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ADRIATIC-IONIAN

European Regional Development Fund - Instrument for Pre-Accession II Fund

CREATURES

DELIVERABLE T.1.2.4

STATE-OF-THE-ART ANALYSIS & SWOT ANALYSIS

JOINT REPORT

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1. Introduction

Contextual background

The State of the Art Report is one of the deliverables in the project CREATURES (*Promoting Creative Tourism through new Experiential and Sustainable routes*) which is funded by INTERREG V-B Adriatic-Ionian ADRION Programme, 2014-2020. The Project aims to promote the sustainable valorization and preservation of natural and cultural heritage as growth assets in the Adriatic Ionian area. Particular focus of the Project is promotion of experiential tourism in the ADRION region by exploiting the potential of Cultural & Creative Industries (CCI). The Project strives to generate three-fold benefits in the ADRION region: economic (increased CC SMEs-startups' competitiveness and tourist flows attracted by CREATURES routes); cultural (greater valorization of cultural heritage); and strategic (improved policies promoting a more integrated vision of CCI).

The project duration is 30 months, starting from March 2020.

The project consortium, consists of eight project partners (PPs) coming from six countries:

1) Metropolitan City of Bologna (*PP1: MCBO*, Lead Partner, Italy),
2) Friuli Venezia Giulia Autonomous Region (*PP2: FVG AR*, Italy),
3) Urban Planning Institute of the Republic of Slovenia (*PP3: UIRS,* Slovenia),
4) Patras Science Park S.A. (*PP4: PSP*, Greece),
5) Athens University of Economics and Business Research Center (*PP5: AUEB-RC*, Greece),
6) Regional Development Agency Dubrovnik – Neretva County Dunea (*PP6: DUNEA*, Croatia),
7) the Regional Directorate of National Culture, Vlorë (*PP7: RDNC*, Albania), and
8) School of Economics and Business in Sarajevo, University of Sarajevo (*PP8: SEBS*, Bosnia and Herzegovina).

Preceding activities

The State of the Art Report is one of the deliverables planned within the first work package of the Project, WP T1 "Increase CCI-related businesses, SMEs and start-ups' capacities and knowledge", led by the PP8 SEBS. It aims to map out the Cultural & Creative Industries (CCI) in the Adrion region, describe the link between CCI and tourism sector, identify challenges CCI sector is facing and highlight the opportunities that could boost the development of innovative and sustainable programmes and interventions to support CCI sector.

In order to deliver a comprehensive, methodologically sound Report that contains consistent and comparable information across the project area, preparation of the Report was preceded by several steps, namely:

- *Working Methodology Report* - prepared by PP5 AUEB-RC. Its purpose is to define a clear, participatory, integrated and holistic methodology for the correct implementation of the WP T1 and the effective development of two outputs of WP T1 - the E-Catalogue of Good Practices and the Final Report of the Joint Acceleration Programme. The Working Methodology Report lays out the common rules, procedures, templates and guidance to all partners for carrying all WP T1 activities. So far, activities listed below were implemented in accordance with the Working Methodology Report.

- *One-on-one in depth interviews* - all partners (except for PP5, responsible for Working Methodology Report) conducted interviews with the stakeholders possessing substantial knowledge and expertise on project topics. Based on the conducted interviews transcripts (reports) were prepared. The interviews were carried out in the earliest phase of the project implementation in order to provide input for the next deliverables (State of the Art and SWOT analyses).

- *The regional level State of the Art Reports* - came as result of state of the art research carried out by all partners individually (except for PP5, responsible for Working Methodology Report). In the reports partners described the regions they belong to, specifically, external environment, the state of CCI, the link between CCI and regional competitiveness and the factors affecting the linkage between CCI, cultural heritage and sustainable tourism.

- *The regional level SWOT analysis* - provides insight in strengths, weaknesses, opportunities and threats pertaining to the utilization of cultural and creative services in cultural heritage promotion and sustainable tourism in the partners' regions. The partners' individual SWOT analyses stem from the previously prepared State of the Art Reports on the level of their respective regions.

State of the Art Report

This document, project level State of the Art Report, offers mapping of the CCI sector in the project area within the broader economic and political context. The objective of the Report is to provide a mapping of the CCI sector on project level, within the broader economic, political context of the regions partners belong to, in terms of:

- The CCI stakeholders, their role(s) and responsibilities in the CCI sector and in the regional policy-making process for CCI, and their classification as primary or secondary.
- The impact of different regional conditions on the CCI sector.
- The impact of the CCI sector on different dimensions of the regional competitiveness.
- The factors that facilitate or hinder the use of CCI products / services in, cultural heritage and sustainable tourism in the region

The Report integrates individual findings partners reached through previously conducted regional level state of the art analyses.

It is organized in the following sections:

1) Introduction
2) External Environment
3) CCI Sector in the Region
4) CCI and Regional Competitiveness
5) Factors that facilitate or hinder the use of CCI products / services in cultural heritage and sustainable tourism.

At the beginning of every section the purpose of the section and its relation to the aim of the Report is presented. Also, a summary of findings on a project level is offered. Results partners reached in their individual, regional/country level state of the art reports are presented individually. Having in mind that partners come from six countries, different in many aspects, and that even partners from the same country belong to different regions, their individual perspective is important to be able to fully grasp all relevant specifics of the project area.

This Report helped identify several similarities and differences amongst the project's regions.

Common factors in most regions/countries relate to the following:

- All regions/countries have a rich cultural heritage

- Most face administrative obstacles related to
- Lack of financing support and opportunities has been identified
- Lack cooperation between cultural heritage institutions and CCI sector
- CCI businesses mostly lacks qualified workforce, clear strategy, and knowledge in business processes
- Uncertainty due to COVID-19 outbreak and its impact on tourism sector, hence CCI industries

Differences between regions/countries relate to the following:

- Mostly macroeconomic indicators, overall level of economic development of the region/country and hence the significance of CCI industries under such circumstances;
- Overall political and administrative organization influences the position of regions within countries and country organisation per se, hence different and sometimes overlapping authorities represent an obstacle to further development of CCI industries;
- Previous point also relates to the connection between tourism sector and CCI industries which then determines the overall share of such industries in a region/country;
- Differences in financial support per region/country also plays a significant role in development and potentials of CCI.

2. External environment

This section aims to provide a brief but comprehensive description of the external factors of the region's economic and policy environment that set the scene for the operation of the CCI sector and the activities of cultural heritage preservation-valorisation and sustainable tourism. The external environment is described in terms of:

- macroeconomic indicators representing the overall economic situation in the respective region;
- main sectors of economic activity in respective region; and
- existing regional policies on development, innovation and competitiveness with a focus on CCI, cultural heritage and sustainable tourism in respective region.

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Project level view

External environment	
Analysis of Emilia-Romagna Region	One of the fastest growing and most prosperous regions of Italy with high rates of employment. Region offers a blend of metropolitan historical attractions and beaches industries* with the highest share to total industries according to NACE are: manufactur.ing (automotive and Mechatronics, agri-food and construction industries)
Analysis of Friuli Venezia Giulia Autonomous Region	Similar to Emilia-Romagna Region, this region of Italy is also very prosperous, with high rates of employment and higher than average national GDP per capita industries* with the highest share to total industries according to NACE are wood-furniture sector, manufacturing and food and beverages industry.
Analysis of Slovenia	One of the fastest growing economies in CEE region and one of the countries with highest GDP per capita industries* with the highest share to total industries according to NACE are: manufacturing, wholesale and retail trade, and transport.
Analysis of Region of Western Greece	One of Greek affluent regions, 6th/13 in terms of the regional contribution to Greek GDP, great number of CCI, both private and public industries* with the highest share to total industries according to NACE are: Agri-food, tourism and wholesale and retail trade.
Analysis of Dubrovnik Neretva County	Measured by the development index, fifth (out of 20, + city of Zagreb) most developed county in Croatia. Even though unemployment rate in the county remains relatively high, in the past few years, the county has experienced in an increase in most tourism-related sectors (transport, real-estate, etc.) industries* with the highest share to total industries according to NACE are: tourism, agriculture and transport.
Analysis of Albania: Vlore region	As a country that was closed and under command economy for a long time, with a switch towards market economy, it was been catching up in terms of macroeconomic indicators with the rest of the region. Unemployment rates remain relatively high and economic growth sluggish. Increasing number of tourism-related industries with very large share of SME in total number of registered businesses industries* with the highest share to total industries according to NACE are: agriculture and trade
Analysis of BiH	Similar to the case of Albania, BiH macroeconomic indicators are similar to those in the region with relatively high unemployment rates (especially among youth) and under-performing levels of GDP growth.

	However, tourism industry is one of the fastest growing industries in the country and one of the most prosperous in the entire region industries* with the highest share to total industries according to NACE are: manufacturing and trade

* N.B. Please bear in mind that data might be incomparable due to regional/country level differences and comparisons.

2.1. Macroeconomic environment of the region

In terms of the macroeconomic environment of the region, partners provide a description of the overall economic environment of the region, based on basic quantitative indicators such as regional GDP, number of companies in the region, percentage of SMEs among all companies, employment level, other indicators that are important to understand the economic environment within which the CCI sector operates.

2.1.1. Italy: Emilia-Romagna Region (PP1: MCBO)

The macroeconomic trends of recent years, the current year and the following years confirm and strengthen the dominant role of the Emilia-Romagna economy within the national context[1].

GDP per capita in Emilia-Romagna is 25% higher than the national average. About two thirds of this difference is due to the higher employment rate[2], and the other third to a productivity gap. The difference in disposable income is lower than that in output, because of the redistributive effect of the tax wedge.

The Emilia-Romagna Region ranks first also with respect to the Europe 2020 Strategy. Compared to the national targets, the Region shows better indicators for employment rate (referred to population aged 20-64), the school drop-out rate, expenditure on R&D and higher education. The situation is also very good with regard to the population at risk of poverty and social exclusion. No data are available at regional level on the energy saving, energy efficiency and greenhouse gas

[1] Regional Document of Economy and Finance, 2020, p.3

[2] Difference in employment rate among data collection template (p …) and the data contained in the present paragraph due to the elaboration of Emilia Romagna Region; the data contained in the data collection template is the direct data from Eurostat

emission reduction targets. In 2018 the economy of the Emilia-Romagna Region continued to grow at a higher rate than the Italian economy overall. Definitive data are not yet available, but the latest estimates for 2018 indicate a growth in regional GDP of 1.4%. This would put our region at the top of the Italian growth table, alongside Lombardy.

In 2018 the Italian economy grew by 0.9%. Therefore, the region achieved a positive growth differential of no fewer than 50 base points. The regional GDP growth rate has exceeded the national figure ever since 2011, but the difference has rarely been so high.

In 2018, household disposable income is estimated to have grown by 2% in real terms compared to 2017. This continues to be reflected in a positive trend in consumption (+1%), although the increase was smaller than in the previous year. In this context, the Metropolitan city of Bologna plays a key role in the Regional Economic, contributing to the 25% of the total Regional GDP (ca. 41 bn EUR per year[3]). It counts more than 84.000 companies[4], which more than 99% are MSME[5]. The level of employment competes with the most advanced European realities, with an estimated unemployment rate of 4,5%[6]; with a benchmark value of 100 for Italy, the added value per inhabitant of MCBO is 142[7] (Emilia Romagna at 124).

The following table lists some main indicators for Both Emilia Romagna (NUTS 2) and MCBO (NUTS 3) territories.

Indicator	Value	Year	Source / Reference / Evidence
Regional GDP (Million EUR)	Emilia-Romagna (NUTS 2): 161.505,350	2018 (NUTS 2)	1 Eurostat 2 Eurostat

[3] Source: Eurostat
[4] Source: Official MCBO statistical site
[5] Chamber of commerce of Bologna (p.14)
[6] Source: Bologna's Chamber of Commerce provisional scenario (October 2019, p. 23)
[7] *Ibidem*, p.24

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	MCBO (NUTS 3): 40.838,830	2017 (NUTS3)	
Number of companies operating in the region	402.829 (NUTS 2) 84.192 (NUTS 3)	2018	Official MCBO statistical site
Number of SMEs	In terms of employees, 99,9% of total (NUTS 3): - 93,7% micro (0-9) - 5,3% small (10-49) - 0,9% Medium (50-249)	2018	Chamber of commerce of Bologna (p.14)
Level of employment in the region	69,6% (NUTS 2) 72,4% (NUTS 3)	2018	1 Official Emilia Romagna statistical site 2 Official MCBO statistical site
... (other indicators)	1 Number of enterprises in sector ATECO R (art, sport and entertainment) for NUTS 3: 1070 2 Number of youth enterprises (< 35 y.o.) NUTS 2: 30.123 3 Number of youth enterprises (< 35 y.o.) NUTS 3 : 6.047 4 Number of youth enterprises operating in sector ATECO R (art, sport and entertainment) for NUTS 3: 77	2018	1 Chamber of Commerce of Bologna (p.41) 2 Chamber of Commerce of Bologna (p. 8) 3 Chamber of Commerce of Bologna (p. 11) 4 Chamber of Commerce of Bologna (p. 24)

	5 Number of innovative start-ups in NUTS 3: 315		5 Chamber of commerce of Bologna (p.11)

Concerning the tourism economic sector, according to the Emilia-Romagna Annual Report 2019, in 2018 the tourist movement grew in Emilia-Romagna's accommodation facilities. Compared to 2017, arrivals grew by 3.7%, and visitors by 1.4%, without substantial differences between Italians and foreigners[8]. In recent years the tourist flows has significantly contributed to the metropolitan economy. In 2018 there were 6.129 companies active in the Housing and Catering sector, representing 7% of the total number of companies at the metropolitan level. Unlike the other sectors, this sector kept growing at metropolitan level considering the number of enterprises involved (+19% from 2009 to 2018). The overall number of enterprises, in the same period, has indeed decreased by 4%[9].

It is worth underlying that the housing and catering sector supported the metropolitan economy during the global crisis that caused the death of a huge number of enterprises. Also from the employment point of view, the number of employees in this sector was growing even in the presence of an overall decrease in the period 2008-2014, and with greater intensity in the following years.

Looking at the Emilia-Romagna Region, there are different tourist vocations and different degrees of maturity. In the overall data certainly weigh realities such as the Romagna Beaches. Focusing on metropolitan level, the tourism phenomena is quite recent, and more oriented to cultural and sustainable tourism. In this regard, the tourist destination “Bologna Metropolitana”, established by Regional law in 2016, aims to enhance tourism in the whole territory of Bologna and its specific features. The regional law assigned the function of tourist destination to the Metropolitan city of Bologna to carry out the administrative functions related to the tourist destination of the area. Three areas have been created as touristic destinations in the whole Region: the Destination Emilia, the Destination Romagna and the Destination metropolitan Bologna.

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8 https://statistica.regione.emilia-romagna.it/documentazione/pubblicazioni/documenti_catalogati/rapporto-annuale-turismo-2018

9 http://inumeridibolognametropolitana.it/studi-e-ricerche/rapporto-sul-turismo-nella-citta-metropolitana-di-bologna-anno-2018

Actions in the metropolitan area are proposed by the metropolitan city Destination Marketing Organization (DMO), Bologna Welcome, jointly identified by the Municipality and Metropolitan city of Bologna.

2.1.2. Italy: Friuli Venezia Giulia Autonomous Region (PP2: FVG AR)

In 2018, economic activity in Friuli Venezia Giulia Autonomous Region (FVG AR) grew by 1.1%, recording a positive contribution both of domestic demand (1.3%) and foreign demand (4.2%). All sectors have made a positive contribution regional economy, in particular manufacturing, which has been the most dynamic economic sector. The added value of production has increased 3.0%, well above expectations. Within the industrial sector, the added value of construction continued to increase (1.4%) thanks in part to a greater responsiveness of the residential property market. More subdued, though still positive, the dynamics added value of services, which grew by 0.8% in 2018.

Within the sector was particularly positive the contribution made by tourism (3.6% tourist attendance), transport (the handling of goods in the port of Trieste surpassed the record for freight handling in 2017) and financial services. The further improvement in the labor market (total labor units increased by 1.6% compared to 2017) helped the growth of household's disposable income (0.9%), generating moderately expansionary effects on consumption (0.7%). Investment dynamics were also positive (4.0%), supported by corporate liquidity and favorable credit supply conditions remain.

Regarding the indicators present in the following table, you can see that the regional GDP represent only the 2,2% of Italy GDP, but it is related to a small population of 1,2 million inhabitants. So socioeconomic conditions are higher than the national average with a GDP per capita also slightly higher than EU-28 average. Data related to the labor market and employment situation corroborate this judgment with a level of employment/unemployment higher/lower that the Italian average rates. Regarding the regional endowment skills, DFVG AR shows a distinctive feature of Italian labor force: a percentage of graduates distinctively lower that the EU-20 average coupled with a lower R&D expenditure as GDP percentage. However, these characteristics are offset by a widespread practice of process and product innovation, typical of a production system consisting almost exclusively of small and medium-sized enterprises[10].

