Policy and support analysis to foster development of Creative and Cultural Industries in project regions

The Interreg Europe project
"CHERRY - making Culture tHe N°1 ally of European RecoveRY"

European Union | 2023

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Introduction

The Interreg Europe project “CHERRY - making Culture tHe N°1 ally of European RecoveRY” aims at improving policies and local plans addressed to Creative and Cultural Industries (CCIs) to react to the pandemic period and to turn the restrictions of that period with the use of innovative communication means, digital technologies and services into an opportunity for further developing this sector, to address new users and, in general, make the culture No.1 ally for EU recovery.

The project approach is structured through following three entries:

- ✓ Entry 1: CCIs and local development, how to support companies from the sector to recover after COVID-19 and how to strengthen their position or support the establishment of new enterprises.
- ✓ Entry 2: CCIs and urban transformation, how CCIs can contribute to the urban transformation triggering emerging trend connected with green and digital transition, creativity, e-commerce, etc.
- ✓ Entry 3: how to support the valorisation of cultural and natural heritage assets with the involvement of CCIs.

Eight different countries from nine different regions are involved within the project implementation:

Table No.1

Partner number	Organisation	Region & Country
PP1	Friuli Venezia Giulia Autonomous Region, Department for culture and sports	Friuli Venezia Giulia Autonomous Region, Italy
PP2	Veneto Region	Veneto Region, Italy
PP3	Kainuu Regional Council	Kainuu Region, Finland
PP4	Centru Regional Development Agency	Centru Region, Romania
PP5	Zemgale Planning Region	Zemgale Region, Latvia

PP6	Central Transdanubian Regional Innovation Agency (KDRIÜ)	Balaton Region, Hungary
PP7	Region of Western Greece	Western Greece Region, Greece
PP8	Region provence-alpes-cote d'azur	Provence-Alpes-Côte d'Azur Region, France
PP9	Intercommunal Leiedal	South-West Flanders Region, Belgium

This report's primary goal is to analyse opportunities and challenges in the improvement and execution of policy measures in the project partner regions, taking into consideration regional and SWOT analysis, and obtained survey data. It must be mentioned that this report will not include information concerning the Provence-Alpes-Côte d'Azur Region of France.

1. Key statistics and information

This section summarizes and analyses key statistics and information obtained from project partner regions, including population and GDP, top industries, employment and unemployment rates, average income and poverty level, number of people involved in education, most significant educational institutions within the regions, and administrative and governance systems.

1.1. Population and GDP in the regions*

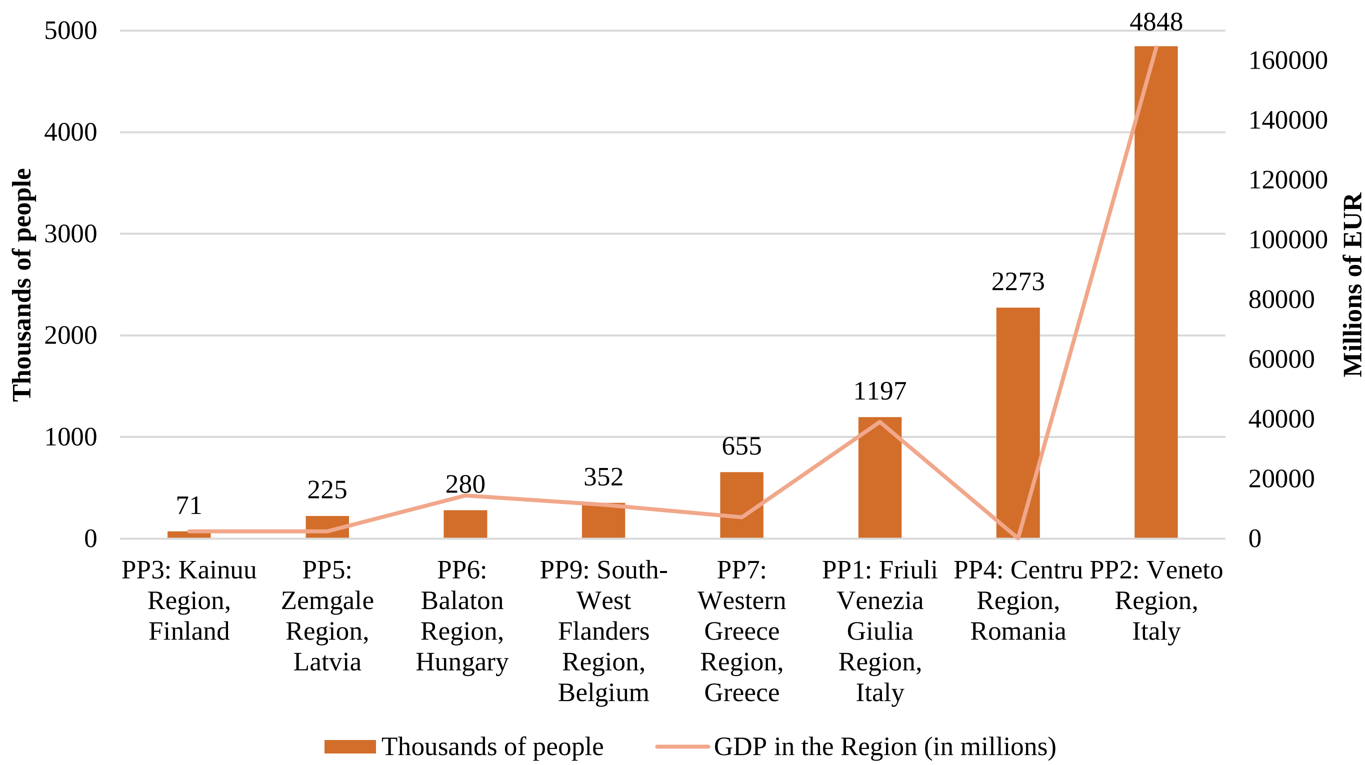

Image No1: Population and GDP in the regions

** Years of provided PP statistical data is indicated in the Regional & SWOT document that each partner organisation contributed. These documents are attached as an appendix to this report.*

Veneto Region (PP2) stands out with a large population and a very high GDP. It's one of the wealthiest and most economically significant regions in Italy. Although, Kainuu Region (PP3) has a relatively small population compared to the other regions but they have reasonably sized GDP. This may indicate that Kainuu is a potentially prosperous region with a smaller population. The analysis of these European regions reveals a wide range of economic diversity. While some regions like Veneto in Italy (PP2) and Balaton in Hungary (PP6) boast high GDP, indicating economic prosperity, others such as Western Greece in Greece (PP7) and Centru in Romania (PP4) face comparatively lower economic outputs, potentially indicating developmental challenges. South-West Flanders in Belgium (PP9) emerges as a significant contributor to the country's economy. Additionally, Friuli Venezia Giulia Autonomous Region in Italy (PP1) showcases a relatively high GDP given its population size. Overall, this data highlights the varying economic landscapes across these regions, each with its unique strengths and potential areas for improvement.

1.2. Top industries

Table No.2

Region	Top industries in the region
PP1: Friuli Venezia Giulia Autonomous Region, Italy	Retail, construction, agriculture, manufacturing, accommodations and catering
PP2: Veneto Region, Italy	Manufacturing, agriculture, tourism, machinery
PP3: Kainuu Region, Finland	Tourism, ICT, forestry, bio economy, mining industry
PP4: Centru Region, Romania	Machinery, food and beverages, forestry, light industry
PP5: Zemgale Planning Region, Latvia	Agriculture, retail, energy industry, construction, forestry
PP6: Balaton Region, Hungary	Agriculture, accommodations and catering, manufacturing, real estate, construction
PP7: Western Greece Region, Greece	Machinery, accommodation and catering, health care, ICT, constructions
PP9: South-West Flanders Region, Belgium	Textiles, manufacturing, food and beverages, ICT, agriculture

The common ground in the analysis of these regions lies in the fact that most of them have a diversified economy, with a mix of industries contributing to their economic output. While the specific industries may vary from region to region, the presence of multiple sectors such as manufacturing, agriculture, construction, and services is a common theme. This diversification can be seen as a strategic approach to reduce economic risks and enhance resilience. Additionally, many regions emphasize industries related to natural resources, like forestry and agriculture, which can be indicative of their geographical and environmental characteristics. Finally, there is a notable presence of tourism and information and communication technology (ICT) in several regions, reflecting the importance of these sectors in modern economies. Overall, these regions appear to be striving for well-rounded economic profiles by leveraging a mix of industries.

1.3. Employment and unemployment rates*

Table No.3

Region	Total % of people of working age	Employed, %	Unemployed, %
PP1: Friuli Venezia Giulia Autonomous Region, Italy	73,1%	67,4%	5,7%
PP2: Veneto Region, Italy	71,0%	65,7%	5,3%
PP3: Kainuu Region, Finland	43,0%	38,0%	4,6%
PP4: Centru Region, Romania	65,0%	61,9%	3,1%
PP5: Zemgale Planning Region, Latvia	77,6%	69,7%	7,9%
PP6: Balaton Region, Hungary	67,8%	66,1%	1,7%
PP7: Western Greece Region, Greece	73,8%	49,7%	24,1%
PP9: South-West Flanders Region, Belgium	82,8%	78,6%	4,2%

** Years of provided PP statistical data is indicated in the Regional & SWOT document that each partner organisation contributed. These documents are attached as an appendix to this report.*

Comparing the regional employment and unemployment statistics to the European averages, employment rates in several regions, including Friuli Venezia Giulia Autonomous Region (PP1), Veneto (PP2), and Balaton (PP6), are higher than the European average. This suggests that these regions have a larger percentage of their working-age population in employment compared to the European average. South-West Flanders in Belgium (PP9), with an employment rate of 78.6%, also surpasses the European average, indicating a robust job market. However, Kainuu Region in Finland (PP3) stands out with a notably lower employment rate of 38.0%, indicating a potential labour market challenge in that region. In regards to unemployment rates Western Greece Region in Greece (PP7) have a significantly higher unemployment rate of 24.1%, well above the European average. This indicates ongoing difficulties in the labour market in that region. Zemgale Planning Region in Latvia (PP5) also exhibits a higher unemployment rate of 7.9%, suggesting some labour market challenges compared to the European average. Most other regions, including Friuli Venezia Giulia Autonomous Region (PP1), Veneto (PP2), Centru (PP4), and South-West Flanders (PP9), have lower unemployment rates compared to the European average, indicating relatively stable job markets. Balaton Region in Hungary (PP6) have an impressively low unemployment rate of 1.7%, indicating a highly stable labour market in that region.

While some regions in the analysis have employment rates above the European average, they also tend to have lower unemployment rates. However, there are notable exceptions, such as Kainuu Region in Finland (PP3), with a lower employment rate, and Western Greece Region (PP7) and Zemgale Planning Region (PP5), which face higher unemployment rates. These variations highlight the diverse labour market conditions across these regions in comparison to the European average.

1.4. Average income and poverty level*

Table No.4

Region	Average income, euro	Poverty level, %
PP1: Friuli Venezia Giulia Autonomous Region, Italy	1959 (gross)	5,70%
PP2: Veneto Region, Italy	No data provided	No data provided
PP3: Kainuu Region, Finland	3300 (gross)	15,20%
PP4: Centru Region, Romania	850 (net)	21,20%
PP5: Zemgale Planning Region, Latvia	1135 (gross)	21,00%
PP6: Balaton Region, Hungary	512 (gross)	10,10%
PP7: Western Greece Region, Greece	1005 (gross)	40,10%
PP9: South-West Flanders Region, Belgium	1685 (gross)	8,30%

** Years of provided PP statistical data is indicated in the Regional & SWOT document that each partner organisation contributed. These documents are attached as an appendix to this report.*

The analysis of the provided data on regional income and poverty levels reveals significant economic disparities across the regions. Regions such as Friuli Venezia Giulia Autonomous Region in Italy (PP1) and South-West Flanders in Belgium (PP9) exhibit higher average incomes, accompanied by lower poverty levels, suggesting greater economic prosperity and robust social safety nets. In contrast, regions like Centru in Romania (PP4) and Western Greece (PP7) face economic challenges with lower average incomes and higher poverty rates. In summary, the data shows considerable variation in average income and poverty levels across different regions. Higher average incomes generally correlate with lower poverty levels, indicating a stronger economy and better living conditions. However, it's important to note that variations in cost of living and social policies can also influence these statistics.

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1.5. People involved in the education*

Table No.5

Region	People in higher education	People in vocational education	People engaging in life-long learning, %
PP1: Friuli Venezia Giulia Autonomous Region, Italy	81416	No data provided	No data provided
PP2: Veneto Region, Italy	21441	21454	No data provided
PP3: Kainuu Region, Finland	2501	3393	No data provided
PP4: Centru Region, Romania	64856	15202	4,9%
PP5: Zemgale Region, Latvia	3825	2823	11,5%
PP6: Balaton Region, Hungary	15321	6500	No data provided
PP7: Western Greece Region, Greece	100900	4000	8,0%
PP9: South-West Flanders Region, Belgium	12602	5036	22,4%

** Years of provided PP statistical data is indicated in the Regional & SWOT document that each partner organisation contributed. These documents are attached as an appendix to this report.*

In regards to higher education and vocational education across the regions, there is variation in the number of the population engaged in higher education and vocational education. Some regions, like Western Greece (PP7), have a higher emphasis on higher education, while others, like Zemgale in Latvia (PP5), have a more balanced distribution. Life-long learning data reveals that there are differing levels of participation in life-long learning initiatives. South-West Flanders in Belgium (PP9) stands out with a significantly higher engagement in lifelong learning, while Centru in Romania (PP4) has a lower participation rate.

Educational priorities and life-long learning engagement vary across these European regions, reflecting different approaches to education and personal development. These variations can be influenced by factors such as regional policies, economic conditions, and cultural preferences.

Most significant educational institutions within the partner regions have been summarized in the table below.

Table no.6

Region	Most significant educational institutions
PP1: Friuli Venezia Giulia Autonomous Region, Italy	✓ University of Trieste ✓ University of Udine ✓ International School for Advanced Study (SISSA)
PP2: Veneto Region, Italy	✓ No information provided
PP3: Kainuu Region, Finland	✓ Kajaani University of Applied Sciences ✓ Kainuu Vocational College KAO ✓ University of Oulu - Kajaani University Consortium

PP4: Centru Region, Romania	✓ Transilvania University of Brașov ✓ "Lucian Blaga" University Sibiu ✓ "George Emil Palade" University of Medicine ✓ Pharmacy, Sciences and Technology Târgu Mureș ✓ "1 Decembrie 1918" University Aba Iulia ✓ University of Arts from Târgu Mureș ✓ "Henri Coandă" Air Force Academy Brașov ✓ "Nicolae Bălcescu" Land Forces Academy Sibiu ✓ "Dimitrie Cantemir" University Târgu Mureș
PP5: Zemgale Region, Latvia	✓ Latvia University Life Sciences and Technologies ✓ Jelgava Technical School ✓ Jēkabpils Agribusiness College
PP6: Balaton Region, Hungary	✓ János Vajda Gimnázium in Keszthely ✓ Pannon University of Veszprém
PP7: Western Greece Region, Greece	✓ University of Patras ✓ University of Peloponnese ✓ The Hellenic Open University
PP9: South-West Flanders Region, Belgium	✓ Howest University of Applied Sciences ✓ Ghent University ✓ KU Leuven Campus Kulak Kortrijk ✓ Vives University of Applied Sciences ✓ Provincial Education and Training Center

1.6. Administrative and governance systems

Table No.7

Region	Administrative and governance system in the region	Links to administration and governance organisations
PP1: Friuli Venezia Giulia Autonomous Region, Italy	✓ <u>Legal bodies:</u> Regional Council, Regional Government, President of the Region. ✓ 4 provinces: Province of Udine, Province of Trieste, Province of Gorizia, Province of Pordenone. Each province is further divided into municipalities.	✓ Constitutional Law 31 January 1963, n. 1 and subsequent additions and integrations - https://www.regione.fvg.it/rafvg/cms/RAFVG/GEN/statuto/

