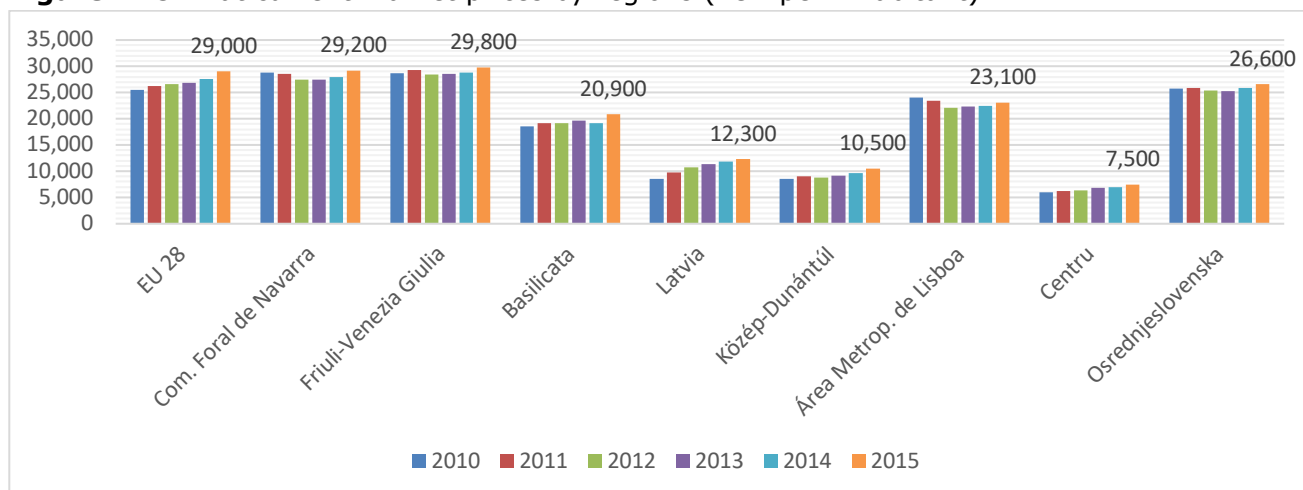
In terms of **economic development**, the levels observed vary among the CRE:HUB project regions. According to the Eurostat data, during the years 2010-2015 the GDP of CRE:HUB partner regions has generally risen. Out of the project regions, Lisbon Metropolitan Area (PT) is the largest GDP contributor, with a GDP (65 million EUR at current market prices) almost six times as large

⁹ Latvian Investments and Development Agency (2015), *The Economic Profile of Riga 2015*, Riga: LIAA. Available at: http://www.liaa.gov.lv/files/liaa/attachments/rigas_profilis_2015_eng_web.pdf



as the region with the smallest GDP, produced by the *Közép-Dunántúl* (Central Transdanubia Region) (around 11 million EUR) and Basilicata Region (IT) (over 11 million EUR), as of 2015. Centru Region (RO) and Latvia (LV) are the only partners to have experienced continual and uninterrupted GDP growth between 2010 and 2015 (see above Figure 1 and Table 3).

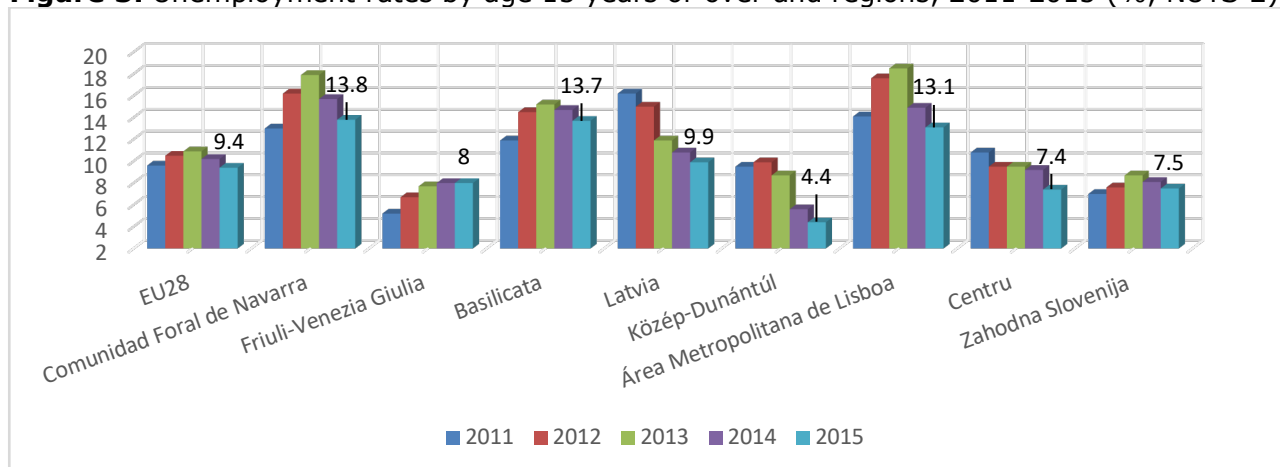
Figure 2. GDP at current market prices by regions (EUR per inhabitant)



Source: Eurostat (accessed 20.11.2017). From the national languages: *Közép-Dunántúl* - Central Transdanubia Region (HU); *Área Metropolitana de Lisboa* - Lisbon Metropolitan Area (PT); *Comunidad Foral de Navarra* - Navarre Region (ES). Ljubljana Urban Region coincides with the *Osrednjeslovenska* statistical region (Central Slovenia, NUTS 3)

After analysing Eurostat data on the GDP per inhabitant (Figure 2), the results suggest that only two regions act above the EU average level during the 2010-2015 - Navarre Region (ES) and Autonomous Region Friuli Venezia Giulia (IT). The lowest performance during this time frame is seen in Latvia (LV), *Közép-Dunántúl* (Central Transdanubia, HU) and Centru Region (RO). Overall, all project regions (except Lisbon Metropolitan Area (PT)) are showing growth in GDP per inhabitant during the period between 2010 and 2015.

Figure 3. Unemployment rates by age 15 years or over and regions, 2011-2015 (% , NUTS 2)



Source: Eurostat (accessed 29.05.2017). Data for the Ljubljana Urban Region (that coincides with *Osrednjeslovenska* (Central Slovenia), NUTS 3) are not available, therefore NUTS 2 level variables were applied - *Zahodna Slovenija* (Western Slovenia). From the national languages: *Közép-Dunántúl* - Central Transdanubia Region (HU); *Área Metropolitana de Lisboa* - Lisbon Metropolitan Area (PT); *Comunidad Foral de Navarra* - Navarre Region (ES)



In terms of **labour market activity**, unemployment rates in most regions experienced a decline in recent years (2011-2015) with exception in the Autonomous Region Friuli Venezia Giulia. However, half of the partner regions (Navarre (ES), Basilicata (IT), Latvia (LV) and Lisbon Metropolitan Area (PT)) show rates above the EU28 average (9.4%, 2015). The highest unemployment was registered in the following regions: Navarre (ES), Basilicata (IT), Lisbon Metropolitan Area (PT), each scoring above 13% of unemployment (2015). The lowest rate was in Central Transdanubia (HU) at 4.4%, showing significant improvements since 2010.

Between 2010 and 2015, Navarre (ES), Basilicata (IT), Lisbon Metropolitan Area (PT), and Western Slovenia (SL) experienced a rise in unemployment, peaking in 2013, and declining in the following two consecutive years. In contrast, Latvia (LV), Central Transdanubia (HU), and Centru (RO) regions have all seen a total drop in unemployment since 2011. Only Autonomous Region Friuli Venezia Giulia (IT) has seen a continued rise in unemployment over the surveyed years (Figure 3).

Cultural and creative industries (CCIs) are closely linked to the **innovation performance** in the EU – the industries are considered an important driver of economic and social innovation in many sectors as well as one of the major sources of the ideas generating new products and services. According to the 2017 assessment of the Regional Innovation Scoreboard, which compared to the European Innovation Scoreboard has a stronger focus on the performance of SMEs, the six CRE:HUB project regions (not including Western Slovenia (SL) and Centru Region (RO)) are classified as “Moderate Innovators” (see Table 4)¹⁰.

Table 4. Regional performance (classification) groups and Regional Innovation Index 2017

	Strong Innovator	Moderate Innovator	Modest Innovator
Western Slovenia (SL)	0.467		
Lisbon Metropolitan Area (PT)		0.401	
Autonomous Region Friuli Venezia Giulia (IT)		0.399	
Navarre (ES)		0.388	
Central Transdanubia (HU)		0.278	
Basilicata (IT)		0.263	
Latvia* (LV)		√	
Centru (RO)			0.139

Source: table elaborated based on the innovation performance indicators provided in the Regional Innovation Scoreboard 2017 report

* Latvia in this case is not included in the regional performance, as it's considered as the whole country (NUTS1 and NUTS2 are equal). For Latvia, performance group membership is identical to that in the European Innovation Scoreboard (EIS) 2017¹¹ report. Data for the Ljubljana Urban Region (*Osrednjeslovenska*, NUTS 3) are not available, therefore NUTS 2 level variables were applied - *Zahodna Slovenija* (Western Slovenia).

The only region that is classified as a “Strong Innovator” within the CRE:HUB area is Western Slovenia (SL), that includes the Ljubljana Urban Region, where its innovation score has decreased since 2011. At the same time, the Centru Region (RO) occupies the “Modest Innovator” position within the EU as it faced decline in the same period of time. The remaining project regions under

¹⁰ European Commission (2017), *Regional Innovation Scoreboard 2017, Main Report*. Ref. Ares(2017)3063769 - 19/06/2017. Available at: http://ec.europa.eu/growth/industry/innovation/facts-figures/regional_en

¹¹ European Innovation Scoreboard 2017. Country profiles, Latvia. Available at: <http://ec.europa.eu/docsroom/documents/23928>



the “Moderate Innovator’s” group, experienced different developmental progress from 2011 to 2017. The innovation performance increased in Latvia (LV) and Autonomous Region Friuli Venezia Giulia (IT); the situation remained generally stable only in Basilicata (IT), whereas Lisbon Metropolitan Area (PT), Navarre (ES) and Central Transdanubia (HU) have faced a decline.¹²

2.2. CCIs definition and sub-sectors in the project area

There is no universally accepted definition of cultural and creative industries (CCIs) due to its differing application and wide coverage over varying sectors. Policy makers, researchers and experts across the world apply diverse definitions and different activity areas (sub-sectors) that CCIs cover. Moreover, the fast-changing and interdisciplinary nature of the CCIs sector, the rapid development of technologies (digitalisation) and emergence of new sectors make it even more difficult to define CCIs as well.

In the CRE:HUB project, the definition¹³ outlined in the “Unlocking the potential of cultural and creative industries” within the Green Paper of European Commission (EC) is used. When analysing the project area, it’s observed that project partners, in the regional State of the Art analysis, refer to those definitions and sub-sectors officially defined in their countries or employ approaches from international organisations such as European Commission and UNESCO.¹⁴

In **Latvia** (LV), the official definition, including sub-sectors, was introduced in 2005 based on the experience from the UK Government’s Department for Culture, Media and Sport (DCMS) and was defined in the cultural policy guidelines within the initiative of the Latvian Ministry of Culture and British Council. In the latest policy guidelines “Creative Latvia 2014–2020”,¹⁵ development of CCIs has been made one of four core priorities.

In the case of **Lisbon Metropolitan Area** (PT), where growth of the CCIs at the national and regional level has been promoted since 2000, the CCIs understanding and concept is formulated based on recent studies on the creative economy in Portugal¹⁶. It recognises the evolution over time from the cultural sector to the creative industries, and finally to the creative economy. Furthermore, the national statistics agency, Statistics Portugal, has made an important contribution in defining statistical data on to analyse the economic activities of CCIs. They are in line with the 2012 ESSnet statistical framework and combine cultural domains (cultural practices, activities or products centred on expressions recognised as artistic) and cultural practices (translating the several phases of production of cultural products).

¹² Regional Innovation Scoreboard 2017, Regional profiles by country. Available at: http://ec.europa.eu/growth/industry/innovation/facts-figures/regional_en

¹³ “Creative industries” are those industries which use culture as an input and have a cultural dimension, although their outputs are mainly functional. Whereas “Cultural industries” are those industries producing and distributing goods or services which at the time they are developed are considered to have a specific attribute, use or purpose which embodies or conveys cultural expressions, irrespective of the commercial value they may have. EC (2010), Green Paper [...], COM (2010) 183 final. Available at: <https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX%3A52010DC0183>

¹⁴ Bina, V., Chantepie, P., Deroin, V. et al. (2012), *ESSnet-CULTURE, European Statistical System Network on Culture, Final Report*, Luxembourg. Available at: http://ec.europa.eu/assets/eac/culture/library/reports/ess-net-report_en.pdf

¹⁵ Cultural Policy Guidelines 2014-2020 “Creative Latvia”, approved by Cabinet Order No. 401 29 July 2014. Available at: <https://www.km.gov.lv/en/ministry/documents>

¹⁶ Augusto Mateus & Associados (2013), *A cultura e a criatividade na internacionalização da economia portuguesa*. Available at: <http://www.portugal.gov.pt/media/1325076/20140131%20sec%20estudo%20cultura%20internacionalizacao%20economia.pdf>; Augusto Mateus & Associados (2016), *A economia criativa em Portugal. Relevância para a competitividade e internacionalização da economia portuguesa*



Though **Central Transdanubia** (HU) has no national or regional CCIs definition, the sub-sectors are formulated in the National Development and Territorial Development Concept of Hungary.

In **Navarre Region** (ES), only recently has the concept of CCIs emerged and their economic value gained recognition. Using its privilege of being an autonomous region of Spain, the Department of Culture, Sport and Youth of the Government of Navarre (CRE:HUB project partner) has initiated the Strategic Culture Plan for Navarre, in which planned activities are foreseen to establish the CCIs definition and specify the range of sub-sectors falling within Navarre's needs and understanding of the industries. The strategy is expected to be adopted at the end of 2017. Meanwhile, the definition of CCIs currently used in the region is taken from UNESCO.

In Italy, though no official definition exists or sub-sectors are defined, both regions – **Basilicata Region** (IT) and **Autonomous Region Friuli Venezia Giulia** (IT) – employ creative industries terminology standards as per the "I am Culture" report from the Unioncamere (Foundation for the Italian qualities) & Symbola Foundation (Chamber of Commerce of Italy).¹⁷ However, at the end of 2017, the Italian government proposed a legal definition of CCIs within the new budget plan "Stability Law for 2018" that to be adopted in January 2018.

In **Ljubljana Urban Region** (LUR) and in Slovenia (SL) there is no official definition of CCIs. The National Programme for Culture 2014-2017¹⁸ refers to the definition from the EC Green Paper discussed above. However, in a statistical analysis of the CCIs prepared by the Ministry of Culture of Slovenia¹⁹, the scope of CCIs is not in line with this definition, since it does not include advertising and computer programming. Therefore, within the regional CRE:HUB State of the Art Report, the LUR project partner adopted the new approach (including selection of the NACE codes) from the EC's last study on CCIs: "Boosting the Competitiveness of Cultural and Creative Industries for Growth and Jobs".²⁰

Also, in the case of Romania, there is no official CCIs definition and scope of sub-sectors available. Therefore, the **Centru Region** (RO) follows the approach from the EC's Green Paper. Nevertheless, local researchers share a common approach in compiling economic activities (NACE codes) for CCIs research studies at the regional and national level. In the case of this study, project partners identified the most important NACE codes to conduct the State of the Art Report of the Centru Region.

There are also variations in the scope of sub-sectors included between regions under the CCIs concept (see Graph 1 and Annex 1). The State of the Art analyses performed by the CRE:HUB partners identifies the following common activities considered a part of the CCIs across the regions:

- ☐ Advertising (promotion)
- ☐ Architecture
- ☐ Books & press (publishing)
- ☐ Cultural heritage
- ☐ Design (including fashion)

¹⁷ Fondazione Symbola – UnionCamere (2015), *Io sono Cultura 2014 - L'Italia della qualità e della bellezza sfida la crisi, Quaderni di Symbola*, Roma

¹⁸ Ministrstvo RS za Kulturo: Nacionalni program za kulturo 2014-2017: Pot do novega modela kulturne politike

¹⁹ Stepančič, L. (Ed.): *Kulturne in kreativne industrije po slovensko*. Ministrstvo RS za kulturo, 2011

²⁰ European Commission (2016), *Boosting the Competitiveness of Cultural and Creative Industries for Growth and Jobs*, EASME/COSME/2015/003, June 2016, prepared by the Austrian Institute for SME Research and VVA Europe. Available at: <http://ec.europa.eu/DocsRoom/documents/18001/attachments/1/translations/en/renditions/native>





2.3. Main CCIs trends in the countries represented by project regions

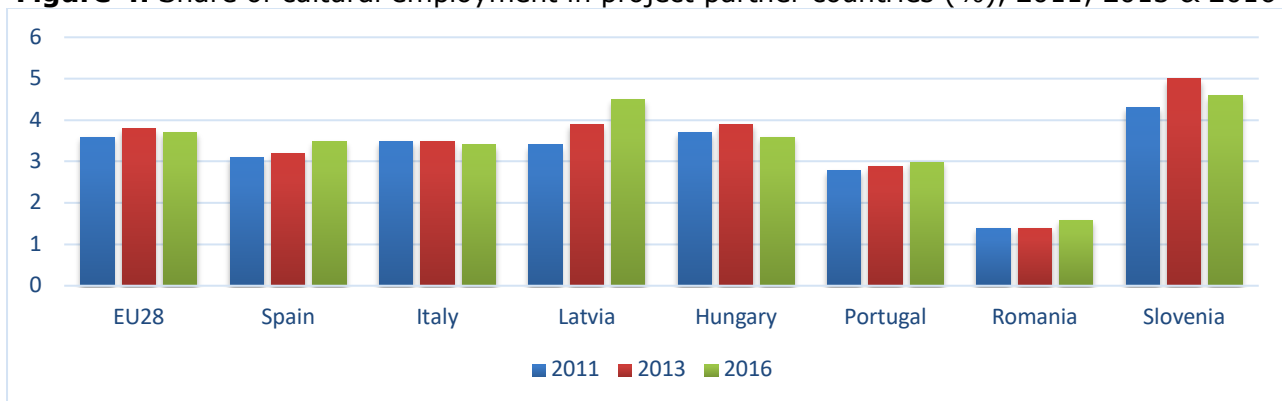
Due to the shortage of clear cultural and creative industries (CCIs) statistical data at the regional or national level in most partner regions and differences in the concept and scope of sub-sectors, it is difficult to perform a reliable comparative analysis within the area of CRE:HUB project. Moreover, this lack of data makes it problematic to undertake a meaningful comparative analysis of the regions due to the statistical differences in the methodological approach of each individual region's data collection and from the interdisciplinary and fast-changing nature of CCIs.

However, one of the potential information sources compiling statistical data on activities related to the CCIs is the Eurostat database. Based on the methodology proposed in the 2012 ESSnet-Culture final report ²¹, the database obtains information on "cultural activities" that define 10 cultural domains,²² which are mostly identical to the CCIs sub-sectors used in the project regions (see [Annex 1](#)).

Considering that data on "cultural activities" is not available at the regional level, this chapter provides an overview of the cultural employment, cultural enterprises and turnovers at the country level of all project regions – Italy, Romania, Hungary, Spain, Latvia, Slovenia and Portugal.

On the basis of the definition of "cultural employment", over 8 million people in the EU were employed in a cultural sector or occupation in 2016, which is 3.7% of the total number of employed people. This slight increase in the EU is observed since 2011. Among the EU countries represented by the project, the highest share of cultural employment was observed in Slovenia (4.6% of the total employment in the country) and Latvia (4.5%), where both countries ranked above the EU average, whereas the lowest share was observed in Romania (1.6%). The overall tendency shows continued growth of cultural employment only in half of the project countries (Spain, Latvia, Portugal and Romania) from 2011 to 2016 (see Figure 4, Table 5).