Indicator	Value	Year	Source / Reference / Evidence
Regional GDP	38.020,6	2018	Eurostat Regions database
Number of companies operating in the region	83.215	2017*	ISTAT (National Statistical Institute) – Statistical Archive of Active Businesses (ASIA)
Number of SMEs	83.116	2017*	ISTAT (National Statistical Institute) – Statistical Archive of Active Businesses (ASIA)
Level of unemployment in the region	6,7	2018	Eurostat, Unemployment statistics at regional level
Level of employment in the region	66,3	2018	Eurostat, regional employment, LFS annual series
… (other indicators) [11]			
Per-capita GDP (PPS, EU28=100)	104	2017	EUROSTAT – elab. by the competent FVG AR Service, in "Region in Figures 2019[12]"
Long-lasting unemployment (% of total unemployment), EU28=43,2	48,0	2018	EUROSTAT – elab. by the competent FVG AR Service, in "Region in Figures 2019"
Long Life Learning EU28=11,1	11,3	2018	EUROSTAT – elab. by the competent FVG AR Service, in "Region in Figures 2019"

10 Macroeconomic Trends. November 2019, Publication by the Friuli Venezia Giulia Autonomous Region Directorate-General Planning service, strategic planning, management control, statistics and safety at work.
11 These should be potential indicators that describe economic environment of the study area.
12 https://www.regione.fvg.it/rafvg/export/sites/default/RAFVG/GEN/statistica/FOGLIA56/allegati/Regione_in_cifre_2019.pdf

Graduates 25-64 years EU28=32,3	21,1	2018	EUROSTAT – elab. by the competent FVG AR Service, in "Region in Figures 2019"
R&D expenditure (% GDP)	1,57	2017	EUROSTAT – elab. by the competent FVG AR Service, in "Region in Figures 2019"

**The data at the regional level refer to two years earlier than the national level (2020/18; 2019/2017; etc.). http://dati.istat.it/*

2.1.3. Slovenia (PP3: UIRS)

Slovenia's GDP value in 2018 was 45,755 bn EUR[13]. The volume of growth from was 4.1, while GDP per capita for 2018 was 22.083,00 EUR[14]. The government debt as a share in GDP was 66,1% at the end of 2019 and it was in decline in recent years. At the end of 2019, the Government surplus as a share in GDP was 0,5%. However, the situation in 2020 got worse due to Covid-19 lockdown. The first data for the GDP growth for the first quarter of 2020 shows a significant drop of 3,4% (adjusted by season) or 2,3% (unadjusted by season)[15] which was the first negative change of the GDP since the 2012.

The total number of companies (public and private) in Slovenia in first quarter of 2020 was 220.490 as stated in the Business register of Slovenia[16]. In 2018, there were approx. 190.000 micro companies (0-9 employees), 7.700 small (10-49 employees), 2.200 medium (50-249) and only 363 (more than 250 employees) in Slovenia[17]. By that information SME's represent only 5% of total companies in Slovenia. The total number of companies however also includes a large number (148,261) of so-called self-employed person/business entities. Taking into consideration only the companies of 2 or more employees, the percentage of SME would then be around 19 percent.

[13] https://www.stat.si/StatWeb/en/Field/Index/1/29

[14] https://www.stat.si/StatWeb/en/Field/Index/1

[15] https://www.finance.si/8962290/Slovenski-BDP-v-prvem-cetrtletju-upadel-za-34-odstotka?cctest&

[16] https://www.ajpes.si/Registri/Poslovni_register/Porocila

[17] https://pxweb.stat.si/SiStatDb/pxweb/sl/20_Ekonomsko/20_Ekonomsko__14_poslovni_subjekti__01_14188_podjetja/1418801S.px/

Seasonally adjusted unemployment in Slovenia in February 2020 dropped to record low 3,6%, and went up again in March 2020 to 3,8 due to Covid-19 lockdown[18]. It is expected the unemployment rate will grow in the following months due to economic crisis followed by the Covid-19 lockdown, as latest data for May 2020 shows 14.352 new unemployed workers[19].

2.1.4. Greece: Western Greece (PP4: Patras Science Park)

The 2018 Regions of Western Greece GDP, according to the EUROSTAT latest data, is 8.32bn EUR, rating the Region at the 6th place out of 13 Regions in Greece. According to the Hellenic Statistical Authority, the total number of companies operating in the region is 97,639 employing 182.058 employees with an employment rate in the region up to 75.9%. Almost 100% of the companies in the Region (as well as the entire country) are considered to be Small and Medium Enterprises but the exact percentage cannot be identified, due to the lack of published data for the Region. Thus, it is safe to say that the entire Companies are considered as SMEs

Indicator	Value	Year	Source / Reference / Evidence
Regional GDP	**8,321.79 mil**	2018	Eurostat (Table code: TGS00003)
Number of companies operating in the region	**97,639**	2017	Hellenic Statistical Authority
Number of SMEs	**97,639**	2017	
Level of employment in the region	**75.9%**	2019	Eurostat (Table code: TGS00010)
Number of employees in Region	**182,058**	2017	Hellenic Statistical Authority

[18] https://ec.europa.eu/eurostat/statistics-explained/index.php/Unemployment_statistics

[19] https://www.uradni-list.si/e-bilten/novica/stevilo-brezposelnih-za-skoraj-petino-vecje-kot-v-enakem-obdobju-lanskega-leta

2.1.5. Croatia: Dubrovnik Neretva County (PP6: DUNEA)

GDP per capita, calculated on the basis of the purchasing power parity of currencies (adjusted for price levels) in the County in the observed period increased from 43% to 58% compared to the EU average and this increase is significantly higher than the average of Croatia and Adriatic Croatia. However, most of the new EU members achieved more dynamic growth, so the County lags far behind the level of development of Poland and Slovakia and is almost equal to Romania.

According to the Development Index from 2013 (Ministry of Regional Development and European Funds), DNC is more developed than the Croatian average. Its development index is 120.84, with the average for the whole of Croatia being 100%, so that the County ranks fifth in the group of 20 counties and the City of Zagreb. Although the per capita income is 11% below the average, the dynamics and education of the population are favourable, and unemployment is lower than the Croatian average. There are extremely large differences within the County and four municipalities (Ston, Kula Norinska, Slivno and Zažablje) have values of this index below 75% of the Croatian average.

Structural features of development were marked by a significant increase in the share of otherwise leading activities of services related to trade, transport and tourism with a share of 38.1% of GDP in 2013, and in almost all other activities, except public administration, a decrease is noticeable. This points to the growing development dependence of Dubrovnik Neretva County (DNC) on a decreasing number of activities.

More detailed data show a trend of long-term decline in the share of manufacturing and agriculture, forestry and fisheries. After a significant increase in the share until 2008, construction returned to a share close to the initial one. The real estate business recorded an increase in the share, which is related to the growth of tourism activities. The share of professional, scientific, technical, administrative and auxiliary service activities also increased. Tourism activities (defined in a narrower sense) have a solid growth of solid dynamics, but it is not enough to start the overall economy of DNC.

The largest share in the structure of gross value added in 2013 falls on wholesale and retail trade, transport and storage, accommodation, food preparation and service, followed by public administration and real estate, followed by construction and professional, scientific, technical, administrative and ancillary service activities. More than 80% of GDP (82.2%) is generated in service activities, which is an increase of 5% compared to 2007 when the service sector generated 75% of GDP. Unlike most other counties, the industry in DNC has a small share in the overall structure of gross value added.

According to the number of companies per 10,000 inhabitants, DNC, with 280 companies, is well above the average of Croatia, which has 234 companies. There were newly opened companies in DNC in 2014 328, and only 6 were deleted from the register.

Small and medium-sized enterprises are the largest employer and contribute significantly to gross domestic product and exports. According to the number of companies per 10,000 inhabitants, DNC with 293 companies is above the average of the Republic of Croatia, which has 251 companies, according to data for 2015. In the structure by size, almost 98% are small companies (2,856 in 2015), and 2% medium and large companies (45 medium and 9 large in 2015) The number of small companies decreased by about 20% in the period from 2008 to 2015. According to the activities, most small companies are in wholesale and retail trade (747 in 2015), accommodation and food service activities (523), in construction (428), in real estate (270), in manufacturing (236). Medium-sized companies are the most numerous in providing accommodation and food preparation and serving. Most companies are in the City of Dubrovnik, 54% small, 65% medium, followed by Metković, Konavle and Ploče. There are large companies in Dubrovnik 4, Ploče 1 and Konavle 1.

Of the total number of crafts, about 18% work only during the tourist season. As far as the structure of crafts is concerned, it is certain that service crafts, crafts related to catering and tourism, and the transport of people and things dominate. The data correlate with tourism, the dominant industry in DNC. Trade is recording a continuous slight decline as a result of an increase in the number of larger retail chains displacing small retail businesses.

Changes in the structure of crafts show that in the five-year period almost all production trades, except food and beverages, recorded a decrease, especially trades in trade. The increase in the number is recorded by all service trades, especially large trades in catering and tourism. Most crafts are in the City of Dubrovnik, about 40% of the total number of crafts in DNC.

The registered unemployment rate in DNC in 2015 was high at 15.9%, but below the national average 16.7%. In the period 2009-2015. the number of unemployed increased by 13.2%, while at the national level a decrease of 2.1% was recorded. However, when comparing the data at the end of the year, the large number of persons newly registered in the CES records due to the end of the tourist season should also be taken into account. The share of the unemployed in the labor force in DNC and Croatia is still higher than in the European Union. Seasonal employment in tourism has a special impact on unemployment and employment. In the last 10 years, the number of employed seasonal workers from the entire County has been constantly increasing.

Regarding the harmonization of the structure of education of the unemployed with the needs of the labour market, before the crisis there was a lack of certain professional profiles in catering (waiter, cook, pastry chef) and construction (bricklayer, carpenter, armourer). In recent years, this shortcoming is still pronounced in the hospitality and healthcare sector (doctors of medicine, nurses and masters of pharmacy).

In the area of DNC in 2014, there were 47,075 active persons (sum of active insured persons of HZMO and the total number of unemployed in the CES records). The number of inactive persons at the end of 2014 was 33,729. The activity rate of the population of DNC at the end of 2014 was 58.3% which is slightly higher compared to the Republic of Croatia, which, according to the Labour Force Survey, in the last quarter of 2014 amounted to 52.6%. In general, it can be argued that unemployment is not as numerous and with a large share in any relevant contingent as the inactivity of the population itself, which clearly confirms the informal activity primarily in tourism-related activities.

A total of 37,829 employees were registered in DNC, and in 2015 there were 39,108 of them, according to the Croatian Pension Insurance Institute as at 31 December 2014. In 2014, the share of employees in legal entities was 81.4%, in natural persons 8.2%, craftsmen 5.9%, individual farmers 1.2% and independent professional activities 3.3%.

The share is worryingly low, as is the unfavourable dynamics in service activities based on knowledge and technology (professional, scientific and technical activities, financial activities and information and communication security activities). These activities have a share of only 7.9% in the total employment of the County, compared to 10.5% at the level of Croatia, with a decrease in employment in the observed 5 years by 2%, while at the same time employment in Croatia increased by 5%.

In respect to the Covid-19 pandemic, the Croatian Bureau of Statistics has issued “Effects of Covid-19 pandemic on social-economic indicators” incorporating following aspects: BDP, prices, construction, industry, foreign trade, population, transport, commerce, tourism, services, employment and salaries. BDP real growth rate in first trimester of 2018 was 2,2 percent, in 2019 4,1 percent and in 2020 0,4 percent. The total seasonally and calendar-adjusted turnover of industry in the Republic of Croatia in March 2020, compared to February 2020 decreased by 17 percent. Among the Member States of the European Union to which the Republic of Croatia exports the most goods in the first two months of 2020, there was a decline in exports to Germany by 9.1% and to Italy by 10.8%, while the decline in exports to Slovenia was 0.2% in Compared to the same period in 2019, the decline in exports in the mentioned period was also recorded among the most important trading partners outside the European Union, and the decline in exports to Serbia amounted to 7.8%, while in Bosnia and Herzegovina this decline amounted to 7.2%. However, in April 2020 compared to the same months last year according to the original indices, only retail in the internet increased by 19,8 percent while all other trade professions recovered a decrease in turnover. In March 2020, only 104.000 tourists’ arrivals and 290.000 overnight stays were realized in commercial accommodation, which is a decrease in tourist arrivals by 76.8 percent and decrease in overnight stays by 69.3 percent compared to March 2019. In March 2020, there was a record decline in turnover from service activities on an annual basis after a continuous growth of 52 months since November 2015. Compared to the same month last year, calendar adjusted turnover from services fell by 10.5%, which is the largest decline in turnover activities on an annual basis since 2011, the beginning of the measurement of monthly series.

Indicator	Value	Year	Source / Reference / Evidence
Regional GDP (million EUR)	1.528	2017	https://digitalnakomora.hr/home
Regional GDP per capita	12.575	2017	https://digitalnakomora.hr/home
Number of companies operating in the region	131.116	2018	https://digitalnakomora.hr/home
Level of employment in the region	5510	2019	https://www.hzz.hr/content/stats/0520/HZZ_stat_bilten_05_2020.pdf

2.1.6. Albania: Region Vlora (PP7: RDNC)

Albania, a formerly closed, centrally planned state, is a developing country with a modern open-market economy. Albania managed to weather the first waves of the global financial crisis but, the negative effects of the crisis caused a significant economic slowdown. Since 2014, Albania's economy has steadily improved and economic growth reached 3.8% in 2017. However, close trade, remittance, and banking sector ties with Greece and Italy make Albania vulnerable to spillover effects of possible debt crises and weak growth in the euro zone.

Remittances, a significant catalyst for economic growth, declined from 12-15% of GDP before the 2008 financial crisis to 5.8% of GDP in 2015, mostly from Albanians residing in Greece and Italy. The agricultural sector, which accounts for more than 40% of employment but less than one quarter of GDP, is limited primarily to small family operations and subsistence farming, because of a lack of modern equipment, unclear property rights, and the prevalence of small, inefficient plots of land. Complex tax codes and licensing requirements, a weak judicial system, endemic corruption, poor enforcement of contracts and property issues, and antiquated infrastructure contribute to Albania's poor business environment making attracting foreign investment difficult. Since 2015, Albania has launched an ambitious program to increase tax compliance and bring more businesses into the formal economy. In July 2016, Albania passed constitutional amendments reforming the judicial system in order to strengthen the rule of law and to reduce deeply entrenched corruption.

Albania's electricity supply is uneven despite upgraded transmission capacities with neighboring countries. However, the government has recently taken steps to stem non-technical losses and has begun to upgrade the distribution grid. Better enforcement of electricity contracts has improved the financial viability of the sector, decreasing its reliance on budget support. Also, with help from international donors, the government is taking steps to improve the poor road and rail networks, a long standing barrier to sustained economic growth.
Inward foreign direct investment has increased significantly in recent years as the government has embarked on an ambitious program to improve the business climate through fiscal and legislative reforms. The government is focused on the simplification of licensing requirements and tax codes, and it entered into a new arrangement with the IMF for additional financial and technical support. Albania's three-year IMF program, an extended fund facility arrangement, was successfully concluded in February 2017. The Albanian Government has strengthened tax collection amid moderate public wage and pension increases in an effort to reduce its budget deficit. The country continues to face high public debt, exceeding its former statutory limit of 60% of GDP in 2013 and reaching 72% in 2016.

According to the INSTAT data the regional GDP for Vlora and Fier for 2018 is 2089090.57. The number of companies operating in the region is 32117 and the number of SME-s is 31.763 that correspond to the 98.9% of the companies in the region. The level of employment in the region is 156.144 according to the INSTAT data for the year 2018.

2.1.7. Bosnia and Herzegovina (PP8: SEBS)

Bosnia and Herzegovina (BiH) is an upper middle-income country which has accomplished a great deal since the mid-1990s. Today, it is an EU potential candidate country and is now embarking on a new growth model amid a period of slow growth and the global financial crisis. Growth averaged at a moderate rate of 3 percent from 2014 to 2018. However, at the current growth rate, income convergence with advanced European countries will take 50 years, all else. Since the economy still lacks competitiveness, the government launched a structural reforms program for 2019-2021[20] to boost private investments and exports. According to data by the World Bank, GDP was valued at

[20] https://ec.europa.eu/neighbourhood-enlargement/sites/near/files/bih_erp_2019-2021.pdf

EUR 17.910 million in 2018. According to the updated IMF forecasts from 14th April 2020, due to the outbreak of the COVID-19, GDP growth is expected to fall to -5% in 2020 and pick up to 3.5% in 2021, subject to the post-pandemic global economic recovery[21].

The table below lists some main indicators for Bosnia and Herzegovina.

Indicator	Value	Year	Source / Reference / Evidence
GDP Region (Million EUR)	17. 910	2018	[The World Bank]
Number of companies operating in the region	75 714 (including enterprises and entrepreneurs)	2017	[Agency for Statistics of Bosnia and Herzegovina] (p.57)
Number of SMEs	Number of enterprises by classes of turnover: small enterprises: 35. 790 medium enterprises: 509 large enterprises: 107 No data (The data is not available in the annual financial report): 612 Number of enterprises by classes of employees: small enterprises: 34.412 medium enterprises: 2.178 large enterprises: 373	2018	[Agency for Statistics of Bosnia and Herzegovina] (p. 63)

[21] https://www.imf.org/en/Countries/BIH#featured

	No data (The data is not available in the annual financial report) : 55		
Level of employment in the region	Unemployment, total (% of total labor force) (national estimate): 15.7% Employment to population ratio, 15+, total (%) (modeled ILO estimate) : 37.8%	2019	The World Bank The World Bank
… (other indicators)	The number of enterprises and entrepreneurs in Art, Entertainment and Recreation: 252 Unemployment, youth total (% of total labor force ages 15-24) (national estimate): 33.792% Research and development expenditure (% of GDP) - Bosnia and Herzegovina: 0.199 Foreign direct investment, net inflows (% of GDP) - Bosnia and Herzegovina: 2.423	2018 2019 2018 2018	Agency for Statistics of Bosnia and Herzegovina The World Bank

The macroeconomic environment in Bosnia and Herzegovina remains stable, but job creation is inadequate, and the income gap with the EU remains wide. BiH has been making progress in reducing internal and external imbalances in recent years, thanks to a prudent fiscal position, driven in part by financing constraints, and a stable monetary anchor provided by the currency board. However, job creation in the private sector has been limited, and unemployment remains high—particularly among the youth. Young people are most affected by unemployment in BiH, where more than one-third of people between the ages of 18 and 30 are neither working nor studying.

Besides, due to the poor business environment and institution quality, the rate of investment in low. Infrastructure bottlenecks are particularly severe, undermine the country's attractiveness to foreign investment and private sector development, and pose constraints on growth potential. Foreign direct investment, net inflows (% of GDP) was 2.4% in 2018. Several factors explain the disappointing FDI performance relative to country's potential, including complex institutional structure, the lack of long-term planning and strategies for economic development, inefficiencies and duplications in the public administration, labour legislation, and high severance payments, a limited tradition in private enterprise formation and entrepreneurship[22].