PP2: Veneto Region, Italy	✓ <u>Legal bodies:</u> Regional Council, Regional Government, President of the Region. ✓ 7 provinces: Province of Belluno, Province of Padua, Province of Rovigo, Province of Treviso, Province of Venice, Province of Verona, Province of Vicenza. Each province is further divided into municipalities.	✓ No information provided
PP3: Kainuu Region, Finland	✓ <u>Legal bodies:</u> Regional Council, Regional Executive, Kainuu Regional Government Office, Municipalities, Kainuu ELY Centre. ✓ 19 regions divided into municipalities and afterwards in sub-regions.	✓ https://kainuunliitto.fi/en/regional-development/ ✓ https://kainuunliitto.fi/en/regional-policy-making/
PP4: Centru Region, Romania	✓ <u>Legal bodies:</u> County Council, County Prefect, Local Municipalities and City Councils, Regional Development Agency, Ministry of Regional Development and Public Administration, Judicial Authorities. ✓ 6 counties: Alba, Brasov, Covasna, Harghita, Mures and Sibiu.	✓ Alba County Council: https://judetul-alba.ro/ ✓ Brasov County Council: https://cjbrasov.ro/ ✓ Covasna County Council: https://www.cjcv.ro/ ✓ Harghita County Council: https://judetulharghita.ro/ ✓ Mures County Council: https://ro.cjmures.ro/ ✓ Sibiu County Council: https://www.cjsibiu.ro/ ✓ The Regional Development Agency "Centru": http://www.adrcentru.ro/
PP5: Zemgale Region, Latvia	✓ <u>Legal bodies:</u> Zemgale Planning Region (under the supervision of the Ministry of Environmental Protection and Regional Development), Development Board, Local Municipalities. ✓ 5 municipalities in Zemgale region: Bauska, Dobele, Aizkraukle, Jēkabpils, Jelgava and State city Jelgava.	✓ https://www.zemgale.lv/en

PP6: Balaton Region, Hungary	✓ Legal bodies: Local Municipalities, County Government, Balaton Development Council, Hungarian National Assembly, Ministry of Innovation and Technology. ✓ The administrative divisions include counties, municipalities, and regions.	✓ kormany.hu
PP7: Western Greece Region, Greece	✓ Legal bodies: Regional Governor, Regional Council, Local Municipalities, Central Government Authorities, Regional Development Fund, Regional Planning Authorities. ✓ 3 regional units: Regional Unit of Etoloakarnania, Regional Unit of Achaia, Regional Unit of Ilia. Within each regional unit, there are multiple municipalities.	✓ https://www.pde.gov.gr/gr/ ✓ https://www.ptapde.gr/en/ ✓ https://dytikiellada.gr/
PP9: South-West Flanders Region, Belgium	✓ Legal bodies: Provincial Government of West Flanders, Governor of West Flanders, West Flanders Provincial Council, Municipalities, Flemish Regional Government, Federal Government of Belgium. ✓ The administrative division include: regions, communities, provinces, and municipalities.	✓ No information provided

Based on the information provided by the project partners, there are several common elements in the administrative and governance systems of these regions. In all the regions mentioned, there are specific legal bodies responsible for regional governance. These typically include a Regional Council and a Regional Government. Some regions also have a President of the Region or a Regional Governor. Each of these regions is further subdivided into smaller administrative units. These units can vary in name and size, but they commonly include provinces, counties, municipalities, or regional units. Local municipalities play a significant role in the governance of these regions. They are responsible for local administration and decision-making. Many regions have regional development agencies or offices tasked with promoting regional development and economic growth. Some regions have provided links related to regional development and policy-making.

2. Information about Cultural and Creative Industries in regions

The main facts concerning the Cultural and Creative Industries (CCIs) in the project partner regions are summarized and analysed in this section, including CCIs definitions, sectors, relevant authorities, and legal documents, CCIs relationship with the RIS3 (Regional Innovation Strategy for Smart Specialization) and the region's CCIs development drivers.

2.1. Definitions of Creative and Cultural Industries

The European Commission defines CCIs as follows: "Cultural and Creative Industries (CCIs) encompass a wide range of activities that combine the creation, production, and commercialization of content that is intangible and cultural in nature. CCIs are heterogeneous and include, among others, visual arts, audio-visuals, performing arts, cultural heritage, design, books and press, and video games. They are at the crossroads of culture, business, and technology and play an important role in the cultural diversity and creativity of the EU".

It must be mentioned that there is no single, universally accepted definition of Cultural and Creative Industries in Europe, therefore in order to compare CCIs definitions we asked project partners to provide definitions that are used within their regions and/or countries. All the provided definitions emphasized the importance of creativity, culture, and artistic expression as central to CCIs. They acknowledged that these industries are rooted in cultural values, diversity, and creativity. CCIs are seen as having the potential to generate economic value, innovation, wealth, and jobs. They are recognized as contributors to the national or regional economy. Many definitions highlighted the role of intellectual property, such as copyrights, patents, and trademarks, in CCIs. They often emphasized the creation of intellectual property and its economic significance. The definitions generally encompassed a wide range of sectors and sub-sectors, including but not limited to visual arts, performing arts, literature, design, architecture, advertising, audio-visual, and heritage-related activities. Some definitions, like the one from Finland (PP3), emphasized the creative economy's role in national competitiveness. Some definitions, like the ones from Latvia (PP5) and Hungary (PP6), highlighted the business and market-oriented nature of CCIs, emphasizing their economic contribution. In contrast, others, like Romania's definition (PP4), included non-market-oriented activities.

While there were common themes in the definitions of CCIs, such as their reliance on culture and creativity and their economic potential, there were also differences in how these industries are categorized, their market orientation, and the specific aspects emphasized by each region or organisation.

2.2. Creative and Cultural Industries sectors

Overall, Cultural and Creative Industries encompass a wide range of sectors and sub-sectors that are characterized by their reliance on culture, creativity, and intellectual property. These sectors contribute to economic, social, and cultural development. While the specific sectors included in CCIs can vary depending on definitions and contexts, here is a broad overview of some common sectors within CCIs identified in all partner regions:

1) Visual arts: this sector includes activities related to traditional and contemporary visual arts, such as painting, sculpture, photography, and digital art.
2) Performing arts: it comprises live performances, including theatre, dance, music, opera, and other forms of stage arts.
3) Literature: this sector encompasses authors, poets, publishers, and other literary-related activities, including book publishing and writing.
4) Design: design-related activities involve product design, graphic design, fashion design, interior design, and industrial design.

5) Architecture: architectural services, including the design and construction of buildings and structures, fall under this sector.
6) Audio-visual: this sector includes film, television, animation, video games, and multimedia production and distribution.
7) Heritage services: activities related to the preservation, conservation, and presentation of cultural heritage, including museums, galleries, and historical sites.
8) Advertising and marketing: creative advertising and marketing agencies that utilize artistic and creative elements to promote products and services.
9) Publishing and print media: this sector involve the publication of books, magazines, newspapers, and other printed materials.
10) Music industry: this includes music production, recording, distribution, live music events, and music-related services.
11) Crafts: artistic and artisanal crafts, such as pottery, ceramics, jewelry-making, and woodworking, fall under this category.
12) Film and video production: activities related to the creation and distribution of films, documentaries, and video content.
13) Software and video games: the development, publishing, and distribution of software applications, video games, and interactive media.
14) Fashion industry: the design, production, and marketing of clothing, accessories, and fashion-related products.
15) Digital and creative media: emerging sectors related to digital content creation, online media, and digital marketing.
16) Cultural events and festivals: organizing and hosting cultural events, festivals, and exhibitions that celebrate artistic and cultural expression.

2.3. Responsible authorities and legal documents regulating CCIs in region and country

This section provides understanding of the responsible authorities and legal frameworks governing CCIs in the project partner regions. The table below summarizes information provided by the project partners in regards to authorities and legal documents regulating CCIs.

Table No.8

Region	Responsible CCIs authorities in region and country	Legal documents regulating CCIs in region and country
PP1: Friuli Venezia Giulia Autonomous Region, Italy	✓ Ministry of Culture (MIC) (national) ✓ Ministry of enterprises and for the development of the Made in Italy - Ministero delle Imprese e del Made in Italy (MIMIT) (national) ✓ National Development Agency (INVITALIA) (national) ✓ Friuli Venezia Giulia Autonomous Region (Department for Culture and Sports) (regional) ✓ Friuli Venezia Giulia Autonomous Region (Department for Economy) (regional) ✓ Promoturismo FVG (regional) ✓ Chambers of Commerce (regional) ✓ Business Incubator and Scientific Parks (Friuli Innovazione, Polo Tecnologico di Pordenone, BIC) ✓ FVG AR body for cultural heritage (ERPAC) (regional)	✓ Law No. 178/2000 ✓ Law No. 62/2001 ✓ "Io Sono Cultura" report ✓ Cluster for Culture and Creativity ✓ Action Plan for Culture and Creativity ✓ Regional Law 2/2021 (February 9, 2021) ✓ Regional Law 3/2021 ✓ Regional Law 22/2022 (December 28, 2022)
PP2: Veneto Region, Italy	✓ Ministry of Culture (MIC) ✓ National Development Agency (INVITALIA) ✓ Veneto Region ✓ Local and regional chamber of commerce ✓ Representatives of industrial sector ✓ Universities	✓ Veneto Regional Law 17/2019 (frame Regional Law for Culture)

	✓ Labour and trades unions ✓ Clusters	
PP3: Kainuu Region, Finland	✓ Regional Council of Kainuu (regional) ✓ Kainuu Centre for Economic Development, Transport and the Environment (regional) ✓ Ministry of Education and Culture (national) ✓ Ministry of Economic Affairs and Employment of Finland (national) ✓ Creative Finland (national) ✓ Creative Business Finland (national)	✓ The regional development acts ✓ Documents provided by Ministry of Education and Culture in the Government
PP4: Centru Region, Romania	✓ The Ministry of Culture ✓ 42 county directorate for culture ✓ National heritage institute ✓ National museums ✓ The National Commission for Historical Monuments ✓ National Archaeological Commission ✓ National Commission for Museums and Collections ✓ 12 Regional Commissions for Historical Monuments ✓ National Institute for Research and Cultural Training	✓ Strategic and Coherent Vision for the Cultural Sector (project) ✓ Governing Programme ✓ Article 33: Access to culture ✓ Law No 8/1996 ✓ GEO No 189/2008 ✓ OG No 51/1998 ✓ Law No 500/2002 ✓ Law No 98/2016 ✓ Law No 31/1990 ✓ OG No 26/2000 ✓ OUG No 44/2008 ✓ Law No 182/2000 ✓ Law No 26/2008 ✓ Law No 422/2001 ✓ Law No 311/2003 ✓ Law No 334/2002 ✓ Law No 504/2002
PP5: Zemgale Region, Latvia	✓ The Ministry of Culture (national) ✓ The Ministry of Economy (national) ✓ Latvian Investment and Development ✓ Agency (LIAA) (national) ✓ State Culture Capital Foundation (VKKF) (national) ✓ Zemgale Planning Region (regional) ✓ Zemgale Business Center (ZUC) (regional)	✓ The Zemgale Planning Region Sustainable Development Strategy 2012-2030 ✓ Zemgale Planning region Development Program 2021-2027 ✓ Development programs of municipalities ✓ Law on Municipalities

	✓ 6 municipalities in the region (regional)	✓ Sustainable Development Strategy of Latvia ("Latvija2030") ✓ National Development Plan 2021-2027 (NAP2027) ✓ Cultural Policy Guidelines for 2022-2027 "Cultural State" ✓ National industrial policy guidelines for 2021-2027 ✓ Commercial Law
PP6: Balaton Region, Hungary	✓ Ministry of Culture and Innovation	✓ The National Association of Cultural and Creative Industries site
P7: Western Greece Region, Greece	✓ Hellenic Chamber of Fine Arts ✓ Association of Greek Authors ✓ Book Publishers' Association ✓ Association of Greek Fiction Writes ✓ Association of Booksellers of Achaea ✓ Dance School Owners Union of Greece ✓ Greek Composers Union ✓ Graphic Designers Association of Greece ✓ Association of Greek Theatrical Writers Musicians and Translators ✓ Greek Directors' Association ✓ Hellenic Film Academy ✓ Federation of Hellenic Film Clubs ✓ Association of Greek Archaelogists ✓ Union of Journalists & Editors of the Magazine and Electronic Journals ✓ Union of Daily Newspaper Journalists & Editors of the Peloponnese, Epirus and Ionian Islands ✓ Architects' Association of the Prefecture of Achaea ✓ Architects' Association of the Prefecture of Ilia	✓ Ministry of Culture annual action plan for 2022 ✓ Regional Development Plan 2020 -2023 ✓ Law No 1103/1980 (Ratification of the international convention of UNESCO) ✓ Law No 2121/1993 (Intellectual Property, Related Rights, and cultural issues) ✓ Law No 3028/2002 (For the protection of the antiquities and the cultural heritage) ✓ Law No 3057/2002 (Modification and supplementation of the Law No 2725/1999) ✓ Law No 3348/2005 (Ratification of the Unidroit convention) ✓ Law No 4887/2022 (New Investment Law) ✓ National Digital Strategy (2016 – 2021) ✓ The Bible of the Digital Transformation (2020 – 2025)

	✓ Architects' Association of the Prefecture of Aitoloakarnania ✓ Association of Greek Photojournalists	✓ National Strategy for Research, Technological Discovery, and Innovation 2021 – 2027
PP9: South-West Flanders Region, Belgium	✓ Department Economie, Wetenschap en Innovatie ✓ Department Cultuur, Jeugd en Media ✓ Flanders innovation & entrepreneurship – VLAIO ✓ Flanders DC	✓ No information provided

2.4. Creative and Cultural Industries linkage to RIS3

Each of the project partner regions appeared to have some connection or participation in regional innovation and smart specialization strategies, with various programs, plans, and strategies in place to promote innovation and economic development. The information in the table below demonstrates project partner connection to the regional innovation strategy for smart specialization (RIS3) and the sources to RIS3 strategy documentation.

Table No.9

Region	CCIs linkage to RIS3	Sources to RIS3 strategy documentation
PP1: Friuli Venezia Giulia Autonomous Region, Italy	✓ Smart Specialization Strategy (RIS4) in the Friuli Venezia Giulia Autonomous Region.	✓ https://www.regione.fvg.it/rafvg/export/sites/default/RAFVG/fondi-europei-fvg-internazionale/S3_FVG/allegati/17012023_allegato_1_Delibera_1841-2022.pdf
PP2: Veneto Region, Italy	✓ Regional RIS3 strategy.	✓ https://www.regione.veneto.it/web/attivita-produttive/Smart-Specialisation-Strategy
PP3: Kainuu Region, Finland	✓ Part of the Kainuu Regional Development program. ✓ Smart specialization program.	✓ https://kainuunliitto.fi/en/regional-development/kainuu-programme/ ✓ https://kainuunliitto.fi/en/regional-development/smart-specialisation-strategy/
PP4: Centru Region, Romania	✓ Centru Region Program 2021-2027.	✓ http://www.adrcentru.ro/wp-content/uploads/2021/01/RIS3Centru_2021-2027.pdf

PP5: Zemgale Region, Latvia	✓ Development Program of the Zemgale Planning Region 2021-2027. ✓ National Industrial Development Guidelines.	✓ https://www.zemgale.lv/lv/media/98/download?attachment ✓ https://tap.mk.gov.lv/mk/mksedes/saraksts/protokols/?protokols=2020-03-10 ✓ https://likumi.lv/ta/id/321037
PP6: Balaton Region, Hungary	✓ EDP - nationwide questionnaire survey.	✓ https://nkfih.gov.hu/english/national-smart-specialisation-strategy/s3-2021-2027
PP7: Western Greece Region, Greece	✓ The National Smart Specialization Strategy 2021-2027.	✓ https://www.espa.gr/el/Documents/FEK_ESEE.pdf
PP9: South-West Flanders Region, Belgium	✓ No information provided	✓ No information provided

2.5. Factors behind the development of Creative and Cultural Industries

Table below summarizes factors behind the development of Cultural and Creative Industries in project partner regions. These factors reflect the diverse approaches and resources that different regions have leveraged to promote the growth and sustainability of Cultural and Creative Industries within their respective areas.

Table No.10

Region	Factors behind the development of CCIs in the region	Sources
PP1: Friuli Venezia Giulia Autonomous Region, Italy	✓ Presence of the Cluster for Culture and Creativity. ✓ Regional grants for start-ups established by young people. ✓ The cultural and creative sector has been identified as strategic for the sustainable growth of the Friuli Venezia Giulia Autonomous Region.	✓ https://www.regione.fvg.it/rafvg/export/sites/default/RAFVG/fondi-europei-fvg-internazionale/S3_FVG/allegati/17012023_allegato_1_Delibera_1841-2022.pdf ✓ https://www.creativefvg.eu/ ✓ https://lexview-int.regione.fvg.it/FontiNormative/xml/xmllex.aspx?anno=2021&legge=3#art25

PP2: Veneto Region, Italy	✓ Tangible and intangible heritage of the area. ✓ The local vocation to entrepreneurship.	✓ No information provided
PP3: Kainuu Region, Finland	✓ Strong local actors and events, e.g. Kuhmo Chamber Music festival, and City Theatre of Kajaani. ✓ Higher educational institutions, e.g. Kajaani University of Applied Sciences source. ✓ Nature & tourism, e.g. Arctic Lakeland Kainuu and Wild Taiga.	✓ https://kuhmofestival.fi/en/ ✓ https://www.kajaaninteatteri.fi/ ✓ https://www.kamk.fi/en ✓ https://arcticlakeland.com/en/ ✓ https://wildtaiga.fi/en/
PP4: Centru Region, Romania	✓ Bringing forgotten traditional cultural values and cultural-historical heritage to light, capitalizing on the rich material and immaterial heritage using modern means of artistic expression. ✓ Several vocational high schools and specialized faculties within the most important universities in the region providing high-level professional training to those involved in the Cultural and Creative Industries. ✓ Increasing digitization process of Cultural and Creative Industries.	✓ No information provided
PP5: Zemgale Region, Latvia	✓ Competitiveness and growth of companies. ✓ Culture and identity.	✓ https://www.zemgale.lv/lv/media/98/download?attachment ✓ https://www.zemgale.lv/lv/media/97/download?attachment
PP6: Balaton Region, Hungary	✓ Public intervention. ✓ Financial support. ✓ Moving away from season-based tourism. ✓ Developing destination marketing.	✓ No information provided
PP7: Western Greece Region, Greece	✓ Regional Operation Programme.	✓ https://www.pde.gov.gr/gr/strategic-planning/ep-pde-2020-2023.html
PP9: South-West Flanders Region, Belgium	✓ No information provided	✓ No information provided

3. Data and characteristics of Creative and Cultural Industries in regions

This section compiles and analyses significant data and characteristics of CCIs in project partner regions, such as yearly CCIs turnover, industry contribution to GDP, number of CCIs SMEs, number of persons engaged in this industry, and the top 5 largest CCIs sectors.