Figure 4. Share of cultural employment in project partner countries (%), 2011, 2013 & 2016



Source: Eurostat (accessed on 10.09.2017)

²¹ <http://ec.europa.eu/eurostat/documents/341465/3199631/essnet-culture.pdf/a6518128-69b3-4d89-82b8-060a3ad0d1d5>

²² As defined by the ESSnet-Culture framework on culture, the CCIs include the following 10 cultural domains: heritage (museums, historical places, archaeological sites, intangible heritage); archives; libraries; book & press; visual arts (Plastic arts, Photography, Design); Performing arts (Music, Dance, Drama, Combined arts and other live show); audiovisual & multimedia (film, radio, TV, video) based on the economic functions of creation, production & publishing, dissemination & trade, preservation, education, management & regulation. With this approach, software and ICT sub-sectors are not included in the cultural and creative industries."



Table 5. Cultural employment in project countries (thousand, %), 2011, 2013 & 2016

	2011		2013		2016	
	thous.	% of total employment	thous.	% of total employment	thous.	% of total employment
EU28	7 848	3.6	8 089.2	3.8	8 396.8	3.7
Spain	563.3	3.1	552.5	3.2	634.2	3.5
Italy	783.1	3.5	784.3	3.5	765.9	3.4
Latvia	29.1	3.4	34.7	3.9	40.1	4.5
Hungary	139.9	3.7	151.2	3.9	157.1	3.6
Portugal	133.7	2.8	127.6	2.9	139.4	3.0
Romania	117.2	1.4	116.3	1.4	133.7	1.6
Slovenia	40.6	4.3	44.9	5.0	42.3	4.6

Source: Eurostat (accessed on 10.09.2017)

According to the latest data, cultural market-oriented enterprises made up 6.3% (702 971) of all enterprises in total business economy services (except trade and financial and insurance activities) in the EU in 2014 (see Table 6). Cultural enterprises employed an average of three persons each (self-employed and employees).

For Slovenia and Italy, the proportion of enterprises in the cultural sector in 2014 was above the EU average: 7.6% and 6.4% respectively. The lowest shares were in Latvia (3.9%) and Portugal (3.8%) the same year. During the period of time 2011-2014, only Slovenia saw the biggest relative increase, while Hungary and Latvia experienced positive growth (see Table 9).

Table 6. Enterprises in the cultural sector²³ in project countries (thousand, %), 2011, 2013 & 2014

	2011		2013		2014	
	thous.	% of total enterprises	thous.	% of total enterprises	thous.	% of total enterprises
EU28	:		:		702 971	6.3
Spain	:		67 971	6.2	62 007	5.6
Italy	107 549	6.7	102 636	6.4	103 747	6.4
Latvia	1 485	3.7	1 918	3.9	2 030	3.9
Hungary	14 111	5.0	12 633	5.0	13 651	5.1
Portugal	16 121	4.0	15 134	3.8	15 551	3.8
Romania	8 150	5.5	8 621	5.3	9 006	5.2
Slovenia	3 745	6.9	4 531	7.3	4 871	7.6

Source: Eurostat (accessed on 10.04.2017 (updated on 12.12.2017)). 'Total enterprises' – represent services of the business economy, except trade and financial and insurance activities (by NACE rev.2). No data available for Spain in 2011

In terms of the turnover (the total value of market sales of goods and services), the cultural sector accounted for more than EUR 309 billion in 2014, which represented 5.2% of all goods and services. The fact that cultural enterprises made up a lower share in total turnover (as compared

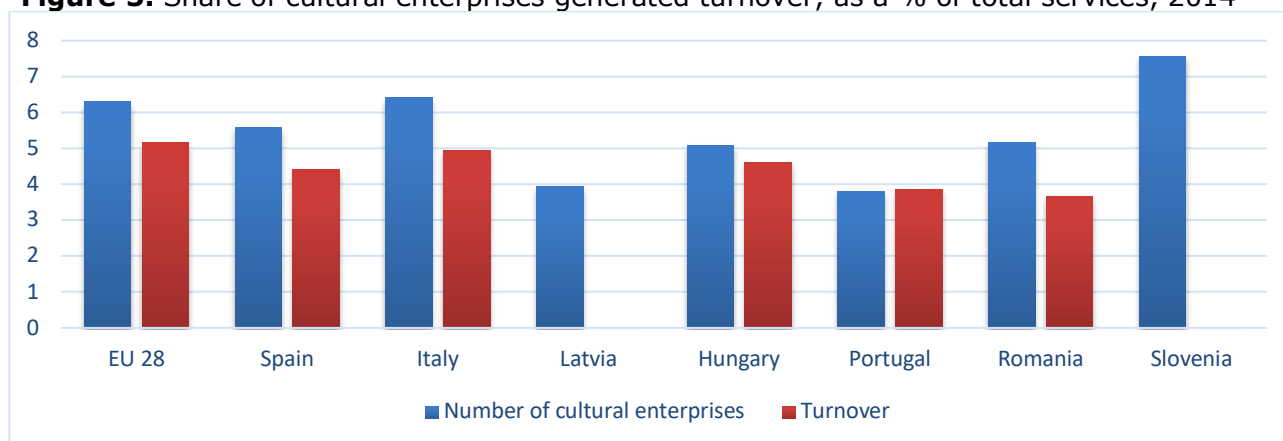
²³ Cultural services include the following activities: book publishing (J58.11); publishing of newspapers (J58.13); publishing of journals & periodicals (J58.14); publishing of computer games (J58.21) motion picture, video & television programme production, sound recording & music publishing activities (J59); programming & broadcasting activities (J60); news agency activities (J63.91); architectural activities (M71.11); specialised design activities (M74.1); creative, arts & entertainment activities (R90); libraries, archives, museums & other cultural activities (R91)



with 6.3% of the number of enterprises) can be explained by the smaller average size of cultural enterprises (three persons employed on the average).²⁴ None of the countries represented by the project region generated higher turnover than the EU average (see Table 8, Figure 5, Table 7).

In 2014, the highest share of turnover within the cultural enterprises was generated in Italy (5.5% of the total services), Hungary (4.6%) and Spain (4.4%). At the same time, the overall tendency shows that all project countries (for which data are available) had yet to return to the 2008 performance level, since the financial crises experienced by the EU and global economy (see Table 7).

Figure 5. Share of cultural enterprises generated turnover, as a % of total services, 2014



Source: Eurostat (accessed on 10.04.2017). 'Total services' – includes total services of the business economy, except trade and financial and insurance activities (by NACE rev.2). Data on turnover in cultural enterprises in Latvia and Slovenia are not available

Table 7. Turnover (gross premiums written) of enterprises in the cultural sectors (mln EUR, %), 2011, 2011 & 2014

	2008		2011		2014	
	mln EUR	% of total services	mln EUR	% of total services	mln EUR	% of total services
EU28	:	:	305 288.5	:	309 090.4	5.2
Spain	27 163.094	6.4	:	:	17 237.4	4.4
Italy	35 282.9	6.2	30 502.3	5.5	27 297.3	5.0
Latvia	:	:	:	:	:	:
Hungary	2 657.5	4.8	2 713.8	5.5	2 355	4.6
Portugal	3 261.2	4.6	2 770.5	4.2	2 406.1	3.9
Romania	2 076.7	5.3	1 452.9	4.1	1 503.8	3.7
Slovenia	:	:	710.5	4.8	:	:

Source: Eurostat (accessed on 10.04.2017). 'Total services' – includes total services of the business economy, except trade and financial and insurance activities (by NACE rev.2). Data for Latvia (2011-2014), Spain (2011) and Slovenia (2008, 2014) are not available

²⁴ Eurostat (2016), *Cultural statistics, 2016 edition*, p.76. Available at: <http://ec.europa.eu/eurostat/documents/3217494/7551543/KS-04-15-737-EN-N.pdf/648072f3-63c4-47d8-905a-6fdc742b8605>



2.4. Common prospects and challenges faced by the regions

In order to obtain an insight into the advantages and challenges of cultural and creative industries (CCIs), each CRE:HUB project partner has carried out a regional SWOT and Barrier & Solution Matrix analysis based on the interviews and discussions with local stakeholders as well as review of the relevant literature and policy documents. In addition, an assessment of the regional/national level policy instruments was completed. In this chapter, a comparative overview of the regional smart specialisation strategies (RIS3) is provided.

Smart specialisation strategies in the CRE:HUB partner regions

For participating regions, CCIs represents a strategic sector of development and is underlined in many of their RIS3. In most regions, CCIs are considered as a priority area and are linked with such sectors as tourism, IT, and digital industries. Latvia (LV) is the only region where CCIs are not included in the strategy. To a limited extension, the potential of CCIs is also recognised in the RIS3 of Ljubljana Urban Region (SL) and RIS3 of Central Transdanubia (HU) (see Table 8).

Although most of the project regions lack a regional strategy with the direct focus on the CCIs supported by specific objectives and indicators, the importance of CCIs in terms of economic potential and innovation is stressed in the various regional and national level policy documents. Considering that many policy documents are available in local languages only, comparison between partner countries and/or regions is lacking. The policy documents related to CCIs are described in the profiles of partner region.

Table 8. CCIs linkage to the regional innovation strategy for smart specialisation (RIS3)

Basilicata (IT)	YES	One of the priority areas
Friuli Venezia Giulia (IT)	YES	One of the priority areas (Culture, Creativity & Tourism)
Lisbon Metropolitan Area (PT)	YES	One of the priority areas
Centru (RO)	YES	One of the priority areas (IT & Creative Industries Sector)
Navarre (ES)	YES	One of the priority areas (Creative & Digital Industries)
Ljubljana Urban Region (SL)	NO	To a limited extent
Central Transdanubia (HU)	NO	To a limited extent
Latvia (LV)	NO	

Source: Information compiled by authors based on the Eye@RIS3²⁵ (online database of RIS3 priorities) and the regional State of the Art analyses elaborated in the framework of the CRE:HUB project

Common challenges faced by CRE:HUB partner regions

The regional SWOT analysis shows that despite the different stages of development and recognition, the CCIs within the CRE:HUB area share common characteristics and tendencies: the industries are built by small businesses (individuals, micro-business and SMEs). The CCIs activities are mainly concentrated in larger urban areas such as capital city regions in the case of Latvia, Portugal and Slovenia as well as other bigger cities in the rest of the project regions (including the capacity of creative human resources, entrepreneurial activity, innovation level, institutional concentration, number of cultural events and others).

The research analysis demonstrates that the common challenges in the partner regions are mostly related to such issues as limited export performance, lack of managerial skills and experience to commercialise creative ideas, lack of financial resources that aid CCIs in enterprise growth (e.g. from self-employed unit to small or medium enterprise) difficulties in access of finances specific

²⁵ Eye@RIS3 – Smart Specialisation Platform. Available at: <http://s3platform.jrc.ec.europa.eu/map>



for CCIs, and poor cooperation between various CCIs stakeholders and others. CRE:HUB project partners confirm that there is no one-size-fits-all picture of the CCIs as its individual sub-sectors are very heterogeneous in terms of company structures, employment, turnover, markets and business models, etc.

The compilation of common SWOT prospects in the CRE:HUB project area are presented below (see Table 9), whereas separate SWOT tables for each region are given in the Annex 2.

Table 9. Common SWOT of the CRE:HUB project region

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none">• All project regions are characterised by rich cultural and historical heritage, diverse cultural life and creative people resulting in extension of cultural activities and events;• Strong specialization in some specific CCIs sub-sectors or professions (e.g., IT, design, publishing, etc.);• Some regions have strong orientation towards industrial activities (e.g. timber production; furniture production) with a potential to support CCIs;• CCIs has potential for internationalisation and export of products and services as well as development of internationally recognised trademarks;• Growing number of good practices in CCIs (see some examples are provided the <u>Chapter 4</u>);• Creative industries are seen as a future driving force of innovations and competitiveness not only within CCIs but also in the rest of the economy;• Presence of higher education institutions and research centres (offering study programmes in some of the CCIs sub-sectors). E.g.in Latvia, presence of study programmes focusing on CCIs business management;• Presence of numerous professional institutions and organisations within the CCIs. Wide range of CCIs stakeholders;• Availability of infrastructures relevant for the CCIs sector development (creative hubs, creative quarters, co-working spaces, business incubators, etc.);	<ul style="list-style-type: none">• Lack of the national or regional strategy for CCIs development (particularly in non-capital regions);• Small CCIs companies and self-employed persons more often face a low degree of exporting and limited innovative capacity (lack of support for internationalisation);• Lack of knowledge in business, marketing, experience (exporting, attraction of investments) as well as innovative approach in the companies (especially small);• Small local markets (low demand for offered products);• Lack of specific funding opportunities (including co-financing) for CCIs;• Low confidence from the business world in the potential of CCIs to bring economic benefits when linking CCIs with traditional industries (lack of recognition of the sector's added value);• Cooperation between different CCIs stakeholders (public institutions, enterprises, professional organisations, research & education institutions, etc.) representing various communities within the region is not always strong;• The specialised study programmes or training initiatives relevant to the CCIs need across the project regions are often missing (e.g. focus on interdisciplinary managerial skills within the industries);• Concentration of CCIs businesses and activities around the larger urban areas (specifically in the regions that locates capital city);• Administrative & tax barriers impose burdens for creative micro-businesses & SMEs;



	<ul style="list-style-type: none"> No regular mapping and analysis of CCIs due to the lack of defined sub-sectors to measure the economic contribution as well as data at the regional level;
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> Elaboration of clear strategy specific for the CCIs sector and its business development and involvement of different players for collaboration strengthening; Expansion of SME activity/employment (increase of demand for creative industries products; including export activity); Introduction of the local and national funding for CCIs business development (SMEs) or alternative financing models (business angels, crowdfunding's, etc.); Development of specific legislation for CCIs SMEs on the tax issues and employment (<i>for those PPs which represents decision-making institutions</i>); Establishment of awareness raising and promotional events; Revitalisation of industrial and urban spaces for CCIs purposes with a view to address both social and economic issues; Adjusting available study programmes according to the needs of CCIs business; Digitalisation of the industry; Arts and design ("design-thinking" approach) a driving force in creativity; Establishment of CCIs clusters or development (expanding) of existing ones; Development of CCIs structures (incubators, innovation centres, innovation centres) and platforms for efficient collaboration; Inter-sectoral cooperation (cross-over); Attraction of regions as destinations for cultural tourism (interaction of CCIs and tourism); 	<p>THREATS</p> <ul style="list-style-type: none"> Lack of highly skilled workforce (brain-drain) due to the demographic and socio-economic conditions of the region (e.g. workforce migration out of the region); Rapidly changing technological environment to which CCIs micro-businesses and SMEs might not have an adequate capacity and skills to adapt to; Competition with other EU regions to attract foreign investments and structural inability of CCIs businesses to penetrate foreign markets; Near-zero private/venture investment, state support in the regional non-IT CCIs; Increasing dependence from state and public financial support (lack of ability to develop based on own resources of the company); Lack of a solid Intellectual Property Rights (IPR) in regional/national systems and related skills which can foster creative content or ideas to easily copy; New wave of economic crisis – problems in private sector & lack of public funds at the national and EU level;

Source: The common strengths and challenges that project regions face within the CCIs were compiled on the basis of Matrix of Barriers and Solutions as well as reports from each separate partner region



3. Region descriptions of cultural and creative industries

This section describes the main trends of the cultural and creative industries (CCIs) in each CRE:HUB project region. It provides a short overview of the regions (population, total area and GDP), main characteristics of CCIs sector and economic performances (enterprises, employment and export data (if possible), based on the latest available data), the most important CCIs sub-sectors, policy instruments related to the CCIs as well as the lists of main stakeholders that includes not only organisations or entities collaborating with the CRE:HUB project but also other entities representing CCIs or related sectors.

Considering that literature and sources of information on CCIs in the project regions are mostly available in national languages, the analysis of the regions were performed based on the State of the Art Reports of project partners as well as author's own research.

3.1. Basilicata Region (Italy)²⁶

Population: 573.7 thousand (0.9% of national total) (2016)
Territory: 9 995 km ² (3.3% of the Italian landmass)
Population density: 57 inhabitants/km ² (in Italy 201.8) (2016)
GDP per capita: 20 900 EUR (in Italy: 27 200 EUR) (2015, Eurostat)
GDP per capita in PPS: 21 200 EUR, 73% of the EU average (in Italy: 27 700 EUR, 95%) (2015, Eurostat)
Unemployment rate: 13.7% (EU28: 9.4%) (2015, Eurostat)

Basilicata Region is the 14th largest Italian region, located in the south of the country. The region is largely rural, as 80% of the population lives in municipalities under 5 000 and the biggest town has fewer than 70 000 inhabitants. Brain drain is an acute problem in the region, as only 1/3 of students stay in Basilicata region for their studies.²⁷

CCIs in Basilicata are seen as a recent phenomenon, since for many years the regional economy has mainly been grounded in traditional sectors (traditional agriculture, construction, traditional services to individuals, low or at most medium-tech manufacturing industry). However, those industries are growing fast, thus providing a response to the economic crises. CCIs are relatively small in the region, but there is space for growth and the CCIs sector is growing rapidly, especially in relation to the tourism sector.

Cultural heritage, including cultural tourism, is the main driver of CCIs development and economy sector in Basilicata. Tourism is centred on the three areas of Matera, Melfi and Metaponto. In recent years, tourism has increased significantly. For example, from 2012 to 2015 tourist arrivals have increased by 40.4% in Matera, and foreign tourist numbers have grown by 70.7%. In Vulture, the second most important cultural area, the increase in total arrivals from 2012 to 2015 has been 51.6%. Foreign tourism has grown at a rate of 79.2%. This trend is expected to continue

²⁶ The text is elaborated based on the information provided in the CRE:HUB State of the Art Report of the Basilicata Region and author's own internet search. Overview of the region and economic performances are described based on the Eurostat database and APT Basilicata (<http://www.aptbasilicata.it/>)

²⁷ Basilicata region homepage. Available at: <http://www.aptbasilicata.it/>



due to the growing importance of culture, arts and creativity in the region. Currently, the region is actively investing on “Matera 2019” branding as an upcoming European Capital of Culture.²⁸

The University of Basilicata fosters knowledge and development of culture and heritage. A number of popular events help to create a dynamic local culture, including: sculpture exhibitions at the rocky churches of Matera and popular festivals such as the Accetture May Festival (a pagan celebration) and the ‘Parade of the Turks’ event in Potenza.

CCIs enterprises²⁹

The regional share of CCIs SMEs activities remains small in comparison to the national one. In 2015, the value added of CCIs in Basilicata Region was 382.9 million EUR (3.9% of the local GDP), employment was about 8 300 (4.4% of the total employment in the region), and number of CCIs SMEs was 2 041 (3.9% of the total regional SMEs).

Whereas in Italy, the same variables in 2015 demonstrated the following results in CCIs SMEs: the added value of CCIs was 89.7 billion EUR (6.1% of the total economy of Italy); employment was 1.49 million (6.1% of the total employment), and number of SMEs – 288 199 (4.7% of the total SMEs in Italy).³⁰

Economically, the export capacity of CCIs in the region is low. Globally, the exports of CCIs represented only 1.5% of the overall regional export in the first nine months of 2016, where the dominating exporters were the furniture industry (based on the handcrafted traditions) and clothing industry. In the first nine months of 2016, Matera’s furniture exports totalled nearly 45 million EUR with a growth rate of 10.5%, in comparison to the previous year. During the same period, regional clothing exports totalled 4.2 million EUR. The rest of the CCIs sector generates an overall export value of only 0.3 million EUR, where more than half of this value is generated by the sector of wood handicraft.³¹

Most important sub-sectors

The sectoral distribution of SMEs is more concentrated than the national average, where the strongest concentration is the publishing sector (34.3%) (from publishing to commercialization of books, newspapers, magazines), followed by the architecture services (21.7%) (professional studies, urban planning activities, innovative construction, etc.) and communication, marketing, and branding services (15.1%). The production of films and videos has a slightly higher share than the national average due to the contribution of the film industry (specifically, the Lucania Film Commission).