According to the IMF, tourism is increasingly driving the surplus in the service account. Tourism arrivals have grown on average in double-digit numbers over the last ten years, as the number of source countries has expanded. The tourism and travel industry contributed to 9.3 % of country's GDP in 2019, as stated by the World Travel &Tourism Council (WTTC).

In terms of the business environment, the main weaknesses are high business operating costs for firms, the institutional fragmentation and lack of a coordinated approach to ease the business environment, limited progress in introducing digital transformation and improving integrated e-services for businesses, the lack of investment in innovative activities. It should be noted that the enterprise sector is not geared to provide the dynamism required to support private sector growth. An incomplete transition to a market economy has hampered the growth of the private sector. The country misses new fast-growing companies that can successfully compete internationally, be part of a regional value chain, and boost productivity. The new business density is the lowest in the

[22] https://unctad.org/en/PublicationsLibrary/diaepcb2015d1_en.pdf

region of Western Balkan[23](1.13 percent compared to 1.76 percent in Serbia, 1.35 percent in Albania, 3.14 percent in Kosovo, 3.88 percent in North Macedonia, or 6.7 percent in Montenegro).

Bosnia and Herzegovina is ranked 90th on the 'Ease of Doing Business' list, as the second worst-ranked country in Europe, with an index score of 65.4. San Marino is the only European country ranked below BiH (92nd, an index score of 64.2).

2.2. Main sectors of economic activity in the region

In terms of the main economic sectors, partners provided a description of the main economic sectors that drive development in the region and their contribution to regional economy and development. In doing so, partners reported on at least the following quantitative indicators: contribution of each economic sector to the regional GDP, contribution of each economic sector in regional employment, number of companies operating in each sector and percentage of SMEs among companies in each sector.

2.2.1. Italy: Emilia-Romagna Region (PP1: MCBO)

Emilia-Romagna's Smart Specialization Strategy (S3) follows the main pillars of the regional economy and highlights the main high-potential sectors which need to be empowered[24]; the strategy identifies 5 major production areas for regional innovation policies to focus on: 3 of them - agro-food, mechatronics and motoring, buildings - represent the current pillars of the regional economy, the other 2 - health and well-being, culture and creativity - they are instead productive sectors with high potential for expansion and change also for other components of the production system. These areas are set inside a 4-priority agenda, structured as it follows:

[23] http://documents1.worldbank.org/curated/en/395811590667406494/pdf/Bosnia-and-Herzegovina-Growth-and-Jobs-Reform-Priorities-for-Promoting-Better-Private-Sector-Jobs.pdf

[24] https://ec.europa.eu/growth/tools-databases/regional-innovation-monitor/policy-document/emilia-romagna-regional-smart-specialisation-strategy

1. Reinforcing leadership in the largest consolidated clusters of the region, in order to increase their competitiveness on the global market and maintain the relevant direct and indirect employment:
    A. Mechatronics and Automotive,
    B. Agri-food,
    C. Construction.
2. Accelerating growth of new clusters with high growth potential and capacity of generating highly qualified employment:
    A. Health and Wellness industries,
    B. Cultural and Creative industries.
3. Orienting innovation processes towards the main drivers of change
    A. Sustainable development;
    B. Information society,
    C. Quality of people life.
4. Promoting service innovation, both for increasing competitiveness of the service industries, and for "servitization" of manufacturing industries and other traditional service industries, basically through advanced logistics, software and other knowledge intensive services.

At Metropolitan level, 9% of companies operates in agriculture and fishery, 25% in the industry sector and more than 63% the services sector, (3% unclassified)[25].

Breaking down the Industry sector[26], the dominant role is made by constructions (More than 13.600 companies, 58% of the sector). Manufacturing (more than 9.600 companies, 40% of the sector),

[25] https://www.bo.camcom.gov.it/sites/default/files/statistica-e-studi/imprese-totale/ImpreseBO2018.pdf, (p.25)
[26] *Ibidem*, p.35 ss.

shows its main numbers in mechanics (ca. 4.500 companies) and in the fashion system (ca. 1.300 companies).

In the service sector[27], the main representative is composed by commerce, with more than 21.000 companies, representing 36% of the total sector. Hotels/Restaurants and real estate companies are also relevant, with more than 7.000 companies each. The sector of art, entertainment and sport (ATECO R) counts 1.070 companies, 1,8% of the total sector. Both the relevance of the Regional S3 sectors and the number of active enterprises at Metropolitan level is also reflected in the contribution of the different sectors to the Regional and Metropolitan GDP. The different contribution in each sector in terms of added value is shown in the table below (highlighted in bold).

Contribution of each economic sector in regional GDP (in million EUR), years 2017-2018

Indicator used: Gross added value at basic prices by NUTS 3 Regions, in million EUR

NACE_R2/GEO	Emilia-Romagna		MCBO
	2017	2018	2017
Total - all NACE activities	141.372,5	144 849.7	36.634,8
Agriculture, forestry and fishing	3.631,8	3 670.6	473,7
Industry (except construction)	38.309,7	40 208.9	8.644,6
Manufacturing	**35.237,4**	**	**7.781,7**
Construction	**5.352,2**	**5 617.4**	**1.175,3**
Wholesale and retail trade; transport; accommodation and food service activities; information and communication	**32.409**	**32 755.2**	**9.411,6**
Wholesale and retail trade, transport, accommodation and food service activities	28.682,4	**	7.632,3
Information and communication	3.726,6	**	1.779,3

[27] Ibidem, p.41 ss.

Financial and insurance activities; real estate activities; professional, scientific and technical activities; administrative and support service activities	38.479,3	39 157.3	10.461,1
Financial and insurance activities	6.533,2	**	1.877,8
Real estate activities	**18.920,8**	**	**4.459,8**
Professional, scientific and technical activities; administrative and support service activities	13.025,2	**	4.123,4
Public administration and defence; compulsory social security; education; human health and social work activities; arts, entertainment and recreation, repair of household goods and other services	23.190,6	23 440.3	6.468,5
Public administration, defence, education, human health and social work activities	17.735	**	5.115,5
Arts, entertainment and recreation; other service activities; activities of household and extra-territorial organizations and bodies	**5.455,6**	**	**1.353**

Source: Eurostat; Istat

Also the distribution of workers[28] gives two useful information:

- The first one, is the confirm of manufacturing (especially mechanics and mechatronics) and food activities as pillars of both Regional and Metropolitan level also in terms of number of employees; in fact, the two sectors together cover 47% of the Metropolitan workforce and almost 50% of the Regional one.
- The second one, is the emersion of a relatively low number of employees (in comparison to their contribution to GDP) in the construction and real estate sectors, and a relatively high number of employees in the Arts, entertainment and recreation sector.

[28] Source Istat, link available in the following table

The following table shows the number of employees for all NACE activities for NUTS 2 and NUTS 3 levels, highlighting the economic pillars and the arts sector in bold.

Contribution of each economic sector in regional employment (in million EUR), years 2017-2018

Indicator used: Employment by NUTS 3 Regions, in thousand persons

NACE_R2/GEO	Emilia-Romagna		Bologna
	2017	2018	2017
Total - all NACE activities	2,130.3	2 173.1	532.4
Agriculture, forestry and fishing	55.8	50.4	6.04
Industry (except construction)	478,0	497.8	104,0
Manufacturing	**455.4**	******	**98.9**
Construction	**120.7**	**122.7**	**26.4**
Wholesale and retail trade; transport; accommodation and food service activities; information and communication	**600.6**	**605.9**	**151,0**
Wholesale and retail trade, transport, accommodation and food service activities	555.6	**	132.4
Information and communication	45,0	**	18.06
Financial and insurance activities; real estate activities; professional, scientific and technical activities; administrative and support service activities	328.9	347.3	98.7
Financial and insurance activities	56.2	**	16.07
Real estate activities	**16.05**	******	**4.01**
Professional, scientific and technical activities; administrative and support service activities	256.2	**	77.9
Public administration and defence; compulsory social security; education; human health and social work activities; arts, entertainment and recreation, repair of household goods and other services	546.3	549.0	145.9
Public administration, defence, education, human health and social work activities	348.2	**	96.8

Arts, entertainment and recreation; other service activities; activities of household and extra-territorial organizations and bodies	**198.1**	**	**49.1**

Source: Eurostat; Istat

Finally, another typical aspect of the local economy, in absolute coherence with Italy as a whole (especially the north-eastern part), is the total dominance of micro enterprises (1-9 employees) all over the Regional and Metropolitan territory. The table below shows the repartition of workers in function of the dimension of the enterprises, both for Emilia-Romagna and for MCBO.

Number of companies operating in each sector, year 2017 (latest year available), source Istat (missing activities A and O)										
NACE_R2/GEO	Emilia-Romagna					MCBO				
	0-9	10-49	50-249	250 and over	total	0-9	10-49	50-249	250 and over	total
Total - all NACE activities (excluded A and O)	345.830	18.293	2.300	439	366.862	82.448	4.149	591	120	87.308
B: mining and quarrying	87	18	4	1	110	11	3	1	..	15
C: manufacturing	27.269	6.782	1.079	207	35.337	5.520	1.460	255	48	7.283
D: electricity, gas, steam and air conditioning supply	811	32	8	2	853	166	9	1	2	178
E: water supply sewerage, waste management and remediation activities	417	124	28	10	579	80	17	4	2	103
F: construction	42.737	1.487	80	16	44.320	8.401	333	18	4	8.756
G: wholesale and retail trade repair of motor	77.774	3.202	330	45	81.351	17.032	732	83	16	17.863

vehicles and motorcycles										
H: transportation and storage	11.397	955	167	39	12.558	3.210	199	42	11	3.462
I: accommodation and food service activities	23.416	2.431	62	7	25.916	4.511	499	19	2	5.031
J: information and communication	7.993	489	84	10	8.576	2.353	130	33	6	2.522
K: financial and insurance activities	7.626	145	23	19	7.813	1.978	46	6	7	2.037
L: real estate activities	27.054	71	4	..	27.129	6.048	24	1	..	6.073
M: professional, scientific and technical activities	60.838	819	94	8	61.759	17.642	235	35	3	17.915
N: administrative and support service activities	9.942	678	138	34	10.792	2.821	193	34	13	3.061
P: education	2.496	126	16	..	2.638	777	27	7	..	811
Q: human health and social work activities	23.338	387	126	35	23.886	6.836	120	43	5	7.004
R: arts, entertainment and recreation	5.837	219	23	3	6.082	1.447	30	5	..	1.482
S: other service activities	16.798	328	34	3	17.163	3.615	92	4	1	3.712

2.2.2. Italy: Friuli Venezia Giulia Autonomous Region (PP2: FVG AR)

The main economic specializations in the FVG Autonomous region, identified in the Regional Operational Programme (ROP) 2014-2020 are the following ones:

- Wood-furniture sector
- Manufacture of metal products
- Manufacture of machinery and equipment
- Food and Beverage Industry
- ICT
- Metallurgy
- Shipbuilding

However, no publications are available for this sector detail and ad hoc extraction of on-line data was carried out. The sectoral GDP figure is not produced by the National Statistical Office (ISTAT); the only aggregate data provided with sectoral detail at territorial level NUTS-2 is the Added Value. Regional data are released against a reference period usually two years earlier than the national one. The data shown here refer to the January 2020 edition. The next edition of the data will be June 2020.

From the table below it can be inferred that the three most relevant sectors, in terms of contribution to regional added value at current prices, are the Manufacture of machinery and equipment, the Manufacture of metal products, wood furniture and ICT, where, unlike the other sectors considered in the table, the ICT sector not only considers the production activity but also service activities (telecommunication services; software production, IT consultancy and related activities; information services and other IT services such as data processing, web portals, etc.).

The sectors shown in the table represent 15.8% of the Regional Added Value. In the same reference year (2017), the aggregate macro-sector of cultural and creative enterprises contributed 979.8 million EUR to the regional added value. The system of companies sees the absolute prevalence of companies with less than 250 employees and only in the case of metallurgy this percentage is below the 98% threshold.

Indicator	Value	Year	Source / Reference / Evidence
Contribution of Wood-furniture sector to the regional Added Value (in million EUR)	908,3	2017	ISTAT dataset: Economic results of enterprises – regions*
Contribution of Wood-furniture sector in regional employment (in thousand)	18,04	2017	“
Number of companies operating in Wood-furniture sector (in thousands)	1,93	2017	“
Percentage of SMEs among companies Wood-furniture sector	99,6%	2017	ISTAT dataset: Companies and Employees**
Contribution of ICT to the regional Added Value (in million EUR)	886,3	2017	ISTAT Territorial Accountings [29]
Contribution of ICT in regional employment (in thousand)	9,4	2017	“
Number of companies operating in the ICT sector (in thousands)	2,48	2017	“
Percentage of SMEs among companies in ICT	99,9%	2017	ISTAT dataset: Companies and Employees**
Contribution of Manufacture of metal products to the regional Added Value (in million EUR)	1.122	2017	“
Contribution of Manufacture of metal products in regional employment (in thousands)	18,1	2017	“
Number of companies operating in Manufacture of metal products (in thous.)	1,47	2017	“

[29] Source cited in “Information and communication technology in the economy of Friuli Venezia Giulia”, Udine and Pordenone Chamber of Commerce, Study Centre - Statistics and Prices Office. Udine and Pordenone Chamber of Commerce, Study Centre - Statistics and Prices Office. Report prepared by M.Cappello and M.Passon, February 2020.

Percentage of SMEs among companies in Manufacture of metal products	99,5%	2017	ISTAT dataset: Companies and Employees**
Contribution of Metallurgy to the regional Added Value (in million EUR)	624	2017*	"
Contribution of Metallurgy in regional employment (in .000)	5,8	2017	"
Number of companies operating in Metallurgy (in .000)	0,08	2017	"
Percentage of SMEs among companies in Metallurgy	91,5%	2017	ISTAT dataset: Companies and Employees**
Contribution of Manufacture of machinery and equipment in regional GDP (in million EUR)	1.216	2017*	"
Contribution of Manufacture of machinery and equipment in regional employment (in thousand)	16,6	2017	"
Number of companies operating Manufacture of machinery and equipment (in thousands)	0,6	2017	"
Percentage of SMEs among companies Manufacture of machinery and equipment	98,3%	2017	ISTAT dataset: Companies and Employees**
Contribution of Food and Beverage Industry to the regional Added Value (in million EUR)	538	2017*	"
Contribution of Food and Beverage Industry in regional employment (in thousand)	7,95	2017	"
Number of companies operating in Food and Beverage Industry (in thousands)	0,9	2017	"
Percentage of SMEs among companies in Food and Beverage Industry	99,6%	2017	ISTAT dataset:

			Companies and Employees**
… (other indicators)[30]			"

*http://dati.istat.it/OECDStat_Metadata/ShowMetadata.ashx?Dataset=DCSP_SBSREG&ShowOnWeb=true&Lang=it
**http://dati.istat.it/OECDStat_Metadata/ShowMetadata.ashx?Dataset=DICA_ASIAUE1P&ShowOnWeb=true&Lang=it

2.2.3. Slovenia (PP3: UIRS)

The most important sectors of Slovenia's economy in 2016 were industry (27.6 %), wholesale and retail trade, transport, accommodation and food services (20.7 %) and public administration, defence, education, human health and social work activities (16.9 %). Intra-EU trade accounts for 75% of Slovenia's exports (Germany 19%, Italy 10% and Austria 7%), while outside the EU 4% go to Serbia and 3% to Bosnia and Herzegovina. In terms of imports, 71% come from EU countries (Germany 17%, Italy 13% and Austria 10%), while outside the EU 5% come from China and 4% from Turkey[31].

The Slovenian economy recovered quickly after 2014 and its competitive position improved as well. As economic growth accelerated, the gap to the EU average in terms of per capita GDP declined post-2016, but it remains wider than before the crisis. The general government balance and the stability of the financial system have shown strong improvements. The improvement of the competitive position was driven by cost-efficiency as well as non-cost factors of competitiveness, which has resulted in higher export market share and better integration in global value chains. Nevertheless, given the relatively low investment rate in the years of growth, productivity gains have been slower than in the pre-crisis period and insufficient to bridge the considerable gap to more developed countries. Moreover, the trends in research and development and innovation, which should form the bedrock of sustainable productivity growth, have been mostly unfavorable. Creation of new companies, which represent the potential for the transfer of know-how and innovation into practice, picked up but remains low by international standards. Since productivity is

[30] These should be potential indicators that describe the main economic sectors of the study area.
[31] https://europa.eu/european-union/about-eu/countries/member-countries/slovenia_en

a key long-term factor determining economic development and living standards, in particular against the backdrop of demographic change, systematic investments in the strengthening of innovation capacity and digitalization represent a key development challenge for Slovenia.

Economic growth accelerated in 2014–2017 before gradually slowing in 2018, though even that year it remained above the EU average. Following a sharp decline during the crisis, GDP growth has exceeded the euro area average since 2014, which has resulted in a narrowing of the development gap measured with per capita GDP at purchasing power parity post-2016. Post-crisis GDP growth has been significantly affected by increased foreign demand, which has in turn been driven to a significant extent by stabilisation in the euro area supported by measures taken by the EC and in particular the ECB. Combined with the concomitant improvement in the competitiveness of exporters, the favourable impulse from the international environment supported the relatively high export growth.

Since 2014 domestic consumption growth has also gradually picked up, as a result of the spill-over of external growth factors to the domestic market and, crucially, the effects of implemented measures, in particular the bailout of the banking system and the gradual fulfilment of fiscal commitments. Both these factors improved Slovenia's standing in financial markets and hence the financing conditions for corporates and the government, which in turn strengthened business and consumer confidence and also helped revive activities focused on the domestic market. Growth of private consumption has been affected by a gradually improving labour market and significant strengthening of consumer confidence, but household spending remains moderate as the savings rate increases.