3.1. Annual turnover of CCIs

Table No.11

Annual turnover of CCIs in regions and countries				
Project partner	**Region and country**	**2020**	**2021**	**2022**
PP1	Friuli Venezia Giulia Autonomous	1,751,000	1,848,000	2,045,000
	Italy	84,602,000	88,584,000	95,511,000
PP2	Veneto	Not available data	Not available data	Not available data
	Italy	84,602,000	88,584,000	95,511,000
PP3	Kainuu	Not available data	Not available data	Not available data
	Finland	7,082,000	Not available data	Not available data
PP4	Centru	658,000	859,000	Not available data
	Romania	3,103,000	3,374,000	Not available data
PP5	Zemgale	Not available data	Not available data	Not available data
	Latvia	3,879,486	4,459,430	Not available data
PP6	Balaton	Not available data	Not available data	Not available data
	Hungary	5,930,000	6,620,000	7,260,000
PP7	Western Greece	Not available data	Not available data	Not available data
	Greece	4,429,000	5,153,000	6,791,000
PP9	South-West Flanders	2,557,471	3,016,938	Not available data
	Belgium	54,759,445	67,697,983	Not available data

In general, there is a trend of increasing annual turnover for most project partners from 2020 to 2021. However, data for 2022 is not available for many partners, making it challenging to determine the trend for that year.

3.2. CCIs contribution to GDP

Table No.12

CCIs contribution (%) to GDP				
Project partner	**Region & country**	**2020**	**2021**	**2022**
PP1:	Friuli Venezia Giulia Autonomous	5,3	5,2	5,5
	Italy	5,7	5,6	5,6
PP2:	Veneto	5,5	5,4	8,7
	Italy	5,7	5,6	6,8
PP3:	Kainuu	Not available data	Not available data	Not available data
	Finland	3,0	3,1	Not available data
PP4:	Centru	3,2	3,7	Not available data
	Romania	4,2	4,7	Not available data
PP5:	Zemgale	Not available data	Not available data	Not available data
	Latvia	Not available data	Not available data	Not available data
PP6:	Balaton	Not available data	Not available data	Not available data
	Hungary	1,4	1,0	Not available data
PP7:	Western Greece	Not available data	Not available data	Not available data
	Greece	3,0	3,0	4,0
PP9:	South-West Flanders	Not available data	Not available data	Not available data
	Belgium	22,6	25,7	Not available data

The CCIs contributions to GDP among project partners reveal notable variability in the percentages for the years 2020, 2021, and 2022. While some partners, like PP1 in Friuli Venezia Giulia Autonomous Region, Italy, maintained consistent contributions of around 5-5.5% of their region's GDP, others, such as PP2 in Veneto, Italy, saw a significant increase from 5.4% to 8.7% from 2021 to 2022. Missing data for several partners limits comprehensive assessments, but it is clear that CCIs contributions vary between project partners and countries, with Italy generally exhibiting higher percentages than Romania, and Belgium showing a substantial CCIs contribution, reaching 25.7% of the region's GDP in 2021. This variance underscores the influence of regional and national policies and economic factors on the Cultural and Creative Industries role in different regions and countries.

3.3. Number of Creative and Cultural Industries small and medium enterprises

Table No.13

Number of CCIs SMEs				
Project partner	**Region & country**	**2020**	**2021**	**2022**
PP1:	Friuli Venezia Giulia Autonomous	5103	4924	5038
	Italy	274929	270318	275318
PP2:	Veneto	22808	22483	23072
	Italy	274929	270318	275318
PP3:	Kainuu	Not available data	Not available data	Not available data
	Finland	10478	Not available data	Not available data
PP4:	Centru	8564	8572	Not available data
	Romania	21980	21970	Not available data
PP5:	Zemgale	Not available data	Not available data	Not available data
	Latvia	20548	19197	Not available data
PP6:	Balaton	Not available data	Not available data	Not available data
	Hungary	Not available data	Not available data	Not available data

PP7:	Western Greece	Not available data	Not available data	Not available data
	Greece	Not available data	Not available data	Not available data
PP9:	South-West Flanders	25600	25500	Not available data
	Belgium	44170	43570	Not available data

The table above shows that partners in Italy, particularly PP2 in Veneto, report a high number of CCIs SMEs, while other regions like Friuli Venezia Giulia Autonomous Region, Italy (PP1), have fewer CCIs SMEs. Missing data for several partners limits comprehensive assessment. Some regions show stability or minor fluctuations in CCIs SME numbers, indicating a consistent presence. Notably, South-West Flanders, Belgium (PP9), experienced noticeable growth in CCIs SMEs from 2020 to 2021, suggesting a thriving CCIs sector. The data underscores the diversity in the CCIs sector's size and dynamics across regions and countries, reflecting regional and national influences on the Cultural and Creative Industries.

3.4. Number of people employed in CCIs

Table No.14

Number of people employed in CCIs				
Project partner	**Region & country**	**2020**	**2021**	**2022**
PP1:	Friuli Venezia Giulia Autonomous	30,700	30,900	31,500
	Italy	1,446,000	1,459,800	1,490,738
PP2:	Veneto	135,500	136,900	140,100
	Italy	1,445,600	1,459,800	1,490,700
PP3:	Kainuu	Not available data	Not available data	Not available data
	Finland	76,900	71,800	Not available data
PP4:	Centru	18,900	18,742	Not available data
	Romania	120,400	111,200	Not available data
PP5:	Zemgale	Not available data	Not available data	Not available data
	Latvia	77,040	75,663	Not available data

PP6:	Balaton	Not available data	Not available data	Not available data
	Hungary	82,700	80,900	79,700
PP7:	Western Greece	4,821	6,885	6,242
	Greece	Not available data	Not available data	Not available data
PP9:	South-West Flanders	8,674	9,155	Not available data
	Belgium	173,884	181,673	Not available data

Italy, particularly represented by PP1 and PP2, reports a lot of CCIs employees, emphasizing the sector's significant scale in the country. Belgium (PP9) also reports a notable CCIs employment figure. In contrast, countries like Romania (PP4) and Latvia (PP5) have fewer CCIs employees, likely due to the size of their economies and CCIs sectors. The data illustrates the diverse employment landscape within the Cultural and Creative Industries, reflecting the influence of regional policies, economic conditions, and the overall strength of the sector in each region. However, the absence of data for certain partners in 2022 underscores the need for comprehensive data collection for a more accurate assessment of recent CCIs employment trends.

3.5. Top 5 largest Creative and Cultural Industries sectors

Table no.15

Region	Largest CCIs sectors in region and/or country
PP1: Friuli Venezia Giulia Autonomous Region, Italy	Architecture and design, publishing and printing, communication, videogames and software, performing arts and visual arts
PP2: Veneto Region, Italy	Architecture and design, communication, performing and visual art, publishing, print and video gaming
PP3: Kainuu Region, Finland	Game industry, tourism industry, culinary heritage restaurants
PP4: Centru Region, Romania	Publishing, advertising, architecture, entertainment, design, performance arts, music, design

PP5: Zemgale Region, Latvia	Computer programming, operations of advertising agencies, intermediation in the placement of advertising in the mass media, printing other types of publishments, retail sale of clothing in specialised stores
PP6: Balaton Region, Hungary	No information provided
PP7: Western Greece Region, Greece	Architecture, retail, computing / programming, arts and entertainment, publishing
PP9: South-West Flanders Region, Belgium	No information provided

Information provided in the table above highlights common trends and key sectors prevalent in these regions. Architecture and design, publishing and printing, communication, and performing arts are prominent CCIs sectors found in multiple regions. Other sectors such as video games and software, music, advertising, and tourism play significant roles in specific regions like Centru in Romania and Kainuu in Finland. These findings underscore the diversity and specialization within the CCIs sectors, reflecting the unique cultural and economic characteristics of each region. However, information gaps exist for some project partners regions.

4. Creative and Cultural Industries: consolidated SWOT analysis of three dimensions

The SWOT analysis reveals that the regions involved in the project are quite diverse. The regions do not share many common factors; however, they share specific characteristics (at least half of the regions).

The shared strengths of the regions are:

1) Rich cultural and natural heritage, tourism offer, exhibitions, events that foster attractiveness of the region;
2) Presence of CCIs eco-system – CCIs, educational institutions, business support organisations, clusters, joint intersectoral projects, certain know-how;
3) Partnership and cooperation among CCIs eco-system's stakeholders;

4) Active CCIs businesses, CCIs talents, professionals and experts;
5) Certain ability of the CCIs to respond to the region's needs and peculiarities by providing natural and cultural heritage products, services, events, brands etc.

The shared weaknesses of the regions are:

1) Insufficient knowledge and skills (management, business and project planning, implementation, evaluation, attracting funding, support options etc.) and poor interest in up-skilling, training by the CCIs sector;
2) Limited availability of infrastructure, facilities, EU and local funding programmes and support tools for the CCIs sector in the region;
3) Low cross-sectoral cooperation bringing together artists, designers, culture specialists, technical specialists, scientists, academia, public sector, businesses, investors etc.

The shared opportunities of the regions are:

1) Presence and/or development of the CCIs eco-system – CCIs, educational institutions, business support organisations, innovation and business development hubs, strong CCIs and tourism operators, clusters, joint intersectoral projects, know-how, knowledge transfer;
2) Internationalisation, transregional partnerships, collaboration platforms, exchanging good practices and experiences;
3) EU, national, regional and local CCIs policies, strategies (RIS3), support programmes and funding for CCIs initiatives;
4) Digitalisation, use of technologies, green deal, sustainability and circularity, smart city and smart region initiatives, social development initiatives;
5) Cross-sectoral cooperation thus boosting the CCIs and promoting entry of the CCIs into new markets and export;
6) Rediscovering new or less known tourism, cultural and natural heritage places which can lead to new CCIs products and services in the region;
7) Determining and strengthening the unique identity and the brand of the region.

The shared threats of the regions are:

1) Demographic decline, CCIs brain drain, aging of the region's population, lack of talent in the region;
2) Regulatory barriers hindering development, projects, innovation, start-ups and businesses of CCIs, hindering sectoral transformation and necessary policy changes;
3) Inconsistency of local governments' actions towards CCIs sector and inability to organize and manage the CCIs sector;
4) The loss of the regions' authentic culture, identity, traditional crafts and skills.

Hereinafter this section includes a consolidated SWOT analysis of three CCIs dimensions, describing the most significant strengths, weaknesses, opportunities and threats. Factors mentioned by at least five out of eight regions that participated in the survey show high similarity among regions. Factors mentioned by three to four regions participating in the survey show medium similarity. Factors mentioned up to two times show low similarity among regions.

4.1. Creative and Cultural Industries and urban transformation and revitalisation: consolidated SWOT

This dimension shows how CCIs can contribute to the urban transformation and revitalisation triggering emerging trends, innovations and helping cities to overcome economic crises and other issues. The consolidated analysis summarizes the opinions of all regions, revealing the common or most frequently mentioned features, as well as the responses that are unique to a particular region. The value in brackets shows the number of regions that mentioned the specific factor in their SWOT analysis.

Table no.15

STRENGTHS	WEAKNESSES
High level of similarities among regions: • Rich cultural and natural heritage, tourism offer, exhibitions, events by CCIs thus fostering the attractiveness of the region (7) • Presence of CCIs eco-system (education, clusters, industry, etc.), and/or business and innovation support organisations and initiatives and/or know-how (6) Medium level of similarities among regions: • Partnership and cooperation among stakeholders (4) • Many active CCIs businesses and talent (4) • Suitable regional policy and planning applying to CCIs (3) • Presence of urban territories, rather high urbanisation rate (3) Low level of similarities among regions: • Application of modern methods, and attention to details and quality (1) • Presence of multisectoral supply or value chains (1) • Community engagement and community wellness promotion by CCIs (1) • Circularity, green deal, digitalisation of CCIs (1) • Growing interest about and awareness of CCIs (1)	High level of similarities among regions: • Insufficient management, business, planning and evaluation abilities, knowledge and skills, poor interest in training, upskilling by CCIs sector (5) Medium level of similarities among regions: • Limited infrastructure, funding and support for CCIs, limited knowledge by CCIs sector of support options and funds (4) • Insufficient use of technology, digitization and innovation in product creation by CCIs sector (3) • Insufficient ability by CCIs sector to attract investment, low confidence of investors in CCIs (3) • Poor ability to network and create partnerships by CCIs sector (3) • Low number of young CCIs entrepreneurs and start-ups (3) • Difficulties in coordinating the complex CCIs ecosystem (3) Low level of similarities among regions: • Weak business model by CCIs, dependence on national funding (2) • Low awareness and recognition of CCIs, people are not ready to pay sufficiently for CCIs services (2) • Poor recognition of the region internationally (2) • Lack of CCIs laws, lack of regional policy and planning documentation and strategy (1) • Lack of thoughtful development of historical urban areas, lack of sustainable housing (1) • Overlapping of CCIs initiatives, events – poor planning (1)

	• Not using all available potential (culture, traditions, etc.) especially in tourism destinations (1) • Lack of product development and service design by CCIs (1) • Small number of population and CCIs talent in the region (1) • Inadequate marketing and visibility of the CCIs sector (1) • Difficulty for new CCIs players to enter the market (1) • Poor correlation between urban and rural regional policy and planning (1) • Lack of data and opportunities to make data-based decisions (1) • Lack of space for urban development (1)
OPPORTUNITIES <u>High level of similarities among regions</u>: • Presence and development of CCIs eco-system (innovation and business development hubs, clusters, education, industry, support system for CCIs SMEs, strong CCIs operators, know-how, knowledge transfer) (6) <u>Medium level of similarities among regions</u>: • Support for internationalisation, creating partnerships, exchanging experiences and good practices (4) • EU and local policies, programmes, strategies (RIS3), funds supporting CCIs initiatives (4) • Technologies, digitalisation of CCIs services (e.g. to foster remigration to the region), smart city initiatives (4) • Fostering intersectoral links and acquiring new markets (4) • Strengthening quality cultural and creative places and spaces, supporting usage of new spaces, outdoor spaces (3) • Partnerships, joining resources, collaboration platforms for talents, co-working spaces (3)	**THREATS** <u>High level of similarities among regions</u>: • Demographic decline, "brain drain", lack of CCIs talent in the region, aging in the region (6) <u>Medium level of similarities among regions</u>: • Inability of local governments to plan and manage CCIs projects, initiatives and budget, negative political decisions towards CCIs (infrastructure, funding), frequent policy change and course of direction (4) • Regulatory barriers hindering CCIs projects, CCIs innovation, sectoral transformation and policy changes. Fracture between political environment and cultural reality (4) • Low awareness and communication of the importance and impact of CCIs, even marginalisation of the industry (3) • Economic instability (3) <u>Low level of similarities among regions</u>: • Lack of business confidence, activity and innovation of CCIs sector (2)

• Encouraging and involving youth - career development support in CCIs (3) Low level of similarities among regions: • Support for the transition to the green deal, digitalisation, circularity (2) • Laws providing benefits for CCIs SMEs, lower taxes, employment benefits (1) • Rich cultural and natural heritage, tourism offer, exhibitions, CCIs events (1) • Investment into CCIs (1) • Awareness raising about CCI's current and potential impact on economy (1) • Exploiting countervailing opportunities: urbanization in regions and emphasizing rural advantages e.g. peace, nostalgia (1) • Fostering interest of local authorities in CCIs, e.g. clarifying regulatory framework, providing funding etc. (1) • Resilience building initiatives for CCIs (1) • Marketing of the region locally and internationally (1) • Bauhaus and modern approach to urban planning e.g. bridging aesthetics and environment, utilising presence of industrial heritage within urban environment (1)	• The loss of the culture and identity (metropolisation, globalisation, the extinction of region's remote places) (2) • Lack of available funding for CCIs, e.g. EU, national, regional, local etc. (2) • Banking sectors lacks adequate methods for evaluating CCIs, difficult to attract financial funds from banks (1) • Lack of understanding the needs of CCIs startups (1) • Widening gap between cultural and creative organisations and business (1) • Lack of statistics, data gap in the industry (1) • Risk of burnout for active CCIs members (1) • Another pandemic – risk of lock-down of the CCIs, other force major factors (1) • Lack of space for CCIs projects, initiatives (1)

4.2. Creative and Cultural Industries and local development: consolidated SWOT

This dimension shows how CCIs can contribute to the local development including new services, cooperation with the tourism sector, opportunities to attract young talent, what support CCIs companies need to recover after Covid-19, what support is needed to encourage start-ups. The consolidated analysis summarizes the opinions of all regions, revealing the common or most frequently mentioned features, as well as the responses that are unique to a particular region. The value in brackets shows the number of regions that mentioned the specific factor in their SWOT analysis.