Also, tourism is identified as one of the most important sub-sectors in Basilicata having a significant growth potential due to the increasing number of tourists each year. In 2015, the attendance of the region’s facilities (attractions) by tourists marked an increase of 9.8% (about

²⁸ Basilicata region homepage. Available at: <http://www.aptbasilicata.it/>

²⁹ The CCIs variables within the CRE:HUB State of the Art Report of the Basilicata Region were analysed based on the information from the report *Io sono Cultura 2016*. Those CCIs data cover 5 areas of CCIs, defined by the Symbola and Unioncamere (see Annex 1), and representing 65 ATECO (Italian NACE) codes. Whereas data on CCIs SMEs in the State of the Art Report of Basilicata were analysed for 4 areas of CCIs, excluding ‘production of creative-driven goods and services’ (44 ATECO codes)

³⁰ Fondazione Symbola – UnionCamere (2017), *Io sono Cultura 2016 - L'Italia della qualità e della bellezza sfida la crisi*, Quaderni di Symbola, Roma, 2017. Available at: <http://www.symbola.net/html/article/Rapporto2016IOSONOCULTURA>

³¹ Ibid



205 thousand), bringing the total amount of overnight stays to over 2.3 million. 2/3 of the arrivals were made to the city of Matera.

Finally, design is considered as a very important segment of the CCIs in Basilicata. Different projects are carried out by the region in order to boost the sub-sector (such as: the MIM Design District and the Open Design School).

Policy instruments

Regional Strategy includes CCIs as one of the five priorities of the **Smart Specialization Strategy (RIS3) of the Basilicata Region**³² which examines three sectors: creative industry for tourism; creative industry and design; and creative industry in the productive sectors. The RIS3 integrates the policies that the Basilicata Region intends to promote and implement for the development of the CCIs sector during the programming period 2014-2020. There are various 'trajectories' identified in the RIS3 that are covering activities related to the CCIs, ranging from supporting innovative technologies in culture, heritage, entrepreneurship, cultural asset management, economic development, quality, design and craftsmanship, etc. For the RIS3 implementation, mainly the resources of the *ERDF Operational Programme 2014-2020* will be exploited.

The **ERDF Regional Operational Programme 2014-2020 – Basilicata** is focused on the promotion of the SMEs competitiveness, where the importance of CCIs, the entertainment sector and the tourism industry is recognised.³³

Another opportunity for SMEs development, in terms of skills and policy development for employability, is the **European Social Fund Operational Programme 2014-2020 - Basilicata**³⁴. It foresees transversal interventions that are important for the development of the CCIs sector, namely introducing active policy measures for employment, young people and long-term unemployed, or for the promotion of new businesses, including CCIs.

Main stakeholders

Main regional agencies
<u>Sviluppo Basilicata</u> (regional government specialising in financial support for start-ups)
Main business associations
<u>Chamber of Commerce</u>
<u>Confindustria</u> (trade association in manufacturing industry within the CCIs)
<u>Confartigianato</u> (trade association for craft industry)
<u>Confederazione Nazionale dell'Artigianato e della Piccola e Media Impresa (CNA)</u> (trade association for craft industry)
CONFAPI Basilicata (Regional Federation of Associations of SME): www.confapimatera.it ; www.confapipotenenza.it
Associazione dell'industria manifatturiera e dell'impresa privata di Basilicata (<u>CONFIMI Industria Basilicata</u>) (manufacturing and private enterprise industry association)
<u>Confcooperative</u>

³² Smart Specialization Strategy 2014-2020 of the Basilicata Region. Available at: http://s3platform.jrc.ec.europa.eu/documents/20182/225192/IT_Basilicata_RIS3_201508_Final.pdf/c70a3f9e-ca3d-4717-a7f6-16919e047f79

³³ European Regional Development Fund (ERDF) Operational Programme 2014-2020 for the Basilicata Region. Available at: http://www.pofesr.basilicata.it/fesr2014-20/wp-content/uploads/downloads/2015/08/POR_FESR_Basilicata_Adottato.pdf

³⁴ European Social Fund (ESF) Operational Programme 2014-2020 for the Basilicata Region. Available at: http://fse.basilicata.it/fsecma/files/docs/10/26/07/DOCUMENT_FILE_102607.pdf



<u>Legacoop</u>
Educational and research institutions
<u>University of Basilicata</u>
<u>CNR National Research Centre</u>
Organizations involved in CCIs activities
<u>Foundation Matera- Basilicata 2019</u> (the main cultural event of Matera 2019 – European Capital of Culture)
Regional centres for creativity: <u>CasaCava</u> ; <u>Centro TILT</u> ; <u>Centro Cecilia</u>
<u>Lucana Film Commission</u>

3.2. Autonomous Region Friuli Venezia Giulia (Italy)³⁵

Population: over 1.2 million (2.01% of national total) (2016)
Territory: 7 862.3 km ² (3.3% of the Italian landmass)
Population density: 155 inhabitants/km ² (in Italy 201.8) (2016)
GDP per capita: 29 800 EUR (in Italy: 27 200 EUR) (2015, Eurostat)
GDP per capita in PPS: 30 300 EUR, 104% of the EU average (in Italy: 27 700 EUR, 95%) (2015, Eurostat)
Unemployment rate: 8% (EU28: 9.4%) (2015, Eurostat)

The Autonomous Region Friuli Venezia Giulia (AR FVG) is located in the north-east of Italy and borders Slovenia, Austria and the Adriatic Sea. In comparison to other Italian regions, the FVG ranks moderately low in both demographic and economic terms. The most important segments of the regional economy are the engineering sector (that coincides with metallurgy, manufacture of metal products and machinery and equipment), the “food chain” which is linked to the food and beverage industry (including agriculture, etc.), the construction industry and the chemical-pharmaceutical industry.³⁶ Those sectors have potential to be linked with CCIs.

The CCIs sector in the AR FVG is mainly defined by tourism and creativity-driven productive service industries. In terms of tourism, this region ranks the second in Italy, while artisanship plays an important role in the region’s productive sectors.

Though the growth of the CCIs sector (in terms of added value and employment) in AR FVG has been low – at only 0.2% over the period from 2010 to 2015, it should be contrasted with the overall -1.8% contraction that befell the region’s total added value over the same period.

CCIs enterprises³⁷

In 2015, about 8 723 CCIs SMEs operated in AR FVG, which accounted for just over 8% of the total SMEs (while in Italy – 412.521 or 6.7%); 32 900 persons were employed in the CCIs sector (6.3% of the total FVG employees, while in Italy it was 6.1% or 1.49 million), averaging 3.8 employees per company.

³⁵ The text is elaborated based on the information provided in the CRE:HUB State of the Art Report of the Autonomous Region Friuli Venezia Giulia (AR FVG) and author’s own internet search. Overview of the region and economic performances are described based on the Eurostat database and Regione Autonoma Friuli Venezia Giulia, ISTAT data

³⁶ Regione Autonoma Friuli Venezia Giulia (2016), *Strategia regionale di ricerca e innovazione per la specializzazione intelligente del Friuli Venezia Giulia S3*, p.59, p.62

³⁷ The CCIs variables within the State of the Art Report of the AR FVG were analysed based on information from the reports *Io sono Cultura* from 2012 to 2016. Those CCIs data cover 5 areas of CCIs, defined by the Symbola and Unioncamere (see Annex 1), and representing 65 ATECO (Italian NACE) codes. Whereas data on CCIs enterprises in the State of the Art Report of AR FVG were calculated based on the reports *Io sono Cultura* as well as the ASIA (Archive of Active Enterprises) – ISTAT data



Some conclusions to be drawn from the data analysed by the AR FVG show that:

- The number of companies within the CCIs between 2011 and 2015 remained rather stagnant (over 8 000 or 8.1% on average of the total SMES in the region), though a small increase was noted following a drop in 2013.
- The number of employed in the CCIs sector decreased overall between 2010 (33 841 or 6.6% of the total employment in the region) and 2015 (32 900 or 6.3%), though it did experience a peak in 2012 (36 700) to which the region has not rebounded yet.
- Added value has remained virtually stagnant, with only minor fluctuations between 2010 (1 841.0 million EUR or 5.7% of the total added value in the region) and 2015 (1 725.5 million EUR or 5.7%). In the period 2011-2015, CCIs produced on average 5.7% of regional added value. However, the added value in 2015 was the lowest registered over the surveyed period.

Regional CCIs companies are relatively export-driven. During the period between 2009 and 2015, the regional export of CCIs SMEs was 16.6% on average). Furthermore, the regional CCI's share in exports has consistently been higher than that of CCIs SMEs on the national level, and the region's degree of internationalisation puts it in third place among Italian regions in this category after Toscana and Veneto. Share in exports on the national level remained constant showing over 10% of the total CCIs SMEs of Italy over the 2009-2015.

Most important sub-sectors

The most important CCIs sub-sectors in AR FVG are identified as audiovisual production, design, software and computer consulting production, management of cultural heritage and architecture. The audiovisual sector is noted for the high quality of its output as well as its economic growth potential on the regional level, where main contributors to the sector in recent years have been the FVG Film Commission together with the Film Fund, and the FVG Audiovisual Fund. In turn, the design industry sits at the centre of regional initiatives. The production software and computer consulting sector stands out as a large source of innovative start-up companies in the region (20.9% of the regional total start-up)³⁸. Architecture³⁹ contributes to the largest CCIs SMEs share in terms of existing enterprises and added value of the region, targeting mainly the local market through the entrepreneurship of individual, self-employed professionals. Lastly, FVG Region is strengthening an integrated system for the management of cultural heritage due to a participatory management model.

Policy instruments

Although there is no comprehensive policy instrument for the CCIs development at the regional level, the following strategies include priorities that focus on the promotion of creative industries: The Regional Operational Programme ERDF 2014-2020 of the Region Friuli Venezia Giulia (ROP ERDF Region FVG) and the FVG Strategic Plan 2014-2018.

The **ROP ERDF 2014-2020 Region FVG** focuses on the promotion of SMEs competitiveness, including CCIs, through Action 2.1.b. It aims to facilitate interventions for the creation and incubation of cultural and creative enterprises, including pre-incubation, incubation and acceleration programmes.

³⁸ Unioncamere Friuli Venezia Giulia (2016), *Rapporto sull'Economia del Friuli Venezia Giulia - Start-Up, Imprese Creative e Culturali*, 14° Giornata dell'Economia, Udine, p.38

³⁹ This sub-sector subsumes both architectural and engineering associated studies



The **FVG Strategic Plan 2014-2018** supports CCIs in order to boost the development of the social sphere and employment within the region through harnessing local knowledge, youth potential, cultural institutions, and expanding cultural funding possibilities.

The FVG's CCIs sector is also tied closely to the **Regional Smart Specialization Strategy** (RIS3), where CCIs are included under the specialization area "Culture, Creativity and Tourism" which is one of the five strategic specialization areas of RIS3. The main focus of this area is related to the management of historical and artistic heritage; film, video, radio and TV.⁴⁰

Despite the lack of specific strategy for the regional development of CCIs, FVG is referring to overall regional legal acts as a potential source of support focusing on creation start-ups, venture capital funds and co-working spaces etc. – e.g. *Regional Law 20 February 2015, n. Rilanciampresa FVG 3 - Reform of industrial policies*.

Main stakeholders

Government institutions
<u>Autonomous Region Friuli- Venezia Giulia, Central Department for Productive Activities, Tourism and Cooperation</u>
<u>Autonomous Region Friuli- Venezia Giulia, Department for Culture, Sports and Solidarity</u>
Regional institutions
<u>Informest (agency for development and international economic cooperation)</u>
Business support organisations
<u>CONFAPI FVG (SME association)</u>
<u>Confindustria F.V.G. (section of the regional Association of Industrialists)</u>
<u>Chambers of Commerce, Industry and Crafts (Udine)</u>
<u>Chambers of Commerce, Industry and Crafts (Pordenone)</u>
<u>Chambers of Commerce, Industry and Crafts (Venezia Giulia)</u>
<u>Uniocamere FVG</u>
Business incubators
<u>Polo Young (cultural incubator of start-ups and CCIs enterprises)</u>
<u>Innovation Factory (in-house company of AREA Science Park)</u>
<u>Technological Pole of Pordenone "Andrea Galvani"</u>
<u>Friuli Innovation</u>
Financial support (banking foundations)
<u>The Foundation CRUP</u>
<u>CARIGO Foundation</u>
<u>CRT Foundation</u>
Educational institutions
<u>University of Trieste, Department of Engineering and Architecture</u>
<u>University of Trieste, Department of Economics, Business, Mathematics and Statistics "Bruno de Finetti (DEAMS)</u>
<u>University of Udine, Department of Economics and Statistics</u>
Associations and enterprises (performing arts & creative industries)
<u>Cultural Association QUARANTASETTEZEROQUATTRO</u>
<u>Audiovisual Workers Association of Friuli- Venezia Giulia - "ALA-FVG"</u>
<u>ETRARTE</u>
<u>Cultural Association MODO</u>
<u>EVE S.R.L. (entertainment and artistic animation agency)</u>

⁴⁰ "Fondi Europei Fvg Internazionale." Regione Autonoma Friuli Venezia Giulia - Strategia Di Specializzazione Intelligente (S3), Regione Autonoma Friuli Venezia Giulia. Available at: <http://www.regione.fvg.it/rafvfg/cms/RAFVG/fondi-europei-fvg-internazionale/Strategia-specializzazione-intelligente/#id1>



ITS (international platform for fashion)

Cultural establishments

ERPAC - Regional Agency for Cultural Heritage

FOUNDATION AQUILEIA

Friuli Venezia Giulia Film Commission

Regional Theatre Body of Friuli Venezia Giulia (established by the Ministry of Heritage and Culture and Tourism)

MuDeFri (Design Museum of FVG)

3.3. Centru Region (Romania)⁴¹

Population: 2.34 million (11.9% of national total) (2016)
Territory: 34 100 km ² (14.3% of the Romanian landmass)
Population density: 69 inhabitants/km ² (in Romania 83) (2016)
GDP per capita: 7 500 EUR (in Romania: 8 100 EUR) (2015, Eurostat)
GDP per capita in PPS: 15 200 EUR, 52% of the EU average (in Romania: 16 300 EUR, 56%) (2015, Eurostat)
Unemployment rate: 7.4% (EU28: 9.4%) (2015, Eurostat)

Centru Region is located in the centre of Romania within the greater curvature of the Carpathian Mountains, and is made up of six separate counties: Alba, Brasov, Covasna, Harghita, Mures and Sibiu. The region's urbanization level stands at 59.4%. It is mostly made up of smaller cities with less than 20 000 inhabitants and only three of its cities come close to or above 200 000: Brasov, Sibiu and Targu Mures. In terms of economy, the region has a strong orientation towards industrial activities with a significant potential for supporting CCIs activities: 46% of the economy consists of the national timber sector while 20% is furniture production.

The CCIs sector in Centru Region has seen a vigorous development in the recent years, mostly due to the growth of ICT (IT and creative industries are seen together). Like all Romanian regions, the CCIs activities of the Centru Region are concentrated around large cities. Regional analysis shows that 3 counties of the Centru Region – Brasov, Mures and Sibiu – are dominating in cultural and creative industries, accounting for 80% of the whole region's CCIs, and 94% for the growth of the regional CCIs between 2012 and 2015. The sector is defined by a well-distributed educational network and well-established sub-sectors like publishing, advertising and ICT-related disciplines. However, it lacks cohesion and collaboration at all regulatory, funding and community levels.

On the other hand, the region is particularly culturally vibrant in relation to the rest of Romania. Based on the 2010 study „Vitalitatea culturala a oraselor din Romania”,⁴² measuring the cultural vitality of 46 Romania's largest settlements, all six county residence cities⁴³ of the Centru Region are in the top 15 of the most culturally vibrant cities of Romania. The cultural potential of these

⁴¹ The text is elaborated based on the information provided in the CRE:HUB State of the Art Report of the Centru Region (regional analysis) and author's own internet search. Overview of the region and economic performances are described based on the Eurostat database and information provided at the regional analysis of the Centru Region

⁴² Centrul de Cercetare si Consultanta in Domeniul Culturii (Centre for Cultural Research and Consultancy) (2010), *Vitalitatea Culturala a Oraselor din Romania 2010*. Available at: http://www.culturadata.ro/wp-content/uploads/2014/05/3_Vitalitatea_Culturala_a_Oraselor_2010.pdf

⁴³ Sibiu, Sf.Gheorge, Alba Iulia, Miercurea Ciuc, Targu Mures, Brasov



cities is determined by the access to cultural goods, cultural and artistic development and the possibility to capitalize on creative work outcomes.

CCIs enterprises⁴⁴

An overview of regional trends shows that the local CCIs sector has been gradually growing in terms of the number of active companies, the number of persons employed and the sector's total turnover between 2011 and 2015.

Since 2011, the number of active CCIs companies have increased by one third in total reaching 4 109 companies in total in 2015. A number of active CCIs companies have also grown by 20-35% in each county of the Centru Region with the largest growth in Alba, followed by Brasov and Sibiu. Whereas the number of employed persons within the CCIs sector has grown from 11 443 (2011) to 14 425 (2015). As of CCIs turnover, it has increased from 1.32 billion RON (Romanian Leu) in 2011 to 2.04 billion RON in 2015.

Most important sub-sectors

The ICT sub-sector is clearly dominant in the CCIs within Centru Region, accounting for over half of the sector's total generated turnover. The ICT sector employs half of all individuals employed within the CCIs, indicating the best yield per employee compared to other CCIs sub-sectors. These figures are also higher on the regional level in comparison to the national level. Aside from global and national factors influencing this sub-sector's dominance, an important regional distinction is a possibility to obtain ICT degrees at the local universities. Other leading sectors, which generated a turnover of more than 100 million RON in 2015, are publishing, printing and editing, advertising and architecture.

Policy instruments

In recent years, CCIs have emerged as one of the national priorities for Romania, with coverage in national and regional policy papers and strategies for the 2014-2020 timeframe. In addition, local policies and initiatives of the Centru Region focused on CCIs support are appearing and showing results, independent of the static national framework.

At the regional level, the Centru Regional Development Agency defined the "IT and creative industries sector" as a field of excellency in the region, and mentioned it in the **Smart Specialization Strategy of the Centru Region** (RIS3)⁴⁵ as one of the developmental areas during the 2014-2020 for micro-companies, SMEs, incubators, accelerators, technology parks, science parks and technology transfer centres, covering the various CCIs sub-sectors (with the funding of the Regional Operational Programme 2014-2020).

Although the **Regional Development Plan 2014-2020**⁴⁶ (the main planning and programming document of the Centru Region) is not directly focused on CCIs, its 5th Strategic Domain, foresees the support to cultural activities, considering the following priorities: Priority 5.1 – Valorising natural and anthropic patrimony, as well as Priority 5.4 – The development of cultural and leisure infrastructure, supporting the cultural activities. On the other hand, the 2nd Strategic Domain of

⁴⁴ Based on the information provided at the regional State of the Art Report of the Centru Region, where the analysis on the CCI's economic indicators such as companies, employment and turnover were performed using the identified 40 NACE codes

⁴⁵ ADR Centru (2017), *Strategia de Specializare Inteligenta a Regiunii Centru pentru perioada 2014-2020*. Available at: <http://www.adrcentru.ro/Lista.aspx?t=StrategiaSpecializareInteligenta>

⁴⁶ Planul de Dezvoltare a Regiunii Centru 2014-2020. Available at: <http://www.adrcentru.ro/Lista.aspx?t=ADELaborare%20PDR%202014-2020>



the plan concentrates on the growth of economic competitiveness and stimulation of the research and innovation. This Strategic Domain addresses most of the NACE codes identified as part of CCIs.