Expansion of investments in machinery and equipment has been driven by high utilisation of capacity and by improved conditions for financing and growth of own funds as company bottom lines have improved. In mid-2016 housing investment also began to recover, having dropped by almost 60% during the crisis; a year later investments in civil engineering works rebounded as well. Overall, infrastructure investments post-2014 were significantly affected by the dynamics of the drawing of EU funds towards the end of the previous and during the transition to the new multiannual financial framework. The economic recovery has not led to a substantial increase in consumer prices. Services prices have been growing at a slightly brisker pace as household spending rises, but other prices are more strongly influenced by external factors, where inflationary pressure is again easing. In conditions of mainly export-driven economic growth, very gradual recovery of investment activity and extensive deleveraging of banks and companies, a surplus has formed post-2012 on the current account of the balance of payments. By 2018 it had risen to 7% of GDP. In the labour market, the favourable economic conditions facilitated a rapid recovery of employment, which exceeded the pre-crisis level in 2018, whereas wage growth did not start recovering more meaningfully until that year[32].

However, the COVID – 19 crisis is changing the economic situation rapidly and the scope of its consequences are uncertain. The Bank of Slovenia in their latest forecasts states, that economic trends are declining rapidly and point to a large-scale global recession in 2020. Slovenia is already facing a deep crisis, but the available data do not yet show all its dimensions. The economic climate deteriorated sharply since March. Expected demand fell sharply in March and this is one of the largest monthly reductions to date. The first signs of deteriorating labor market conditions are already appearing. The fall was strongest in service activities, excluding trade, where the monthly decline in the expected employment indicator was the largest since the beginning of the previous one crisis in November 2008. Bank of Slovenia current estimates suggests that this year's decline in economic activity is likely to be higher than in 2009, when GDP fell by 7.5%[33].

2.2.4. Greece: Western Greece (PP4: Patras Science Park)

In the Regional Specialization Strategy RIS3 for the Region of Western Greece, a number of Economic Sectors and Activities have been identified as main Priorities. Culture and Creative Sector (CCS) that we are analyzing in the present State of the Art report, is one of them. The main other sectors identified as priorities are: Agri-Food sector, Tourism and Manufacturing Sector. The Wholesale and Retail Trade sector was added as an important economic sector for the Region due to its size, as it is described in the Hellenic Statistical Authority published data.

[32] https://www.umar.gov.si/fileadmin/user_upload/razvoj_slovenije/2019/angleski/POR2019_ANG_splet.pdf

[33] https://www.bsi.si/publikacije/gospodarska-gibanja-in-projekcije/gospodarska-in-financna-gibanja

No data related to GDP per Sector per NUTS II are published by ELSTAT. 49,827 companies operating in the Agri-food sector in the region, employing 48,180 employees, contributing to the total Region's GVA 793 mill EUR.

The Tourism Sector employs 18,441 employees in 6,012 companies, while the Wholesale and Retail Trade sector employs 28,016 in 13,786 companies contributing 1,580 mil EUR in the total Region's GVA.

Finally, the Manufacturing sector contributes 705 mil EUR to the Region's GVA, employing 10,247 people in the 3,221 companies that operate within the sector. Again, it is considered safe to accept that the entire companies within these sectors are SMEs.

Indicator	Value	Year	Source / Reference / Evidence
Contribution of each economic sector in regional GDP (in million EUR)			
Agri-food	n/a		
Tourism	n/a		
Wholesale & Retail Trade	n/a		
Manufacturing Sector	n/a		
Contribution of each economic sector in regional employment (in million EUR)			
Agri-food	48,180	2017	Hellenic Statistical Authority
Tourism	18,441	2017	Hellenic Statistical Authority
Wholesale & Retail Trade	28,016	2017	Hellenic Statistical Authority
Manufacturing Sector	10,247	2017	Hellenic Statistical Authority
Number of companies operating in each sector (in thousands)			
Agri-food	49,827	2017	Hellenic Statistical Authority
Tourism	6,012	2017	Hellenic Statistical Authority

Wholesale & Retail Trade	13,786	2017	Hellenic Statistical Authority
Manufacturing Sector	3,221	2017	Hellenic Statistical Authority
Percentage of SMEs among companies in each sector			
Agri-food	100%		
Tourism	100%		
Wholesale & Retail Trade	100%		
Manufacturing Sector	100%		
Contribution of each economic sector in regional Gross Value Added -GVA (in million EUR)			
TOTAL REGIONAL GVA	7,065	2017	Hellenic Statistical Authority
Agri-food	793	2017	Hellenic Statistical Authority
Tourism	**no source**		
Wholesale & Retail Trade	1,580	2017	Hellenic Statistical Authority
Manufacturing Sector	705	2017	Hellenic Statistical Authority

2.2.5. Croatia: Dubrovnik Neretva County (PP6: DUNEA)

	Micro	**Small**	**Medium**	**Large**	**TOTAL**
TOTAL INCOME (AOP177)	3.199 bn	4.036 bn	2.798 bn	2.254 bn	12.289 bn
NUMBER OF COMPANIES					
(A) AGRICULTURE, FORESTRY AND FISHERY	3.113	377	51	9	3.550
(B) MINING AND QUARRYING	159	46	10	3	218
(C) MANUFACTURING	11.629	2.308	448	121	14.506
(D) ELECTRICITY, GAS, STEAM AND AIR CONDITIONING SUPPLY	693	80	19	12	804
(E) WATER SUPPLY, WASTEWATER DISPOSAL, WASTE MANAGEMENT AND	455	248	79	11	793

ENVIRONMENTAL REHABILITATION ACTIVITIES					
(F) CONSTRUCTION	13.567	1.215	133	22	14.937
(G) WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES	25.062	3.381	385	91	28.919
(H) TRANSPORT AND STORAGE	5.124	674	84	25	5.907
(I) ACCOMODATION PROVISIONS AND FOOD PREPARATION AND SERVICE	11.320	660	88	25	12.093
(J) INFORMATION AND COMMUNICATION	5.951	442	42	19	6.454
(K) FINANCIAL AND INSURANCE ACTIVITIES	431	29	5	6	471
(L) REAL ESTATE	5.363	250	15	1	5.629
(M) PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES	19.858	843	64	7	20.772
(N) ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES	6.095	385	41	1	6.522
(O) PUBLIC ADMINISTRATION AND DEFENSE, COMPULSORY SOCIAL SECURITY	49	3	0	0	52
(P) EDUCATION	1.500	75	1	0	1.576
(Q) HEALTH AND SOCIAL WELFARE ACTIVITIES	1.565	138	9	1	1.713
(R) ART, ENTERTAINMENT AND RECREATION	1.595	87	18	5	1.705
(S) OTHER SERVICE ACTIVITIES	4.172	73	6	1	4.252
(T) HOUSEHOLD ACTIVITIES	2	0	0	0	2
(X) NON-EXISTING FIELD OF ACTIVITY	238	3	0	0	241
NUMBER OF COMPANIES	**117.941**	**11.317**	**1.498**	**360**	**131.116**

The main characteristic of the Region’s economy is that it is dominated by tertiary sector activities, while the share of primary and secondary sector activities is much smaller. The entire economy is mostly oriented to the hospitality industry and tourism as well as to the agriculture and maritime transport. The microregion around the River Neretva is mostly focused on the agricultural activities, trade and transport. The centres of the Dubrovnik microregion have a prevailing orientation to the hospitality industry and tourism, and the orientation towards the industry, namely towards agriculture, fisheries, transport and communication can be perceived in the centres of the island of Korčula, which also have a strong shipbuilding industry.

The main business, and therefore economic centres, are the cities, with a particular emphasis on the city of Dubrovnik as an administrative, historical, cultural and economic centre in which there is about 46% of the active population of the Region, and which has 25% of the total accommodation capacity of the Region.

The main determinants of economic development are still tourism, agriculture and the use of the sea in economic and transport terms. The economic development in the time to come should be directed towards further development of the wine-growing and olive-growing sector, followed by a focus on fisheries and marine culture, hospitality industry and tourism, shipping, road and port traffic and environmentally-friendly production.

Tourism is the most important economic branch of the County and has a great influence on the development and business in others industries such as construction, real estate, transportation services, agriculture, cultural activities, etc.

The primary tourist season is still in the summer months. Extreme seasonality causes difficulties in the labour market and in general the concentration of activities and events and the availability of certain services in only one period of the year. To further strengthen in the direction of an elite destination, in addition to investing in content, it is necessary to provide a more educated workforce that has developed skills to provide high quality services and develop the County as a comprehensive tourist destination so that everything does not remain on offer high quality accommodation. Also, even stronger destination promotion is needed. Strategic goals, measures and programs for the development of county tourism are set out in the Tourism Development Strategy of DNC 2012-2022.

Indicator	Value	Year	Source / Reference / Evidence

Contribution of each economic sector in regional GDP	33% rest 23,2% accommodation, catering 12,7% real state 10,3% transport 8,1% construction 6,6% trade 5,7% public administration	2014.	https://www.hgk.hr/documents/bdp-po-zupanijama-u-2015-godini-final5ad4af7f0c664.pdf

2.2.6. Albania: Region Vlora (PP7: RDNC)

Agriculture is an important economic sector for the Albanian economy. It contributes 18.4% of the GDP and employs 38% of the workforce (World Bank, 2019). Agricultural production concentrates on wheat, corn, oats, potatoes, vegetables, olives, tobacco, fruits, sugar beets, vines, livestock farming and dairy products. The agriculture sector in Albania suffers from a lack of modern equipment, highly fragmented land ownership and limited area of cultivation, all of which lead to a relatively low productivity. Only 24% of its territory is classified as agricultural land while 76% is non-arable land (of which 6% are forests; source: FAO). Finally, it should be noted that agricultural production is higher than its share of the GDP: a large part of the produce is in fact consumed by the farmers themselves and therefore is not marketed.

The industrial sector accounts for 21.3% of the country's GDP and employs 19% of the active population. The sector is concentrated on food processing, textiles and clothing, timber work (construction), oil, cement, chemical products, mining, transport and hydraulic energy. The manufacturing sector's value added is estimated to contribute to nearly 6% of the country's GDP (World Bank).

The services sector represents 47.9% of the GDP, employing 43% of the workforce. The tourism, telephony, banking and insurance sectors are all booming. According to a report by the World Travel & Tourism Council (WTTC), travel and tourism receipts in 2018 represented 27.3% of GDP.

Referring to the data of INSTAT Annual Statistic Report the main economic sectors in the region are:

- Agriculture & Aquaculture (36,75%)
- Extractive Industry, processing, energy, water (13%)
- Construction (9.1%)
- Trade, transport, hotels (15.4%)
- Information and communication (2.1%)
- Financial and insurance economy (2.5%)
- Real estate activities (6.4%)
- Scientific, professional, and technical activities (2.7%)
- Public administration, education, and health (10,5%)
- Arts, leisure, entertainment (2%) of Regional GDP

With the respective contribution in percentage to the economic sector in the regional GDP of 83.563.62 EURO.

2.2.7. Bosnia and Herzegovina (PP8: SEBS)

The agricultural sector accounts for 5.9% of GDP and nearly 15,4% of total employment (data by the World Bank for year 2019), with corn, wheat, fruits, vegetables, livestock, and poultry main agriculture products. The country has approximately 1.6 million hectares of land suitable for cultivation, and most farms are small in size and family-owned. Bosnia and Herzegovina is still a net food importer.

The industry sector represents 24.5% of the country's GDP, employing 32.3% of the workforce. Bosnia and Herzegovina mainly produces raw material such as steel, coal, iron ore, lead, zinc, and aluminium. Additionally, wood is a significant sector and export commodity. Other important production sectors are mineral and chemical products, machinery, mechanical appliances, textile, and footwear. However, the industry has been shrinking in the last decade due to the global financial crisis and the subsequent fall in both domestic and European demand. The overall value-added of the manufacturing sector is estimated at 13% of GDP (World Bank for the year 2018).

Lastly, the service sector contributes 55% of GDP and more than half of total employment (52.3%) /World Bank for the year 2019). The most important service sector of the economy is trade, followed by business services, transport and construction. Tourism is growing fast, with foreign tourist arrivals increasing by 12,1% in 2018 in comparison with 2017 (Agency for Statistics of Bosnia and Herzegovina).[34]

Contribution of each economic sector in regional employment year 2017 (latest year available); *Source: Agency for Statistics Bosnia and Herzegovina (missing activities A, K and O)* *Indicator used: Number of personal employed*		
	Number of personal employed	% of total employment – all NACE activities (excluded A, K, and O)
Total - all NACE activities (excluded A, K and O)	555.690	100.0
B: mining and quarrying	18.699	3.4
C: manufacturing	159.502	28.7
D: electricity, gas, steam and air conditioning supply	18.070	3.3
E: water supply sewerage, waste management and remediation activities	13.034	2.3
F: construction	37.389	6.7
G: wholesale and retail trade repair of motor vehicles and motorcycles	145.199	26.1
H: transportation and storage	38.167	6.9
I: accommodation and food service activities	35.733	6.4
J: information and communication	20.406	3.7
L: real estate activities	3.711	0.7
M: professional, scientific and technical activities	22.443	4.0
N: administrative and support service activities	13.004	2.3
P: education	5.109	0.9
Q: human health and social work activities	6.340	1.1

[34] http://bhas.gov.ba/data/Publikacije/Saopstenja/2019/TUR_02_2018_12_0_EN.pdf

R: arts, entertainment and recreation	9.520	1.7
S: other service activities	9.264	1.7

Source: [*http://www.bhas.ba/saopstenja/2018/SBS_00_2017_Y1_0_BS.pdf*](http://www.bhas.ba/saopstenja/2018/SBS_00_2017_Y1_0_BS.pdf)

Number of companies operating in each sector, year 2017 (latest year available). *Source: Agency for Statistics Bosnia and Herzegovina (missing activities A, K and O)*								
	NUMBER OF ENTERPRISES				**NUMBER OF ENTERPRENEURS**			
	Small (0-49 employees)	Medium (50-249 employees)	Large (250 and over)	**TOTAL**	Small (0-49 employees)	Medium 50-249 employees)	Large (250 and over)	**TOTAL**
Total - all NACE activities (excluded A, K and O)								
B: mining and quarrying	167	14	13	**194**	3	0	0	**3**
C: manufacturing	4.177	470	113	**4.760**	6.020	13	1	**6.034**
D: electricity, gas, steam and air conditioning supply	170	8	17	**195**	7	0	0	**7**
E: water supply sewerage, waste management and remediation activities	257	72	4	**333**	44	0	0	**44**
F: construction	1.927	134	10	**2.071**	1.930	0	0	**1.930**
G: wholesale and retail trade repair of motor vehicles and motorcycles	9.463	279	45	**9.787**	15.486	3	2	**15.491**

H: transportation and storage	1.899	61	10	**1.970**	4.721	0	0	**4.721**
I: accommodation and food service activities	829	37	2	**868**	10.230	0	0	**10.230**
J: information and communication	1.019	48	8	**1.075**	275	1	0	**276**
L: real estate activities	723	D	A	**733**	80	0	0	**80**
M: professional, scientific and technical activities	2.851	D	A	**2.893**	2.896	D	0	**2.897**
N: administrative and support service activities	854	34	8	**896**	429	0	0	**429**
P: education	429	11	0	**440**	468	0	0	**468**
Q: human health and social work activities	658	D	A	**668**	638	0	0	**638**
R: arts, entertainment and recreation	119	37	8	**154**	98	0	0	**98**
S: other service activities	338	4	0	**342**	5.003	2	0	**5.005**

A-primary confidentiality. Data is confidential if it includes less than three statistical units

D-secondary confidentiality. Data is protected in order to prevent disclosure of primary confidential data.

Source: *http://www.bhas.ba/saopstenja/2018/SBS_00_2017_Y1_0_BS.pdf*

2.3. Policy environment

In terms of the existing regional development policies, partners provided a contextual description of the regional development policies in place in their respective regions. Particularly, partners emphasized the main priorities of the region's development strategy in the following two dimensions: support to the overall regional development and competitiveness and specific policy priorities and actions/programmes with regards to CCI, cultural heritage preservation and sustainable tourism.

2.3.1. Italy: Emilia-Romagna Region (PP1: MCBO)

The way the policy facilitates the context has a strong impact on the context itself. The policy context for CCIs and tourism sector is constructed over a number of laws from different levels of administration and provides a number of tools for:

- The development of CCI sector as a whole
- The development of tourism sector as a whole
- The exploitation of synergies and spill over effects among the two sectors.

At regional level: the S3 strategy involves the CCI while at Metropolitan level, the Metropolitan Strategic Plan dedicates the V axis to CCI, and explicitly mentions the necessity of a strong transversal integration among Cultural sector and tourism in the I axis; while the touristic sphere is represented by 2 more Plans: a public planning and another one where public-private bodies jointly interact for local development.

In the following table are briefly listed the overall strategies which drive the Regional and Metropolitan development.