Table No.16

STRENGTHS	WEAKNESSES
High level of similarities among regions: • Presence of CCIs eco-system (education, clusters, industry, etc.), and/or business and innovation support organisations and initiatives and/or know-how (5) • Rich cultural and natural heritage, tourism offer, exhibitions, events by CCIs thus fostering the attractiveness of the region (5) Medium level of similarities among regions: • Many active CCIs companies (business entities) and CCIs talent (3) • Niche CCIs sectors, e.g. gastronomy, rivers and canals, local specialities (3) Low level of similarities among regions: • Presence of multisectoral supply or value chains, design platforms etc. (2) • Growing interest about and awareness of CCIs (2) • CCIs has a strategic role in the region (2) • Regional policy and planning applying to CCIs (1) • Partnership and cooperation among stakeholders (1) • Culture as a strong attraction for tourists and inhabitants (1) • Integration of cultural and natural heritage (1) • CCIs increasing well-being and spirit of local community (1) • Region with a potential to create new products with added value (1)	Medium level of similarities among regions: • Lack of events, facilities and cross-sectoral cooperation bringing together artists, designers, culture specialists, public administrators, businessmen, investors etc. (4) • Lack of EU and other funding for CCIs sector (4) • Insufficient management, business, planning and evaluation abilities, knowledge and skills, poor interest in training, upskilling by CCIs sector (3) • Low awareness and recognition of CCIs and its impact on economy (3) • Small number population and CCIs talent in the region (3) Low level of similarities among regions: • Insufficient ability to attract investment, low confidence of investors (2) • Inadequate marketing and visibility of the CCIs sector and region, lack of the unique selling proposition (2) • It is difficult for new players to enter the market (2) • Lack of CCIs laws, lack of regional policy and planning documentation and strategy (2) • Low community, society involvement in decision making, weak CCI's connection to local communities (2) • Lack of effective cross-sectoral cooperation (1) • Many CCIs SMEs, however they lack ambition (1) • Few destination management organizations utilising culture in services and marketing (1) • Lack of product development and service design by CCIs (1)

	• Season-based tourism, CCIs offer (1) • Lack of data and opportunities to make data-based decisions (1) • CCIs services are too costly for local tourists (1) • Low levels of CCIs digitalisation (1) • Very few instant culture products and lack of culture as a by-product (1) • Difficulties in coordinating the information and actions for and by CCIs (1)
OPPORTUNITIES <u>High level of similarities among regions</u>: • Digitalisations, green deal, sustainability, circularity, social development in CCIs (7) • Presence and development of CCIs eco-system (innovation and business development hubs, clusters, education, industry, support system for CCIs SMEs, strong CCIs operators, know-how, knowledge transfer, joint initiatives) (5) <u>Medium level of similarities among regions</u>: • Partnerships, joining resources, collaboration platforms for CCIs talents, co-working spaces (3) <u>Low level of similarities among regions</u>: • EU funding calls, incl. Support for research, innovations and skills of CCIs (2) • Specific national and local development funding programmes involving also CCIs (2) • Recognising local resources, places, stories events that can be utilised for tourism, new CCIs products, experiences (2) • Fostering intersectoral links and acquiring new markets (2) • Marketing and sales support to sell CCIs products and the region better, e.g. participating in international design fairs,	**THREATS** <u>Medium level of similarities among regions</u>: • The loss of the culture and identity of the region, disappearance of traditional crafts, skills (4) • Difficulties accessing private, public funding, investment (3) <u>Low level of similarities among regions</u>: • Demographic decline, "brain drain", lack of CCIs talent in the region, aging in the region (2) • Negative political decisions towards CCIs (infrastructure, funding), frequent policy change and course of direction (2) • Natural disasters, climate change spoiling nature and cultural heritage (2) • Economic instability (2) • Regulatory barriers hindering CCIs projects, CCIs innovation, sectoral transformation and policy changes. Fracture between political environment and cultural reality (2) • Widening gap between cultural and creative organisations and business (1) • Lack of business confidence, activity and innovation of CCIs sector (1) • Lack of sustainability of CCIs projects, events (1)

being member of the UNESCO recognised design region network, being European cultural capital etc. (2) • Laws providing benefits for CCIs SMEs (lower taxes, employment benefits etc.) (1) • Investment into CCIs (1) • Encouraging and involving youth - career development support in CCIs (1) • Awareness raising about CCI's current and potential impact on economy (1) • Exploiting countervailing opportunities: urbanization in regions and emphasizing rural advantages (peace, nostalgia) (1) • Mobility of artists, CCIs representatives (1) • CCIs as solution provider to societal challenges (1) • Providing life-long learning opportunities for CCIs sector (1)	• Lack of statistics, data gap in the industry (1) • Lack of specific legislation for CCIs (1) • Weak coordination of CCIs sector (1) • Small CCIs SMEs with low ambition, innovation (1) • Low awareness and communication of the importance and impact of CCIs (1) • Risk of burnout for active CCIs members (1) • Dangers of mass tourism (1) • Changes in consumer behaviour (1) • International and local competition of the regions (1) • Lack of patented designs of CCIs products (1)

4.3. Creative and Cultural Industries and valorisation of natural and cultural heritage assets: consolidated SWOT

This dimension shows how CCIs can contribute by providing products and services to valorisation of natural and cultural heritage assets, including museums, historical gardens, archaeological areas etc. The consolidated analysis summarizes the opinions of all regions, revealing the common or most frequently mentioned features, as well as the responses that are unique to a particular region. The value in brackets shows the number of regions that mentioned the specific factor in their SWOT analysis.

Table No.17

STRENGTHS	**WEAKNESSES**
<u>High level of similarities among regions</u>: • Rich cultural and natural heritage, presence of different cultures, variety of geography and nature, tourism offer, exhibitions, events by	<u>Medium level of similarities among regions</u>: • Lack of EU and other funding, infrastructure (4)

CCIs thus fostering the attractiveness of the region (8) • Ability to respond to regions needs and peculiarities by providing natural and cultural heritage services, events, brands (6) • Presence of CCIs eco-system (education, clusters, industry, etc.), and/or business and innovation support organisations and initiatives and/or know-how (5) Medium level of similarities among regions: • Presence of CCIs talent, professionals in the region. Extensive experience in valorisation of natural and cultural heritage assets on all levels (4) Low level of similarities among regions: • Cooperation with stakeholders (1) • CCIs has a strategic role in the region (1) • Widely visited museums and permanent exhibitions in the region (1) • Growing interest about and awareness of CCIs (1) • Active creative community (1) • Large university student community (1) • Presence of R&D organisations and labs (1) • New mobility infrastructure to shorten the distance to CCIs ecosystem (1)	• Insufficient ability to attract investment, low confidence of investors, private funds, venture capitalists, business angels (3) • Low awareness and recognition of CCIs and its impact on economy (3) • The choice of marketings, communication tools and channels is often inappropriate, lack of the unique selling proposition (3) Low level of similarities among regions: • Insufficient management, business, planning and evaluation abilities, knowledge and skills, poor interest in training, upskilling by CCIs sector (2) • Weak business model and business spirit of CCIs (2) • Lack of experts in the field of accessibility to heritage objects (2) • Insufficient intersectoral coordination and cooperation (2) • Inconsistency in cultural design activities (1) • Demographic decline, lack of CCIs talent in the region (1) • Lack of product development and service design by CCIs (1) • Few destination management organizations utilising culture in services and marketing (1) • CCIs services are too costly for local tourists (1) • It is difficult for new players to enter the market (1) • Lack of CCIs laws, lack of regional policy and planning documentation and strategy (1) • Low levels of CCIs digitalisation, use of technology (1) • Weak export capacity of CCIs (1) • Fragmentation of counties in the region, lack of a unified identity (1)

	• Lack of data and opportunities to make data-based decisions (1) • Climate change spoiling nature and cultural heritage (1) • The diminishing role of local culture (1) • Mass tourisms degrading natural and cultural assets (1) • Weak CCIs eco-system, stakeholders not realising they belong to the ecosystem, immature local CCIs community (1) • Limited support for CCIs start-ups, limited incubation services (1) • Heritage as a by-product, fragmented heritage (1) • Season-based tourism, CCIs offer (1) • Too few tourism operators in the regions (1) • Insufficient temporary and flexible locations for developing CCIs projects (1)
OPPORTUNITIES High level of similarities among regions: • Presence and development of CCIs eco-system (innovation and business development hubs, clusters, education, industry, support system for CCIs SMEs, strong CCIs operators, know-how, knowledge transfer, joint initiatives) (5) Medium level of similarities among regions: • Partnerships, joining resources, intersectoral cooperation, collaboration platforms for CCIs talents, co-working spaces (4) • Specific regional funding and support programmes (training, mentoring, consultancy etc.) especially for green cultural tourism, sustainable projects etc. (4)	**THREATS** High level of similarities among regions: • The loss of the culture, authenticity, identity of the region, disappearance of traditional crafts, skills (5) Medium level of similarities among regions: • Lack of business confidence, activity and innovation of CCIs sector (3) • Demographic decline, "brain-drain", lack of CCIs talent, aging in the region (3) • Natural disasters, climate change spoiling nature and cultural heritage (3) • Dangers of mass tourism, especially in ecologically sensitive locations (3) • Economic instability, the negative impact of inflation on development, slow recovery after economic recess and the pandemic, unemployment (3)

• Rediscovering new or less known tourism, cultural and natural heritage places, creating new CCIs products (4) • Unique identity of the region, cultural heritage for regional branding (4) • Marketing to raise visibility of the region and the demand for authentic cultural experiences (3) • CCIs digitalisation, use of technology, green deal (3) Low level of similarities among regions: • Laws defining sectoral policies and action plans for CCIs as well as providing benefits for CCIs SMEs (lower taxes, employment benefits etc.) (2) • CCIs as solution provider to societal challenges (2) • Development of transportation, green mobility in the region (1) • Increase in the number of visitors (1) • Rich CCIs offer - events, stories, history (1) • Encouraging and involving youth - career development support in CCIs (1) • CCIs increasing well-being and spirit of local community, business spirit, employment (1) • Attracting talent to the region (1) • EU funded projects for CCIs (1) • International well-established events, conferences, festivals hold locally to promote local CCIs (1) • Bauhaus approach - combining aesthetics with sustainability (1)	Low level of similarities among regions: • Weak coordination of CCIs sector, ad hoc approach, inability to sustain long-term CCIs projects and heritage development plans leading to failure of results (2) • Negative political decisions towards CCIs (infrastructure, funding), frequent policy change and course of direction (2) • Low awareness and communication of the importance and impact of CCIs (2) • Regulatory barriers hindering CCIs projects, CCIs innovation, sectoral transformation and policy changes. Fracture between political environment and cultural reality (2) • Lack funding, investment, business support opportunities in the region (2) • Widening gap between cultural and creative organisations and business (1) • Lack of statistics, data gap in the industry (1) • Lack of valorisation leading to loss of value and identity of heritage and places (1) • Weak coordination of CCIs sector (1) • Low awareness and recognition of CCIs (1) • Low engagement of local people in CCIs projects, events (1) • Misunderstanding of local customs (1) • Risk of burnout for active CCIs members • Threats of AI on CCIs sector (1) • Market distortion, government competing with private sector (1) • Another pandemic - lock-down of the CCIs, other force major factors (1) • International competition of CCIs sector (1) • Environmental fundamentalism (1)

5. Cultural and Creative Industries: survey analysis

To assess support and policy instruments in the CCIs sector, experts surveyed representatives of the CCIs in eight European regions involved in the CHERRY project. Respondents representing various sub-directions of the CCIs sector. A total of 196 respondents took part in the survey, providing a broad assessment and insight into support and policy instruments during and after the Covid-19 pandemic as well as in three dimensions of the CCIs sector: (1) CCIs and urban transformation and revitalisation, (2) CCIs and local development, (3) CCIs and valorisation of natural and cultural heritage assets.

5.1. Information about the survey respondents

Respondents from eight European regions took part in the survey: (1) Central Transdanubian Region, Hungary (2) Centru Region, Romania, (3) Friuli Venezia Giulia Autonomous Region, Italy, (4) Kainuu Region, Finland, (5) South West Flanders Region, Belgium, (6) Veneto Region, Italy, (7) Western Greece Region, Greece, (8) Zemgale Region, Latvia. Regions are equally represented in the survey; the slightly lower representation is from South West Flanders Region, Belgium, and Western Greece Region, Greece.

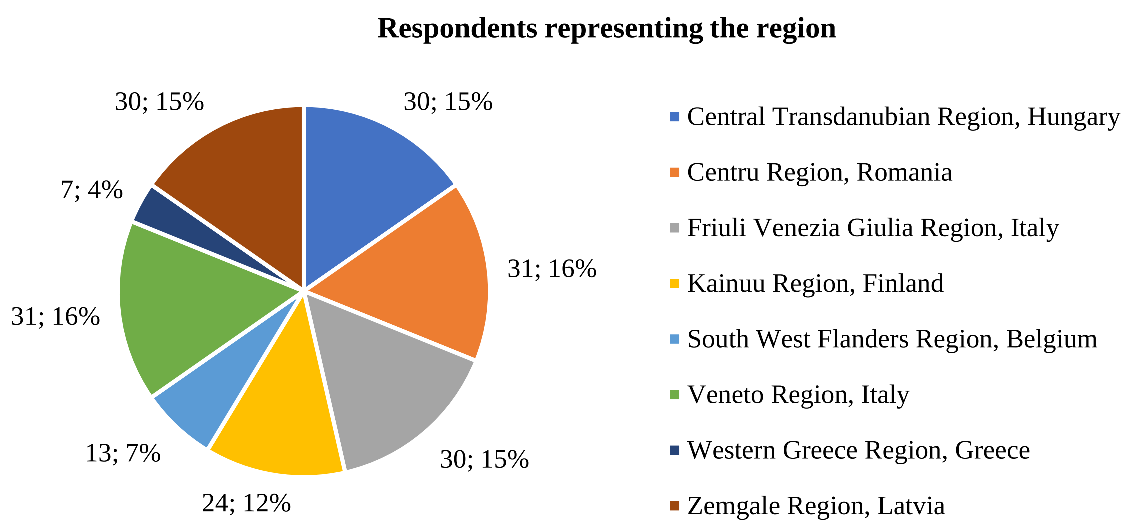

Image No.2: Respondents representing the region

The majority of respondents represent CCIs companies (micro enterprises, small or medium enterprises or SMEs and individual self-employed artists, CCIs specialists, freelancers, authors) or business support organizations (52%). The second largest part of respondents represents local, regional and national CCIs organizations - associations, consortiums, NGOs, unions, community organisations (34%). Policy planning and implementation organizations at local, regional and national levels (local governments, planning region, regional centre or agency, ministry, state agency) are represented the least (14%).