Nevertheless, at the local level the awareness of authorities in the need for local policies and projects supporting the CCIs is limited. Despite the lack of a comprehensive strategy, CCIs can benefit from a variety of support policy instruments that support various CCIs sub-sectors (specifically IT): **Regional Operational Programme 2014-2020**⁴⁷ (Priority Axis 1 – strengthening research, technological development and innovation, Priority Axis 2 – promoting entrepreneurship by facilitating the economic exploitation of new ideas and fostering the creation of new businesses, including business incubators), sectoral **Operational Programme "Human Capital"** (priority 3.7 – most of the start-ups support projects identifies as Romania StartUp Plus are fostering initiatives in IT&CCIs) and others.

In Romania, the **National Strategy for Competitiveness 2014-2020**⁴⁸ has considered the Creative Industries as one of the main pillars for economic development. As a consequence, many economic activities related to IT and CCIs gained access to financing under Regional Operational Program Priority Axis 2 (which is linked as priority domains with the National Strategy for Competitiveness). In addition, this strategy lists the "Creativity – stimulating entrepreneurship in creative industries by creating incubators / clusters / business accelerators and by supporting the establishing and development of companies in cultural and creative sectors (strategic objective 3.4)" as a priority.

Main stakeholders

Clusters (focus on innovation and value chain)
<u>Regional Pro Wood Cluster</u>
<u>Innovative Cluster Régiófa (Odoheiu Secuiesc)</u>
<u>Transylvania Textile & Fashion Cluster (Sfântu Gheorghe)</u>
<u>Cluster for Innovation and Technology (Braşov)</u>
<u>Innovative Regional Cluster for Packaging – Print – Design (Sfântu Gheorghe)</u>
<u>IT Plus Cluster (Sfântu Gheorghe)</u>
Business support organisations
<u>Brasov Chamber of Commerce and Industry</u>
<u>Sibiu Chamber of Commerce, Industry and Agriculture</u>
<u>Mures Chamber of Commerce and Industry</u>
<u>Alba Chamber of Commerce, Industry and Agriculture</u>
<u>Covasna Chamber of Commerce and Industry</u>
<u>Harghita Chamber of Commerce and Industry</u>
<u>Territorial Office for SMEs and Cooperation Brasov</u>
Educational institutions
<u>Transilvania University of Brasov</u>
<u>Lucian Blaga University of Sibiu</u>
<u>Petru Maior University of Targu Mures</u>
<u>University of Arts Targu Mures - relevant degree programs (Romanian and Hungarian)</u>
<u>1 Decembrie 1918 University of Alba Iulia</u>
Actors in research, development and innovation
<u>The Research and Development Institute of Transylvania University of Brasov</u>
<u>Siemens Industry Software SRL, Brasov</u>
<u>Siemens SRL, Brasov</u>

⁴⁷ Regional Operational Programme 2014-2020. Available at: <http://regio-adrcentru.ro/prezentare-axe-por-2014-2020/>

⁴⁸ http://www.minind.ro/strategie_competitivitate/Strategia_Nationala_de_Competitivitate_iunie_2014-en.pdf



<u>Pentalog Romania SRL, Braşov</u>
<u>Flashnet SRL, Braşov</u>
<u>Vision Systems SRL, Braşov</u>
<u>Sobis Solutions SRL, Sibiu</u>
<u>Industrial Software SRL, Sibiu</u>
<u>Rosoftlab SRL, Braşov</u>
Other actors
<u>Regional Development Agency, Alba-Iulia</u>
<u>Regional Innovation Consortium - CRI Centru</u>
<u>Regional Cluster Consortium</u>
<u>Regional Adult Vocational Training Center Brasov</u>
<u>Regional Adult Vocational Training Center Mures</u>
<u>Vocational Training Center Sibiu</u>
<u>Institute for Qualifications, Sibiu</u>
<u>AGILE Hub, Brasov</u>
<u>"Pro Invest" Business Association, Brasov</u>

3.4. Central Transdanubia (Hungary)⁴⁹

Population: 1.06 million (10.8% of national total) (2016)
Territory: 11 112 km ² (14.3% of the Hungarian landmass)
Population density: 96 inhabitants/km ² (in Hungary 106) (2016)
GDP per capita: 10 500 EUR (in Hungary: 11 300 EUR) (2015, Eurostat)
GDP per capita in PPS: 18 400 EUR, 63% of the EU average (in Hungary: 19 800 EUR, 68%) (2015, Eurostat)
Unemployment rate: 4.4% (EU28: 9.4%) (2015, Eurostat)

The Region of Central Transdanubia (Hungarian: Közép-Dunántúl) consists of the counties of Fejér, Komárom-Esztergom and Veszprém. The geography of the region is mainly defined by the Transdanubian Mountains, while its southern territory comprises of the Hungarian Plain. Since the end of 1990s, the region has seen significant foreign economic investment, due to its integration into the EU's economic space. Nevertheless, its economic growth and innovation capacity is under the EU average.

Central Transdanubia is the third most developed region in Hungary, with strong industrial development, where the main sectors are the machinery, chemical and food industry.⁵⁰ A number of important factors determine advantages for the development of the CCIs sector in Transdanubia, including its geographical position and targeted foreign direct investments. The functional metropolitan tetrahedron built up by the main cities (Székesfehérvár, Veszprém, Tatabánya and Dunaújváros) is the most important for the region's social and economic

⁴⁹ The text is elaborated based on the information provided in the CRE:HUB State of the Art Report of the Central Transdanubia Region and author's own internet search. Overview of the region and economic performances are described based on the Eurostat database and information provided at the regional analysis of the region

⁵⁰ TeIR database (National Territorial Development and Spatial Planning Information System). Available at: <https://www.teir.hu/>



development. Moreover, the region has an important cultural and historical heritage central to its tourism industry as well as innovative output.⁵¹

The region's CCIs are mostly urbanized (the county centres – Székesfehérvár, Tatabánya, Veszprém – are the leaders of CCIs activities in the region) and largely depend on the innovative cooperation axis which exists between the larger metropolitan centres, primarily Szekesfehervar due to its industrial performance and Veszprém due to higher education and research activity. Some additional factors influencing creativity and cultural vitality among the region's counties are their proximity to Central Hungary and cooperation with local research centres and universities.

CCIs enterprises

As result of the lack of a clear regional CCI concept and statistical data concerning CCIs in the Region and Hungary, no analysis on the economic performances of CCIs at regional or national level is currently provided. Therefore, the regional State of the Art is focusing on the Eurostat data covering "cultural activity", which are also analysed in [the Chapter 2.4](#).

Overall, the number of cultural enterprises in Hungary has been increasing between 2008 and 2014, with a total of 13 651, comprising 5.1% of the total enterprises in the last surveyed year. The employment figures of the cultural sectors have been volatile from 2011 to 2016 and experienced a slight drop of share in the last surveyed year: in 2011 the share of total employment was 3.7% (about 139 900 employees), and in 2016 the share was 3.6% (about 157 100 employees). Turnover of the industries has seen an overall decrease from 2.66 billion EUR in 2008 (4.8% of the total service) to 2.35 billion EUR in 2014 (4.6%). In terms of CCIs exports, Hungary increased its contribution to the EU28 total exports between 2005 and 2014 (from 0.26% to 0.65%). Exports have been primarily aimed towards EU Member States. The monetary value of the trade in cultural goods more than doubled in the examined period: from a total of 55.1 million EUR in 2005 to 117.3 million EUR in 2014.⁵²

Most important sub-sectors

The shortage of regional statistical data also prevents clear identification and evaluation of the most important CCIs sub-sectors. However, within the scope of the Smart Specialization Strategy (RIS3), software development, IT and computer services are deemed key CCIs activities. Their importance hinges on their "engine" role to facilitate the development of the whole CCIs. These activities are also well grounded in both academia and the private sector. Additionally, historical and cultural heritage is also vital for this region, and is considered a catalysing force for the rest of the creative sector. Among these are crafts and performing arts, museums, galleries and libraries as well as industrial arts.

Policy instruments

In relation to policy instruments, there are no policy documents or strategies that directly focus on the CCIs development or describe industry as a priority topic at the regional level. At the national level, "innovative and creative industries" are mentioned in the **National Development 2030 - National Development and Territorial Development Concept**⁵³ as an important tool

⁵¹ Eurostat (2017), 2015 *GDP per capita in 276 EU regions*, Newsrelease Nr. 52/2017. Available at: <http://ec.europa.eu/eurostat/documents/2995521/7962764/1-30032017-AP-EN.pdf/4e9c09e5-c743-41a5-afc8-eb4aa89913f6>

⁵² Eurostat (2016), *Culture statistics 2016*. Available at: <http://ec.europa.eu/eurostat/documents/3217494/7551543/KS-04-15-737-EN-N.pdf/648072f3-63c4-47d8-905a-6fdc742b8605>

⁵³ Hungarian Official Journal (2014), *National Development and Territorial Development Concept*. Vol. 2014, Issue No.1. Available at: http://ngmszakmaiteruletek.kormany.hu/download/4/7f/d0000/OFTK_vegleges_EN.pdf



for economic development, building a creative knowledge-based society, marketable skills and Research, Development and Innovation (R&D&I). In addition, guidelines for the CCIs development are underlined by this national development strategy.

The CCIs have potential to benefit from one of the funding priorities of **the Economic Development and Innovation Operational Programme** of Hungary (GINOP)⁵⁴ related to increasing the competitiveness and productivity of SMEs. However, CCIs are only mentioned broadly, with no specific measures included.

The Regional Smart Specialization Strategy (RIS3)⁵⁵ underlines policy objectives for the strategic priority of “Innovation oriented development of the emerging industries”, which includes the content delivery and creative industrial service development as a tool for promoting the CCIs sector.

In addition, there are county-level programmes developed by local governments that describe various opportunities for the development of CCIs from the aspect of the education, infrastructure or technology. The programmes include: the Veszprém county’s Territorial Development Concept, the Fejér county’s Territorial Development Concept and the Komárom-Esztergom county’s Territorial Development Concept.⁵⁶

At a national level, two legal acts that regulate related aspects of CCIs has been highlighted in the regional State of the Art Report, specifically *Act No. XXXIII of 1995 on the Protection of Inventions by Patents*⁵⁷ and *Act No. LXXVI of 1999 on Copyright*⁵⁸. The aim of these two acts is to support the promotion of technical progress of the economy, the implementation of modern technologies and to moderate and manage the creation of intellectual property as well as enforce its regulation.

Main stakeholders

Government institutions
Székesfehérvár local government
Veszprém local government
Tatabánya local government
Dunaújváros local government
Business support organisations
Chambers of Commerce and Industry of Fejér county
Chambers of Commerce and Industry of Komárom-Esztergom county
Chambers of Commerce and Industry of Veszprém county
Fejér Enterprise Agency
Veszprém Enterprise Agency
Komárom-Esztergom Enterprise Agency
National Association of Entrepreneurs and Employers (NAEE)
NAEE Fejér county Organization

⁵⁴ GINOP available at: http://ec.europa.eu/regional_policy/en/atlas/programmes/2014-2020/hungary/2014hu16m0op001

⁵⁵ Central Transdanubian Regional Innovation Agency (2013), *RIS3 Central Transdanubia*, Available at: <http://kdriu.hu/images/dokumentumok/kdris3.pdf>

⁵⁶ *Territorial Development Concept of Veszprém county* (2013). Available at: http://vpmegye.hu/letoltesek/teruletfejlesztes/Vp_Tfk_20131219.pdf; *Territorial Development Concept of Komárom-Esztergom county* (2014). Available at: http://pozsgay.hu/KEM_Konceptio_javaslati_fazis_tervezoi_valtozat.pdf. *Territorial Development Concept of Fejér county* (2014). Available at: http://www.fejer.hu/_user/browser/File/Ter%C3%BCletfejleszt%C3%A9s/12_FM_koncept_1_sz_%20mell.pdf.

⁵⁷ Act No. XXXIII of 1995. Available at: <http://www.wipo.int/edocs/lexdocs/laws/en/hu/hu098en.pdf>

⁵⁸ Act No. LXXVI of 1999. Available at: http://www.wipo.int/wipolex/en/text.jsp?file_id=127829



<u>NAEE Komárom-Esztergom county Organization</u>
<u>NAEE Veszprém county Organization</u>
Educational institutions
<u>Pannon University, Faculty of Information Technology</u>
<u>University of Dunaújváros, IT Institute</u>
<u>Óbuda University, Alba Regia Technical Faculty</u>
<u>Kodolányi János University of Applied Sciences</u>
<u>Institute of Cultural, Communication and Media Studies</u>
<u>Institutional Departments of Creative Arts</u>
<u>Institutional Departments of Cultural Studies</u>
Other actors in R&D&I
<u>Central Transdanubian Regional Innovation Agency</u>
<u>Hungarian Academy of Sciences West Hungarian Research Institute, Central Transdanubian subsidiary</u>
<u>Agricultural Institute, Centre for Agricultural Research, Hungarian Academy of Sciences involve</u>
Clusters
<u>System Science Innovation Cluster (IT)</u>
<u>Innoskart (IT)</u>
<u>Ecopolis cluster (environmental science)</u>
<u>Pharmagora cluster (health and pharmaceuticals)</u>
Enterprises, associations
<u>Association of Hungarian Folk Artists</u>
<u>Fehérvári Fesztivál Ltd. (organizer of FEZEN Festival)</u>
<u>Csurgódombi Sajtkonyha (small cheesemaker manufactory)</u>
<u>Platán Restaurant and Guesthouse (Tata) (innovative kitchen technology consuming mostly locally produced ingredients)</u>
<u>Művészetek Völgye Nonprofit Ltd. (organizer of the largest multi-art festival in Hungary – Valley of Arts)</u>
<u>Herend Porcelain Manufactory (hand painted & gilded porcelain pieces)</u>
<u>Albacomp (innovative IT)</u>
<u>Veszpremfest Ltd. (Non-profit public organizer of quality music event – VeszprémFest)</u>
<u>Németh Wine Cellar, Badacsony (craft winery)</u>
<u>Ajka Crystal Glass Factory Ltd. (handmade pieces from crystal)</u>

3.5. Latvia (the whole country)⁵⁹

Population: 1.96 million (2016)
Territory: 64 573 km ²
Population density: 30.49 inhabitants/km ² (in Hungary 106) (2016)
GDP per capita: 12 300 EUR (2015, Eurostat)
GDP per capita in PPS: 18 500 EUR, 64% of the EU average (2015, Eurostat)
Unemployment rate: 9.9% (EU28: 9.4%) (2015, Eurostat)

Latvia is one of the Baltic States located in Northern Europe. It is a small, open economy country with close links to trading partners in the Baltic Sea region. Due to its geographical location, transit

⁵⁹ The text is elaborated based on the information provided in the CRE:HUB State of the Art Report of Latvia and author's own internet search. Overview of the region and economic performances are described based on the Eurostat database and the Central Statistical Bureau of Latvia



services are highly-developed, along with timber and wood-processing, agriculture, food products as well as manufacturing of machinery and electronics industries.⁶⁰

According to the Ministry of Economics, in 2016, Latvia has experienced the highest GDP per capita over the last five years (2012-2016). During this period, the GDP growth was 2.8% on the average.⁶¹

Riga, the capital and biggest city of Latvia, has among the Baltic States the highest potential for CCIs development. It boasts of having a majority of enterprises (including those in CCIs sector), the highest share of population (32% of the total country), largest communication and transportation infrastructure and the most cultural events in the country. The city accounts for almost 60% of Latvia's GDP, and has a more urbanized economy than the rest of the country.⁶² However, in the latest CCIs study in Latvia (2013)⁶³, other cities with considerable potential for CCIs were recognised such as Cēsis, Kuldīga and Liepāja among others.

The number of education establishments (secondary vocational and higher-level education) in Latvia ensure preparation of professionals and artists for work in creative industries (including CCIs management) and their sub-sectors. Moreover, several interdisciplinary initiatives in Latvia encourage the development of creative skills (creative thinking, innovation, management skills), such as Demola, LIAA Creative Industries Incubator, etc. (see the main stakeholders below).

CCIs enterprises⁶⁴

The CCIs has been a growing sector in Latvia over the past 10 years. The latest statistics indicate that there were around 13 181 CCIs enterprises in Latvia in 2015, accounting for 8.19% of all national enterprises. This number has seen a constant upward trajectory since 2010, when only 7 811 enterprises existed. The number of people employed in CCIs has also been increasing year by year, growing from 38 783 in 2010 to 49 480 in 2015. As a share of the total employment in Latvia, CCIs grew from 5.76% to 6.80% over 2010-2015.

The CCIs are mostly represented by micro and small enterprises, employing relatively few people and performing rather poorly with regards to economic indicators. With the help of certain tax rate benefits, the number of micro-enterprises has been increasing during the period 2000-2015. The dependence on public finances and support is observed in the country.

The CCIs turnover in Latvia averages at 1 billion EUR per year, and its largest contributors are advertising, programming, furniture manufacturing, and architecture sub-sectors. Relevant information on CCIs export in Latvia has not been collected or reported.⁶⁵

⁶⁰ The World Factbook, Latvia. Available at: https://www.cia.gov/library/publications/the-world-factbook/geos/print_lg.html

⁶¹ Ministry of Economics of the Republic of Latvia (2016), *Report on the Economic Development of Latvia 2016*. Available at: https://www.em.gov.lv/en/economic_development/report_on_the_economic_development_of_latvia

⁶² Rozentale, I. (2014), „Creative industries during economic recession: the case of Riga,” *Regional Studies, Regional Science*, Vol.1, Issue 1. Available at: <http://www.tandfonline.com/doi/full/10.1080/21681376.2014.981578>

⁶³ Baltijas Konsultācijas Ltd & Konsorts Ltd (2013), *The Performance of the Creative Industries Sector of Latvia and Preconditions for its Targeted Development*, Summary of the Study. Available at: <https://www.km.gov.lv/en/culture/creative-industries/publications-and-research>

⁶⁴ The analysis on the CCIs enterprises and employment was performed based on the data from the Central Statistical Bureau of Latvia for the selected 56 NACE codes within the State of the Art Report of Latvia

⁶⁵ Baltijas Konsultācijas Ltd & Konsorts Ltd (2013), *The Performance of the Creative Industries Sector of Latvia and Preconditions for its Targeted Development*, Summary of the Study



Most important sub-sectors

Based on the scope of activities by the Ministry of Culture of Latvia and other CCIs related institutions and initiatives, architecture, design, audiovisuals, advertising and ICT are recognised as one of the most important CCIs sub-sectors in the country.

Policy instruments

The CCIs sector in Latvia is emphasized in the most national policy level instruments. According to the thematic objective "SMEs Competitiveness" (priority axis 3) of the **Latvian Operational Programme (OP) "Growth and Employment"**,⁶⁶ 7.11% of the OP resources are allocated to supporting the competitiveness and innovation of SMEs. This is achieved by creating the necessary preconditions for private investments and by creating new enterprises and jobs in the national and regional development centres. Among the indicative activities to be supported is the establishment of the business incubators and access to funding for business creation, including for enterprises representing the CCIs sector. In addition, the "Education, Skills and Lifelong learning" (priority axis 8) aims at supporting and increasing a number of STEM⁶⁷ study programmes, including creative industries, as well as supporting the study environment.

The main long-term policy document **Sustainable Development Strategy of Latvia 2030** outlines the importance of establishing a creative society by developing the creative skills of each individual, considering creativity as an integral element of educational programmes, creating favourable urban environments, developing the CCIs, using the potential of cultural heritage when developing creative tourism, expanding the digital culture space of Latvia as well as increasing public participation in the creation of cultural processes.^{68 69}

The **Cultural Policy Guidelines "Creative Latvia"**⁷⁰ corresponds to the main planning documents at the national and EU level, and outlines CCIs as one of four strategic priorities. It puts a focus on the promotion of CCIs sectors and the development of CCIs businesses (specifically the development of creative industries of high export potential), although the strategy was developed by the Ministry of Culture of the Republic of Latvia.

The **National Development Plan**⁷¹ states that one of the goals is the development of *commercial creative industries* measured by an increased share of CCIs exports in the total exports as well as increased proportion of businesses operating in the CCIs within the total number of businesses. Another task of the Plan is related to CCIs education and focuses on the need to introduce innovative forms of curriculum content and activities in elementary and secondary education levels to promote creative and entrepreneurial abilities.