Support to overall regional development and competitiveness		
Priority	**Description**	**Source / Reference / Evidence**
Priority 1: **Research and innovation**	To strengthen the regional network for research and technology transfer to enterprises.	**ROP-ERDF 2014-2020**

Priority 2: **ICT and ICT development and Digital Agenda**	To support the use of ICT by businesses and public administration to improve the productivity of the former and the efficiency of the latter and, consequently, to offer more opportunities and benefits to citizens.	To strengthen regional economic and social cohesion, by investing in the areas that support growth to improve competitiveness and create jobs. ERDF finances also integration projects among member countries, through the European territorial cooperation.
Priority 3: **Competitive and attractive production system**	To stimulate an innovative and attractive process for investments, new entrepreneurial initiatives and talent.	
Priority 4: **Promotion of low carbon economy**	To create incentives for energy efficiency and energy savings and the development of renewable energy sources by both public authorities and companies with a view to the regional sustainable development both in terms of environmental protection and saving energy costs.	
Priority 5: **Enhancement of artistic, cultural and environmental resources**	Systemic enhancement and promotion of Emilia-Romagna's environmental, cultural and artistic assets to improve the competitiveness of its destinations and to attract new flows of tourists. The intended strategic areas for action include the Coastal District, the Apennines, the Po Delta, the cities of art scheme and the areas affected by the earthquake.	
Priority 6: **Attractive and participative cities**	To implement the European Urban Agenda which gives cities a central role as a regional hub and covers the enhancement of cultural heritage and the development of any factors that could encourage citizens to take part in the strategic decisions of their towns through the use of new ICTs.	
Priority 7: **Technical assistance**	Promoting measures and tools to support the implementation, monitoring, assessment, supervision and publication of interventions co-financed by the programme.	
Priority 1: **Employment**	To promote sustainable and quality employment and support workers' mobility.	POR-FSE

Priority 2: **Social inclusion**	To promote social inclusion and fight poverty and all discrimination.	To guarantee all citizens equal rights to acquire knowledge and skills and to grow and work by expressing their potential to the best of their ability, and to generate conditions of a closer relationship between training provision and the needs of businesses.
Priority 3**: Education and training**	To develop people's skills and lifelong learning	
Priority 4: **Quality of public services**	To strengthen the institutional capacity of public authorities and promote an efficient public administration.	
Priority 5: **Technical assistance**	It aims at supporting the implementation of the operational programme in its main phases of preparation, management, monitoring and control.	
Regional S3: Agro-food	Priority 1 of Regional S3. Pillar of regional Economy, support to further development	Emilia-Romagna's Regional S3 (5 priorities)
Regional S3: Mechanics and mechatronics	Priority 2 of Regional S3. Pillar of regional Economy, support to further development	
Regional S3: Constructions	Priority 3 of Regional S3. Pillar of regional Economy, support to further development	
Regional S3: Health and wellbeing	Priority 4 of Regional S3. High-potential sector, needed support to its expansion because of its potential and its spillover effects	
Regional S3: Culture and creativity	Priority 5 of Regional S3. High-potential sector, needed support to its expansion because of its potential and its spillover effects	
Metropolitan Strategic plan. **Metropolitan Bologna: sustainable,**	Principle 1 of Bologna's Metropolitan Strategic plan. Aims to: - Enriching and complementing the metropolitan identity; - Innovation and strategic development for high-quality gr owth;	Bologna's Metropolitan Strategic Plan (Main policy instrument of the metropolitan area as a local institution, 7

responsible and attractive	- A sustainable tourism that can grow with the territory (promotion of the Touristic destination, see also the touristic promotion plan in the second part of the table)	principles in total; English version available)
Metropolitan Strategic plan. **Urban and** **environmental regeneration**	Principle 2 of Bologna's Metropolitan Strategic plan. Aims to: - Territory as a communal asset - Aim to 45 square meters of green space per inhabitant - territorial agreements	
Metropolitan Strategic plan. **Mobility**	Principle 3 of Bologna's Metropolitan Strategic plan. Aims to: - One single travel document for all public transport - sustainable private mobility projects - Moving by bicycle and by foot as a competitive choice of mobility	
Metropolitan Strategic plan. **Manufacture, new industry** **and training**	Principle 4 of Bologna's Metropolitan Strategic plan. Aims to: - Creation of the breeding ground for new ideas: the Metropolitan City as a Start-up valley - Metropolitan development for high-quality employment - A single contact point for businesses - Education and training as stimuli for development - Technical and scientific culture as branding for the metropolitan territory	
Metropolitan Strategic plan. **Culture, knowledge,** **creativity and sport**	Principle 5 of Bologna's Metropolitan Strategic plan. Aims to: - Culture as a generator of social cohesion - launch system connections among cultural institutes and shows and events; guarantee its sustainability of these	

	activities and the conservation of tangible and intangible cultural heritage - The Metropolitan City as a breeding ground for creativity and cultural jobs - Enhancement of the museum system and the library system	
Metropolitan Strategic plan. **Education** **and learning**	Principle 6 of Bologna's Metropolitan Strategic plan. Aims to: - 49 Millions of investment in school buildings - -10% early school leavers - building the first territorial Network for lifelong learning	
Metropolitan Strategic plan. **Health, welfare** **and wellbeing**	Principle 7 of Bologna's Metropolitan Strategic plan. Aims to: - Clinical metropolitan network and improvement of home care - Technical territorial coordination for children and adolescents - Impoverishment and the fight against gender discrimination and violence - Refugees and migrants: integration to enrich society	
Priorities and actions / programmes with regards to CCI, cultural heritage preservation and sustainable tourism		
Priority / action / programme	**Description**	**Source / Reference / Evidence**
Priority 5: **Enhancement of artistic, cultural and environmental resources**	Systemic enhancement and promotion of Emilia-Romagna's environmental, cultural and artistic assets to improve the competitiveness of its destinations and to attract new flows of tourists. The intended strategic areas for action include the Coastal District, the Apennines, the Po Delta, the cities of art scheme and the areas affected by the earthquake.	**ROP-ERDF 2014-2020**

<table>
<tr><td>Regional S3: Culture and creativity</td><td>Priority 5 of Regional S3. High-potential sector, needed support to its expansion because of its potential and its spillover effects</td><td>Emilia-Romagna’s Regional S3 (5 priorities)</td></tr>
<tr><td>Metropolitan Strategic plan.

Metropolitan Bologna: sustainable,

responsible and attractive</td><td>Principle 1 of Bologna’s Metropolitan Strategic plan. Aims to:

- Enriching and complementing the metropolitan identity;

- Innovation and strategic development for high-quality growth;

- A sustainable tourism that can grow with the territory (promotion of the Touristic destination, see also the touristic promotion plan)</td><td rowspan="2">Bologna’s Metropolitan Strategic Plan (Main policy instrument of the metropolitan area as a local institution, 7 principles in total; english version available)</td></tr>
<tr><td>Metropolitan Strategic plan.

Culture, knowledge,

creativity and sport</td><td>Principle 5 of Bologna’s Metropolitan Strategic plan. Aims to:

- Culture as a generator of social cohesion

- launch system connections among cultural institutes and shows and events; guarantee its sustainability of these activities and the conservation of tangible and intangible cultural heritage

- The Metropolitan City as a breeding ground for creativity and cultural jobs

- Enhancement of the museum system and the library system</td></tr>
<tr><td>Local promotion touristic program</td><td>Yearly Act of the Metropolitan City (which follows pluriannual guidelines) in which are established the priorities of intervention regarding promotional local activities (priority I) and promotion and development of the territory (priority II).The Destination aims to be:

- Authentic, working on original, non-reproducible elements, strongly anchored to local values

- Experiential, which proposes engaging, memorable moments to tell and to come back to with something more</td><td>Local promotion touristic program 2020

Pluriannual guidelines</td></tr>
</table>

	- Safe, which ensures security (physical) and psychological comfort (sense of security, certainty of receiving the promised/obvious) - Sustainable, attentive to the various aspects of environmental quality: air, water, waste, territory, energy, mobility, i.e. oriented to constantly improve standards. - Responsible and accessible, attentive to the needs of all (both residents and tourists) and in particular the most disadvantaged ones - Technological, connected and integrated through advanced communication (ICT) and transport infrastructures and solutions.	
Promo-commercial touristic program	Program document containing the actions to be taken from the Touristic Destination, with reference to the pluriannual guidelines. The actions are proposed by Bologna welcome (cf. stakeholder interview), which is MCBO's Destination Management Organization (DMO)	Promo-commercial touristic program Pluriannual guidelines
Performing arts and museums: **Regulation on the promotion of culture and the agreement for the three-year period 2019-2021**	Its purpose is "the diffusion and enjoyment of cultural activities" and to promote "the widest pluralism of expressions and initiatives" through a valorisation of the actors who, in terms of organisation and aggregation, express "identity, values and cultural interests". Financial support for the projects will be provided through a three-year agreement between the Region and the beneficiaries.	Regional law 37/1994
Regulation of extraordinary initiatives	It concerns extraordinary initiatives for the valorisation of historical, artistic and cultural expressions in the Emilia-Romagna region and projects of particular relevance for the whole regional territory can be financed, which concern buildings of cultural interest, in order to ensure their stable and continuous enhancement.	Regional law 40/1998

Performing arts: **Regulations for the performing arts and the long-term programme**	The implementation is carried out through a long-term Programme, usually three years, with which the Region provides guidelines on entertainment to support the production and circulation of events, promote innovation, research and experimentation, encourage mobility and training of the public, encourage collaboration between public and private entities with a view to optimizing resources.	Regional law 13/1999
Arts and museums: **Regulations on libraries, historical archives, museums and cultural heritage**	With the support of the IBC, the Region promotes the right of all citizens to information and lifelong learning, and to develop research and knowledge by collecting, ordering, preserving and making available to citizens the common heritage of books and documents.	Regional law 18/2000
Music: **Regulations for the development of the music sector and the long-term programme**	It is the first of its kind in Italy, it defines the aims and types of intervention in the music sector, aiming to strengthen the regional system and to give a transversal and innovative imprint to the sector. The implementation is carried out through a long-term Programme, usually three years.	Regional law 2/2018
Preservation and valorisation of the dialects **of Emilia-Romagna**	It entrusts the Institute for Artistic, Cultural and Natural Heritage (IBC) with the annual programming of actions and interventions that promote the knowledge and conservation of the Emilian and Romagna dialects through studies, research and conferences, projects and teaching aids in schools, events, shows and publishing initiatives. The law also supports the networking of existing public and private archives and funds, the creation of a bibliographic fund and a documental archive dedicated and consultable online, the creation of specific sections dedicated to dialects in libraries.	Regional law 16/2014
Cinema and audio-visual:	Set up jointly by the regional departments of culture, tourism, professional training and business activities, the law rationalises all the regional interventions which in previous years had been conceived through Regional Law No 37/94	Regional law 20/2014

Regulation for the promotion and the production of cinema and audio-visual sectors **and the long-term programme**	"Regulations on cultural promotion" and Regional Law No 13/99 "Regulations on entertainment". It formally establishes the role of the E-R Region as Film Commission for the territory and highlights these objectives: - The promotion and the dissemination of the cinema and audio-visual culture; - A support to the growth within the broader context of CCI - A support to the regional cinema establishments Concerning the promotion and dissemination objective, the law has the priority of promoting film festivals, valorising training projects addressed to citizens and supporting the research, collection and digitalization of documentation of regional and national interest, supporting the dissemination of the regional works, especially those coming from young authors. The financial allocation is established year by year in line with the three-year Film and Audiovisual Programme 2018 - 2020.	
Radio **channel on culture and creativity**	It is an information channel of the Department of Culture, Youth and Legality Policies and IBC. RER is the first institutional podcast radio made by an Italian region; it offers daily in-depth information on creativity and culture in synergy with EmiliaRomagnaCreativa.it, the regional multimedia information and cultural promotion project of which it is a part.	Radio Emilia-Romagna - RER

The table highlights how the different policy levels share priorities and development goals, giving wide support to the CCI sector; in fact, CCIs are recognised as one of the most high-potential (and consequently) most valuable sectors over the territory.

It should be noted that, the various levels of policy share priorities and lines of development, and the broad support offered to the sector, as to be recognised in S3 as one of the two sectors with the greatest potential for development.

2.3.2. Italy: Friuli Venezia Giulia Autonomous Region (PP2: FVG AR)

The FVG AR Strategic Plan 2018-2023[35] set "Economic development and competitiveness" as one of the main priorities. In particular this priority is composed by some objectives: a) Continuation of the implementation of the Regional Law 3/2015 "RilancimpresaFVG" (FVG Raisenterprise), evolving it into Sviluppaimpresa FVG" (FVG develops enterprise), with the creation of a regional Agency that represents the only interlocutor for the coordination of economic, labour and investment policies for entrepreneurs; b) Enhancement of the system of regional clusters, a development model that increases network economies and synergies also in the field of process and product innovation, an essential element to increase competitiveness on the markets: c) Promotion of the role of support to companies in the regional network of research institutions, thanks to the creation of an innovation ecosystem including the key-players in the development of the production system (science parks, clusters, trade associations); d) an internationalization strategy based on some axes: strengthening of exports; business combinations and promotion of the supply chains that also allow the related industries to engage; development of business skills, to provide qualified orientation for foreign markets; support for start-ups by certified incubators in the region.

A second priority of the Strategic Plan 2018-2023 related the overall regional development and competitiveness regards Labour and Vocational training policies. This priority embeds different points: a) Strengthening of the Employment Centres, through collaboration (primarily) with accredited subjects for work services, and strengthening of services rendered to companies, in order to provide advice and collect requests for employment and training needs; b) the new Lavoro & SviluppoImpresa Agency (Employment & Business Development) will integrate investment policies with active labour policies, training and professionalisation, from the perspective of the regional industrial plan; c) Revision, ss far as professional training is concerned, of the specific regulation of accreditation of training subjects, adopting structured models of lifelong learning. D) Improvement of the operational integration between training and the labour market, between lifelong learning and lifelong guidance, thanks to the launch of the Regional Skills Certification System and the new phase of the Integrated Plan for Employment and Work Policies (PIPOL).

[35] "Strategic Plan 2018-2023", publication by the Presidency of the Friuli Venezia Giulia Autonomous Region . General direction - Service for Programming, strategic planning, management control, statistics and workplace safety.
http://www.regione.fvg.it/rafvg/export/sites/default/RAFVG/GEN/piano-strategico-2018/allegati/PianoStrategico_2018_2023.pdf

A third priority of the Strategic Plan 2018-2023 related the overall regional development and competitiveness regards Education and right to study. The main points are: a) the support to higher university education for the qualitative increase of the didactic offer, of the research activities and of the services; b) the support to research paths with repercussions in the corporate field.

Regarding the FVG AR main priorities, actions and programmes with regards to CCI, cultural heritage preservation and sustainable tourism, the regional portfolio is quite relevant and differentiated. The regional research and innovation strategy for the intelligent specialization of Friuli - Venezia Giulia (S3) identifies 5 thematic areas. The thematic area "Culture, Creativity and Tourism", to which three relevant trajectories of technological development connect, is identified as related to the management of cultural heritage, non-industrial artistic productions and all those activities that draw creative life from culture and that contribute to conveying their meanings and values in the productions of goods and services, the regional creative cultural system is, by its definition and composition, considered as a network between companies, territories, Universities and Administration[36].

The Strategic document of the AR FVG for policies in favour of culture and creativity[37] set three relevant actions to be undertaken. The first concerns coordination activities aimed at creating synergies between EU funding and support regional to cultural and creative industries. This action foresees the setting up of a working group to coordinate actions and calls of the POR during the programming period 2014-2020. The Working Group will identify possible synergies, between the ROPs and between the ROPs and the regional funds. The Working Group also promotes an examination on projects approved for identify further synergies / capitalizations with regional resources. A second action focus on the Creation of financial instruments to support CCIs' credit access in strengthening the existing funding opportunities and in introducing new ones, FVG authorities must play a crucial role in stimulating private investment and promoting PPPs, promoting SMEs' specific needs. In this perspective feasible Implementation tools are: grants, guarantee

[36] https://www.regione.fvg.it/rafvg/export/sites/default/RAFVG/fondi-europei-fvg-internazionale/Strategia-specializzazione-intelligente/allegati/15022016_Abstract_S3_inglese.pdf

[37] Strategic policies in favor of culture and creativity in FVG (Resolution of the Regional Council n. 2442/2018), http://www.regione.fvg.it/rafvg/export/sites/default/RAFVG/cultura-sport/progetti-bandi-europei/FOGLIA2/allegati/Allegato_1_alla_Delibera_2442-2018x0.1x.pdf

mechanisms, equity financing, crowd funding, etc. This action wants to evaluate the possibility of using a Guarantee Fund, even an existing one, adopting new conditionality criteria (e.g. compulsory mix of skills). The third action, may be the more relevant, foresaw the creation of an ICC cluster Region FVG AR promoted the birth of the Regional Cluster Culture and Creativity. The already established Cluster[38], through the implementation of activities in the regional area, will improve visibility and the attractiveness of the regional ecosystem in the cultural and creative sector, through the identification, selection and promotion of value chains, based on the demand of the market. In addition, the activities of the Cluster will strengthen the absorption capacity of innovation, to create a structural relationship with the “core” of the FVG economic system, adding attractiveness to the regional ecosystem.

In 2019 the three-year program (2020-2022) "Cultural and Creative Hubs" has been launched, focusing on the financing of projects for the preparation, furnishing, equipment and technological equipment of spaces and archives, and for the realization of multidisciplinary projects related to cultural, creative and educational activities[39].

In 2019 another relevant regional program concerning the cultural and creative sector was launched. The program concerns the creation of the Professional Technical Pole of the Cultural and Creative Sector[40]. The Pole is a tool for the realization of an organic educational offer with respect to the cultural and creative sector, considered a strategic sector for the development of the territory. A three-year Plan, updated by resolution of the Regional Council n.1235 of 19 July 2019, has integrated the reference areas for Training Centres in Friuli Venezia Giulia with the cultural and creative sector. For the purpose of establishing the Professional Technical Pole of the Cultural and Creative Sector , the sectoral areas of reference are: the Preservation and enhancement of historical

[38]“Regional Call for applications aimed at becoming the manager of the Regional Cluster Culture and Creativity” http://www.regione.fvg.it/rafvg/cms/RAFVG/MODULI/bandi_avvisi/strutture/Direzione_centrale_cultura_e_sport/allegati/10072019_Bando_ClusterI_CC.pdf

[39] Regional Law 06 August 2019, n. 13, Art. 7 (Cultural and Creative Hubs)
http://lexview-int.regione.fvg.it/FontiNormative/xml/xmllex.aspx?anno=2019&legge=13

[40]European Social Fund. Regional Operational Program 2014/2020. PPO 2019 Specific program n.54 / 19 - Notice for the presentation of applications for the identification of the actuators of the Technical Professional Pole of the Cultural and Creative Sector and for the implementation of system and coordination actions
http://bandiformazione.regione.fvg.it/fop2011/Bandi/Dettaglio.aspx?type=portale&Id=5421

and artistic heritage (e.g.: museums, libraries, archives, monuments); Performing arts, visual arts and live performances; the Creative Industry pertaining to the world of services (e.g.: communication, architecture, design); Activities related to the production of cultural goods and services according to an industrial logic of repeatability (e.g.: cinema, radio-TV, video games and software, publishing and printing, music).