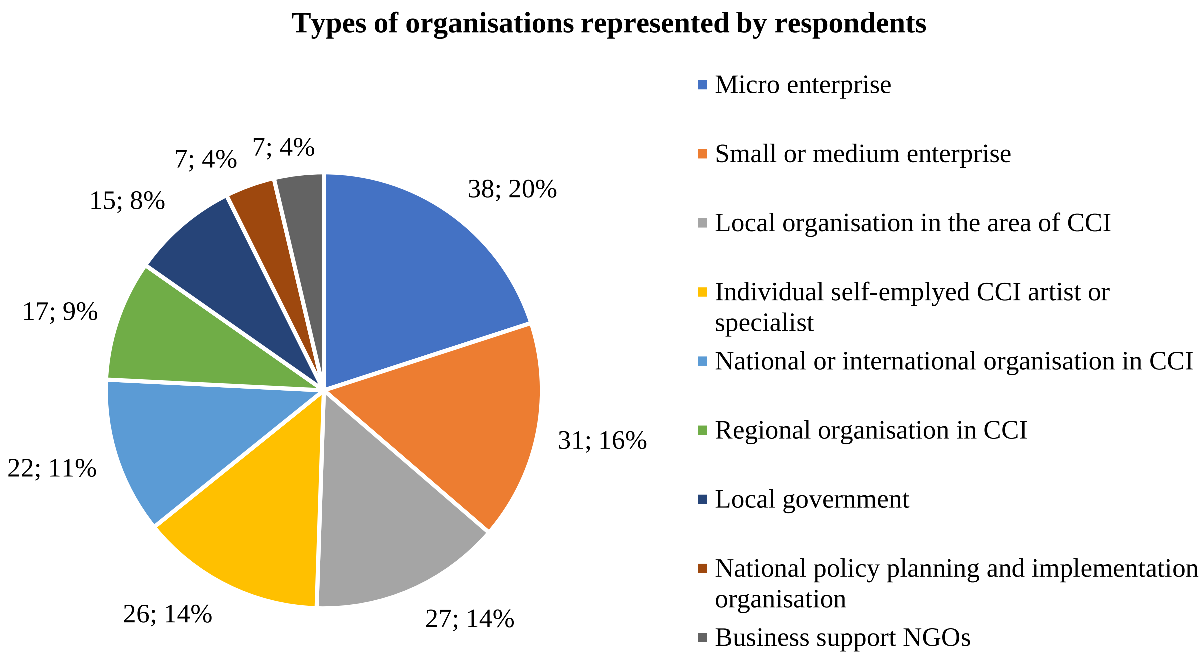

Image No.3: Types of organisatoins represenred by respondents

Survey respondents represent 20 different CCIs subsectors. The most widely represented sub-sectors are: (1) cultural education, (2) performing arts, (3) cultural heritage and restoration, (4) support to CCIs organisations and representatives, (5) planning and/or implementation of CCIs policies, (6) music, (7) recreation and entertainment, (8) visual art. The following sub-sectors are quite widely represented: (1) museums, (2) design, (3) cinema, video, photo, (4) publishing / writing, (5) dance, (6) applied arts and crafts, (7) fine art, (8) advertising. The following sectors are least represented: (1) computer games, applications and interactive software, (2) architecture, (3) radio, TV and interactive media, (4) fashion.

CCIs type represented by respondents

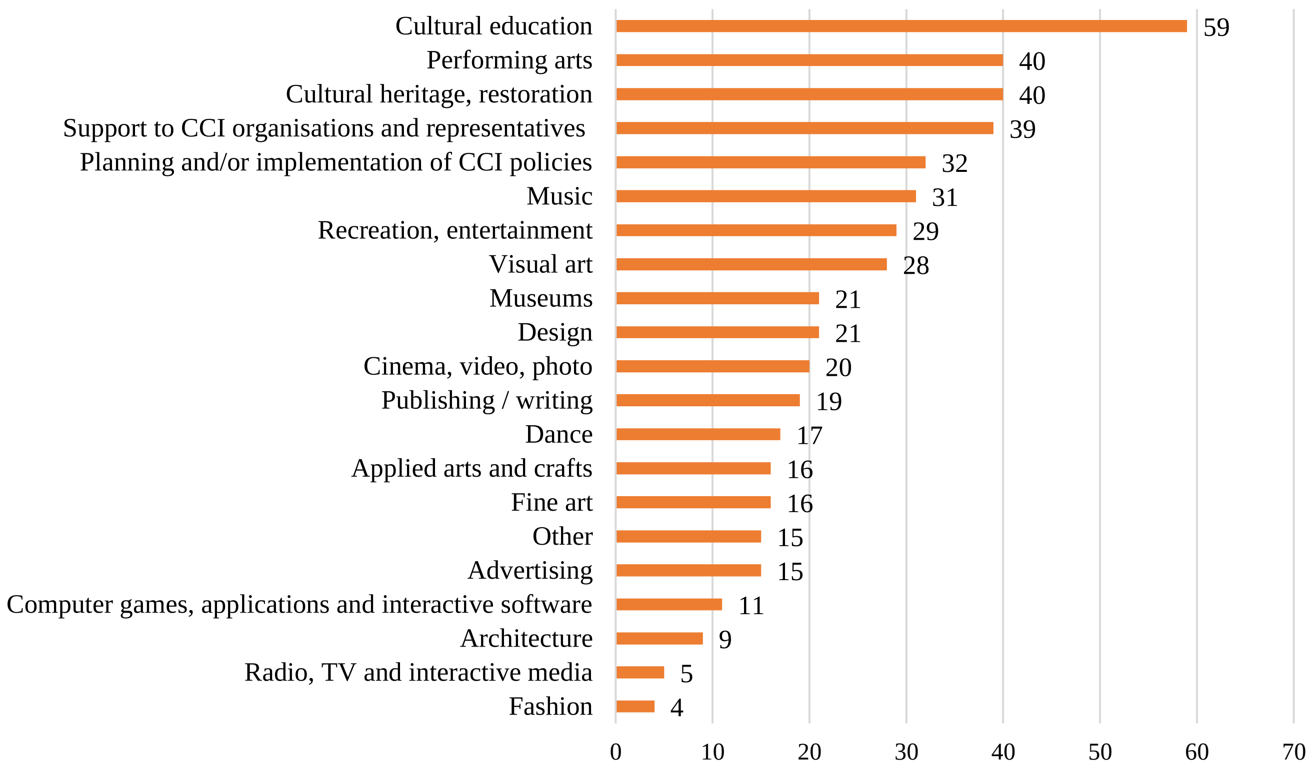

Image No.4: CCIs type represented by respondents

5.2. Assessment of policy and support initiatives during Covid-19

The Covid-19 pandemic significantly impacted Cultural and Creative Industries worldwide, leading to widespread event cancellations, closures of theatres, museums, and galleries, and the postponement of festivals and concerts. The loss of revenue, coupled with social distancing measures, forced many artists and creative professionals to adapt to online platforms, accelerating the digital transformation of these industries.

In the survey, the experts asked the respondents to rate the effect of the pandemic on CCIs businesses or organisations. The impact of the pandemic on the industry was varied. In most cases (56%) the impact was negative or devastating. 30% say that the pandemic did not affect the company or organization. 14% of respondents indicate that the impact of the pandemic on the company or organization was positive.

The CCIs sectors affected most positive were: (1) radio, TV and interactive media (40%), (2) computer games, applications and interactive software (27%), (3) fashion (25%), (4) music (23%), (5) support to CCIs organisations and representatives through engagement, networking, events (23%) and (6) architecture (22%).

The sectors affected most negative were: (1) visual art (79%), (2) fine art (75%), (3) dance (71%), (4) cinema, video, photo (70%), (5) museums (67%), (6) performing arts (65%).

The industries whose representatives most often noted that the impact of the pandemic on the industry was neutral were: (1) fashion (75%), (2) computer games, applications and interactive software (55%), (3) planning and/or implementation of policies in the area of CCIs at local, regional or national level (55%), (4) support to CCIs organisations and representatives through engagement, networking, events, etc. (50%), (5) publishing / writing (31%), (6) applied arts and crafts (31%).

Assessment of the Covid-19 pandemic impact on CCIs

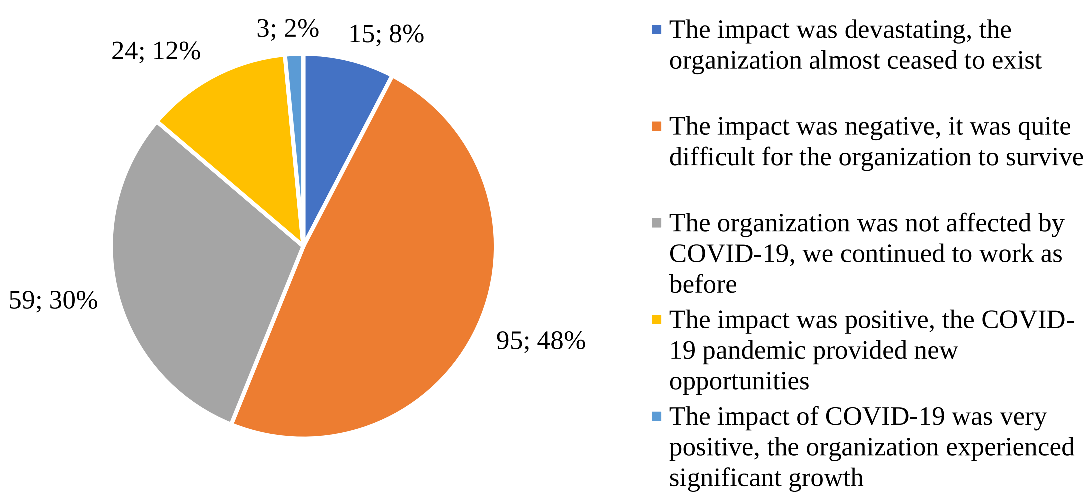

Image No.5: Assessment of the Covid-19 pandemic impact on CCIs

An analysis of the usefulness of various support and policy instruments during Covid-19 pandemic revealed that CCIs industry representatives consider the following solutions to be the most useful (positive or significantly positive impact): (1) financial support programmes available for all businesses (grants, subsidies, loans, compensation of losses etc.) (38%), (2) changes, relief of procedures, regulations and binding rules (28%), (3) job retention schemes (downtime benefits, vacation benefits, etc.) (25%), (4) loan provision and guarantee (20%), (5) relief and resilience funds specifically for CCIs (to address immediate financial challenges faced by the industry) (20%).

The support and policy instruments that were used by CCIs in some cases proved to be irrelevant and did not provide necessary positive impact; the top choices by the respondents were: (1) (1) financial support programmes available for all businesses (grants, subsidies, loans, compensation of losses etc.) (15%), (2) relief and resilience funds specifically for CCIs (to address immediate financial challenges faced by the industry) (12%), (3) support for freelancers and the self-employed (e.g. income support schemes, grants, access to social security benefits, etc.) (12%), (4) support for mental health and well-being (counselling, helplines, etc.) (12%), (5) rent relief and business rate support (discounts, rent subsidies, postponement of dues, relief of dues, etc.) (12%), (6) additional support for unemployed professionals (unemployment benefits) (12%).

For the most part, the CCIs industry used national support and policy instruments during the pandemic (211 mentioned cases). Local level (138 mentioned cases) and regional level (117 mentioned cases) support and policy instruments were also frequently used. EU (37 mentioned cases) and other (17 mentioned cases) support and policy instruments were used less frequently.

The most frequently used national and regional level support and policy instrument was financial support programmes available for all businesses (grants, subsidies, loans, compensation of losses etc.) (53 and 22 mentioned cases). The most frequently used local level support and policy instrument was changes, relief of procedures, regulations and binding rules (22 mentioned cases). The most frequently used EU and other support and policy instrument was support for cross-border cooperation (cross-border projects, virtual events, involvement in international networks, etc.) (13 and 4 mentioned cases).

Other support and policy instruments used by organizations during the pandemic were as follows (1) private funds, funds of friends and family, (2) adjusted working methods and time, (3) applying for tenders, (4) support for digital transformation and digital skills training, (5) using information provided by support organisations, (6) payment deadlines postponement authorised by government.

Usefulness of the support and policy instruments

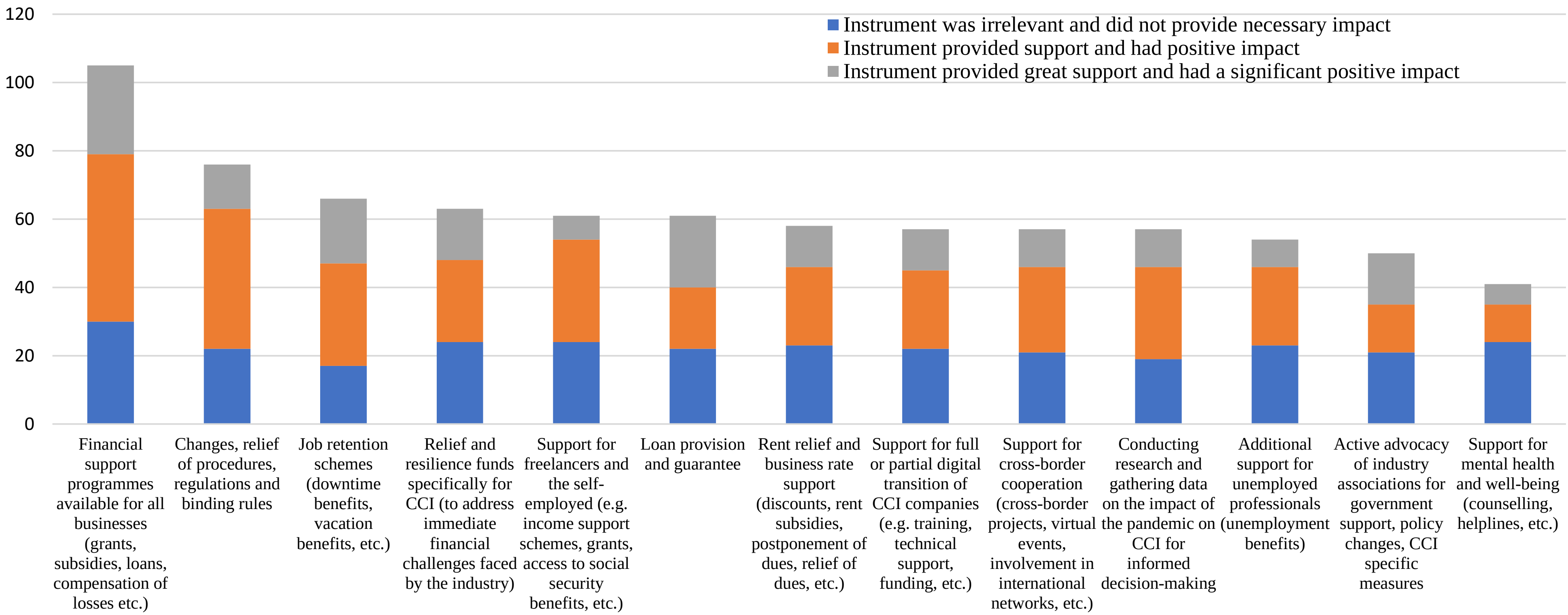

Image No.6: Usefulness of the support and policy instruments

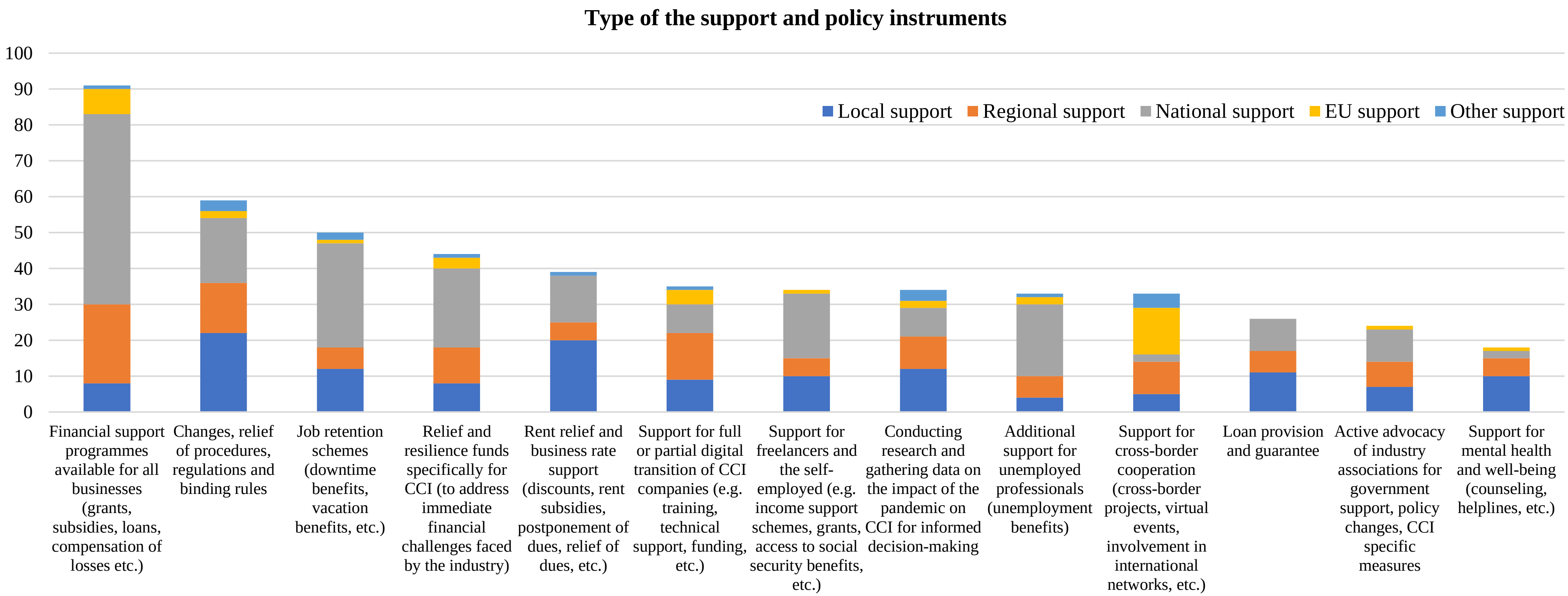

Image No.7: Type of the support and policy instruments

5.3. Creative and Cultural Industries and urban transformation and revitalisation

Cultural and Creative Industries are crucial for urban transformation and revitalization due to their multifaceted contributions. Economically, these sectors create jobs, attract investments, and stimulate local businesses, fostering economic growth and stability. Culturally, they preserve heritage, promote social cohesion, and enhance urban identity, making cities more appealing to residents and tourists alike. Creativity and innovation within these industries can also inspire solutions to urban challenges, fostering a culture of ingenuity. Moreover, these sectors often rejuvenate neglected urban areas, breathing new life into communities and attracting further investments. Additionally, by providing avenues for education and skill development, Cultural and Creative Industries ensure the growth of a skilled workforce, securing a city's sustainable future. In essence, their involvement enriches the economic, social, and cultural fabric of cities, making them vibrant, inclusive, and innovative spaces.