⁶⁶ Operational Programme "Growth and Employment" (in Latvian). Available at: http://www.esfondi.lv/upload/Planosana/OP_2014LV16MAOP001.pdf

⁶⁷ STEM - Science, Technology, Engineering, and Mathematics

⁶⁸ Saeima of the Republic of Latvia (2010), *Sustainable Development Strategy of Latvia until 2030*. Available at: https://www.cbs.nl/NR/rdonlyres/B7A5865F-0D1B-42AE-A838-FBA4CA31674D/0/Latvia_2010.pdf

⁶⁹ Estonian Ministry of Culture, British Council, et al (2011), *Creative Industries in Estonia, Latvia and Lithuania 2011*. Available at: <https://goo.gl/a8b26u>

⁷⁰ Cultural Policy Guidelines 2014-2020 "Creative Latvia" (Informative Part), approved by Cabinet Order No. 401 29 July 2014. Available at: <https://www.km.gov.lv/en/ministry/documents>

⁷¹ English version of the National Development Plan 2014-2016. Available at: http://www.pkc.gov.lv/images/NAP2020%20dokumenti/NDP2020_English_Final.pdf



Additionally, to the above-mentioned documents, CCIs are also outlined in the ***Design Strategy of Latvia 2020***,⁷² which pays attention to the need of strengthening innovation capacity in design enterprises, establishing new design enterprises including those of CCIs as well as raising the export potential of creative industries' cluster.

The Creative Industries Incubator of the Latvian Investment and Development Agency is the main support instrument that is specialised for the CCIs sector aimed at providing support for CCIs start-up establishment or CCIs business development (see more info in the [Chapter 4.5.](#))

Main stakeholders

Governmental institutions
Ministry of Culture (Cultural Policy Department, Creative Industries Division)
Ministry of Economics
Ministry of Education and Science
Ministry of Finance
Business support organisations
Latvian Investment and Development Agency (LIAA)
LIAA Creative Industries Incubator
LIAA Development of Innovations Centre/Technology Transfer Centre
Latvian Chamber of Commerce and Industry (LCCI)
University of Latvia (LU) Business Incubator
RISEBA Creative Business Incubator
Altum (state-owned financial institution)
Educational and research institutions
University of Latvia
Art Academy of Latvia
Latvian Academy of Culture (LAC)
Riga Technical University
BA School of Business and Finance
Riga International School of Economics and Business Administration (RISEBA)
The University College of Economics and Culture (EKA)
Jāzeps Vītols Latvian Academy of Music
Janis Rozentals School of the Arts
Riga Design and Art School
Latvian Culture College
Riga Technical University (RTU) Design Factory (DF)
Joint study programme "Creative Industries" (BSc) by RTU and LAC
Initiatives related to the CCIs and business
Project Creativity Week "radi"
Demola Latvia
FOLD-Creative Industries Communication Platform
The Red Jackets (award on the best exporting brand)
Skola 6 (creative industries centre, co-working space in Cēsis city)
Gigi Bloks (enterprise - building blocks for children)
Vividly (enterprise - virtual reality for architects and designers)
Design Elevator (enterprise - design, design-thinking)
Catchbox (start-up - throwable microphone)
IdeAllies, PULSE Hub, Creativity Lab
Autine Tools

⁷² The publication *Design of Latvia 2020*. Available at: https://www.km.gov.lv/uploads/ckeditor/files/EN/Design/Design-of-Latvia-2020_WEB.pdf



Interest organizations
<u>State Culture Capital Foundation (SCCF)</u>
<u>Council of the Creative Unions of Latvia</u>
<u>Latvian National Centre for Culture (LNCC)</u>
<u>Latvian Designers Society</u>
<u>Centre for Culture Information Systems</u>
Institutions of regional development
<u>Kurzeme Planning Region</u>
<u>Vidzeme Planning Region</u>
<u>Latgale Planning Region</u>
<u>Zemgale Planning Region</u>
<u>Pierīga Planning Region</u>

3.6. Navarre Region (Spain)⁷³

Population: 643.2 thousand (1.38% of national total) (2016)
Territory: 10 391 km ² (3.3% of the Spanish landmass)
Population density: 64 inhabitants/km ² (in Spain: 93) (2016)
GDP per capita: 29 200 EUR (in Spain: 23 300 EUR) (2015, Eurostat)
GDP per capita in PPS: 33 000 EUR, 114% of the EU average (in Spain: 26 300 EUR, 91%) (2015, Eurostat)
Unemployment rate: 13.8% (EU28: 9.4%) (2015, Eurostat)

Navarre Region (Spanish: Comunidad Foral de Navarra) is one of the autonomous regions in Spain, located in the northwest of the country and bordering France along the Pyrenees Mountains. The capital of the region, Pamplona, has developed from a small rural town to a modern, medium-sized city of industry and services within a few decades. Today, the metropolitan area of Pamplona agglomerates about half of Navarre's population and is the heart of the cultural, social and economic activity of the region. Currently, economic activity is stimulated by the following industries: automobile, construction materials, metalworking, food-processing and energy technologies (wind turbines manufacturing and generation).

As one of the four self-governing regions of Spain, Navarre has its own fiscal system. The cultural and social characteristics of the region have created a favourable atmosphere for the development of various local CCIs sub-sectors. The cultural and ethnic uniqueness of Navarre drives heritage and architectural sectors, while its geography and favourable tax legislation have fostered a vibrant film production and audiovisual industry. Overall, the CCIs in Navarre are considered as an emerging sector.

CCIs enterprises

Based on the latest available data identified by the Government of Navarre, CCIs⁷⁴ comprised 2 192 SMEs; where about half of all CCIs enterprises were made up by architecture, and employed

⁷³ The text is elaborated based on the information provided in the CRE:HUB State of the Art Report of the Navarre Region and author's own search. Overview of the region and economic performances are described based on the Eurostat database and the information from Gobierno de Navarra, *Navarra en Cifras, Economía*

⁷⁴ Analysis on the CCIs enterprises performed for the following sub-sectors (considered as the strongest in the region): publishing, architecture, fashion, advertising, video game & digital culture, film & audiovisual production, design and music based on the Gobierno de Navarra (2016), *Diagnostico de la situación de las Industrias culturales y creativas en Navarra*. Available at: <https://gobiernoabierto.navarra.es/es/participacion/procesos/1759/diagnostico-objetivos-del-plan-estrategico> (last accessed 20.11.2017)



5 092 persons with the largest contributor being the publishing sub-sector holding one third of the total CCIs employment in 2015. Nearly 92% of CCIs enterprises had less than 2.5 employees.

On the regional level, 23% of CCIs enterprises have Navarre Region as their main market, while another 22% use the Navarre and neighbouring regions of Spain. More than one-third of the companies operate in the domestic and exterior markets.

Most important sub-sectors

The most important CCIs sub-sectors by number of enterprises and employed persons in Navarre Region are architecture, publishing, advertising, software (video games) and fashion. Architecture is the largest sector in terms of number of enterprises (50% of the total CCIs enterprises), while the publishing sector (33% of the total CCIs employment), software (17%), advertising (14%) and fashion (13%) possess the largest share of the employed persons in Navarre's CCIs sector.⁷⁵ These sub-sectors are also important due to their unique social reputation, which is recognized at the regional level through local cultural activity and historical consciousness.

Policy instruments

CCIs have been absent from the agenda of regional policies in Navarre until 2015. In 2016, the Department of Culture, Sport and Youth of the Government of Navarre decided to include CCIs as a strategic sector in the local cultural policy, thus ensuring CCIs sector considerable attention in the next few years. As a result, a specific strategic line on the promotion of CCIs will be included in the **Strategic Plan for Culture 2017-2023**. The Strategy will also include the implementation of a new localized definition for the CCIs and its activities. This initiative has potential to create more effective policy-making process that could benefit Navarre's CCIs sector.

The region of Navarre has adopted the vision of the **NAVARRA S3 – Smart Strategy Sectors**, which delineates six economic sectors important for the development of the local economy, among which "creative and digital industries" are outlined. It aims at focusing regional resources and policies on these priority sectors and engagement of local industries, businesses, academic and governmental actors in the decision-making and planning process for the region's economic development.

Although there is no direct focus on the CCIs development, they can benefit from the funding priority of the **Operational Programme Navarra ERDF 2014-2020**,⁷⁶ "Enhancement of SME competitiveness" (TO 3) aims to improve the productivity and efficiency of SMEs as well as to adapt the productive system towards higher added value activities. The specific objective 3.4. "support of SMEs growth in regional, national and international markets as well as in innovation process" foresees the promotion of SMEs' growth and consolidation by improving the financing, technology and access to advanced services (specifically for such sectors as agriculture, fishing, maritime, tourism, cultural, commercial and rehabilitation of building). The policy could enable an access of CCIs companies to investments and support services within business incubators and business accelerators.

⁷⁵ Gobierno de Navarra (2016), *Diagnostico de la situación de las Industrias culturales y creativas en Navarra*. Available at: <https://gobiernoabierto.navarra.es/es/participacion/procesos/1759/diagnostico-objetivos-del-plan-estrategico> (last accessed 20.11.2017)

⁷⁶ Navarra OP ERDF 2014-2020 available at: http://www.dgfc.sepg.minhfp.gob.es/sitios/dgfc/es-ES/ipr/fcp1420/p/PORregionales/Documents/PO_Navarra_2014-2020_aprobado_COMPLETO.pdf



In addition to using the privileges of being an autonomous region, Navarre possesses two legislative frameworks which serves as a financial support instrument for the film industry and cultural projects in the region:

- *Ley Foral 29/2014* – defining the tax incentive for film and audiovisual production (35% tax deduction on Corporate Tax, initiative aligned with RIS3 objectives);
- *Ley Foral 8/2014* – on the Cultural Sponsorship in Navarre (donations, loans and tax breaks both for individuals and companies).

Furthermore, a draft is underway for another initiative to implement a Law on the Right for Culture which can further promote the role of culture and creativity for regional development.

Main stakeholders

Governmental institutions

The Spanish Ministry of Public Works
Government of Navarre, Culture Department and Sections
Government of Navarre, Department for Economic Development and Sections
Government of Navarre, Department for Education
Pamplona City Council, Area of Local Sustainable Development
Pamplona City Council, Area of Culture and Education

Business support organisations

SODENA Regional business development agency
EDER Consortium for strategic development of Southern Navarre
CEIN European Centre for Enterprises and Innovation
EEN European Enterprise Network_A (with the University of Navarre)
Chamber of Commerce and Industry Navarre
La Tierra Colabora (co-working)

Public enterprises

Navarre Institute for Statistics
NICDO Management of public leisure facilities
CACH Contemporary Arts Centre

Clusters, associations

CLAVNA Audio visual cluster of Navarre
Association of Audiovisual Producers of Navarre, NAPAR
AEGRAN Graphic Arts Association of Navarre
Navarre Functional Print Cluster
ATANA Information and Communication Technology Cluster
EIDE Basque-Navarrese Design Association
Basque-Navarrese Architects Association
Federation of Municipalities and Councils of Navarre
AIN Industry Association of Navarre
Navarrese Association of Innovation, Creativity and Culture (ANICC)
Network of Theatres of Navarre
AJE Association of Young Entrepreneurs of Navarre

Educational institutions

School of Architecture of Navarre of University of Navarre
Public University of Navarre
Arts School Pamplona
Creanavarra Design School Navarre



3.7. Ljubljana Urban Region (Slovenia)⁷⁷

Population: over 0.5 million (26% of national total) (2017)
Territory: 2 334 km ² (10% of the Slovenian landmass)
Population density: 229 inhabitants/km ² (in Slovenia: 101) (2016)
GDP per capita: 26 600 EUR (in Slovenia: 18 800 EUR) (2015, Eurostat)
GDP per capita in PPS: 33 500 EUR, 115% of the EU average (in Slovenia: 23 800 EUR, 82%) (2015, Eurostat)
Unemployment rate: 7.3% (2015, SURS)

Ljubljana Urban Region (LUR) coincides with the *Osrednjeslovenska* statistical region (Central Slovenia, NUTS 3). LUR is the second largest Slovenian region in terms of the territory inhabited by 26% of the total population (mostly young persons). The economic performance of the region is above the national one. Wages are the highest in the LUR compared to the rest of the country and unemployment is lower than the national average. In LUR, there is a large concentration of human resources, entrepreneurship, knowledge and creative potential which creates opportunities for further economic and cultural growth.⁷⁸ The region has an exceptional strategic position both within the country and the European level, due to its central geographical location, and as a result the region serves as the economic, administrative and cultural hub.

As Slovenia's capital, LUR also has a high concentration of creative industries. Regionally, the share of CCIs SMEs and the share of employed in CCIs SMEs is significantly larger in LUR than in the rest of Slovenia. Also, the concentration of CCIs around the capital city reflects a preference on the part of creative people to settle in Ljubljana especially as most national cultural institutions are located in Ljubljana. It has been estimated that around 60% of all Slovenian cultural events, infrastructure and people working for the cultural sector are concentrated in Ljubljana.⁷⁹ All the major faculties of the University of Ljubljana are located in the capital city, and the major companies from other business sectors concentrate in the capital city as well.

CCIs enterprises

Based on the data drawn from the database of all Slovenian enterprises' final accounts⁸⁰ and list of NACE rev.2 activities from the study of the European Commission's "Boosting the Competitiveness of Cultural and Creative Industries for Growths and Jobs",⁸¹ calculations were performed to analyse the enterprises, employment and turnover of CCIs sector for the period from 2009 to 2015. As a result, the main conclusions are as follows:

- The number of CCIs SMEs has significantly increased in LUR between 2009 and 2012 (from 3 634 to 4 624); however, in 2015, the number of CCIs SMEs slightly decreased again (to 4 110). Correspondingly, the shares of CCIs SMEs in all SMEs changed from 10.6% in 2009

⁷⁷ The text is elaborated based on the information provided in the CRE:HUB State of the Art Report of the Ljubljana Urban Region and author's own internet search. Overview of the region and economic performances are described based on the Eurostat database and data of the Statistical Office of the Republic Slovenia (SURS). In case of the LUR, data at the NUTS3 level were applied

⁷⁸ Statistical Office of the Republic Slovenia (2017), *Slovene Regions in Figures*, Ljubljana: SURS. Available at: <http://www.stat.si/StatWeb/File/DocSysFile/9374> (accessed 19.03.2017)

⁷⁹ Murovec, N., Kavaš, D. (2010), *SWOT Analysis – Status of the Creative Industries in Ljubljana*, Ljubljana: IER. Available at: <http://www.rcke.si/media/datoteke/03-SWOT-analysis-Ljubljana-s-povzetkom-v-SLO-2012.pdf>

⁸⁰ Statistical office of the Republic Slovenia (SURS). Available at: <http://www.stat.si/StatWeb/en>

⁸¹ Report is available at: <http://ec.europa.eu/DocsRoom/documents/18001/attachments/1/translations/en/renditions/native>



to 11.4% in 2012 and 11.2% in 2015. At the national level, the share of CCIs enterprises in all SMEs constituted 8.3% in 2009, and 8.9% in 2015;

- The number of persons employed in CCIs SMEs has been decreasing since 2009; while looking at all SMEs, this number has slightly increased again between 2012 and 2015: 6 881 persons or 6.1% of the total number of employed in all SMEs (2009), 6 248 persons or 6.0% (2012) and 5 862 persons or 5.6% (2015). Whereas, the share of CCIs employment in all Slovenia was smaller: 4.4% of the total employment in 2009, and 4.1% – in 2015;
- CCIs enterprises are generally smaller compared to other industries since the share of employed in CCIs SMEs is significantly smaller than the share in the number of CCIs SMEs. In 2015, SME in the CCIs sector employed an average of 1.4 persons;
- The total turnover in CCIs SMEs in LUR has been decreasing from 2009 (over 906.9 million EUR; 6.3% of the total turnover in all SMEs) to 2015 (856.6 million EUR; 5.3%), while total turnover in all SMEs has been significantly increasing in that period – from 14.3 billion (2009) EUR to over 16 billion EU).

Like in all of Slovenia, CCIs SMEs in LUR are not very export-oriented. However, their exports have significantly increased between 2009 (3.6% of the total export in SMEs) and 2015 (4.0% of the total export in SMEs) and exceed the share of CCIs SME exports in Slovenia (2.6% of the total export in SMEs). Most of the CCIs SMEs aspire to become more international, however there are different drawbacks, such as lack of financing, and support for internationalisation.

Most important sub-sectors

With regards to the scope and focus of the Regional Creative Economy Centre's (RCKE) activities, architecture, design, advertising, and software and games were defined as the most important CCIs sub-sectors. Design is recognised as a driver of innovation as well as the main focus of RCKE's activities. Architecture and design are recognised as dynamic and complex sub-sectors, whereas "software and games" is a fast-growing sub-sector with the potential to generate high added value (specifically, when linked with design).

Policy instruments

In Slovenia, the **National Programme for Culture 2014-2017**⁸² is a strategic document that addresses CCIs issues. On one hand, the document includes measures related to the development of cultural industries locally and the promotion of Slovenian cultural industries internationally. On the other hand, it includes the development of creative industries by proposing a number of measures such as support for projects linking creative industries with traditional industries, introducing design management in the public sector and others. In addition, content for a next NPC is currently being negotiated.

At the regional level – the **Regional Development Programme of the Ljubljana Urban Region 2014-2020**⁸³ considers CCIs as the driver of economic development and an effective tool for internationalisation. The programme of the document promotes new forms of interdisciplinary cooperation between CCIs and other industries as well as promoting the introduction of CCIs into

⁸² Ministry of Culture of the Republic of Slovenia (2014), *National Programme for culture 2014-2017*, press release. Available at: http://www.mk.gov.si/en/media_room/news/5969/

⁸³ RRA LUR (2015), *The Regional Development Programme of the LUR 2014-2020*, 2nd proposal. Available at: <http://www.rralur.si/sites/default/files/rralur/RRP%20LUR%202014-2020%20english%20version.pdf>



the strategic development processes of enterprises, to create value of products and services that are attractive for the international market.

Within **Slovenia's Smart Specialisation Strategy** (RIS3),⁸⁴ CCIs are not identified as a specific priority, but are limitedly recognised as having potential, which is currently underutilised in Slovenia. It is foreseen in the RIS3 that the Centre for Creativity (CZK) will be established and conducted under the *Operational Programme for the Implementation of the EU Cohesion Policy 2014-2020*⁸⁵ to encourage growth, entrepreneurship, empowerment and promotion of CCIs and cross-sector cooperation between CCIs and other sectors (businesses, private, public and non-governmental sector, educational organizations, tourism). CZK is financed by the European Regional Development Fund and national funds (10.9 million EUR over 6 years).

The importance of CCIs is also recognised in the financial instrument **Operational Programme for the Implementation of the EU Cohesion Policy 2014-2020**,⁸⁶ where support for the industries development can be gained for the purposes of entrepreneurship (action 2.3.3, specific objective 1 – to Promote the creation and operation of new firms, especially start-ups”, specific objective 2 – Increase the added value of SMEs) and non-technological innovation development (with emphasis on design-management) (action 2.1.4.) as well as revitalisation of urban abandoned areas (support activities targeting social regeneration and economic recovery in urban areas and creation of new creative and business centres in areas that used to be abandoned, action 2.5.6)

Main stakeholders

Governmental institutions
<u>Government Office for Development and European Cohesion Policy</u>
<u>Ministry of Economic Development and Technology</u>
<u>Ministry of Culture</u>
<u>Municipalities of Ljubljana Urban Region</u>
Business support organisations
<u>Technology Park Ljubljana</u>
<u>ABC Accelerator</u>
<u>Slovenian Enterprise Fund</u>
<u>Spirit Slovenia</u>
Educational and research institutions
<u>University of Ljubljana</u>
<u>Institute for Economic Research</u>
<u>Academy of Fine Arts and Design</u>
<u>Centre for Technology Transfer and Innovation (Jožef Štefan Institute)</u>
CCIs support organisations, interest organisations
<u>City Museum of Ljubljana/ROG Creative Centre</u>
<u>Centre for Creativity</u>
<u>Intellectual Property Office</u>

⁸⁴ Slovenia's Smart Specialisation Strategy (2015). Available at:

http://www.svrk.gov.si/fileadmin/svrk.gov.si/pageuploads/SPS_predstavitev/S4_dokument_2015_oktober_eng_clean_lekt.pdf

⁸⁵ Government Office for Development and European Cohesion Policy of the Republic of Slovenia (2014), *Operational Programme the Implementation of the EU Cohesion Policy 2014-2020*, Ljubljana: GODECP. Available at:

http://www.eu-skladi.si/sl/dokumenti/kljucni-dokumenti/op_ang_final_web.pdf

⁸⁶ Government Office for Development and European Cohesion Policy of the Republic of Slovenia GODECP (2014), *Operational Programme the Implementation of the EU Cohesion Policy 2014-2020*, Ljubljana: GODECP, p.22, 66.