Regarding the actions of the FVG region concerning sustainable tourism it should be noted that the strategic vision of the 2019-2022 marketing plan for sustainable tourism focuses on the definition of destination products[41]. The Priority Product Cluster - Culture is divided into: City Breack; Guided tours; Thematic itineraries; Unesco; Religious paths. The "Special interest" Product Cluster for cultural itineraries will be divided into: discovery and touring; historical itineraries; villages, castles and residences, traditional festivals. In the 2019-2022 Marketing Plan the Guidelines for the product "Culture" are divided into the following themes: Cities of Art; Unesco sites; Minor Locations; Walk of Peace (Great War); Historical; Sustainability.

Another relevant initiative related to Sustainable Tourism concerns the Regional Landscape Plan[42]. Regional Landscape Plan - FVG was designed through a gradual and participatory process considering both the spirit of the European Landscape Convention and the contents of the Code of Cultural Heritage and Landscape. The inter-institutional working group (Region FVG, UNIUD, UTI Carnia, MFSN, ERPAC) arranged the PPR-FVG in co-planning with MiBACT. All citizens contributed to the contents of the Plan through the Archive of on-line reports, the local bodies that entered into the agreements, institutions and stakeholders. The plan subsumes three strategic networks as components: the Regional Ecological Network, the Cultural Heritage Network and the Slow Mobility Network.

As part of the policies aimed at safeguarding and enhancing the historical and cultural heritage, the FVG Region will complete the concrete implementation of the L.R. 23/2015 (Regional rules on cultural heritage) as regards the reform introduced by it in the museum sector. The establishment

[41]Marketing Plan Strategy 2019-2022. http://www.regione.fvg.it/rafvg/export/sites/default/RAFVG/economia-imprese/turismo/FOGLIA80/allegati/%20PTFVG_Linee_indirizzo_2019_2022.pdf

[42]https://www.regione.fvg.it/rafvg/cms/RAFVG/ambiente-territorio/pianificazione-gestione-territorio/FOGLIA21/#id1

of the Regional Museum System will allow all the institutions that will be part of it to have a common recognition logo and to take advantage of both the promotional initiatives and campaigns that will be implemented by Promoturismo FVG, and the training activities that will be organized. by ERPAC, the Regional Agency for Cultural Heritage, for the purpose of specialization and professional updating of operators. In this context, great importance will be attributed to the ability to aggregate between several museums in the form of museum network, aimed at enhancing the relations between museums and the territory, qualifying and promoting the offer of use and achieving the basic functional requirements that sometimes individual museums do not own and will allow networks to become part of the regional museum system.

The action already started in previous years, aimed at the recovery, conservation and enhancement of the regional cultural heritage (L.R. 23/2015), will continue. The Region will contribute financially, through annual calls, to the realization of investment projects for the recovery, conservation and enhancement of the assets of the archaeological heritage, of the assets of the fortified architecture, of the industrial archaeology assets, of the historic houses and gardens, buildings of artistic and architectural value as well as movable cultural heritage. At the same time, the support action of the great cultural realities will also continue; the operation and development of the Aquileia Foundation will be ensured, following the recent renewal, for a further 10 years, of the agreement with Mibac for the archaeological, monumental and urban enhancement of Aquileia, an agreement with which the contribution was also made to use of the Foundation itself of numerous additional areas of significant archaeological interest.

Particular attention will also be paid to the Regional Authority for the cultural heritage of the Autonomous Region of Friuli - Venezia Giulia - ERPAC which is today the only strategic reference point of the Region for the integrated exercise of the functions of cataloguing, conservation, restoration, management, enhancement and promotion of the cultural heritage in the area.

2.3.3. Slovenia (PP3: UIRS)

There are few policy documents that connects and *support* the overall regional development and competitiveness, and some specific policy priorities and actions / programmes with regards to CCI, cultural heritage and sustainable tourism.

The are some strategic development and policy documents from the field of culture that crosses other strategic documents like a Draft National Programme for Culture 2020–2027, National Programme for Culture 2014–2017, Act on the Realization of the Public Interest in Culture, Strategy of the National Film Education Program (2016), Architectural Policy of Slovenia Architecture for People (2017), Development Strategy of Slovenia 2030, The Cultural Heritage 2020-2023 Strategy (2019)[43] and others.

A. *Slovenia's Development Strategy 2014-2020 (draft)* - is an umbrella strategic document that defines the vision and goals of Slovenia's development until 2020. The document identifies four priority areas:

   i) Competitive economy

   ii) Knowledge and employment

   iii) Green living environment

   iv) Inclusive society.

   Within the defined priorities, the following three horizontal development contents have been identified, for which a part of the development funds that will be available by 2020 will be allocated:

   i) research and development and innovation,

   ii) start-up, growth and development of small and medium-sized enterprises,

   iii) employment, education, training, knowledge and competencies (young and old).

B. *Slovenian Industrial Policy - SIP*, February 2013 - The Government of the Republic of Slovenia has adopted the Slovenian Industrial Policy (SIP) as a strategic document that represents a set of guidelines for increasing the competitiveness of the business environment, strengthening entrepreneurship and innovation capacity of the economy. At the same time,

[43] Ministrstvo za kulturo, 2019; https://www.gov.si/assets/ministrstva/MK/DEDISCINA/STRAT_KD_2019.pdf

the SIP is an important element in the preparation of the operational program for the multiannual period of the financial perspective 2014-2020 and the preparation of programs of measures in the field of entrepreneurship, competitiveness and technology. An important emphasis within the SIP is on improving access to funding sources, where the guidelines are in supporting the growth and development of companies and expansion into foreign markets through debt sources of financing (financial engineering instruments: interest rate subsidies, microloans, micro-guarantees, loans and mezzanine loans, guarantees, etc.)[44].

C. *Cohesion Policy* targets all regions and cities in the European Union in order to support job creation, business competitiveness, economic growth, sustainable development, and improve citizens' quality of life. In the 2014-2020 period Slovenia is eligible to EUR 3.312 bn under the European Structural Funds and the Cohesion Fund of which EUR 159.8 million is earmarked for Connecting Europe Facility (for transport) and EUR 64 million for European Territorial Cooperation programmes. The remaining, i.e. majority, of the available funding will be spent to meet the Europe 2020 Strategy goals focusing on key areas of economic growth and job creation: research and innovation, information and communication technologies, enhancing the competitiveness of small and medium-sized enterprises, supporting the shift towards a low-carbon economy._ In line with the EU methodology Slovenia was divided into two cohesion regions, namely the cohesion region Zahodna Slovenija (west Slovenia) and the cohesion region Vzhodna Slovenija (east Slovenia). The cohesion region Zahodna Slovenija is eligible to EUR 849 million and the cohesion region Vzhodna Slovenija to EUR 1.305 bn, namely under the European Regional Development Fund (ERDF) and the European Social Fund (ESF). Key documents serving as a basis for European Cohesion Policy implementation in Sloveni**a** are:

   i) *Partnership Agreement between Slovenia and the European Commission 2014–2020; Partnership Agreement of Slovenia (draft)* - The Partnership Agreement is a document that must contain clear justifications for the selected strategic priorities in the country, taking into account the promotion of cooperation and coordination between different stakeholders. Main elements of the Partnership Agreement:

[44] Slovenski podjetniški sklad 2020; https://podjetniskisklad.si/en/about-us/supportive-environment-for-entrepreneurship/national-strategic-documents

1) coherence with the EU 2020 strategy on smart, sustainable and inclusive growth, must meet the requirements of each EU fund (ie ERDF, ESF, CF, EAFRD, EMFF) so as to ensure economic, social and territorial cohesion; 2) an integrated approach to territorial development, supported by EU funds; and 3) effective implementation.

ii) *Operational Programme for the Implementation of the European Cohesion Policy in the 2014-2020 Slovenia* will contribute to meeting the following objectives:1) Raising the competitiveness, productivity and innovation potential of the Slovenian economy based on research and innovation; 2) Increasing the employment of women and men, especially in key target groups (young people, the elderly, the long-term unemployed, the less educated); 3) Achieving national goals in the field of climate and energy package; 4) Reducing the number of people at high risk of poverty and social exclusion. The EU funding of EUR 3.011 bn from the European Regional Development Fund (ERDF), the Cohesion Fund (CF), the European Social Fund (ESF) and the specific allocation for the Youth Employment Initiative (YEI) is targeted according to development needs, existing disparities and growth potentials of Slovenia. The total allocation by fund is as follows: - EUR 1.390 bn from the European Regional Development Fund, - EUR 895 million from the Cohesion Fund, - EUR 717 million from the European Social Fund, - EUR 9 million from the Youth Employment Initiative. thematic objectives and corresponding investment priorities, with a focus on: Increasing the international competitiveness of enterprises, particularly of SMEs, to accelerate economic development and the creation of jobs. Improving the infrastructure for research and innovation while strengthening its links with enterprises and the higher education sector. Developing a high-quality broadband infrastructure and enhancing access to broadband electronic communication services. Increasing energy efficiency and the use of renewable energy sources (RES) in the public sector, in households and enterprises. Implementing sustainable mobility measures in urban areas to improve air quality and to promote public passenger transport. Supporting climate change adaptation measures to reduce the risk of flooding in areas with significant flood risks. Developing environmental infrastructure in the water sector and ensuring the efficient and sustainable use of natural resources. Upgrading the railway infrastructure and constructing the missing motorway sections along the Trans-European Transport (TEN-T) Network. Increasing the share of employment, particularly of the long-term unemployed, the young and older people, as well as of the persons with low education levels. Reducing the number of socially excluded persons and persons at the risk of poverty while increasing the access and quality of community-based services and promoting social entrepreneurship. Improving the responsiveness of the education and training systems to the needs of the labour market and ensuring equal access to education, trainings and lifelong learning for all groups. Increasing the institutional capacities and the efficiency of the public administration and public services.

iii) *Slovenia’s Smart Specialisation Strategy 2015* - Slovenia's smart specialization strategy represents a strategic and implementation plan for the restructuring of the Slovenian economy and society with the support of EU funds in the period 2014-2020. S4 is a strategy for strengthening the competitiveness of the economy by strengthening its innovation capacity, diversifying existing industry and service activities and the growth of new and fast-growing industries or companies. Objectives S4: Raising value added per employee; Improving competitiveness in global markets with an increased knowledge and technologies in Slovenia's exports; Raising entrepreneurial activity. S4 is an implementation document of already adopted Slovenian strategic documents (for example, Research and Innovation Strategies and Slovenian Industrial Policy). The implementation of S4 is based on: niche orientation through defined priority areas, targeted, comprehensive and tailored package of measures, a new model of development cooperation between key innovation stakeholders and a globally integrated approach. On the basis of S4, national strategic development priorities were defined, where Slovenia has a critical mass of knowledge, capacities and competencies and comparative advantages, and thus the potential for positioning in global markets. National strategic development priorities thus dictate priority investments in the field of research, development and innovation in Slovenia. Crucially, the priorities were not defined "from the top down", but on the basis of a new development model of the quadruple helix, in partnership between the economy, knowledge institutions, other stakeholders and the state. National strategic development priorities were defined during the preparation of S4 through an in-depth process of stakeholder consultations in the period 2014-2015.

S4 defines three priority pillars and nine areas of application with focus areas and technologies:

- 1. Digital (1.1. Smart cities and communities; 1.2. Smart buildings and home with a wooden chain)
- 2. Circular (2.1. Networks for the transition to a circular economy; 2.2 Sustainable food; 2.3 Sustainable tourism)
- 3. (S) Industry 4.0 (3.1. Factories of the future; 3.2 Health-medicine; 3.3 Mobility; 3.4. Materials as final products)[45]).

As a development of creative industries in Slovenia and realization of goals in the National Programme for Culture 2014–2017, Operational Programme for the Implementation of the European Cohesion Policy in the 2014-2020 and Slovenia's Smart Specialisation Strategy - in 2016 the Ministry for Culture RS issued a decision to establish a cohesion project Center for Creativity (CzK). The Center for Creativity (CzK) defines the following areas as the central areas of CCS in Slovenia and the main areas are: architecture, advertising, design, visual arts, cultural heritage, archival and library activities, the field of books, cultural and artistic education, music, performing and intermedia arts, media, software and games, film and AV activity, as well as cultural tourism and other artistic creation[46].

The Center for Creativity (CzK) is a measure of the Republic of Slovenia which, through public tenders of the Ministry of Culture and the activities of the CzK Platform, supports the development of the creative sector in Slovenia. The activities and program of the Center for Creativity were designed by the Museum of Architecture and Design (MAO) at the initiative of the Ministry of Culture of the Republic of Slovenia. The investment, which is carried out through two inseparable lots, is worth almost 11 million euros in total The project in the period 2017–2022 is co-financed by the European Union from the European Regional Development Fund and the Republic of Slovenia. It is implemented within the Operational Program for the Implementation of European Cohesion Policy

[45] Slovenski podjetniški sklad 2020; https://podjetniskisklad.si/en/about-us/supportive-environment-for-entrepreneurship/national-strategic-documents

EU skladi 2020; https://www.eu-skladi.si/en/cohesion-by-2020-1/cohesion-by-2020

[46] Internal Document MAO, 2020; Establishing Document Platform Centre For Creativity (CzK), 2017.

in the period 2014-2020, under Priority Axis 3. Dynamic and competitive entrepreneurship for green economic growth, investment priorities 3.1. Promoting entrepreneurship, in particular facilitating the economic exploitation of new ideas and encouraging the creation of new businesses, including business incubators, and a specific objective 3.1.1. Encouraging the creation and operation of companies, especially start-up companies:

i) The Creativity Center platform, run by the Museum of Architecture and Design, carries out support activities for the development of the creative sector: arranging education and networking, pursuing internationalization, conducting research, managing the online platform and providing online offerings, and promoting the cultural and creative sector.

ii) Public grants "Promotion of creative cultural industries", led by the Ministry of Culture of the Republic of Slovenia, provide € 5,290,000 for the development of creative companies, projects and ideas and stronger cooperation between the economy and the creative sector. Creatives and businessmen can receive from € 15,000 to € 40,000 in grants for various development phases and approved projects[47].

The Center for Creativity has its roots and linkage to other strategic development projects. And the project was placed in a supportive environment for entrepreneurship and innovation RS. In recent years, the supportive environment for entrepreneurship in Slovenia has undergone intensive development following the example of good practices of the most developed countries in the world. The Slovenian Support Environment for Entrepreneurship offers innovative and high-tech companies solutions in the field of providing infrastructure in the form of business premises and consulting services for their operation and development. This function is performed by university and regional business incubators and technology parks. In recent years, a number of institutions have developed in Slovenia, whose key task is to support new, innovative, promising business ideas with global market potential at various stages of development. In fact, the current supportive environment for entrepreneurship and innovation, as well as key tenders in the field of start-ups (P2, SK75, SK200), provide an opportunity for entrepreneurs who have new ideas in various development and technology areas, while exceptionally involving little possibilities of functioning of

[47] Center za kreativnost, MAO, 2020; https://czk.si/podprti_projekti/

ideas of the creative-cultural sector (designers, architects, visual artists, design managers, creative tourism etc.). In this way, the opportunity to significantly strengthen the entrepreneurial-innovation ecosystem, as understood by S4, is missed**.** According to S4, the cultural and creative sector operates horizontally by linking creativity on the one hand with the economy on the other, with the effects of integration visible in the increase in the number of innovative products, significant revenue growth and productivity growth of companies cooperating with CCS . The Center for Creativity (CzK), as a central factor for combining and promoting cooperation between CCS and the economy, therefore represents a key platform through which these effects can be achieved, which, in line with S4 goals, will be reflected in raising overall entrepreneurial activity and increasing share of knowledge in products or services at the entire Slovenian level. The key added value of the Center for Creativity (CzK) is in its principle of functioning as a comprehensive ecosystem, which not only promotes cooperation between CCS and the economy, but also raises awareness of the importance of CCS and explores opportunities for cooperation at a new level. Existing support environment actors often do not have such a deep and broad ecosystem, and in particular there was no such support environment actor for CCS. On the other hand, we are aware that many other support institutions have more knowledge and experience in the field of modern technology and entrepreneurship, so we have provided opportunities for cooperation with them. We believe that companies from the field of CCS are extremely important for greater competitiveness, higher added value and more even development of entrepreneurship, but they have not yet been properly recognized in our environment. Incubators place the greatest emphasis on the research and development and business activities of new technology-oriented companies, which do not include companies in the field of CCS. The S4 defines the vision and goals of Slovenia's development and four development priorities. The establishment of the Center for Creativity (CzK) was in line with the priority "Competitive Economy", especially in the part that advocates the establishment of a healthy core of industry / economy in new areas promising for new jobs, in the field of international economy and society, in the field of high quality industrial design and in the field of incentives for research and development[48].

Ministry of Economic Development and Technology (MGRT) whom is co-financing tourism projects; Slovenian Tourist Board who gives guidelines and tenders/calls for new products, helps create new

[48] Internal Document MAO, 2020; Establishing Document Platform Centre For Creativity (CzK), 2017; MAO

content on this topic, promotion of tourism. In the Statistical region (NUTS3**)** this was not emphasise enough. Only the new documents for the following financial perspective will include better support for the CCS. There is a strong need for capacity building at the level of NUTS3, since there is a lack of knowledge in the field of CCS. Ministry of culture planned a mobile Task force to mitigate this knowledge gap, so that this mobile teams of expert's could support NUT3 statistical regions in the development of the cultural heritage products, to support them to develop call for co-financing of such industries and to help them compete for cofounding on a EU level, too. Some of this support is planned to be integrated in local Technological parks, (subsidised by the state). The main strong point is a financial support offered by the Ministry of culture and CZK.si combined with the EU cohesion funds[49].