CCIs participation in activities to foster urban transformation and revitalisation

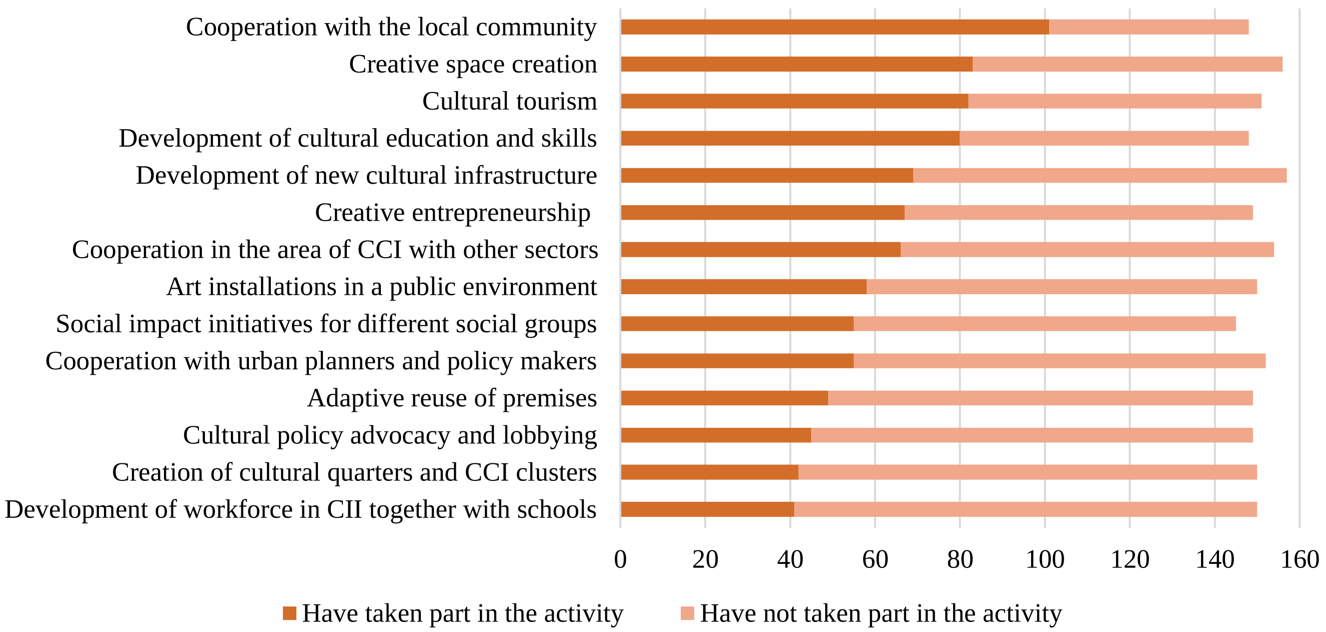

Image No.8: CCIs participation in activities to foster urban transformation and revitalisation

The survey reveals the involvement of CCIs sector in various activities related to urban transformation and revitalization. The top mentioned activities were: (1) cooperation with the local community, implementing CCIs projects, initiatives, (2) creative space creation (use of culture and art to improve space, public environment), (3) cultural tourism (guided tours, cultural festivals, heritage walks, etc.), (4) development of cultural education and skills (conducting and administrating training and creative workshops), (5) development of new cultural infrastructure, (6) creative entrepreneurship (support - training, mentoring, funding), (7) cooperation in the area of CCIs with other sectors.

Activities in which the CCIs sector involves less were: (1) development of workforce in creative industries, urban planning in cooperation with formal education institutions, (2) creation of cultural quarters and clusters of creative industries, (3) cultural policy advocacy and lobbying, (4) adaptive reuse of premises (revitalization of abandoned buildings, premises, adapting to CCIs needs, content), (5) cooperation with urban planners and policy makers, (6) social impact initiatives for different social groups, promoting inclusion and reducing inequality, (7) art installations in a public environment.

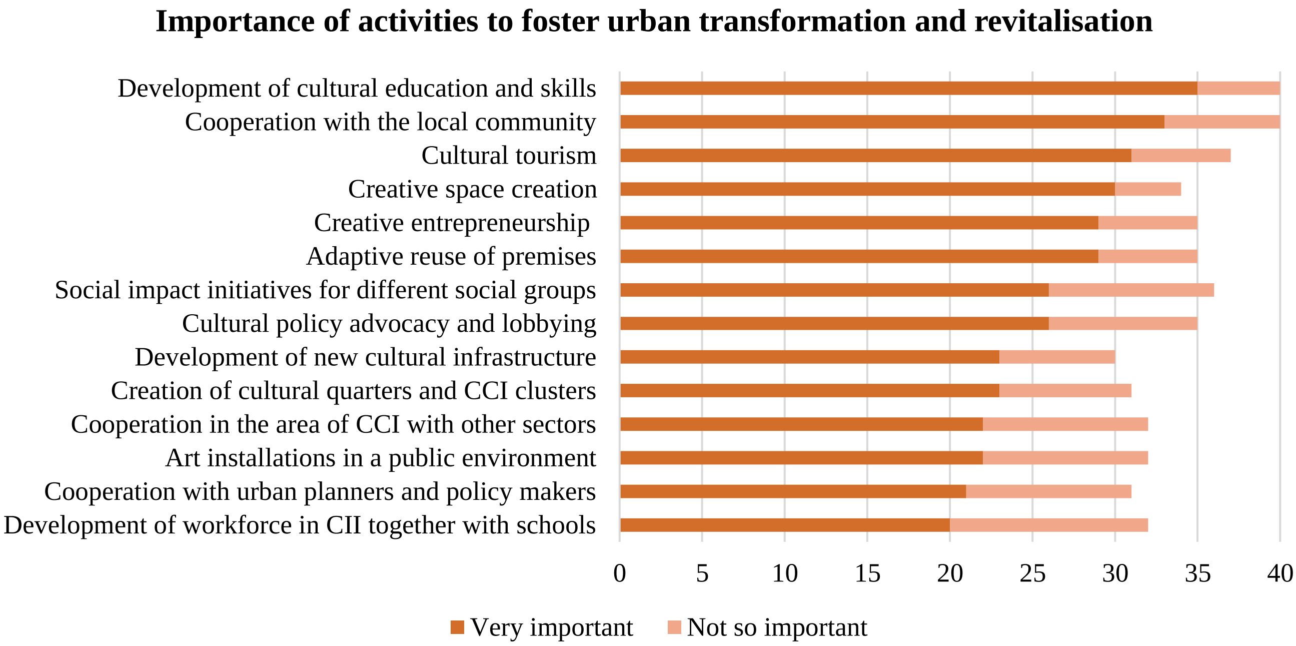

Image No.9: Importance of activities to foster urban transformation and revitalisation

The experts asked the CCIs sector to evaluate the importance of activities to promote urban transformation and revitalisation. According to CCIs, the top important activities are: (1) development of cultural education and skills, (2) cooperation with the local community, (3) cultural tourism, (4) creative space creation, (5) creative entrepreneurship, (6) adaptive reuse of premises, (7) social impact initiatives for different social groups.

According to CCIs, the less important activities are: (1) development of workforce in CII together with schools, (2) cooperation with urban planners and policy makers, (3) art installations in a public environment, (4) cooperation in the area of CCIs with other sectors, (5) creation of cultural quarters and CCIs clusters, (6) development of new cultural infrastructure, (7) cultural policy advocacy and lobbying.

To promote the involvement of the CCIs sector in the urban transformation and revitalisation activities, the CCIs sector needs support. Here are top support tools needed by the CCIs sector: (1) support grants and funding (access to grants, grants, subsidies, loans, venture capital and philanthropic funding), (2) marketing support (support in marketing campaigns, branding, tourism promotion, audience attraction, etc.), (3) networking and collaboration platforms (including digital networking, collaboration and knowledge sharing among professionals), (4) adequate infrastructure (creative industries need adequate and accessible infrastructure), (5) public engagement and promotion of participation (support for community involvement, public information, promotion of participation, etc.), business development assistance (assistance in the selection of price policies, business models, market research, mentoring, incubation, etc.), (6) access to technology, digitalisation, innovation (digital platforms, software, equipment, latest technologies such as virtual and augmented reality, etc.), (7) support for green transition.

Need for support for CCIs to foster urban transformation and revitalisation

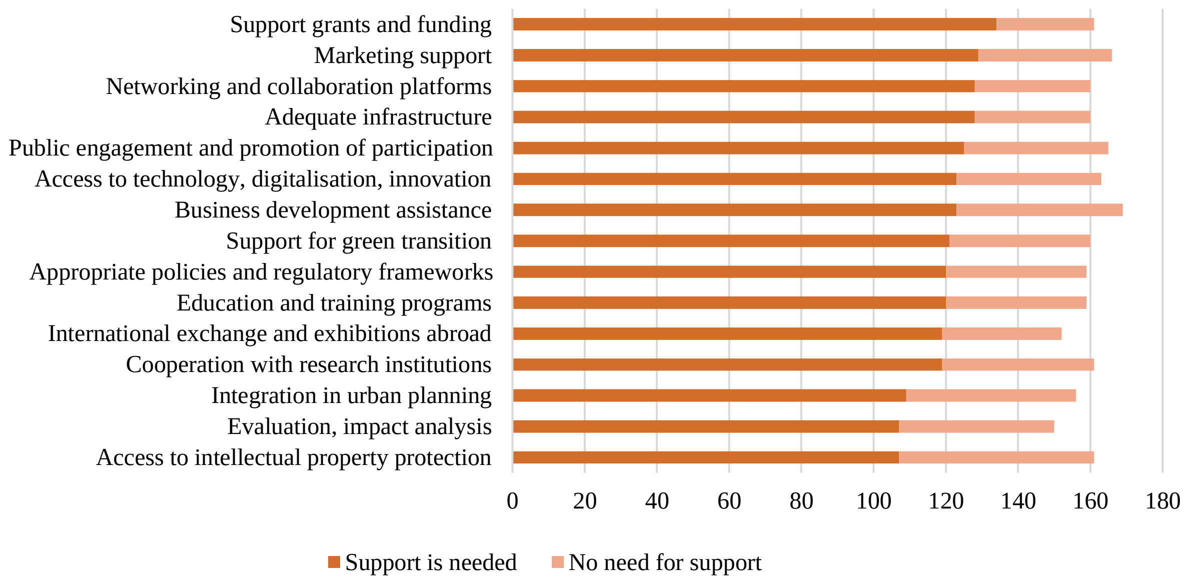

Image No.10: Need for support for CCIs to foster urban transformation and revitalisation

According to CCIs, the following support tools are needed, too: (1) evaluation, impact analysis (measurement of CCIs impact and effectiveness, importance and impact of CCIs support, etc.), (2) access to intellectual property protection (legal assistance, copyright protection measures, education on intellectual property rights, etc.), (3) integration in urban planning (involvement of CCIs field representatives in urban planning committees, mechanisms for mutual communication and cooperation between municipalities and CCIs field representatives, etc.), (4) international exchange and exhibitions abroad (cultural exchange, partnership, participation, exhibitions, festivals, entering foreign markets), (5) cooperation with research institutions (innovation and knowledge exchange, cooperation projects between CCIs and research institution, personnel), (6) appropriate policies and regulatory frameworks (e.g. tax incentives, protection of intellectual property, simplified licensing, simplified zoning of territories for events, etc.), (7) education and training programs (qualitative education and training programs adapted to the needs of CCIs).

Evaluation of support for CCIs to foster urban transformation and revitalisation

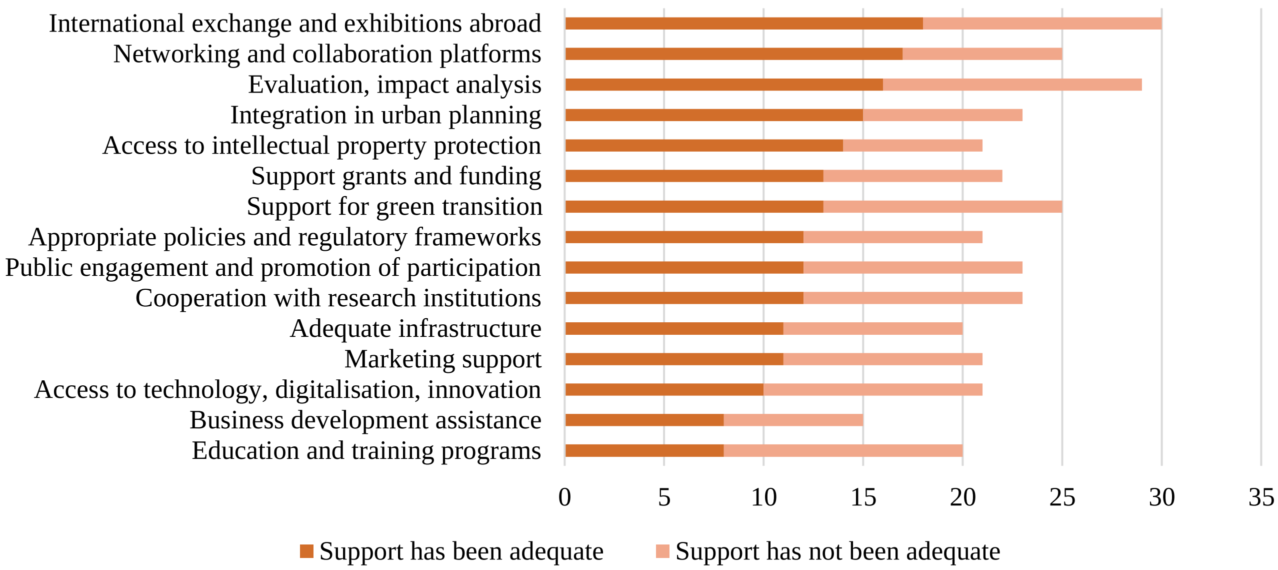

Image No.11: Evaluation of support for CCIs to foster urban transformation and revitalisation

According to the CCIs, the top list of support tools for promoting CCI's involvement in urban transition and revitalisation for which the support has been adequate is the following: (1) international exchange and exhibitions abroad, (2) networking and collaboration platforms, (3) evaluation, impact analysis, (4) integration in urban planning, (5) access to intellectual property protection.

The top answers for tools for which the support has not been adequate are the following: (1) evaluation, impact analysis, (2) education and training programs, (3) support for green transition, (4) international exchange and exhibitions abroad.

Other support initiatives and tools that CCIs sector mentioned as necessary and important are: (1) public and private partnership incentives for CCIs, (2) lower amount of co-financing needed by CCIs sector SMEs in EU and other programmes, (3) reduced bureaucracy on all levels, (4) no content and thematic limits to CCIs beneficiaries throughout all support instruments allowing maximum creativity and expression.

Examples of good practice of CCIs sector promoting urban transformation and revitalisations

Table No.19

Title	Short description	Web link
BASE Milan	BASE Milan is a hybrid cultural centre serving the city. Not a museum, not a theatre, not just a meeting space or a restaurant, not a traditional coworking, not a dance club. They are all these things together and much more.	https://base.milano.it/
Matadero Madrid	Matadero Madrid is the Centre for Contemporary Creation of the Madrid City Council. In its different warehouses it develops an extensive program that includes exhibitions, theatre, festivals, live music, film and audiovisual projects, conferences, conversations and workshops, artist residencies, educational programs and activities for families.	https://www.matadero madrid.org/que-es
Innovation Lab Legnago	The Municipality of Legnago provides 12 workstations within the Space13 Innovation lab.	https://www.space13.it/
Digital Library of Romania	The National Digital Library comprises the digital collections created by the digitization of documents in the special collections of the National Library of Romania, organized by themes or by events.	https://www.bibnat.ro /Despre-noi-s1-ro.htm
Pulse: Cultural Network for Transition	Pulse – Cultural Network for Transition believes that culture can be a driver for transition to a socially just and sustainable society. It connects cultural organizations that experiment with sustainable alternatives to current societal model, with self-sufficiency and cultural activism at its core.	www.pulsenetwerk.be
Grants from Arts	The Arts Promotion Centre Finland (Taike) is an expert and service	https://www.taike.fi/en

Promotion Centre Finland	agency for promoting the arts under the Ministry of Education and Culture. Taike's mission is to promote the arts on both the national and international levels.	
Cooperation with Paltamo municipality	E.g. Melalahti Music Week.	https://www.paltamo.fi/etusivu.html (info only in Finnish)

5.4. Creative and Cultural Industries, local development and establishing CCIs start-ups

Supporting Cultural and Creative Industries businesses is crucial because they are not just a source of entertainment and artistic expression, but also significant contributors to economic growth and societal development. These industries generate employment opportunities, foster entrepreneurship, and attract tourists, thus bolstering local economies. Moreover, they preserve cultural heritage and promote social cohesion, enhancing the overall quality of life. In the digital age, supporting CCIs businesses is also pivotal for encouraging innovation, ensuring the continued production of meaningful content, and fostering a vibrant cultural landscape.