Available at: http://www.eu-skladi.si/sl/dokumenti/kljucni-dokumenti/op_ang_final_web.pdf



Designers Society of Slovenia
CCIs initiatives, creative centres
<u>Društvo Pekinpah</u>
<u>Poligon</u>
<u>Service8</u>
<u>Punkt</u>
<u>GEEK House</u> (co-working)
CCIs companies
<u>Lushna</u>
<u>Mashoni</u>
<u>Donar</u>
<u>Paralaksa</u>
<u>Siti</u>

3.8. Lisbon Metropolitan Area (Portugal)⁸⁷

Population: over 2.8 million (27% of national total) (2016)
Territory: 3 015 km ² (3.3% of the Slovenian landmass)
Population density: 932 inhabitants/km ² (in Portugal: 112) (2016)
GDP per capita: 23 100 EUR (in Portugal: 17 400 EUR) (2015, Eurostat)
GDP per capita in PPS: 29 600 EUR, 102% of the EU average (in Portugal: 22 300 EUR, 77%) (2015, Eurostat)
Unemployment rate: 13.1% (EU28: 9.4%) (2015, Eurostat)

The Lisbon Metropolitan Area (Portuguese: Área Metropolitana de Lisboa) (LMA) consists of 18 municipalities, including the national capital Lisbon and is home to 27% of Portugal's population, making it the most populous region in the country. The LMA is also the most economically advanced region if compared to the rest of Portugal. It leads in terms of income per capita (see above) and is the most important contributor to the national GDP (35.9%), productivity, labour force (70.2% of total population of LMA is economically active) and possesses a strong tertiary sector, along with the highest density of enterprises in the country (107.1 Nr./km², while in PT: 12.6 Nr./km²). These favourable economic conditions provide also a favourable environment for the CCIs sector as well.⁸⁸

CCIs enterprises

In 2014, the region was home to 23 125 CCIs enterprises (accounting for 46% of all CCIs enterprises in Portugal). The average number of persons employed per company was 1.8 thus showing that in the LMA are dominating small size CCIs, similarly as in the rest of the CRE:HUB project area.

Statistical data on the Lisbon region's CCIs demonstrates that the CCIs sector provided around 3% out of the total employment through the period 2012-2015. The employment in the CCIs

⁸⁷ The text is elaborated based on the information provided in the CRE:HUB State of the Art Report of the Lisbon Metropolitan Area and author's own internet search. Overview of the region and economic performances are described based on the Eurostat database and data of the National Statistical Institute of Portugal

⁸⁸ Instituto Nacional de Estatísticas (2017), *Anuário Estatístico da Área Metropolitana de Lisboa 2016*. Available at: https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_publicacoes&PUBLICACOESpub_boui=277105510&PUBLICACOESmodo=2



sector has seen a slight decrease: from about 41 000 employed in CCIs in 2012 (3.5% of the total employment) to about 40 600 in 2015 (3.4%), contrary to the total employment in Portugal which saw a small increase in the same period: about 76 700 in 2010 (1.9%) to about 85 200 in 2015 (1.7%). Despite a higher concentration of CCIs businesses in LMA than in the country, in recent years a phenomenon has appeared where companies are leaving Lisbon due to the lower financing rate (40%) that is possible to receive in the LMA.⁸⁹

The CCIs activities in Portugal are regularly supported by public funding (mainly EU funds), however many of them run as a “business model”. In 2015, expenditures by municipalities on CCIs activities, covering personnel, capital and other expenditures, in LMA totalled 82.85 million EUR (4.7% of the total expenditure in the region), while total expenditures on CCIs in Portugal was 392.2 million EUR (5.4% of the total expenditure). Additionally, the share of CCIs personnel expenditure and capital expenditure was 7.06% or over 43.37 million EUR (national expenditure 6.26% or over 137 million EUR) and 1.83% or 7 043 EUR (national – 4.22% or around 89.80 million EUR), respectively.⁹⁰

Most important sub-sectors

Based on the Cultural Satellite Account of Statistics Portugal, five CCIs sub-sectors are identified which are deemed as the largest and most prominent in the LMA (in terms of gross added-value): books and press, audiovisual and multimedia, inter-disciplinary work (including arts and crafts), advertising and performing arts. If CCIs are analysed by employment criteria, the same five sub-sectors employed the highest number of people but in the different “top” sequence: books and press, performing arts, inter-disciplinary (including arts and crafts), audiovisual and multimedia and advertising.

Policy instruments

CCIs as a priority sector is broadly emphasized in the regional level strategies of the LMA. The guiding principles of the **Integrated Territorial Plan 2014-2020**⁹¹ (elaborated within the scope of the Europe 2020 strategy and the Partnership Agreement between Portugal 2020 and European Commission) make specific reference to CCIs and their importance in developing the region’s industries and creating opportunities for future economic prosperity. Its framework outlines two strategic goals: valuing innovation and differentiation in order to promote a knowledge-based economy as well as valuing human and social experiences provided by the region for deepening tourism and solidifying the region’s ecological, cultural and social foundation. In a broader sense, such an all-encompassing strategy is aimed at harnessing the CCIs resources for the benefit of regional community, economy and technology.

The **Lisbon Regional Action Plan’s 2014-2020**⁹² strategic priority “Smart growth” includes the key domain “Creative media and cultural industries” that encompasses three primary strategic paths for CCIs through: the creation of the initiatives in the creative and cultural industries; the promotion of support to the creative media and cultural industries; and the protection and promotion of the cultural heritage. Overall, the Action Plan focuses on the promotion of qualified

⁸⁹ Instituto Nacional de Estatísticas (2016), *Estatísticas da Cultura-2015*. Available at: https://www.ine.pt/ngt_server/attachfileu.jsp?look_parentBoui=279266948&att_display=n&att_download=y

⁹⁰ Ibid

⁹¹ Área Metropolitana de Lisboa (2015), *Estratégia Integrada de Desenvolvimento Territorial da Área Metropolitana de Lisboa 2014-2020*. Available at: <http://www.am-lisboa.pt/documentos/1518970305A2fNI7cy4Ku53CX9.pdf>

⁹² CCDRLVT (2014), *Plano de Ação Regional de Lisboa 2014-2020*. Available at: [http://lisboa.portugal2020.pt/np4/%7B\\$clientServletPath%7D/?newsId=20&fileName=PAR_Lisboa_2014_2020.pdf](http://lisboa.portugal2020.pt/np4/%7B$clientServletPath%7D/?newsId=20&fileName=PAR_Lisboa_2014_2020.pdf)



entrepreneurship, strengthening the entrepreneurial capability for internationalisation and development of products and services (innovation), improvement of funding conditions, promotion of the investments and increase of regional tourism attractiveness.

Lisbon Regional Smart Specialisation Strategy (RIS3),⁹³ developed in the framework of the regional development strategy 2014-2020, categorizes CCIs as one of five priority specialisation areas. It outlines the importance of supporting entrepreneurship in several areas, including CCIs. In the RIS3, area of CCIs is supported by innovation in ICT and is linked to tourism.

In addition, financial support can be exploited through the regional instrument the **Lisbon Region Operational Program 2014-2020**⁹⁴ (POR Lisboa 2020) to support the competitiveness of SME in the LMA (internationalisation, innovation and R&D), including CCIs.

Main stakeholders

National, regional and local authorities
<u>Lisbon and Tagus Valley Regional Coordination and Development Commission (CCDR LVT)</u> (policy and funding authority)
Ministry of Economy, Secretary of the State of Industry
Ministry of Culture
Nacional Agency for Development and Cohesion (ADC)
Lisbon City Council (CML), Economy and Innovation Department & Culture Department
National Association of Portuguese Municipalities (ANMP)
Turismo de Portugal (Portuguese Tourism Authority)
EGEAC (municipal company: management & programming of spaces and cultural events in Lisbon)
Business support organisations
<u>Agency for Investment and Foreign Trade of Portugal (AICEP)</u>
<u>Portuguese Agency for Competitiveness and Innovation (IAPMEI)</u>
<u>Startup Lisbon</u> (incubator, private non-profit association)
<u>Invest Lisboa</u> (Lisbon's investment promotion agency)
Beta-i (entrepreneurship and innovation organizations)
CCIs business representatives
<u>Portuguese Association of Advertising, Communication and Marketing Agencies (APAP)</u>
<u>Association of Independent TV Producers (APIT)</u>
<u>APECATE</u> (association of companies in the sectors of congresses, tourism and even organisation)
<u>Plataforma de Media Privados (PMP)</u> (a small organization in the business services industry)
<u>ADDICT</u> (national creative industries cluster)
<u>Ordem dos Arquitectos</u> (public association representing interests of architects in Portugal)
Educational institutions & research bodies
<u>Institute for the Development of Economic, Financial and Business Studies (IDFEF)</u>
<u>Instituto Superior Técnico</u> (University of Lisbon) (IST)
<u>INESC-ID Lisboa</u> (research centre, University of Lisbon)
<u>IES – Centro de Formação e Investigação em Empreendedorismo Social</u> (Centre for Training and Research of Social Entrepreneurship)
<u>Restart – Creativity, Arts and New Technologies Institute</u>
<u>ISEG Lisbon School of Economics & Management</u>
<u>IADE – Creative University</u> (the largest school of design in Portugal)
NGOs, think tanks
<u>EXPERIMENTADESIGN</u>
<u>Group of Reflection and Support for Corporate Citizenship (GRACE)</u>

⁹³ *Especialização Inteligente de Lisboa 2014-2020*. Available at: <http://lisboa.portugal2020.pt/np4/19.html>

⁹⁴ *Programa Operacional Regional de Lisboa 2014 – 2020*. Available at: <http://www.ccdr-lvt.pt/pt/inovacao-e-competitividade/6373.htm>



Trienal de Arquitectura (The Lisbon Architecture Triennale)

APDC-Digital Academy Hub (ICT and media platform)

National Association of Vocational Schools (ANESPO)

Enterprises

Chilltime (massively multiplayer online games developer)

BeeVeryCreative (3D printing company)

Goma Design Lda

PROMONTORIO, Arquitectos Associados Lda (architecture studio)

Graf.ly (startup -content creation for journalists & editors on the newsroom)

ARX Portugal Arquitectos (architecture studio)

Sensefinity (IT startup)

Storymatic – Storyo App

Relógio d'Água (publishing)

THU - Trojan horse is a unicorn (Digital Art Event/B-Side)

LX Factory (creative quarter)

Todos (creative Hub)

Ocubo Internacional (video mapping & interactive projections)

Other CCIs-related organizations

Europa Criativa - Creative Europe Information Centre

Artemrede (cultural organisation)

WHY Portugal (music cluster business association)

PERFORMARTE (association for the performing arts in Portugal)

Portuguese Innovation Society (SPI) (knowledge-management consultancy company)

Clube de Criativos de Portugal (non-profit organization holds the Creativity Festival in Portugal)

Moda Lisboa (Lisbon Fashion Association, non-profit organization)



4. Good practices of the regions

This chapter provides examples of good practices carried out in the CRE:HUB partner regions. Most of them are related to cultural heritage, film industry, audiovisual projects, artistic performances, revitalisation of industrial areas, development of creative quarters, as well as promotion of the cultural and creative industries (CCIs) and boosting economic performances within the sector.

Undoubtedly, these practices greatly contribute to raising awareness of the obstacles CCIs face, help to build and enhance partnerships among different players, foster business development (e.g. support of start-ups) and empower regional cultural development. Having proven success in the CRE:HUB partner regions, these initiatives can also be applied in cases of other regions and beyond.

Table 11. Overview of the CCIs good practices

BASILICATA REGION (IT) <ul style="list-style-type: none">• MATERA 2019-EUROPEAN CAPITAL OF CULTURE• LUCANA FILM COMMISSION	FRIULI VENEZIA GIULIA REGION (IT) <ul style="list-style-type: none">• FVG FILM COMMISSION• AQUILEIA FOUNDATION
CENTRU REGION (RO) <ul style="list-style-type: none">• ALT FESTIVAL• CAROLINA CREATIVE QUARTER	CENTRAL TRANS-DANUBIA REGION (HU) <ul style="list-style-type: none">• ALBACOMP INNOVATION CENTRE• VALLEY OF ARTS
LATVIA (LV) <ul style="list-style-type: none">• LIAA CREATIVE INDUSTRIES INCUBATOR• CREATIVE INDUSTRIES' COMMUNICATION PLATFORM "FOLD"	NAVARRRE REGION (ES) <ul style="list-style-type: none">• MERKATUA• INDIRECT CULTURAL POLICY
LJUBLJANA URBAN REGION (SL) <ul style="list-style-type: none">• COMPETENCE CENTRE FOR DESIGN MANAGEMENT• REGIONAL CREATIVE ECONOMY CENTRE	LISBON METROPOLITAN AREA (PT) <ul style="list-style-type: none">• STARTUP LISBOA• LX FACTORY

In the framework of the CRE:HUB project, partners and stakeholders from CCIs can benefit from the project's learning process and the practices of more experienced regions by participating in study visits. The aim of these visits is to share the experiences and achievements in the CCIs sector with other regions involved in addition to building and strengthening interregional relationships among partners, other policy makers and stakeholders. After each study visit, participating representatives spread the acquired knowledge and experience of CCIs good practices in their regions.



4.1. Basilicata Region – Italy



MATERA 2019 –EUROPEAN CAPITAL OF CULTURE

Since 1985, the European Council of Ministers has assigned a title of European Capital of Culture to various cities. The application dossier for Matera European Capital of Culture was prepared by the Committee Matera 2019 with involvement of the local municipality, the University of Basilicata, the two provinces – Matera and Potenza, the Chambers of Commerce, the Foundation Zetema, the Matera's Murgia Park, and the Conservatory of Matera, and was accepted on 17 October 2014.

It is important to highlight the steps on the path to becoming a Capital of Culture. First of all, the city is required to produce a program for enhancing location identity by developing innovative cultural products. Additionally, the program must involve cooperation between the entire local population and foreign tourists. Finally, the program must fit into the city's long-term development plans.

Some of the issues particularly appreciated by the jury and declared in the assessment of the project were technological (great attention was dedicated to digital technology and the removal of obstacles preventing access to culture through new technologies), and personal (the enthusiasm and the innovation characterizing artistic approaches, through which a popular initiative has evolved into an element placed in the centre of the town and regional planning).

MORE INFO: <http://www.matera-basilicata2019.it/en/>
http://ec.europa.eu/culture/news/2014/matera-be-2019-european-capital-culture-italy_en



LUCANA FILM COMMISSION

The Foundation "Lucana Film Commission" (LFC) is considered a starting point for the Basilicata Movie Hub. It was established in 2012 with a purpose of promoting and supporting the production of films, television, audiovisual materials and advertisement in Basilicata. The production and distribution of the works produced in the region can exploit grants and incentives provided through the specially established LFC fund.

The LFC, in cooperation with local authorities, facilitates and accelerates the procedures for issuing authorizations, permits, concessions and carrying out other issues that are necessary for the development of films, television productions and advertisements. The LFC acts as the 'facilitator' of bureaucratic processes that often can slow down the implementation of projects and initiatives mainly in the south of Italy.

Since 2014, 24 films have been produced on the region's territory and in several other locations, not only Matera, but also other places such as: the archaeological area of Metaponto, the beaches of Maratea and Pisticci, and the lunar landscape of the Calanchi.

MORE INFO: <http://www.lucanafilmmcommission.it/>



4.2. Autonomous Region Friuli Venezia Giulia Region – Italy



FVG FILM COMMISSION

Friuli Venezia Giulia Film Commission (FVG FC), established in 2000, has assisted in the production of hundreds of projects, including films, documentaries, television series, music videos and commercials. FVG FC is a founding member of European Film Commission Network that is associated with the Film Commission on the European market. In 2003, it established the FVG Film Fund that provides funding to productions that chose Friuli Venezia Giulia for shooting. The Fund is based on an economic development logic – productions coming to shoot in the region are not only promoting the area, but also consuming local products and services (transportation, machinery, rent, catering and hotels for the troupes etc.), thus stimulating the development of the local economy. The ratio between the FVG Film Commission investment and productions economic fallout is around 1 to 6.

FVG FC provides assistance not only in the film production administration, but also in the technical and logistical issues. Given the small size of the Friuli Venezia Giulia Region, it is possible to handle the location scouting directly.

MORE INFO: <http://www.fvgfilmcommission.com/en/>



FONDAZIONE **AQUILEIA**

AQUILEIA FOUNDATION

The Aquileia Foundation (AF), an investee of the Ministry of Cultural Heritage and Activities of Italy, the AR FVG, the Province of Udine, the Municipality of Aquileia and the Archdiocese of Gorizia, was established in 2008 (under the Regional Law n.18 / 2006) for the purpose of preserving and promoting the extraordinary archaeological heritage of Aquileia town, which joined UNESCO's prestigious World Heritage List in 1998.

Additionally, the AF opens the site to the public, prepares strategic plans, promotes the development of cultural tourism, co-finances conservation interventions, indirectly manages the valorisation activity, and carries out operations of research, conservation and restoration of the cultural heritage (the technologies for the preservation and promotion of cultural heritage represents one of the development trajectories identified by the regional RIS3).

As conservation and restoration activities are considered a part of CCIs, AF is an important example of integration between cultural heritage and economic development driven by innovation. In fact, AF has organized activities promoting a variety of conservation and restoration work such as Competition for Ideas.

Moreover, AF is one of the main components of an integrated system for the management of cultural heritage as the foundation adds up with the new Regional Agency for Cultural Heritage (ERPAC), residences of performing arts at the Villa Manin and with the recently reformed regional system of museums.

MORE INFO: <https://www.fondazioneaquileia.it/>



4.3. Centru Region – Romania



ALT FESTIVAL

ALT Festival is a technology event organized every year since 2014 by the Cluster for Innovation and Technology in Brasov, Centru Region. It's the first tech fest in Romania, mixing workshops, exhibitions, hackathons and concerts in a multi-day and multi-location format. It has evolved from a 3-day, 500+ participant event in 2014, to become a 6-day, 3000+ participant event in 2016.

The aim of ALT Festival is to promote Brasov as an international axis for the CCIs – with a particular focus on the ITC/digital sub-sectors. Every edition has been co-organized with its 45 members – companies, institutions and universities from Brasov and Bucharest, with every member in charge of a workshop, hackathon or exhibition.

Every year, the festival has a different focus in order to bring new people, organizations and markets in touch with the cluster's ecosystem and actors.

MORE INFO: <http://www.altbrasov.org/>



CAROLINA CREATIVE QUARTER

Carolina Creative Quarter (CCQ) was established in order to bring together all creative and innovative resources of the city of Alba Iulia in the Centru Region and create a permanent culture and art infrastructure within the premises of the historical Carolina Citadel. The added value of the CCQ project is revitalization of the old city fortress. The initiative is supported by the administration of the city of Alba Iulia, which is planning to set up a series of spaces dedicated to the CCIs in the city: workshops, galleries, incubators, training facilities – all within the historical citadel.

The CCQ initiative is the first initiative of its kind in Romania. It has already managed to overcome one of the most common barriers that stand in the way of such projects – an ambivalence of public administration towards such initiatives and projects.