2.3.4. Greece: Western Greece (PP4: Patras Science Park)

Support to overall regional development and competitiveness		
Priority	**Description**	**Source / Reference / Evidence**
Strategic Priority 1. Health, welfare, education, Lifelong learning, Sports.	Strengthening social cohesion with targeted actions and improving infrastructure and services in health, welfare, education - Lifelong learning, sports.	Regional Operational Plan of the Region of Western Greece
Strategic goal 2: Productivity Restructure	Strengthening and reconstruction of the productive base of the Region in each economic sector.	Regional Operational Plan of the Region of Western Greece
Strategic goal 3: Entrepreneurship & Innovation	Supporting entrepreneurship and innovation	Regional Operational Plan of the Region of Western Greece.
Strategic Priority 4. Tourism	Promoting a tourist product of Western Greece in connection with cultural and natural	Regional Operational Plan of the Region of Western Greece.

[49] Based on interviews conducted with stakeholders (CREATURES activity).

	resources of our region is one of the 6 Strategic Priorities of the RWG according to the 5-year operational Plan.	
Strategic Priority 5. Transport and Infrastructure	Promoting sustainable transport and key network infrastructure	Regional Operational Plan of the Region of Western Greece.
Strategic goal 6: Administrative Operation	Improving the administrative Operation of the Region Organisation in the direction of drawing up and implementing a distinct regional policy.	Regional Operational Plan of the Region of Western Greece.
RIS3 Priority 1. Agricultural Production - Aquaculture and food	New extroverted pace and attitude for the sector focusing on the production of local, traditional products.	Strategies for Smart Specialisation RIS3 of RWG http://dytikiellada.gr/wp-content/uploads/2016/01/RIS3_ΔE_2-2015.pdf
RIS3 Priority 2. Tourism & Culture	Promote Tourism and culture as one of the driving forces of the Region's economy.	Strategies for Smart Specialisation RIS3 of RWG http://dytikiellada.gr/wp-content/uploads/2016/01/RIS3_ΔE_2-2015.pdf
RIS3 Priority 2. Materials and microelectronics	Applied research partnerships between research departments and companies to promote international competitiveness	Strategies for Smart Specialisation RIS3 of RWG http://dytikiellada.gr/wp-content/uploads/2016/01/RIS3_ΔE_2-2015.pdf

Priorities and actions / programmes with regards to CCI, cultural heritage preservation and sustainable tourism		
Priority / action / programme	**Description**	**Source / Reference / Evidence**
Film Office of the Region of Western Greece (CIAK project)	The RWG office for managing filming requests and production support.	Region of Western Greece Press release. https://www.pde.gov.gr/gr/enimerosi/film-office.html
CI-NOVATEC Project	INTERREG Greece-Italy Project focusing on Local Tourism Clusters related to Creative Sector, Agri-food, Tourism and Trade.	https://www.interregcinovatec.eu
InnoXenia Project	INTERREG Adriatic - Ionian Project focusing on the tourism sector innovation in the area.	https://innoxenia.adrioninterreg.eu/
SPARC Project	INTERREG Greece-Italy Project. Development of a close collaboration between tourism sector, cultural and creative industries (CCI) local SMEs	https://greece-italy.eu/rlb-funded-projects/sparc/
RIS3-Smart Specialisation Strategy	The RWG in Priority 2 of the RIS3 Strategy, places Tourism & Culture sectors together and prepare strategies and policy considering these sectors as one of the main sectors for the Region's development	Strategies for Smart Specialisation RIS3 of RWG http://dytikiellada.gr/wp-content/uploads/2016/01/RIS3_ΔΕ_2-2015.pdf

Tourism in collaboration with Culture and Creative Sector is one of the 6 main Priorities identified in the Regions' of Western Greece main policy document, the Regional Operational Plan. The other five Priorities that the Region is focusing on, are Health - welfare - education - Lifelong learning - Sports, Productivity Restructure, Entrepreneurship & Innovation, Transport and Infrastructure and improvement of the Administrative Operation.

In addition, the connection of Culture to Tourism is getting more clear in the Smart Specialisation Strategy of the Region, since the two sectors are considered as a single priority (one of the three in total), in order to prepare strategies and policy.

One of the main Actions that the Region has undertaken in order to promote Culture in connection with Tourism is the establishment of the RWG Film Office, in order to attract and support new Film and other Audio-visual Productions in the area.

The CI-NOVATEC Interreg Greece - Italy Project should also be mentioned since it is focusing in creation of Local Tourism Clusters related to Creative Sector, Agri-food, Tourism and Trade in peripheral cities of the Region.

SPARC (Creativity Hubs for Sustainable DeveloPment through the VAloRization of Cultural Heritage Assets - SPARC) is project funded by Interreg Greece Italy programme, aiming to valorise the cultural and natural heritage by increasing the level of attractiveness of the territories involved, through the development of a close collaboration and synergy among tourism sector, cultural and creative industries (CCI) local SMEs.

InnoXenia project, funded by the Interreg Adriatic Ionian Programme, aims at improving the innovation capability of ADRION tourism sector, relying heavily on innovative products, processes and services that can supplement natural and cultural offerings.

2.3.5. Croatia: Dubrovnik Neretva County (PP6: DUNEA)

Support to overall regional development and competitiveness		
Priority	**Description**	**Source / Reference / Evidence**

1. Increase competitiveness and establish sustainable economic growth and development	To improve business environment for SMEs; to diversify economy by development of key economic activities and investment incentives; to develop knowledge and innovation for economic development	County Development Strategy Dubrovnik Neretva County 2016 - 2020
2. Improvement od sustainable management of space, resources and infrastructure	To improve infrastructure; to protect the environment and manage the space; sustainable management of ecologic network, natural and cultural heritage	
3. Improvement of quality of life and strengthen institutional capacities human and social resources	To improve quality and availability of social services and encouraging demographic growth; to ensure employment and answer to market needs; to strengthen institutional capacity and participative approach	
Priorities and actions / programmes with regards to CCI, cultural heritage preservation and sustainable tourism		
Priority / action / programme	**Description**	**Source / Reference / Evidence**
1.2.1 Improvement of tourism activities	The aim of this measure is the implementation of activities and projects determined by the Tourism Development Strategy of DNC 2012-2022 that include increase of tourism competitiveness, innovation and diversification of the tourist offer, raising the level of quality of services in tourism Improved tourist infrastructure, improvement of knowledge and skills of employees in tourism, improvement of destination promotion, increase of the level of awareness of all stakeholders for sustainable tourism, preservation and sustainable use of environment and cultural heritage.	County Development Strategy Dubrovnik Neretva County 2016 - 2020
1.2.5 Development of cultural and creative industries and other activities based on	Strengthening financial support to cultural and creative activities / industries, which have a relevant impact on economic development; Supporting stakeholder cooperation in the culture and tourism sectors;	

knowledge, innovation and technology	Development of cultural tourism based on quality contemporary art; Supporting the development of strategies, action plans and development guidelines related to building the necessary infrastructure for creative industries; Development of cultural and creative industry (music and film production, visual activities, virtual reality production, architecture, design, branding, promotion, new media, publishing, cultural and tourist products); Development of clusters of cultural and creative industries; Supporting the development of cultural management; Development of educational programs for cultural workers on innovative methods of working with the audience; Supporting the promotion of intercultural activities; Application and development of digital and multimedia technologies with the aim of preserving, promoting and educating about culture.	
2.3.2 Improvement of system of management and protection of cultural heritage	Identification, valorization and adequate protection at the local level of urban and rural units; Organization and implementation of research on unexplored monumental heritage; Inventory of tangible and intangible cultural heritage; Establishment of adequate protection (registration) of all individual buildings within the UNESCO-protected city center of Dubrovnik and beyond; Consolidation of all data and documentation of premises and facilities in one place - on the GIS platform; Systematic and organized restoration and revitalization of neglected cultural assets; Preparation of spatial planning documentation for identified environmentally valuable units and assemblies with landscapes; Development of management plans for valuable cultural units; Implementation of the audit of damaged cultural heritage sites in the context of (re) defining the protection status; Implementation of appropriate protective and conservation measures over cultural and	

	monumental assets (rehabilitation and restoration); Preparation of appropriate programs for the protection of tangible and intangible heritage; Strengthening the capacity of existing professional staff in the field of cultural heritage protection and attracting new staff; Maintenance and restoration of cultural monuments in the historic center of Dubrovnik and the contact zone of the historic center; Development of a landscape base and its incorporation into spatial planning documentation; Preparation of studies for the evaluation of cultural landscapes at the regional and local level, including the vineyard landscapes of the Pelješac peninsula and the island of Korčula; Engaging additional funding for heritage preservation and valorization through the preparation and implementation of EU-funded projects and other international projects; Raising awareness of a wide range of stakeholders about the importance of sustainable management, especially sustainable use, of cultural heritage and involving more stakeholders in the cultural heritage management planning process; Connecting institutions for the protection and preservation of cultural heritage and economic organizations, entrepreneurs, investors, cultural managers, tourism organizations; Design, preparation and implementation of projects for the preservation of the old historic centre of Dubrovnik while ensuring and preserving the local flavor; Design, preparation and implementation of projects for the restoration and revitalization of cultural heritage sites, especially sacral, in order to improve the scientific and tourist offer (the Monastery and the Church of Sr. Mary on the island of Mljet, etc.); Design and implementation of programs for active involvement of visitors in cultural events and interpretations of tangible and intangible cultural heritage; Development and implementation of creative cultural-tourist programs and products of connecting	

	cultural heritage with other tourist attractions in the County	
2.3.3 Active promotion of cultural and natural heritage	Design and implementation of programs for the systematic promotion of sustainable use of cultural and natural heritage; Support for the organization of scientific and educational conferences (symposia, summer schools, etc.) on the protection and preservation of cultural and natural heritage, in cooperation with Dubrovnik and other universities in the Republic of Croatia and abroad and other scientific research organizations; Development of cooperation with world-famous and recognized institutions; Encouraging cooperation on projects within the European Territorial Cooperation Program and other EU programs; Development and implementation of programs for greater and better representation of cultural and natural heritage in the tourist offer; Development and implementation of a program to further promote the Neretva Delta as a unique phenomenon; Design and implementation of volunteering programs; Development and implementation of programs for participation in relevant fairs and gatherings of tourist employees and employees in culture and nature protection, scientific conferences.	
3.1.4 Diversification and increase of the quality of cultural content	Preparation of an analysis of the situation and needs for the development of cultural content in the County; Development and implementation of cultural content development programs in the County in cooperation with all local governments; Investing in the development of human resources in culture - attracting staff and additional training; Improving the mechanisms	

	of co-financing of cultural institutions and the independent sector; Strengthening the capacity of cultural institutions, for management, for the development of new and innovative programs and services; Strengthening the connection of the institutional sector in culture with the independent sector through the preparation and implementation of joint projects; Improving the accessibility of cultural facilities to the population outside Dubrovnik, especially to the inhabitants of the islands and peripheral parts of the County; Strengthening and improving the offer of cultural facilities outside the tourist season; Promotion of culture as an indispensable offer of the County as a tourist destination and a place of quality living; Strengthening activities for the involvement and participation of the population in planning, performance and presentation cultural content; Encouraging the development of cultural content (theater, music, dance, creative activities, etc.) for all ages (children, young, middle, old).	

2.3.6.Albania: Region Vlora (PP7: RDNC)

The Ministry of Culture is the sole body responsible for policies and strategies for cultural development. It supports around 30 cultural institutions of national importance, regulates the cultural sector and takes measures to protect cultural heritage. A small proportion of the Ministry's budget (EUR 300 000) is open for calls for proposals to support projects proposed by cultural stakeholders in relation to projects or initiatives reflecting the Ministry's priorities. There is no organised body representing the cultural sector nationally. There are however a number of trade associations that can be consulted (notably in publishing and cinema).

One of the main challenges in relation to cultural policy is to modernize the cultural institutions by adapting them to function under a market economy, with new forms of cultural consumptions, budgetary constraints, the need to internationalise and network as well as to mobilise alternative sources of funding (investors in Albania have yet to be mobilised to support art and culture). The appetite for cultural investment and cultural consumption is to be strengthened and regulation should make investment in the cultural sector by private investors as attractive as possible. The 8 development of tourism services and the need for a coherent cultural offer to attract visitors as well as investors is an opportunity to develop a public – private partnership. The new law on cultural heritage aims to address this point.

Another challenge relates to the positioning of the State and Albanian municipalities on promoting the emergence of a creative economy largely stemming from cultural and artistic education and practices. Few local policy makers seem to be aware of the potential of culture for economic and social development. It is important to raise awareness on the potential of culture and creative industries in local context. This will help mobilise important resources to monitor implementation of heritage policy for instance (protection of sites) but also to raise funding alongside the State budget.

A Strategy for Culture serves several purposes:

A. It guides policy actions and mobilises policy tools in accordance to set priority goals. It serves to debate the purpose and content of culture policy. It clarifies the missions of the Ministry as well as the national cultural agencies. It determines the relationship with decentralised authorities and the private sector. It informs public opinion and cultural stakeholders. Importantly it puts culture policy in the context of the national development strategy and international technical assistance programme thus enabling the cultural sector to be included in strategic decisions.
B. It gives the opportunity for the Ministry to establish a process of consultation and participation with professionals, policy makers and citizens that serves the elaboration of the strategy as well as its implementation. The Ministry is held accountable for the implementation of the strategy.
C. The strategy serves to justify cultural investment and to develop a list of indicators on which the effectiveness of the policy actions will be judged and reviewed.

Albania has yet to define its originality and what the country is standing for in the concert of Nations. The culture strategy is also about supporting the development of narrative that highlights the country's cultural specificities and how its cultural resources contribute to diversity. The challenge is to make use of the country's past, cultural, political and religious assets to build a future that is inclusive, and serves as an example to neighbouring countries whether in the Balkans or across the Mediterranean. The strategy wished to position Albania at the cross road so that the cultural sector, which plays a key role in strengthening mutual understanding and cultural dialogue, is in a position to benefit from donors' programmes in the region.

2.3.7. Bosnia and Herzegovina (PP8: SEBS)

In terms of economic development and competitiveness, Bosnia and Herzegovina have made some progress but is still at an early stage of establishing a functioning market economy. Some improvements in the business environment have been achieved, and the financial sector has been strengthened. Key remaining issues are a weak rule of law, a still poor business environment, a fragmented and inefficient public administration, and major labor market imbalances related to a poor education system, weak institutional capacities, and an unsupportive investment climate. Moreover, the informal economy remains significant.

The CCI sector is also influenced by all the above mentioned factors hindering the country's economic development and competitiveness. The policy context for the CCIs and tourism sector is deeply rooted in the social, economic, cultural, and political changes and challenges of Bosnia and Herzegovina.

Key challenges facing the development of the CCI sector are reaching balanced development of all cultural activities at the entity, cantonal and local level, strengthening of legal and institutional support, and building human resources capacities. Also, we have to emphasize that determination and implementation of cultural policies and legislation are within the competence of the ten cantonal ministries for culture in the entity of the Federation of B%H. These ten cantonal ministries have their laws, policies, strategies, budgets, objectives, and priorities for culture.

In BiH, culture is decentralized. At the national level, the BiH Ministry of Civil Affairs is responsible for cultural issues, within which cultural-related activities are performed by the Sector for Science / Science and Culture. It is responsible for preparing and implementing regulations, harmonization of plans of entity/district authorities and defining strategies at the international level in the field of culture, participation in international organizations in the field of culture and ensuring the fulfillment of international obligations of BiH and preparation of international agreements/contracts in the field of culture.

At the entity level, there are ministries in charge of cultural issues. The jurisdiction in the Federation of BiH is with the Federal Ministry of Culture and Sports. It performs tasks within the Federation of BiH's competence concerning various areas of culture: cultural heritage, museums, archives, publishing, performing arts, filmmaking, civil initiatives in the field of culture, etc. Within the Federal Ministry of Culture and Sports there are several sectors, one of which is the Sector for Cultural-Historical Heritage and Culture.

At the initiative of the Commission for the development of cultural strategy BiH, established by the BiH Council of Ministers, cultural development is included in the revised Medium Term BiH Development Strategy 2004-2007, for the first time in some strategic and development document of the country. The BiH Cultural Policy Strategy was adopted in 2008. It defines strategic goals and priorities and measures for their implementation. Action plan for the implementation of the Cultural Strategy policy in Bosnia and Herzegovina was adopted in 2011 for the period 2011-2014. Afterward, the implementation of the Action plan was extended (2017-2018).

Moreover, the Development Strategy of the Federation of BiH determines the goals and instruments of cultural development of FBiH including culture in a broader sense and culture in a narrower sense; arts and cultural industry; cultural heritage, cultural relations, and cross-sectoral action.

In the following table are briefly listed the overall strategies which drive the development of Bosnia and Herzegovina in general.

Support to overall regional development and competitiveness

Priority	**Description**	**Source / Reference / Evidence**
Priority 1: **Support the production of higher value-added products, which are recognizable and attractive for export**	Federation of BiH has a small and thus necessarily open economy, so it inevitably faces increasing competition in the global market. Therefore, it is necessary to identify leaders of the cities / regions around which small companies could be clustered following a trade policy and policy of smart specializations.	**Strategy of the development of Federation BiH 2021-2027** Strategic document that defines vision of the development of Federation BiH and strategic goals
Priority 2: **Support technology transfer and technology development**	Value chain policies, cluster policies, productivity policiea, and research and development policies should support the establishment of funds for research, development and innovation, centers of excellence, connecting with European entrepreneurial and scientific research networks, in order to establish a "translation infrastructure" that would ensure transfer and development technology. It is especially important to work on the establishment of centers of excellence through a partnership of public, private and civil (academic) sectors, which would occur through its two components: research and development center and training center.	
Priority 3: **Increase the digitization of the economy**	Digitization, i.e., the intelligent connection of people, processes, data, and things, is key to maintain productivity and competitiveness of the economy, development of innovation and job creation. The digitalization transforms the way economies operate and provides the basis for achieving long-term growth.	
Priority 4: **Increase savings and investments**	It is necessary to update existing or enact laws on financial institutions (e.g. credit deposit institutions, credit guarantee funds, SME financing funds and startups), financial mechanisms (e.g., multilateral compensation) and financial instruments (e.g., those relating to the primary and secondary capital markets) to boost the mobilization of savings and its placement through investments.	