Establishing Cultural and Creative Industries start-ups is equally important as it nurtures innovation and creativity from the ground up. Start-ups often bring fresh perspectives and novel ideas to the table, challenging traditional norms and pushing boundaries. They are hotbeds for experimentation and can lead to the development of groundbreaking technologies and artistic expressions. Furthermore, supporting Cultural and Creative Industries start-ups encourages a culture of entrepreneurship, empowering individuals to transform their creative passion into sustainable businesses. By fostering a supportive ecosystem for these new ventures, societies can tap into their potential to drive economic growth, create jobs, and enrich the cultural tapestry of communities.

To promote establishment of new CCIs start-ups, support is crucial. Here are top support tools needed by CCIs start-ups: (1) support in legal and intellectual property matters, (2) expert support in business planning and development, (3) access to financing and risk capital, (4) support for green transition, (5) skills development and training, (6) support in marketing and product promotion, (7) financial management and accounting support, (8) networking and collaboration capabilities (access to conferences, exhibitions, networking events, matchmaking events).

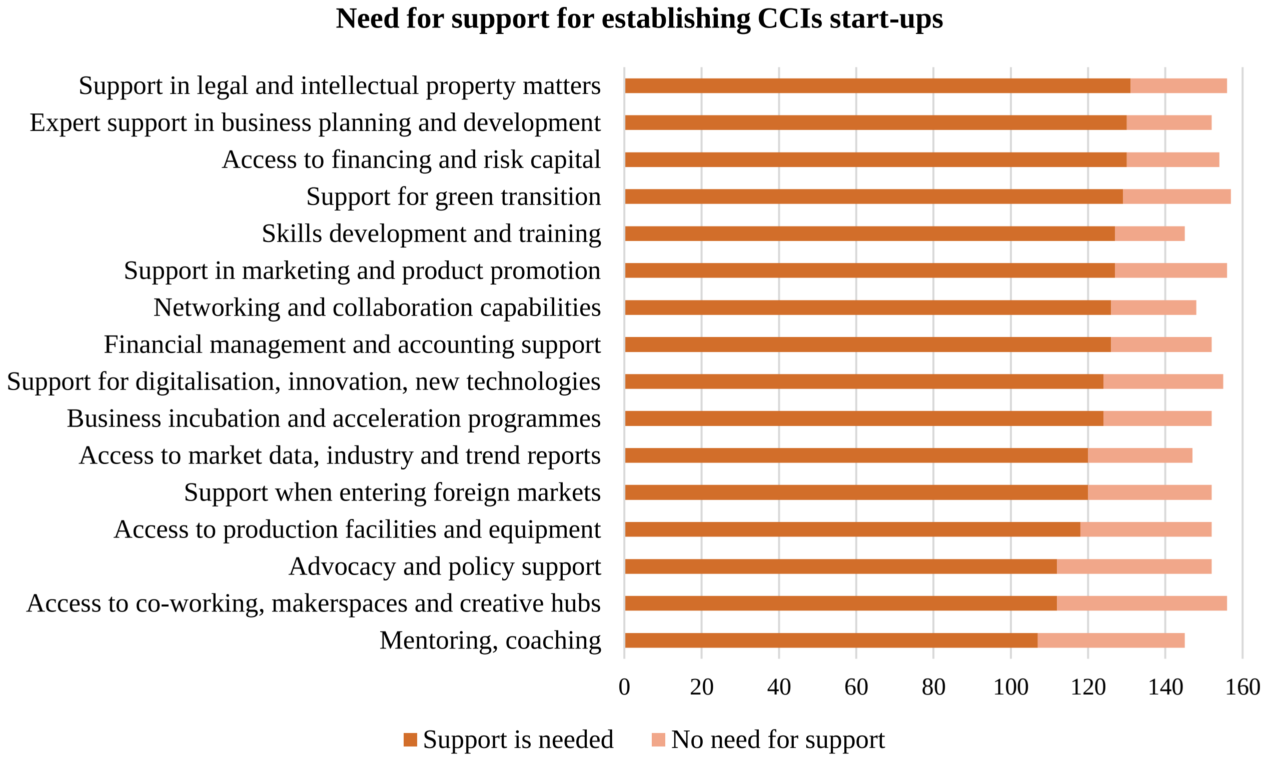

Image no.12: Need for support for establishing CCIs start-ups

According to CCIs, the following support tools to promote establishing new CCIs start-ups are needed, too: (1) support for digitalisation, innovation, new technologies, (2) business incubation and acceleration programmes, (3) support when entering foreign markets, understanding export, logistics conditions, international networking, creating international business strategies, (4) access to market data, industry reports, trend analysis and reports, (5) access to production facilities and equipment, (6) advocacy and policy support (involvement in advocacy activities and cooperation with associations to create a favourable ecosystem for CCIs), (7) access to co-working facilities, co-creation facilities (makerspaces) and creative hubs, (8) mentoring, coaching.

According to the CCIs, the top list of support tools for establishing CCIs start-ups for which the support has been adequate is the following: (1) networking and collaboration capabilities, (2) mentoring, coaching, (3) access to market data, industry and trend reports, (4) skills development and training, (5) expert support in business planning and development, (6) support in marketing and product promotion.

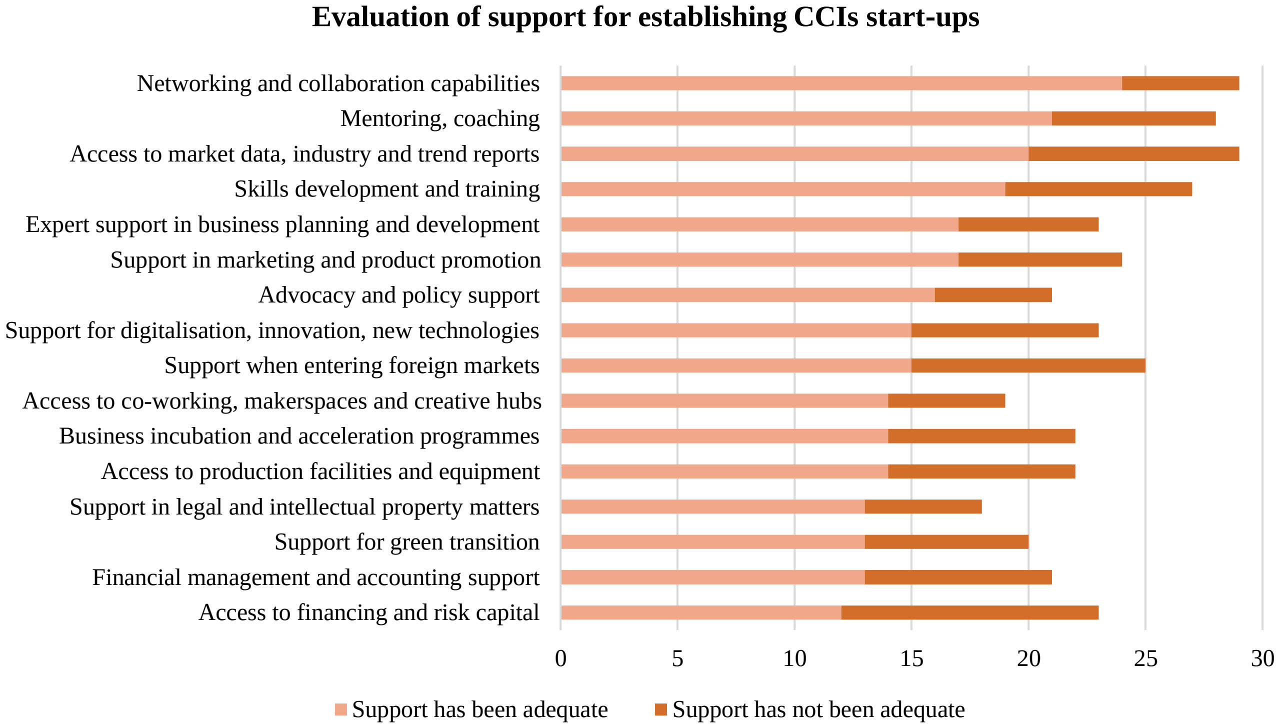

Image No.13: Evaluation of support for establishing CCIs start-ups

The top answers for tools for which the support has not been adequate are the following: (1) access to financing and risk capital, (2) support when entering foreign markets, (3) access to market data, industry and trend reports, (4) financial management and accounting support, (5) access to production facilities and equipment, (6) business incubation and acceleration programmes, (7) support for digitalisation, innovation, new technologies, (8) skills development and training.

Other support initiatives and tools that CCIs sector mentioned as necessary and important to foster establishing new CCIs start-ups are: (1) reduced bureaucracy on all levels, (2) tax incentives, reduced taxes for CCIs start-ups, especially those developing original intellectual property, (3) public guarantees to access credit, (4) simplified conditions for obtaining a patent.

Examples of good practice of fostering establishment of new CCIs start-ups

Table No.20

Title	Short description	Web link
Basilicata Creativa	Basilicata Creativa is the cluster of Cultural and Creative industries in Basilicata.	https://www.basilicatacreativa.it/
Interreg Italy - Slovenia project: DIVA	The overall objective of the project was to create an ecosystem of cross-border cooperation in which social and technological innovations for the future society emerges.	https://2014-2020.ita-slo.eu/en/diva
The National Institute of Crafts: INMA	The Institut National des Métiers d'Art is the unique inter-ministerial reference structure that brings together all the actors in the sector, professional and institutional, to serve the general interest of the arts. INMA promotes exchanges, develops expertise and gives coherence to the different dynamics.	https://www.culture.gouv.fr/en/Thematic/Metiers-d-art/Crafts-in-France/The-National-Institute-of-Crafts-INMA
Interreg Central Europe project: INDUCCI	Fosters Cultural and Creative Industries (CCIs) as a key transformative force for economy and society in non-metropolitan industrial regions.	https://programme2014-20.interreg-central.eu/Content.Node/InduCCI.html
Urban Digital Center Rovigo	Urban Digital Center - Innovation Lab of Rovigo is a public place , which opens its doors to citizens to be an environment dedicated to training and information, digital acculturation, co-planning and participation in urban development processes, with innovation spaces and events and creativity for the territory, at the service of citizens.	https://urbandigitalcenterrovigo.it/it/content/urban-digital-center
European platform: LINA	The European platform LINA is a network connecting relevant institutions with emerging practitioners and thinkers who work at the intersection of architecture and other fields related to spatial culture: it aims to promote up-and-coming talent.	https://lina.community/who-we-are/
Designregio Kortrijk	Designregio Kortrijk helps your company find the right creative and innovative skills; coordinates the entire process and monitors deadlines; guarantees a new product/service over a period of one year; makes its network	https://designregio-kortrijk.be/en/drk-for-you/5x5-innovation-track

	available to you for all your questions about IP, communication, etc. takes care of the launching moment of your new product with both physical and online communication.	
#GameCity Kajaani	The three-year #GameCity Kajaani project aims at generating new successful game industry companies in the region.	https://www.kajaani.fi/en/jobs-and-business-services/gamecity-kajaani-the-city-of-gaming-industry/

5.5. Creative and Cultural Industries and valorisation of cultural and natural heritage

Valorising cultural and natural heritage is vital for several reasons. Firstly, it preserves and promotes a community's unique identity, traditions, and history, fostering a sense of pride and belonging among its members. By incorporating elements of cultural and natural heritage into creative endeavours, these industries can bridge the gap between the past and the present, ensuring that valuable traditions and knowledge are not lost but rather celebrated and passed down to future generations.

Secondly, valorising cultural and natural heritage can boost tourism and local economies. Tourists are often drawn to destinations that offer authentic cultural experiences and showcase natural beauty. By integrating heritage into creative products, services, and experiences, Creative and Cultural Industries can attract a wider audience, leading to increased tourism revenue and supporting local businesses.

Additionally, valuing cultural and natural heritage fosters environmental conservation. By highlighting the significance of natural heritage, Creative and Cultural Industries can raise awareness about environmental issues and promote sustainable practices. This synergy between heritage and environmental consciousness not only preserves natural resources but also educates the public, encouraging them to participate in conservation efforts.

The valorisation of cultural and natural heritage preserves cultural identity, drives economic growth through tourism, and promotes environmental awareness, making it essential for the sustainable development of communities and the overall well-being of society.

The survey reveals the involvement level of CCIs sector in various activities to valorise cultural and natural heritage. The top mentioned activities were: (1) cultural heritage valorisation (interpretive programs, exhibitions and multimedia experiences that bring to life the stories and meaning of natural and cultural heritage values), (2) engaging and empowering local communities through participatory projects, workshops and cultural initiatives, (3) creative arts shows at heritage sites (including concerts, dance performances, theatrical performances, story sessions), (4) cultural heritage tourism experience (guided tours, immersive routes, etc.), (5) providing educational programs and workshops that educate people, especially young people, about the value and importance of nature and cultural heritage instils a sense of responsibility, (6) storytelling and preserving oral history by keeping traditional knowledge alive and working with local communities, (7) use of digital technologies, digitalisation (virtual reality, augmented reality, online platforms, digital presentations, virtual tours, etc.).

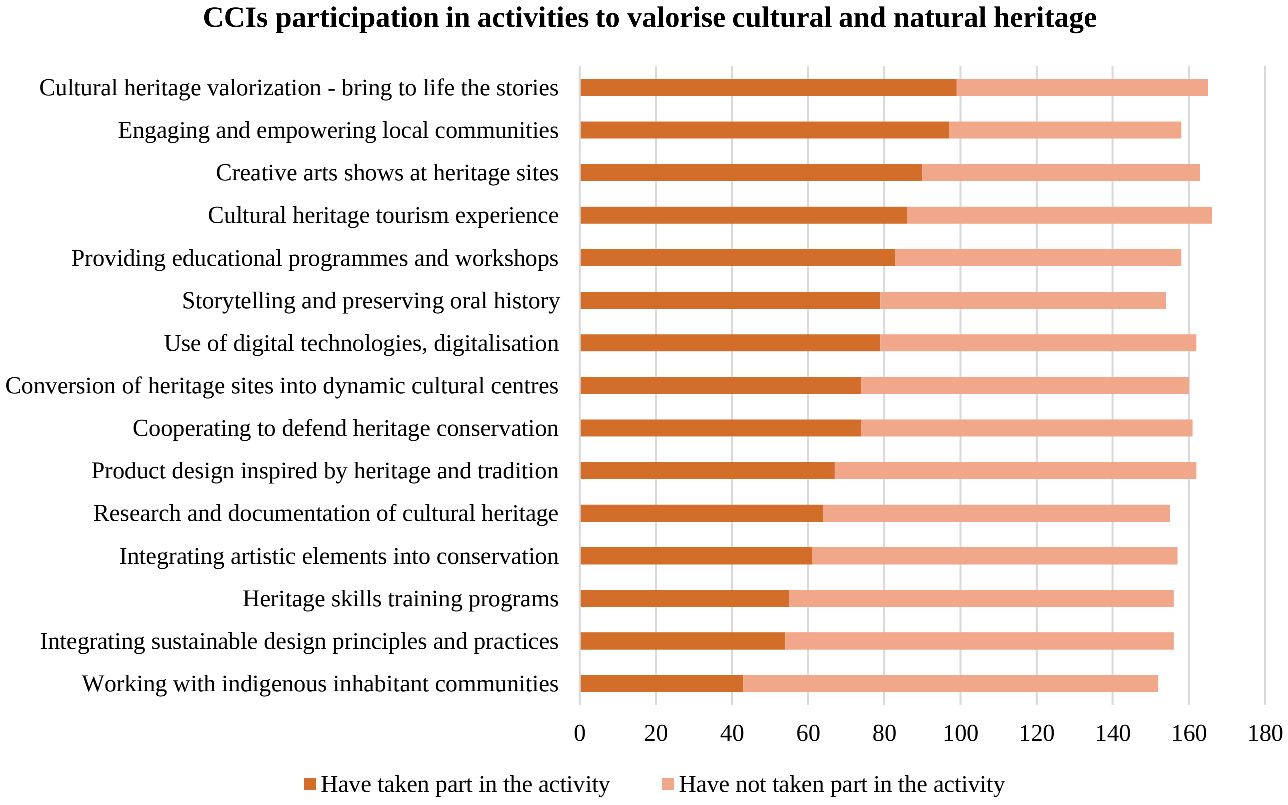

Image No.14: CCIs participation in activities to valorise cultural and natural heritage

Activities in which the CCIs sector involves less were: (1) working with indigenous inhabitant communities, making sure heritage values are in line with community / group values, (2) integrating sustainable design principles and practices into the development and management of cultural and creative projects related to natural and cultural heritage, (3) heritage skills training programs that transfer traditional craft skills, arts techniques and cultural practices to future generations, (4) integration of artistic elements into conservation (e.g. art installations, murals, use of sculptures, etc.), (5) research and documentation of cultural heritage (research by increasing knowledge and understanding of heritage's historical, ecological and cultural importance), (6) product design inspired by heritage and tradition in collaboration with local artists, designers and amateurs, (7) conversion of heritage sites into dynamic cultural centres by organising art exhibitions, music festivals, craft fairs and cultural events, (8) cooperation with organizations, being defenders of heritage conservation and promoting awareness of heritage and the threat to its values.