The objective of the CCQ initiative is to refocus the economic development of Alba Iulia towards CCIs, and to bring gifted (talented) human resources from the CCIs back to Alba Iulia.

MORE INFO: <https://www.facebook.com/CartierulCreativCarolina/>;
https://www.youtube.com/watch?v=IK_oEZ1keR8



4.4. Central Transdanubia – Hungary



ALBACOMP INNOVATION CENTRE

The Albacomp Innovation Centre was established in 2015 in Székesfehérvár. It boasts an impressive 4000 m² area with offices and production hall. The Centre provides a suitable environment for research, development and innovation (R&D&I), back office and commercial activities, services, education and production. It can also offer a research infrastructure for cluster members. The Albacomp RI Ltd. has an agreement with the Alba Regia Technical Faculty (Óbuda University) in the field of dual training, thus, the centre is home for educational activities as well.

MORE INFO:

Albacomp Innovation Centre – <http://autopro.hu/en/news/Albacomp-establishes-innovation-centre-in-Szekesfehervar/9142/>

Albacomp – <https://www.albacomp.hu/ea-home>



VALLEY OF ARTS

The Valley of Arts plays a significant role in cultural life of the region. The self-organized summer festival, taking place every year since 1989, offers various cultural, musical, theatrical and literary programs. It is based on local culture as well as natural and constructed environments. The centre of the festival is Kapolcs village, but it has also expanded to other neighbouring villages. The income of the festival is divided between the participating villages, which can be further used for rural development aims. Besides economic benefits, the Valley of Arts catalyses and promotes folklore activities and creates identity. The festival also gives importance to the local handmade products which are a source of revenue for local people and helps them to survive during the low season (festival extend impact over the whole year).

MORE INFO: <https://www.muveszetekvolgye.hu/en>



4.5. Latvia

LIAA CREATIVE INDUSTRIES INCUBATOR

On December 2016, the Incubator of Creative Industries (CI) was established within the Investment and Development Agency of Latvia (LIAA) with the mission to support the creation and development of new and current creative enterprises in Latvia. CI Incubator offers two programmes:

Pre-incubation (up to 6 months) – suitable for prospective and young creative entrepreneurs developing or improving business ideas. The program provides access to open office, mentoring and a carefully curated educational program. Status of legal entity is not required.

Incubation (up to 4 years) – suitable for entrepreneurs with clearly defined business ideas. The program supports companies under 3 years. In addition to educational training in business strategy, marketing, PR, etc. it offers 50% co-funding for the following services: financial, IT, legal, design and marketing services; consulting in Virtual Reality and other specific areas of expertise; prototyping, testing and other specific services; product certification; and grants up to 10,000 EUR for equipment.

MORE INFO: <https://www.facebook.com/LiaaRIBI/>



CREATIVE INDUSTRIES' COMMUNICATION PLATFORM "FOLD"

FOLD is a communication platform that brings together Latvian and foreign CCIs with the aim to facilitate their collaboration and learning together.

The creation of the platform is based on the merger of previously existing blogs – "[Plikums](#)" and "DesignBlog" (both created in 2009), which gathered news on interesting items in Latvian design, and a slightly younger "[Fine Young Urbanists](#)", which wrote about urban planning and design. At the end of 2012, the combined team took part in and won a competition organized by the Ministry of Culture of the Republic of Latvia to create a communication platform for Latvian CCIs. As a result, the FOLD platform was launched in 2013 and now operates in Latvian and English.

The platform contains highlights of creative processes, in-depth articles, articles on CCIs theory, interviews and documentary shorts about creative people, and a calendar of upcoming events.

MORE INFO: <http://www.fold.lv/>



4.6. Navarre Region – Spain

MERKATUA

MERKATUA is an arts festival-fair focusing on the disciplines of theatre, dance, film, music and literature. It was created with the intention of ensuring a professional showcase of products of Navarrese culture to distributors and to other types of agents of bordering communities and provinces, including specialized agents. The first edition of Merkatua was organised on 15-16 November 2017 in Pamplona (Navarre).

The goal of the Merkatua is to support the professional network of Navarrese artists and promote the creative, cultural and professional companies of Navarre. This will lead to economic improvement of the CCIs businesses of Navarre and generate new business opportunities for the creative and cultural companies of the region.

Areas involved are: theatre, dance, music, literary editing, creative industries (companies and innovative cultural projects made in Navarre) and cinema.

MORE INFO: <http://www.948merkatua.com/en/home>

INDIRECT CULTURAL POLICY

An indirect cultural policy provides support for CCIs within the legislative framework of Navarre. One of the important support measures are tax credits for film and audiovisual production implemented according to the local law (*Ley Foral*), 29/2014, Article 70 (effective since 24 December 2014). This law stipulates the provision of tax credits for investment in the production of films and TV series (fiction, animation and/or documentary) as well as services delivered for productions.

Another focus is *Cultural Sponsorship in Navarre*. After establishment of the Law on Cultural Sponsorship, the region became a pioneer of cultural sponsorship stipulating private participation in the projects of culture or related activities of a social character. The sponsorship can be provided through three modalities: donations, loans (with or without charge and cooperation agreements) and considerable tax incentives for both individuals and companies, through a corporate tax.

Some examples of cultural sponsorship success: in 2015 there were 6 022 contributions for cultural sponsorship from 63 persons with a total value of over 1.634 million EUR.

MORE INFO ON TAX INCENTIVES

http://www.navarra.es/home_es/Actualidad/BON/Boletines/2014/254/Anuncio-2/

MORE INFO ON CULTURAL SPONSORSHIP

<http://www.lexnavarra.navarra.es/detalle.asp?r=33853>



4.7. Ljubljana Urban Region – Slovenia



COMPETENCE CENTRE FOR DESIGN MANAGEMENT

The Competence Centre for Design Management (KCDM) was established in 2013 within the Human Resources Development Operational Programme 2007-2013 and was co-financed by the European Social Fund. It was a pilot project of the design agency Gigodesign which included 19 companies from design, consulting as well as new products and services development sectors. The aim of the project was to improve knowledge and processes in cooperation, increase the value of brands, and improve the position of participating companies on the market. The mission of KCDM was to connect ambitious companies to the sources of design management knowledge. KCDM activities focused on the following: pooling, transferring knowledge and good practices in the design management; training according to the obtained/developed competence model; cooperation for the establishment as well as development and implementation of design management strategies.

KCDM achieved a great success in the two and a half years of the project duration. As a result, the added value of the involved companies increased by 70%, their net profits increased by 245%, and their turnover increased by 14%. KCDM received a prestigious Design Value Award of the internationally renowned Design Management Institute in 2016. KCDM aims to continue its good practice and involve new companies in the future.

MORE INFO: <http://www.design-management.si/en/>



REGIONAL CREATIVE ECONOMY CENTRE

The Regional Creative Economy Centre (RCKE) was established within the Regional Development Agency of Ljubljana Urban Region (RRA LUR) in the context of Interreg Central Europe project Creative Cities. It is still mainly funded through different EU projects, but partially also by RRA LUR. The main aim of RCKE is to train and connect creative individuals from CCIs with companies in other industries, thus creating conditions for achieving business successes based on multidisciplinary development processes.

As a part of the regional development agency, RCKE plays an important role in the policy making process, particularly in relation to the creative sector (CCIs). Ljubljana Urban Region is a national front runner in terms of the creative sector share and RCKE is a leading institution promoting the creative sector at the national level. At the regional level, RRA LUR is in charge of preparation of the Regional Development Programme 2014-2020, which is the basis for implementation of projects where creative industries have been given an important role. Their engagement at the international level represents an active approach to the policy making process given their membership in different working groups and initiatives.

MORE INFO: <http://www.rcke.si/en/>



4.8. Lisbon Metropolitan Area – Portugal



STARTUP LISBOA

Startup Lisboa is an initiative of the Lisbon City Council, included in the wider strategic umbrella “Lisbon Creative City” and is a part of the city’s entrepreneurial ecosystem. The proposal to set up this incubator stemmed from the Council’s strategy and was supported from its budget of 2009-2010. Startup Lisboa was founded in 2011 as a private non-profit association with the support of Montepio Geral Bank and the governmental agency IAPMEI – Agency for Competitiveness and Innovation. Currently, it is a part of an urban regeneration project for Lisbon’s downtown area (Baixa), which involves the reuse of historical buildings. Startup Lisboa is the most important incubator of the Lisbon network of business incubators. It supports entrepreneurs in developing business ideas that are innovative and ready for the market, and helps to attract investments for supporting business growth of companies.

According to Lisbon City Council statistics, the results have so far been quite impressive as the number of incubated start-ups increased from 45 in 2013 to 200 in 2015; up to 700 new workplaces have been created within the period of 3 years (2013-2015), while the start-ups have generated 5 EUR million.

MORE INFO: <http://www.startuplisboa.com/#about>



L X F A C T O R Y

LX FACTORY

The opening of the creative quarter LX Factory was a private initiative. It lies on a grand 23.000 m² territory former factory in the Lisbon area of Alcântara, comprising ten buildings ranging from one to five floors. In 2008, the factory complex was turned into a creative island for enterprises and professionals, serving also as the stage for a diverse set of events for fashion, advertising, communication, fine arts, architecture, music etc.

There are 203 enterprises and professionals representing the different sectors: architecture, design, catering/restaurants, shopping/leisure, advertising, fashion, visual arts, performing arts, music, new technologies, communication/marketing, photography publishers, etc.

A key success factor of this project is its concept of a creative island and management. Apart from the rehabilitation of a derelict urban area, preserving authenticity of this place and its industrial characteristics helped to create its branding image.

MORE INFO: <http://www.lxfactory.com/en/welcome/>



5. Conclusions

General conclusions

Analysis of the available Eurostat microeconomic variables and Regional Innovation Scoreboard indicator at the regional level (NUTS 2) points out that there is a diverse performance level in CRE:HUB project area. However, all eight regions have demonstrated improvements during the period 2010-2015.

According to the regional State of the Art Reports, in the most of project regions/countries there is neither a locally accepted definition for cultural and creative industries (CCIs) nor the set of the sub-sectors. Consequently, project partners employed different approaches (mainly from the European Commission and UNESCO) to perform analysis on the CCIs in their region. Only Latvia and Portugal applied a specific definition and specific sub-sectors. In turn, in Italy and Spain, specifically Navarre with a status of an autonomous region, government authorities are currently working on the defining CCIs in the policy documents, and the results are expected at the beginning of 2018.

The lack of local CCIs definitions and sub-sectors derives from the overall challenge of collectively understanding the meaning of CCIs and determining which sub-sectors to cover. This also leads to the difficulties in obtaining statistical data in order to assess the economic performance of CCIs characteristics, tendencies and their impact, specifically in linkage with other traditional industries.

Furthermore, the variety of applied definitions and lack of regional data or different methodologies for data collection for many CCIs variables also challenges the effective mapping of CCIs and measuring their economic contribution in a systematic and comparable way across the project regions. As a result, the cross-regional data comparisons within the CRE:HUB project area is lacking in the Joint Report.

Nevertheless, the available national-level Eurostat data on “cultural activities” confirms that the industry's potential for contributing to economy growth and employment is considerable. On the one hand, most of the project countries experienced growth in share of “cultural employment” in the recent years, and 5 out of 7 countries are acting above or almost at the EU28 level (3.7%, 2016): Slovenia, Latvia, Spain, Italy, Latvia and Hungary. On the other hand, the trend for “cultural enterprises” is the opposite – most of the countries experienced a slight decline and only 2 countries are acting below EU28 level (6.3%, 2014): Slovenia and Italy. This may show a sign of possible growth in the sizes of cultural enterprises.

The regional state of the art analysis confirms that the CRE:HUB project regions share typical characteristics for CCIs – the sector is dominated by micro and small-size enterprises with mostly low performance indicators and CCIs activities are bound to urban environment. Also, the IT industry (software, gaming) is considered as a driving force for CCIs development.

Based on the SWOT analyses of CRE:HUB project partners, there are several common challenges to overcome in the project area that are related to developing a clear regional/national strategy for CCIs development (supported with specific objectives and actions) or improving of its implementation and coordination; improving access to the financial support (public and private); improving business skills and knowledge (on management, marketing, digitalisation) to attract investments/financial support or foster export capacity; raising awareness about CCIs potential to bring economic benefit (specifically when CCIs are linked with traditional industries); and



strengthening collaboration between various stakeholders, specifically from local governance level.

Partners-specific conclusions

In some project regions the CCIs are considered as emerging sectors – Basilicata (IT), Central Transdanubia (HU), Navarre (ES), while in the rest, CCIs are at the developing stage (see below).

Basilicata Region (Italy, IT): as CCIs are at the emerging phase in the region, the awareness of the sector is currently low. Performance of the regional CCIs is lower than in Italy as well as in Friuli Venezia Giulia, Italian CRE:HUB partner region. The main room for growth is cultural heritage and cultural tourism (e.g. Matera 2019 – European Capital of Culture). Policy instruments: no clear CCIs strategy with specific support instruments and objectives.

Autonomous Region Friuli Venezia Giulia (Italy, IT): the CCIs sector is at the developing stage and of high economic importance. Awareness of the CCI potential and its linkage with traditional sectors is currently rising. Although the number of enterprises and share of employment within CCIs in FVG remained stable during 2011-2015, the regional performance level is higher than the national one, on average.⁹⁵ Policy instruments: the key regional policy documents include priorities focusing on the development of CCIs entrepreneurial activities development, however, no specific measures are provided.

Centru Region (Romania): the CCIs sector is at the developing stage and has a potential to be linked with industrial sectors. Dominance of the ICT sub-sector is highlighted as it leads to the faster growth of CCIs. During 2011-2015 a constant increase of the number of CCIs business indicators is observed.⁹⁶ However, for further growth, CCIs must overcome a number of regional barriers such as lack of cohesion and cooperation at all regulatory, funding and community levels. Policy instruments: CCIs as the national priority are covered in the national and regional policy strategies. In addition, local policies and initiatives of the region focused on CCIs support are appearing and showing effective results.

Central Transdanubia (Hungary): CCIs are an emerging sector with low level of awareness about its potential. The main force for the sector's development is IT, particularly its software sector. Also, a favourable geographical position, availability of foreign direct investments and presence of industrial sector creates possibilities for CCIs development. Due to the regional data shortage, analysis of the CCIs' economic performance in the region is missing. Policy instruments: no direct focus on the CCIs development in the regional policy strategies.

Latvia: CCIs have significantly developed in the last 10 years with a large number of public, private and community initiatives. CCIs also form a significant part of the economy and are an important employment source in Latvia. Number of CCIs' enterprises and employment within the sector were growing during 2010-2015.⁹⁷ Although most of the CCIs enterprises and activities are concentrated in the capital city Riga, sector is appearing in the other regions as well. Policy instruments: the importance of CCIs is reflected in the key national level policy instruments. Also, under the cultural policy guidelines specific objectives are indicated in relation to CCIs.

Navarre Region (Spain): CCIs are considered as an emerging sector showing potential for local economy stimulation and creation of employment opportunities. The cultural and social

⁹⁵ Based on the calculations of selected NACE codes (Italian ATECO codes) from the State of the Arts Report of AR FVG

⁹⁶ Based on the calculations of selected NACE codes from the State of the Arts Report of the Centru Region

⁹⁷ Based on the calculations of selected NACE codes in Latvia (State of the Arts Report of Latvia)



characteristics of the region have created a favourable atmosphere for the development of various local CCIs sub-sectors such as the architecture and audio-visual industry. Policy instruments: awareness of the CCIs is constantly growing, therefore local administration is working on the elaboration of Strategic Culture Plan for Navarre focusing on CCIs.

Ljubljana Urban Region (Slovenia): as LUR has the most developed economy of Slovenia, most of the country's human resources, infrastructure and business sector, including CCIs, are located in the capital Ljubljana. Its central geographic position serves as an economic and cultural hub at national and EU level. The development of the CCIs business environment during 2009-2015 is characterised by the increase of CCIs' SMEs but the decrease of employment, thus pointing that the sector is mainly represented by micro enterprises. Also, the sector is not considered export-oriented despite its export growth during the same period. Policy instruments: there is a national level strategy proposing a number of measures for CCIs development (it ends up in 2017), however, there is a lack of regional strategy.

Lisbon Metropolitan Area (Portugal): As the most economically advanced region in Portugal, LMA is characterised by a high concentration of CCIs businesses and activities. Due to the active investments of the Lisbon city into the entrepreneurial ecosystem, the region has a favourable environment for CCIs development and high potential to foster a regional innovation system geared to international technology transfer. Nonetheless, during the last years a "relocation" phenomenon has appeared attracting LMA companies (especially in the CCIs) to other regions due to the lower financing rates. Policy instruments: despite not having separate strategy, CCIs are recognised as the driver of economic development in the key regional, national and supranational level strategies, including RIS3.

Taking into account the different levels of CCIs development and overcoming challenges of the fast growth of industries, each project partner benefits from participation in the CRE:HUB project by transferring and implementing good practises and experiences of other project partners identified in the regional State of the Art Reports and learned during the Study Visits and Bar Camps in each region. For example, Ljubljana Urban Region in Slovenia, which is lacking an updated design strategy, could learn from Latvia where recently a guide *Design of Latvia 2020* has been published in order to explain the *Design Strategy of Latvia 2017-2020* in a modern and easy approach.



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ANNEXES

Annex 1. CCIs definitions and sub-sectors followed in the study

	CCIs definition	CCIs sub-sectors
Basilicata, AR FVG (Italy)	<p>No official CCIs definition has been adopted in Italy, nor in both regions. The government program 'Industry 4.0' is about enabling technologies, rather than business characteristics, thus leaving the CCIs definition vague.</p> <p>Symbola (Foundation for the Italian qualities) and Unioncamere (public body representing the Chambers of Commerce) have carried out studies on CCIs and within the report 'I am Culture⁹⁸ (<i>Io sono cultura</i>)' defined standards of the industries which are currently followed by both regions.</p> <p>In December 2017, Government of Italy will present the <u>Stability Law for 2018</u> that will <u>introduce the official definition</u> of CCIs and scope of sub-sectors.</p>	<p>The Symbola and Unioncamere defined 5 areas* and sub-sectors of production related to CCIs:</p> <ul style="list-style-type: none"> • Performing and visual arts; • Artistic & historical heritage (museums, libraries, archives, management of sites or monuments); • Cultural industries – production of reproducible goods in various areas (film, television, publishing, music and video game & software industries); • Creative industries – activities that convey meaning, goods & services production (design, architecture & communication); • Production of creative-driven goods & services – hard to define the area due to constant changes, creative-driven economic activities are continuously growing (i.e. 'Made in Italy') <p>* The five areas of production are reflecting 65 economic activities with four digits of the ATECO Classification 2007 (NACE)</p>
Centru Region (Romania)	<p>Romania, including Centru Region, has not officially adopted a CCIs definition. The Region follows the definition proposed by the European Commission's Green Paper⁹⁹ consisting of two parts: cultural industries' and 'creative industries'.</p> <p><i>"Cultural industries" are those industries producing and distributing goods or services which at the time they are developed are considered to have a specific attribute, use or purpose which embodies or conveys cultural expressions, irrespective of the commercial value they may have.</i></p> <p><i>"Creative industries" are those industries which use culture as an input and have a cultural dimension, although their outputs are mainly functional. They include architecture and design, which integrate creative elements into wider processes, as well as subsectors such as graphic design, fashion design or advertising.</i></p>	<p>European Commission's Green Paper: *</p> <ul style="list-style-type: none"> • advertising • books & press • cultural heritage • design (graphic and fashion) • fashion design • film, DVD & video • music • new media • TV and radio • video games • visual arts <p>* Considering that IT field is not covered in the Green Paper, it was included in the Centru Region's State of the Art when identified the most important NACE codes.</p>

⁹⁸ Symbola Foundation – Union of Chambers (2015), *Io sono Cultura 2014*, Rome, pp.268-270

⁹⁹ European Commission (2010), *Green Paper "Unlocking the potential of cultural and creative industries"*. Available at: <https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX%3A52010DC0183>



Central Transdanubia (Hungary)	There is no clear definition of CCIs in Hungary or Central Transdanubia Region.	Despite of the clear CCIs definition shortage, the National Development and Territorial Development Concept ¹⁰⁰ of Hungary suggests the following activities as part of the CCIs: <ul style="list-style-type: none"> • Advertising & promotion • Artistic & antique market • Book publishing • Construction • Craftsmanship • Design & fashion design • Electronic & printed press • Film & video • Fine arts • Industrial arts • Music • Performing arts • Popular arts • Software & digital game development
Latvia	Official definition & scope of sub-sectors are adopted in the cultural policy guidelines based on the UK DCMS's model. Currently, the active policy document is the " Creative Latvia 2014-2020 " ¹⁰¹ (implemented by the Ministry of Culture of the Republic of Latvia): "CCIs are 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."	Scope of the sub-sectors specified in the cultural policy guidelines: <ul style="list-style-type: none"> • Advertising • Architecture • Cinematography • Computer games & interactive software • Cultural education • Cultural heritage • Design • Music • Performing arts • Publishing • Radio, TV & interactive media • Recreation, entertainment, other cultural activities • Visual arts
Navarre Region (Spain)	No common adopted definition at the regional, nor national level. For 2017, the Department of Culture of the Government of Navarre has set in motion the creation of the Strategic Culture Plan for Navarre (PECN) that will include a specific line on CCIs with its according definition. Meanwhile, the working definition is the one proposed by UNESCO ¹⁰² : „Sector of organised activity whose principal purpose is the production or reproduction, promotion, distribution and/or commercialisation of goods, services and activities of a cultural, artistic or heritage-related nature."	CCIs in Navarre are considered an emerging sector made up of the following sub-sectors: <ul style="list-style-type: none"> • Advertising /communication • Architecture • Books and press publishing • Design& fashion • Digital content • Dramatic arts & music • Film production & audiovisuals • Heritage • Radio & TV • Visual arts

¹⁰⁰ Hungarian Official Journal (2014), *National Development and Territorial Development Concept*. Vol. 2014, Issue No.1. Available at: http://ngmszakmaiteruletek.kormany.hu/download/4/7f/d0000/OFTK_vegleges_EN.pdf

¹⁰¹ Cultural Policy Guidelines 2014-2020 "Creative Latvia", approved by Cabinet Order No. 401 29 July 2014. Available at: <https://www.km.gov.lv/en/ministry/documents>

¹⁰² United Nations Educational, Scientific and Cultural Organization (UNESCO) | Creative Industries. Available at: <http://www.unesco.org/new/en/santiago/culture/creative-industries/>



<p>Ljubljana Urban Region (Slovenia)</p>	<p>Slovenia, including Ljubljana Urban Region, follows the definition proposed by the European Commission Green Paper¹⁰³ consisting of two parts: cultural industries' and 'creative industries'.</p> <p><i>"Cultural industries" are those industries producing and distributing goods or services which at the time they are developed are considered to have a specific attribute, use or purpose which embodies or conveys cultural expressions, irrespective of the commercial value they may have.</i></p> <p><i>"Creative industries" are those industries which use culture as an input and have a cultural dimension, although their outputs are mainly functional. They include architecture and design, which integrate creative elements into wider processes, as well as subsectors such as graphic design, fashion design or advertising.</i></p>	<p>CCIs sub-sectors are defined based on the model from the EC report Boosting the Competitiveness of Cultural and Creative Industries for Growth and Job¹⁰⁴, and are used in the State of the Art analysis of the region:</p> <ul style="list-style-type: none"> • Advertising • Architecture • Archives & libraries • Artistic crafts • Audiovisual (including film, video games & multimedia) • Cultural heritage • Design (including fashion design) • Festivals • Music • Performing & visual arts • Publishing (books & press) • TV & Radio • Software • Fashion high-end industries
<p>Lisbon Metropolitan Area (Portugal)</p>	<p>CCIs in Portugal are defined in line with the 2012 ESSnet statistical framework (ESSnet Culture final report)¹⁰⁵. The national agency Statistics Portugal made important advances in the definition of CCIs activities, combining cultural domains (cultural practices, activities or products centred in expressions recognised as artistic) and cultural practices (translating the several phases of production of cultural products).</p>	<p>CCIs sub-sectors are covered by the Culture Satellite Account of Statistics Portugal:</p> <ul style="list-style-type: none"> • Advertising • Architecture • Archives • Audiovisual & multimedia • Books & press • Heritage • Interdisciplinary • Libraries • Performing arts • Visual arts

¹⁰³ European Commission (2010), *Green Paper "Unlocking the potential of cultural and creative industries"*. Available at: <https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX%3A52010DC0183>

¹⁰⁴ European Commission (2016, p. 282) - *Boosting the Competitiveness of Cultural and Creative Industries for Growth and Jobs*, EASME/COSME/2015/003, June 2016, prepared by the Austrian Institute for SME Research & VVA Europe, p.9. Available at: <http://ec.europa.eu/DocsRoom/documents/18001/attachments/1/translations/en/renditions/native>

¹⁰⁵ Bina, V., Chantepie, P., Deroin, V. et al. (2012), *ESSnet-CULTURE, European Statistical System Network on Culture, Final Report*. Available at: http://ec.europa.eu/assets/eac/culture/library/reports/ess-net-report_en.pdf



Annex 2. SWOT Table of CCIs in the project partners countries

	STRENGTHS	WEAKNESSES
BASILICATA REGION (ITALY)	Very wide and strong cultural and historical heritage, mostly still unknown and to be exploited; Mapping of the cultural sites exists as the basis for sectoral policies; Strong specialisation in some creative sub-sectors (typical agro-food, handicraft & artistic crafting) based on a long-lasting tradition; Active labour policies aimed at the creation of CCIs start-ups within the ESF Operational Program (OP) 2014-2020 & policies developing sustainable cultural tourism within the ESF OP 2014-2020; Presence of the furniture cluster, that after hard reorganization, is showing signs of new capacity in penetrating export markets; Some internationally & locally recognised cultural poles as tourist destinations (Matera, Vulture).	Low degree of internationalisation of most of CCIs; General unawareness of the cultural resources of the region; Lack of entrepreneurial capacity affecting the perception of CCIs market opportunities, although the number of firms is quickly increasing; Low productivity of the companies of the sector; An occupational absorption of CCIs sector is still below the national average.
FRIULI VENEZIA GIULIA (ITALY)	Co-presence of centres of tertiary education academies & institute of technology, industrial cluster (agribusiness; engineering; maritime technologies; "smart health") and the CCIs; Presence of "extended" inter-sectoral chains within the CCIs sub-sectors, especially the creative-driven sub-sectors (tourism-fashion-film; wood-furniture-nautical); Presence of structures that facilitate innovation processes "from idea to market" and support the creation/development of enterprises (incubators); promotion events of businesses / talent / products in some CCIs (e.g.: Mittel Moda; Film Festivals; International Talent Support; Design Week).	Insufficient capacity to attract investments mainly due to poor marketing ability to promote business projects to financial institutions; Inadequate management skills & lack of appropriate networking that requires solid business models; Low confidence in the potential of CCIs to bring economic benefits; Low number of young entrepreneurs "under 35" as FVG region has the lowest share of "under 35" in Italy; No collaboration between education & CCIs; Lack of facilities and/or events (Bar-Camp) that would bring together artists, designers, culture & entertainment workers, funders, public administrators, researchers in a non-pre-structured way.
CENTRU REGION (ROMANIA)	Powerful growth in recent years, especially due to rise of ICT; Well-established sub-sectors including ICT, publishing, advertising; First CCIs good practices have emerged; Well distributed educational network – universities existing in almost every county; Availability of local grants for cultural projects; A wide range of stakeholders supporting CCIs & its clusters.	Most of the CCIs products and services are meant for export; Low regional purchase power; Lack of cultural entrepreneurship; Low positioning on global value chains; Lack of cohesion between counties in terms of CCIs policies; Poor cooperation of CCIs communities within the region; Available funding not suitable for specifics of CCIs; Lack of highly skilled human resources; Inflexibility of educational capacities for the needs of the CCIs in the regions.
CENTRAL TRANSDA-NUBIA (HUNGARY)	Dynamic growth of the CCIs; High added value; Strong and intensifying IT sector; Rich historical, cultural & architectural heritage; Presence of good examples (practices); Well-established education and training programmes in some sub-sectors; Internationally recognised individuals and motivated players in the industries; International cooperation; Extensive availability of institutions.	Low demand; Small market; Lack of promotion; Insufficient funding & break lines inside of the CCIs sector (fragmentation of the industries, diverse level of business knowledge); Lack of infrastructure in some sub-branches; Lack of new methods and measures to stimulate the development of CCIs activities & innovation; Insufficient business knowledge; Weak cooperation among different CCIs players (enterprises, professional organisations, etc.); Territorial inequalities inside the region in terms of



		development of innovations and creativity (social problems, lack of infrastructure in some regions).
LATVIA	Latvia has a diverse & rich cultural heritage, cultural life and creative people developing CCIs with high export potential; Interest in & awareness of the CCIs is constantly increasing; Necessary potential to develop exportable CCIs products on the basis of culture (festivals, movie production, music records etc.) as well as to create design products with high added value; Exportable brands in specific sub-sectors (start-ups, handicrafts, design); Strong & close inter-institutional cooperation among ministries, state agencies, think tanks, NGOs; State-level support for the CCIs – Ministry of Culture & Ministry of Economics play important role in the development & monitoring of CCIs; The creative professions have high prestige in society; Developed policy framework for CCIs at the national level; Support structures for promoting & creating CCIs enterprises, such as Creative Industries Incubator, partnership initiative, creative hubs; Presence of the study educational institutions (VET and HEI) that offers study programmes on the CCIs as well as non-formal training initiatives.	Lack of knowledge & skills about business processes, “fear” & lack of experience in the commercialisation of creative ideas; Comparatively low demand for the offered products & services in the local market (small market), tax & administration burden, lack of working capital & skilled workforce; Lack of specific financials support for CCIs; Only a small number of entrepreneurs considers CCIs as a potential tool for regional/national development; Insufficient distribution & low activity of CCIs enterprises outside the capital city – Riga; Lack of the funding that would be specific for the business development in the CCIs; Insufficient cooperation between CCIs, traditional industries & services sectors, which is important transfer of knowledge & innovation; The agenda for Smart Specialization Strategies is not focusing one the CCIs sector; Lack of appropriate (clear) statistical data.
NAVARR REGION (SPAIN)	Some CCIs companies have stable (strong) position & client network; Introduction of ICTs into the world of culture and entertainment that leads the creation of new companies and work places; Presence of professional associations; Commitment to organise multidisciplinary training (management, training and technical skills) in some sector companies; Extensive network of theatres and socio-cultural centres in Navarre.	Lack of recognition of CCIs economic and social potential; Lack of knowledge about the cultural agenda by general public; Low level of cooperation between companies & public institutions; Small economic power of CCIs enterprises; Unattractive working conditions; Existence of an informal (grey) economy, largely due to low level of professional competencies and job insecurity; Lack of ability to apply business management strategies in smaller companies; Changes in business model due to the development of ICTs in some specific sectors, to which some companies have not adapted well; Lack of knowledge to use social networks; Lack of sufficient trainings (both for employments and formal trainings).
LJUBLJANA URBAN REGION (SLOVENIA)	In terms of CCIs market, strong public financing of the cultural sector (culture as Slovenia’s national interest) as well as internationally recognised individuals & SMEs in some industries; Tradition to foster competences and maintain trainings; Products & services suitable to be sold in the international market; Critical mass of infrastructure, institutions and firms located in Ljubljana; Availability of office/production spaces and modern technology; Active national professional	Unsuitable tax & labour legislation as well as Intellectual Property Rights protection; Small market; Low product& service prices obtained, competition based on price; Low demand for innovative products; Few competent intermediaries; Uneven relations in the value chain; Lack of critical mass (orientation on domestic market only) and strong trademarks; Heterogeneous quality of CCIs products& services; Poor marketing & business management skills; Educational system is not fostering creativity; Lack of specialised interdisciplinary educational



	associations; Established events & awards facilitating CCIs awareness and promotion.	programmes and; Lack of appropriate funding opportunities; Lack of support for internationalisation; Low concentration of infrastructure, institutions & firms outside of Ljubljana; Lack of spaces for networking; Support institutions are not coordinated; Low promotion & awareness about the role of CCIs as well as efforts to improve it; Lack of national level strategic document recognising the CCIs importance & support policies; Unsuitable public procurement criteria.
LISBON METROPOLITAN AREA (PORTUGAL)	Regional economic dynamics based on a very diversified set of sub-sectors and the establishment of very dynamic actors of economic development (e.g., scientific & technological system, financial groups, multinationals, highly qualified professionals with higher buying power); Concentration of human, financial & technological resources relevant for the knowledge economy; Network of artistic, cultural and sports infrastructures and experience in the organization of large national and international events; Relevant concentration of cultural agents, poles of creative companies, spaces for creators and events, as well as the capacity to attract tourists in the subsector of cultural and artistic heritage; Regional resources that may facilitate rural and nature tourism (parks and natural reserves); Tourism dynamism in the Lisbon region, reflected in the increasing demand for accommodation by foreign guests, boosting the current trends in international tourist demand; Pioneering in the development of CCIs at the national level, relevant to the business fabric and structure of employment; Relevant concentration of higher education establishments, research centres, science and technology parks & state research laboratories; Availability of programmes, strategies and funding sources for innovation; Availability of regional infrastructures relevant for the development of the CCIs sector (creative hubs, business incubators, co-working spaces, etc.).	The provision of vocational & technological training, and underfunding of the vocational schools, together with lesser proportion of higher education students in technological courses, resulting in a lack of specialized staff; Weak cooperation between the cultural structures and the educational system, impairing the link between arts & schools; Limited efficiency of technology transfer & low levels of collaboration between higher education & enterprises; Insufficient levels of structured technical support for the implementation and follow-up of entrepreneurial projects at regional level; Insufficient international mobility & participation in networks by CCIs organizations; Lack of associations/ promotion agencies in the CCIs sector.



	OPPORTUNITIES	THREATS
BASILICATA REGION (ITALY)	Basilicata region has opportunity to benefit from the project "Matera 2019" as a driver for the cultural exploitation of Basilicata; from the new cultural policies of the Minister of Cultural Heritage as a driver for the creation of a "last-mile" ("km zero") promotion of local - and perhaps peripheral - cultural and historical heritages; and from the national programme Industry 4.0 that can boost the innovation & creativity in entrepreneurship.	Low growth rates of the number of CCIs companies due to the declining number of regional youth population; Slowing down in the facilitation of strong demand for CCIs products & services due to the continuous stagnation of national and regional economy; The lack of a valorisation culture of historical and artistic resources, focus is only on maintenance of the present resources; Reducing the spending capacity in terms of cultural public investment, but also the ordinary maintenance of the goods.
FRIULI VENEZIA GIULIA (ITALY)	There are opportunities to develop specific legislation for CCIs SMEs related to tax issues (income tax deductions; cash taxes), employment & unemployment (benefits for a range of professions); to identify more efficient measures to promote & support young entrepreneurs ("under 35") at regional and national level; to promote events of cross-border CCIs companies & talents in terms of territorial marketing (local CCIs brands, e.g., "Brained in Alpe-Adria"); to develop alternative financing services & tools such as the "reward based" crowdfunding platforms operating in Italy; to develop dedicated structures (innovation centres & cultural experiments) & interaction platforms (for co-creation & collaboration between artists); to develop the "supply chain" of education, training, institutions/ associations, artists, civil society and CCIs enterprises.	The banking sector lacks adequate business valuation models for CCIs businesses, both for capital (intangible) assets and revenues (quantification of services); "Cognitive" gap between the CCIs and institutions who often miss to identify the needs and requirements of the start-ups operating in the creative industries; Further worsening of business confidence and increase of risk aversion - primarily of the innovative and creative start-ups - due to the protracted seven-years crisis for the Italian economy and the uncertain internal and external growth prospects; Uncertain sustainability of the promotion events of businesses/talent in different CCIs, as sustainability is strongly linked to the economic cycle and the variable results of fundraising; Shortage of data.
CENTRU REGION (ROMANIA)	There are opportunities to promote regional good practices and "raw" models; to introduce local and regional funding for CCIs SMEs; increase of local market for CCIs products and services. Emergence of business angels, venture capital and other alternative models of funding projects in CCIs; Prospects of grants available at regional and national level.	"Brain and talent drain" towards Bucharest (from Brasov, Sibiu) and Cluj (from Alba, Mures, Harghita, Covasna); No specific incentives for CCIs; Lack of solid skills regarding Intellectual Property Rights (IPR).
CENTRAL TRANS-DANUBIA (HUNGARY)	Opportunities of the industries are related to the knowledge overflow from Central Hungary; strong connection to the EU economic space; support and grants from national actors (e.g. National Cultural Fund); increasing demand for creative products; Calls for SMEs.	"Brain drain" of talented workforce to bigger cities; Difficulties to access international markets; Unfavourable tax environment for CCIs; Rapidly changing technologies; Contents are easy to copy (lack of protection of intellectual property).
LATVIA	There are opportunities to foster partnerships between the state/municipalities, universities (academia) and business environments to promote develop of the industries and new products & services; to strength the synergy between CCIs & traditional industries in order to provide cooperation of various sectors ("crossover" effect); to establish a CCIs related cluster; to extend and develop current support structures for business development	Stagnation of CCIs development due to the lack of funds (EU, state & other) and lack of innovative activities & new cooperation models; Dependence on public funding sources; Decreasing number of CCIs SMEs and microenterprises; "Brain drain" due to the insufficient economic conditions of the country (lack of incentive pay for creative workers); Lack of qualified workforce (specifically in some sub-sectors).



	(crowdfunding; business accelerator, etc.); to improve and extend study programmes and training opportunities using partnership initiatives on CCIs management.	
NAVARRE REGION (SPAIN)	Optimisation of existing resources; Investment in innovation and creativity; Diversity of natural resources that enable development at local level in different Navarre areas (i.e. through the creation of culture management companies); To extend marketing, communication and dissemination policies in order to attract the highest possible number of people to the leisure and cultural agenda.	Semi-professional or amateur nature, which prevents CCIs professionals to become/create a strong business model or enterprise; High level of dependence on public subsidies; Lack of critical mass; Changes in leisure and consumption patterns towards the digital home as a place of consumption.
LJUBLJANA URBAN REGION (SLOVENIA)	Increasing demand for creative products; Digitalisation creates new grounds for development; Availability of the ICT infrastructure; Cross Cutting Technologies across CCIs sub-sectors; The important role of arts and design as driving forces in creativity; The rise of cultural tourism.	Economic crisis (problems in private sector & lack of public funds at the national and EU level); Rapidly changing technologies; Fierce competition from other countries; Migration of talents to abroad; Inconsistent IPR & Copyright systems exist (contents are easy to copy); Socio-demographic factors (migration, aging); trend toward precarisation of labour.
LISBON METROPOLITAN AREA (PORTUGAL)	Potential to develop a regional innovation system geared to international technology transfer; Attraction of high profile international artistic, technological and cultural events; Industrial/urban areas in decline in excellent locations offering the potential for new uses; Attraction of the region as destination for residential and cultural tourism with particular emphasis on cultural, sports, nautical and business tourism; Promotion of the knowledge-based economy (supported by culture) with a focus on the development of the CCIs cluster; Cosmopolitan environment and critical mass with capacity to attract talent and develop activities that combine heritage, artistic and cultural creation, leisure, tourism and urban experiences; Use of historical and cultural elements for the creation and affirmation of brands in international markets (Fado, Pessoa, Oceans).	Competition with other European regions/cities to attract technology and foreign CCIs companies; Frailty of the economic actors in funding and investing in structuring projects as well as in supporting the arts; Insufficient flexibility in the management of public administration; Increase of the drain of highly qualified people who have chosen or felt compelled to live and work abroad