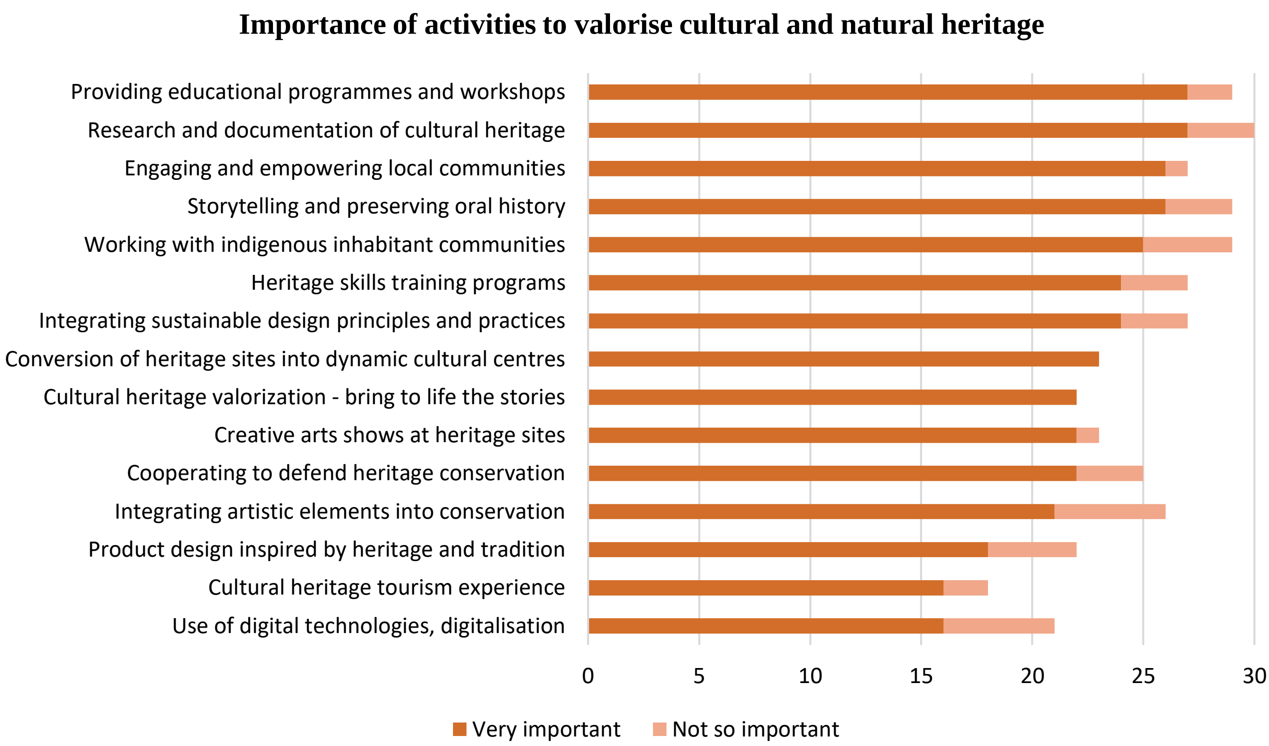

Image No.15: Importance of activities to valorise cultural and natural heritage

The experts asked the CCIs sector to evaluate the importance of activities to promote valorisation of cultural and natural heritage. According to CCIs, the top important activities are: (1) providing educational programmes and workshops, (2) research and documentation of cultural heritage, (3) engaging and empowering local communities, (4) storytelling and preserving oral history, (5) working with indigenous inhabitant communities, (6) heritage skills training programmes, (7) integrating sustainable design principles and practices, (8) conversion of heritage sites into dynamic cultural centres, (9) cultural heritage valorisation - bring to life the stories.

According to CCIs, the less important activities are: (1) use of digital technologies, digitalisation, (2) cultural heritage tourism experience, (3) product design inspired by heritage and tradition, (4) integrating artistic elements into conservation, (5) cooperating to defend heritage conservation, (6) creative arts show at heritage sites.

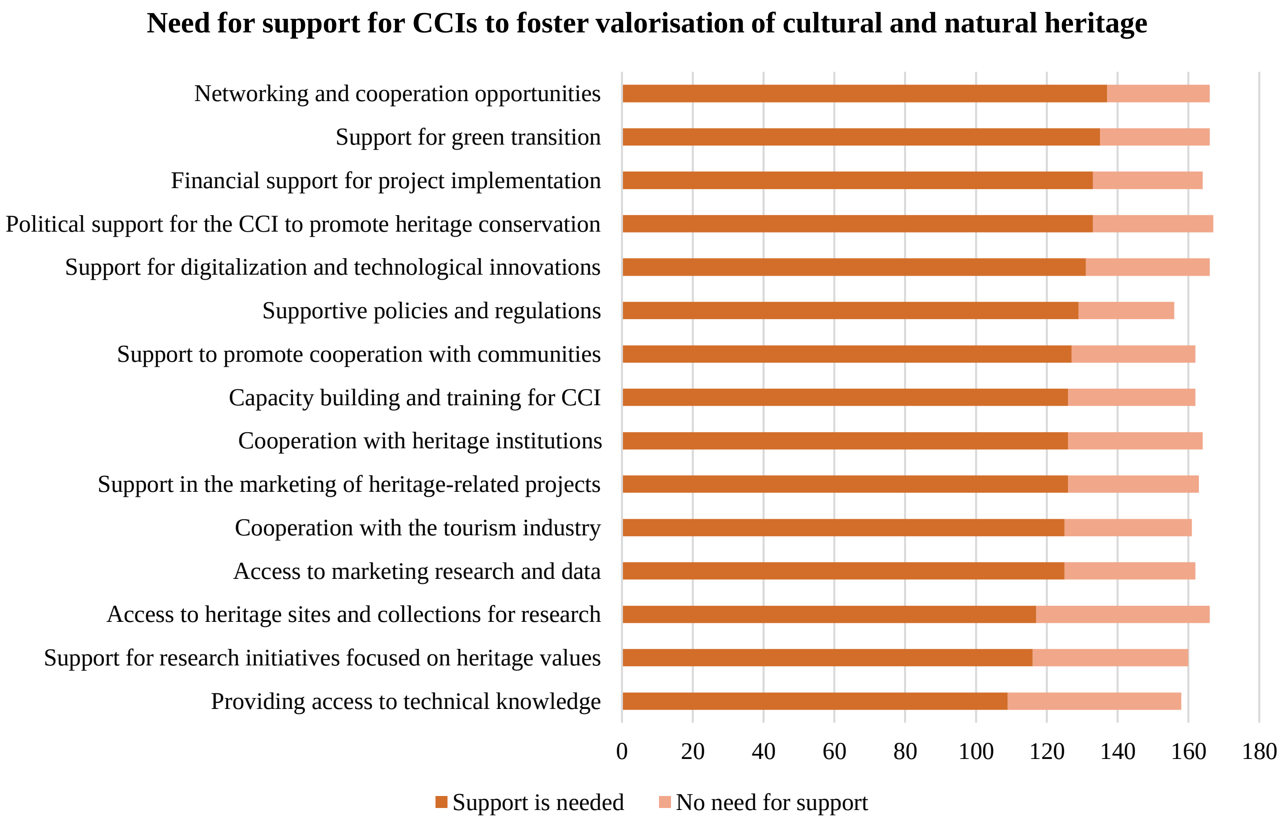

Image no.16: Need for support for CCIs to foster valorisation of cultural and natural heritage

To promote the involvement of the CCIs sector in valorisation of cultural and natural heritage, the CCIs sector needs support. Here are support tools needed by the CCIs sector in order of importance: (1) networking and cooperation opportunities to promote collaboration, exchange of knowledge and good practices, (2) support for green transition, (3) financial support for the implementation of heritage projects (grants, subsidies, sponsorship, etc.), (4) political support for the CCIs in its efforts to promote heritage conservation, sustainable tourism and cultural preservation, (5) support for digitalization and implementation of technological innovations (for example, virtual reality, augmented reality, digital storytelling, etc.), (6) supportive policies and regulations that recognize and prioritize the valorisation of natural and cultural heritage values, (7) support to promote cooperation with local communities, groups and holders of traditional knowledge, (8) cooperation with heritage institutions (museums, archives, etc.), also provide access to expertise, research, resources and collections, (9) capacity building and training for CCIs representatives working with natural and cultural heritage issues, projects, (10) support in the marketing of heritage-related projects and initiatives (marketing campaigns, digital platforms, tourism partnerships, participation in events, etc.), (11) cooperation with the tourism industry (tour operators, travel agencies, hospitality companies), integrating heritage-related experiences and products into tourism offers, (12) access to marketing research and data to more accurately target heritage audiences, (13) access to heritage sites and collections for research, inspiration and development of heritage-focused projects, (14) support for research initiatives focused on heritage values (e.g. research on historical context, ecological impact or community engagement), (15) providing access to technical knowledge such as heritage conservation specialists, archaeologists and curators.

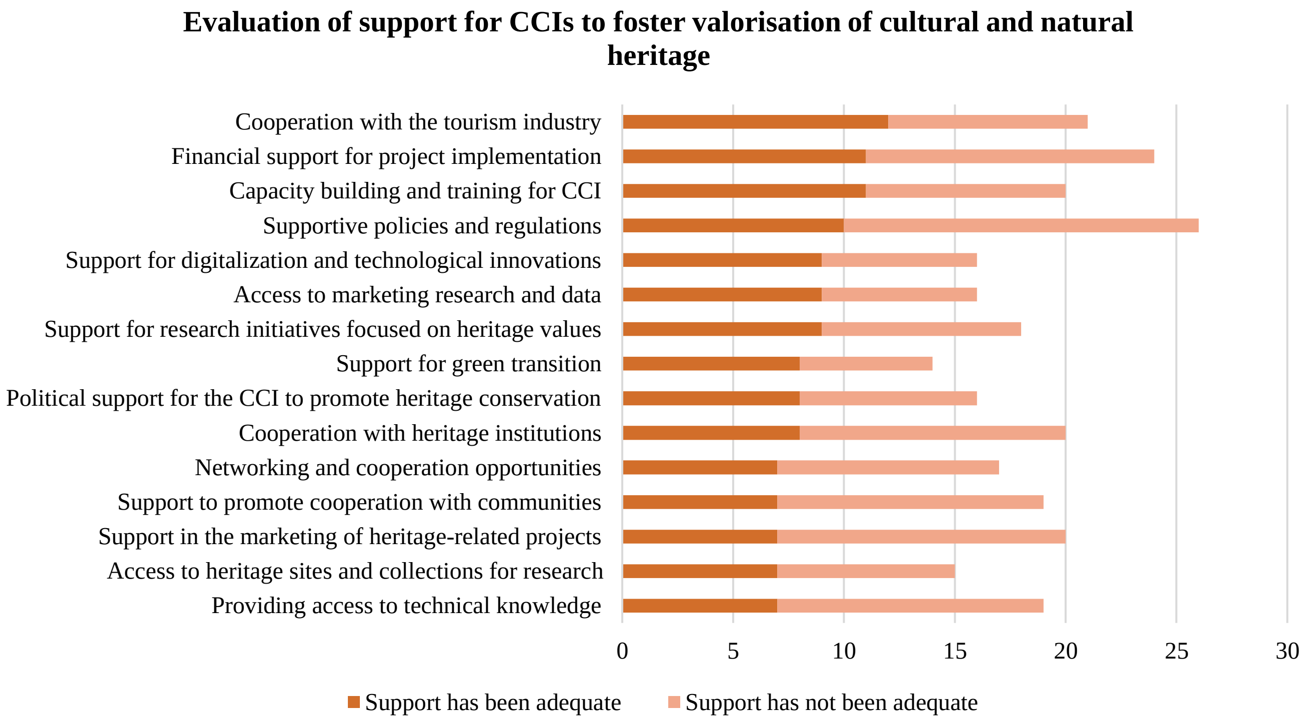

Image No.17: Evaluation of support for CCIs to foster valorisation of cultural and natural heritage

According to the CCIs, the top list of support tools for promoting CCI's involvement in valorisation of natural and cultural heritage for which the support has been adequate is the following: (1) cooperation with the tourism industry, (2) financial support for project implementation, (3) capacity building and training for CCIs, (4) supportive policies and regulations, (5) support for digitalization and technological innovations, (6) access to marketing research and data, (7) support for research initiatives focused on heritage values

The top answers for tools for which the support has not been adequate are the following: (1) supportive policies and regulations, (2) support in the marketing of heritage-related projects, (3) financial support for project implementation, (4) providing access to technical knowledge, (5) support to promote cooperation with communities, (6) cooperation with heritage institutions.

Other support initiatives and tools that CCIs sector mentioned as necessary and important are: (1) public and private partnership incentives for CCIs, (2) reduced bureaucracy on all levels.

Examples of good practice of CCIs sector promoting valorisation of cultural and natural heritage

Table No.21

Title	Short description	Web link
Humus Park	Humus Park is most important Italian Land Art event. The Land Art is an artistic form using natural materials. Some of its numbers: 13 days, 3 locations, more than 90 artists from 13 countries all over the words, 8 art schools and academies involved.	http://www.humuspark.it/en/
PAFF! International Museum of Comic Art	It is the first cultural institution in Italy that promotes the dissemination of art and science through the facilitative tool of comics.	https://paff.it/chi-siamo/
Initiative for Responsible Mining Assurance: IRMA	The Initiative for Responsible Mining Assurance (IRMA) is the answer to a global demand for more socially and environmentally responsible mining. IRMA offers true independent assessment against a comprehensive standard for all mined materials that provides 'one-stop coverage' of the full range of issues related to the impacts of industrial-scale mines.	https://responsiblemining.net/about/about-us/
Casa Noha Sassi di Matera	Casa Noha is an historical house where you can immerse yourself in the history of the town through a multimedia project.	https://fondoambiente.it/casa-noha-eng/
Interreg Central Europe project ARTISTIC	The ARTISTIC project implemented in the 2017-2020, aimed to improve	https://programme2014-20.interreg-central.eu/Content.

	cooperation between cultural operators, citizens and financial operators and supported them in valorisation of the intangible cultural heritage and in searching for solutions on how to make local cultural projects sustainable.	Node/ARTISTIC.html
Cultural Heritage in Action program: Eurocities	Allows over 100 local and regional policy makers to exchange knowledge on cultural heritage, with a focus on participatory governance of cultural heritage, adaptive reuse of heritage buildings and quality principles for interventions on cultural heritage.	https://eurocities.eu/projects/cultural-heritage-in-action/
Dobele Castle development	Dobele Livonia Castle has become a multi-purpose cultural, craft and tourism development center after reconstruction.	https://jauns.lv/raksts/zinas/464538-foto-par-gada-labako-restaureto-buvi-atzita-dobeles-livonijas-pils-atverta-apmekletajiem http://www.dobelesmuzejs.lv/
Bauska Caste	Constant development and improvement of Bauska Palace. Professional audioguide, adapted mobility, content suitable for people with intellectual challenges.	https://www.bauskaspils.lv/lv/
Culture heritage programme: Built Heritage and Cultural Environment in Kainuu = Katajainen Kansa, Kainuun kulttuuriympäristöohjelma	Based on 2012-2013 inventories, the publication presents nearly 100 cultural environments in Kainuu.	https://issuu.com/koutamedia/docs/kainuun_kulttuuriymparisto-julkaisu/1
Juminkeko - cultural centre	Juminkeko aims at preserving, treasuring and	https://www.juminkeko.fi/en/activities/about-juminkeko/

	spreading the cultural heritage related to the Finnish national epic Kalevala.	
Raatteen Portti Winter War Museum	Raatteen Portti is a fascinating tourist destination and boasts, among other things, a Winter War (1939-1940) exhibition, field of stones, Winter War Monument and other memorials along Raate Road. Raatteen Portti is Europe's largest Winter War museum.	https://www.raatteenportti.fi/en/