Priority 5**: Strongly supports the development of small and medium enterprises**	To increase the number of entrepreneurs, it is necessary to develop entrepreneurial culture, promote entrepreneurship and crafts, establish institutional framework, and mechanism to support entrepreneurship	
Priority 6**: Improve the tourist offer**	Federation of BiH has excellent opportunities for the development of certain types of tourism. However, the tourism sector faces with multiple challenges	
Priority 7: **Improvement of the market mechanism**	To strengthen the effects of market competition, protect property rights, improve the functioning of the labor market and strengthen the functioning of the bodies involved in the standardization, certification and accreditation	
Priority 8: **Reduce inactivity and unemployment, especially long-term**	Employment policy should be focused on reducing inactivity and unemployment.	
Priority 9: **Improvement of the education system**	To implement a comprehensive curricular reform of preschool, primary and secondary education, higher education based on evidence-based data, aiming to meet the educational needs (talents, people with developmental disabilities and physical disabilities, social vulnerable), and improve educational infrastructure.	
Priority 10: **Improve health system outcomes**	To promote the right to health care for all citizens of FBiH, to improve coverage health insurance, implement lifelong learning programs about health and healthy lifestyles, protect the reproductive health of young people, strengthen vertical and horizontal coordination, especially in public health crises.	
Priority 11: **Improve the position of young people, family stability and population growth**	To provide financial and housing support for young people	

Priority 12: **Reduce poverty and social exclusion**	Adoption of new laws on social insurance and social work, development of social cards and registry, following guidelines for aligning reporting on social indicators with EU practice.	
Priority 13: **Improve the protection and use of natural resources**	To awareness regarding the protection and preservation of the environment, define the rights and obligations of resource owners in environmental management and natural heritage, building institutional capabilities in the field of nature and culture heritage protection, align legislation with EU legislation, introduce economic instruments respecting the principle of "polluter pays and "user pays"	
Priority 14: **Improve air quality**	To improve air quality by relative emission reductions, especially in the area transport, by redirecting to adequate heat sources, by increasing energy efficiency, by transposing and complying with the relevant EU directives	
Priority 15: **Increase energy efficiency**	The increase in energy efficiency, especially in the energy consumption segment, has the largest effect on the decarbonization of the energy sector, the reduction of energy costs, and the increasing the productivity and competitiveness of economic entities.	
Priority 16: **Start with the implementation of the energy transition plan**	To change the paradigm of energy development, by shifting the focus towards the development of renewable energy sources i.e., start moderate/accelerated decarbonization of the energy sector	
Priority 17: **Encourage the development of IT infrastructure**	To increase investments in research and development in the ICT sector, establish an adequate legal framework for broadband at the BiH / FBiH level harmonized with EU legislation, create administrative and legal conditions for e-business	
Priority 18: **Encourage the development of transport infrastructure**	To build transport infrastructure, especially planned highways, connect large city centers in FBiH and improve regional connectivity.	
Priority 19: **Encourage the development of**	Design adequate financial mechanisms that must be market-oriented and supported by the competent authorities and	

infrastructure in rural areas	international development agencies/organizations providing technical assistance	
Priority 20: **Promote the rule of law**	To increase the efficiency of the judicial system	
Priority 21: **Put public administration in the service of citizens**	To implement reform of public administration	
Priority 22: **Improve accountability in the area of public finances**	To strengthen tax morale, better collection of public revenues and their more effective and more efficient spending through public expenditures	
Priority 23: **Reduce corruption**	Progress in reducing corruption requires two fundamental preconditions: a solid civilian organization society and a developed environment that protects civil liberties, especially "whistleblowers".	
Priorities and actions / programs with regards to CCI, cultural heritage preservation and sustainable tourism		
Priority / action / programme	**Description**	**Source / Reference / Evidence**
Culture Development Strategy in B&H 2010 – 2020	This strategy sets the following goals: affirmation of cultural diversities and promotion of cultural expressions in the time of globalization, preservation, and promotion of heritage and arts, safeguarding tangible and intangible cultural heritage, the development of cultural tourism, digitalization of cultural heritage and support for digital creativity, development of cultural/creative industries, improvement of intercultural understanding to achieve inter-cultural dialogue as well as to strengthen social cohesion of society at the territory of Federation of BiH	Culture Development Strategy in B&H 2010 – 2020
Culture Development	The Strategy aims at strengthening the common understanding and respect among individuals, communities, and people,	Culture Development

Strategy of Republika Srpska 2017-2022	strengthening the cultural understanding through dialogues of all interested parties in the field of culture, promoting cultural differences, as well as harmonising the policies and the legislation of Republika Srpska with the relevant EU policies. In that regard, the main objectives of the Strategy have been defined as follows: 1) Contribution to sustainable development of Republika Srpska through culture and art – creative industry; 2) Decentralisation – Cultural development of Republika Srpska (encouraging people in municipalities to get involved in art and culture to a higher extent, through creating new audience or active participants in development and promotion of cultural contents; 3) Sustainability of cultural organisations (public cultural institutions, associations, artists); 4) International and regional cultural cooperation; 5) Education in culture.	Strategy of Republika Srpska 2017-2022
Culture Development Strategy of Zenica-Doboj Canton 2014 – 2020	The Strategy sets the following priorities: 1. Amendments to cantonal laws in culture 2. Identify sources and mechanism of financing culture 3. Establish an educational policy on culture 4. Development of cultural policy strategies at the local level 5. Creating conditions for all-round cultural development of young people 6. Affirmation of cultural activities among marginalized groups 7. Building the capacity of the Culture Sector of the Ministry of Education, Science, Culture and Sports 8. Strengthening cooperation between cultural institutions, organizations and individuals 9. Design the model of cultural policy	Culture Development Strategy of Zenica-Doboj Canton 2014 – 2020
Culture Development Strategy of City Mostar 2018 – 2026	The Strategy sets two strategic goals: 1. Improve the environments for investors, entrepreneurs and innovators	Culture Development Strategy of City Mostar 2018 – 2026

	2. Become a creative and inclusive city with a high degree of cooperation between the city administration and citizens	
Study CCI sector in Canton Sarajevo	This study outlines the status of CCI in Canton Sarajevo and provides the list of potential project aimed to boost development of CCI sector. Selected projects are: 1. Sarajevo Design Network 2. Cluster of CCI in Caton Sarajevo 3. Establishment of the Center of Creative Industries in Caton Sarajevo 4. Design of new and innovative master program "Management and marketing in culture" 5. Design of digital guide for cultural events in Canton Sarajevo	Study CCI sector in Canton Sarajevo

3. CCI sector in the region

In this section partners provided a brief but comprehensive description of the CCI sector in the region. The CCI sector in every region/country is described in terms of demographical indicators, linkage to cultural heritage and sustainable tourism, and the main stakeholders involved in these activities.

Project level view

CCI sector in the region (*all regions/countries have adopted several strategic documents related to CCI; all regions/countries have significant number of CCI stakeholders ranging from policymaking institutions/authorities, private and public enterprises, and NGO sector*)	
Analysis of Emilia-Romagna Region	Great number of CCI related enterprises (to total number of enterprises) with the contribution of CCI industries of 5,4% to regional GDP (employees contribute same- 5.4% to regional employment).
Analysis of Friuli Venezia Giulia Autonomous Region	Employees of CCI enterprises as percentage of regional workforce – 6.3%; 5.4% of regional added value.
Analysis of Slovenia	CCI employs 7% of all employees in the country, with CCI industries making 3.5% to the total gross value added (GVA) in Slovenia.

Analysis of Region of Western Greece	employees of CCI enterprises make 1.8% of regional workforce.
Analysis of Dubrovnik Neretva County	Employment in CCI industries amounts to 3% of the total employment of the Croatian economy.
Analysis of Albania: Vlore region	CCI employs 0,7% of employees expressed as percentage of regional workforce.
Analysis of BiH	No data on employment, but expressed as a percentage of national GDP, CCI industries amount to 5.72%.

3.1. Business demographics of the CCI sector

In terms of the business demographics of the CCI sector, in the following sub-section, partners are providing the basic demographic data of the CCI sector using fundamental quantitative indicators including, but not limited to: 1) Size of CCI sector; 2) Contribution to regional GDP; 3) Contribution to national GDP; 4) Number of employees of CCI enterprises and percentage of regional workforce; 5) Volume of sales by regional CCI enterprises; and 6) Number of enterprises, size and employment per CCI subsector.

3.1.2. Italy: Emilia-Romagna Region (PP1: MCBO)

The CCI sector has been deeply analysed in Emilia-Romagna, especially in consideration of its potential and its capacity of being transversal in numerous other sectors. The fundamental document analysis is the Second Report on Orange Economy in Emilia Romagna[50], made by ART-ER[51] for the year 2018 (the first one was made in 2012), which gives a complete view of the Cultural and creative sector in Emilia Romagna, not only in qualitative terms, but also quantitative: starting from the problem of defining the borders the CCI sector, a detailed description of the market and a list of indicators is presented. Within the framework of this report, a specific focus is also given[52] to the employment aspects of the CCI sector, providing indicators in terms of number of employees, requested professional figures, level of education and training in the sector, value added.

[50] Full report available at the following institutional link: http://www.ervet.it/?p=13363

[51] Cf. Stakeholder section 3.3 1. for further details

[52] Il comportamento occupazionale delle imprese culturali e creative in Emilia-Romagna – Andrea Gianni, CLAS S.p.A. Full intervention available at the following institutional link (bottom of the page): http://www.ervet.it/?p=13363

Focusing on the Metropolitan level, a relevant source basing on the same definitions of the Report on Orange Economy in Emilia Romagna) is the report on creativity and its industries[53], carried out in 2012 in the context of the Innovation and development Working Group[54]. This report (also if not so updated as the second Report on Orange Economy), clearly defines MCBO as a centre for CCIs in the Regional context, deepening the different subsectors (in particular the agro-food one and the multimedia one) and listing the main institutional actors of the sector; a qualitative description of the creative context (in terms of education, training and soft skills) shows how the CCIs sector is richly composed by high-trained, transversal and flexible figures, both technical and humanistic, with a great added value potential. The following table reports the main indicators collected for CCIs at Regional level.

Indicator	Value	Source Year 2018*
Size of sector **in million EUR**	8.721,289 (NUTS 2, 5,4% of total)	Report on Orange Economy in Emilia-Romagna
Size of sector **in number of enterprises**	34.700 (NUTS 2, counted in local units)	Report on Orange Economy in Emilia-Romagna
Contribution to regional GDP **(size of sector as percentage of regional GDP)**	5,4% (NUTS 2)	Report on Orange Economy in Emilia-Romagna
Contribution to national GDP **(size of sector as percentage of national GDP)**	0.42%	Calculated as regional CCI sector over national GDP

53 Full report available at the following institutional link: https://psm.bologna.it/Engine/RAServeFile.php/f/Tavoli/report-creativita_senza-logo.pdf

54 Full report of the Innovation and development table available at the following institutional link: https://psm.bologna.it/Engine/RAServeFile.php/f/Tavoli/report-innovazione-e-sviluppo_senza-logo.pdf

Number of employees of CCI enterprises	89.000 (NUTS 2) 26.000 (NUTS 3, 29,3% of Regional data)	Report on Orange Economy in Emilia-Romagna
Employees of CCI enterprises as percentage of regional workforce	5,4% (NUTS 2)	Report on Orange Economy in Emilia-Romagna
Volume of sales by regional CCI enterprises **in million EUR**	--	
Size of CCI subsectors **in million EUR**	**Subdivision not available**	
Number of enterprises per CCI subsector	NUTS 2 Level: 1 Creative services: architecture, design, photography, software, gaming and informatics consultancy, advertisement: 63% of total companies of the sector 2 Media and cultural Industry: Cinema and audiovideo, publishing, music, radio and TV: 9,2% of total companies of the sector 3 Cultural, artistic and entertainment activities: live performances, recreational activities, historical, artistic and cultural heritage, other artistic activities: 11,5% of total companies of the sector 4 Distribution of Cultural products: 8,7% of total companies	Report on Creativity in the Metropolitan Area of Bologna

	5 Artistic manufacturing: 6,8% of total companies	
Employment **(in thousands)** per CCI subsector	NUTS 2 Level: 1 Creative services: architecture, design, photography, software, gaming and informatics consultancy, advertisement: 46.700 employees, 52,3% of total employees of the sector 2 Media and cultural Industry: Cinema and audiovideo, publishing, music, radio and TV: 17.100 employees, 19,2% of total employees of the sector 3 Cultural, artistic and entertainment activities: live performances, recreational activities, historical, artistic and cultural heritage, other artistic activities: 13.800 employees, 15,4% of total employees of the sector.	Report on Orange Economy in Emilia-Romagna
… (other indicators)[55]	Single-person enterprises and freelances are 70% of the entire sector, with 22.000 enterprises. In the other sectors, this percentage is 60%. The tendency to small scaling is confirmed also from the analysis in terms of revenues of the enterprises.	Report on Orange Economy in Emilia-Romagna

- *Exception made for "Number of enterprises per CCI subsector" which is 2012*

3.1.2. Italy: Friuli Venezia Giulia Autonomous Region (PP2: FVG AR)

The only data published for the sub-sectors of the Italian cultural and creative system is that of the number of companies. The Structural Regional Business Statistics and the Regional Business

[55] These should be potential indicators that describe the demographics of the CCI sector in the study area.

Demography of EUROSTAT[56] also publish only the data relating to the number of companies. In order to have data at sub-sectoral level, an ad hoc processing by the regional statistical service is required, not compatible with the timetable relating to this Deliverable.

An interesting element of analysis concerns the distinction between the contribution of core activities and the contribution of creative driven activities within the whole Cultural and Creative Production System. The creative-driven activities are those manufacturing activities which, although not directly involved in cultural and creative activities, benefit from them, using professionalism and skills in the sector, to enhance their production of goods and services. The core activities are those of the creative industries (architecture and design; communication), the cultural industries (cinema, radio, TV; video games and software; music; publishing and printing; performing arts: historical and artistic heritage). In Friuli-Venezia Giulia the contribution of the core activities with regard to the Added Value is 3.0% and that of the creative-driven activities is 2.4%. As regards employment, the breakdown sees the core of cultural activities contribute 3.6% to regional employment and creative-driven activities contribute 2.7%.
Trieste, the capital city of the Friuli-Venezia Giulia Region, is in 11th place among the 110 Italian provinces for the contribution of the Cultural and Creative Production System to the added value of the province (6.3%) and is in sixth place for contribution to provincial employment (7.5%). The division between the core component and the creative driven component is 4.0% / 2.3% for the added value and 4.8% / 2.7% for the employment.

Indicator	Value	Year	Source
Size of sector in million EUR	1.850,5	2018	"Io sono Cultura 2019"[57]
Size of sector in number of enterprises of the Core	5.179	2018	"

[56] https://ec.europa.eu/eurostat/web/regions/data/

[57] "Io sono Cultura 2019 - L'Italia della qualità e della bellezza sfida la crisi, Quaderni Symbola, by Fondazione Symbola and UnionCamere, June 2019.

Contribution to regional Added Value (size of sector as percentage of regional AV)	5,4	2018	"
Contribution to national Added Value (size of sector as percentage of national AV)	1,9	2018	"
Number of employees of CCI enterprises (thousands)	34,0	2018	"
Employees of CCI enterprises as percentage of regional workforce	6,3	2018	"
Volume of sales by regional CCI enterprises in million EUR	n.a.	2018	"
Number of enterprises* Architecture and Design	1.653	2018	"
Number of enterprises* Communication	638	2018	"
Number of enterprises * Cinema Radio and tv	188	2018	"
Number of enterprises * Videogames and Software	761	2018	"
Number of enterprises * Music	86	2018	"
Number of enterprises * Publishing and print	1.623	2018	"
Number of enterprises * Performing arts	215	2018	"

Number of enterprises * Historical and Artistic Heritage	15	2018	“
… (other indicators)[58]			

3.1.3. Slovenia (PP3: UIRS)

Few days ago Centre For Creativity launched the first extensive research analysis of the creative sector in Slovenia called - *Statistical Analysis of the Situation of the Cultural and Creative Sector in Slovenia 2008–2017*. Analysis included 35,212 individuals working in creative professions and 24,062 registered organizational units in the field of activities in CCS. Extensive analysis provides insight into the dimension and potential of the sector and provides a basis for further research and policy recommendations in the field of CCS in Slovenia.

Creative economy employs 7% of all employees in Slovenia. The term "employees" in the survey refers to employees in an employment relationship and self-employed persons (including the self-employed in culture), who are also compulsorily social on this basis insured, regardless of whether they have a full-time or part-time job. CCS in the entire economy of Slovenia occupies 10.5% of all registered organizational units, and among economic entities it includes 8.4%all active companies in the Slovenian economy. In 2017, the entire CCS in Slovenia generated EUR 2,964,164,438.53sales revenue. This is 2.7% of revenues generated in the entire Slovenian economy. CCS generated more revenue than the chemical industry, and at the same time the share is comparable to the revenue generated by the electrical appliance industry this year. Companies operating in CCS contributed 3.5% to the total gross value added (GVA) in Slovenia. GVA per employee in CCS amounted to EUR 45,527 and was higher than the average of the economy (EUR 43,210).In the field of employment and generated GVA, CCS is more important than the chemical industry or the production of computers, electronic and optical products, and is comparable to the automotive industry in several respects.

[58] These should be potential indicators that describe the demographics of the CCI sector in the study area.

4.7% of all employees in Slovenia are employed in creative professions. If we add other (support) professions that are employed in CCS to the creative professions (employees in CCS and outside CCS), we find that the power on the part of CCS is even greater - in the so-called creative economy there are as many as 51,934 individuals employed in Slovenia. , this is 7% of all employees.

In the Slovenian economy, the cultural and creative sector accounts for 10.5% (24,062) of all registered organizational units and is comparable in number to construction. In terms of employment, compared to all industries in Slovenia, CCS occupies approximately the same share as the production of electrical appliances and financial and insurance activities, and at the same time a larger share than the chemical and automotive industries.

In the term of growth in the field of CCS, the software and games industry and the profession of software developer stand out. Since 2008, the number of units in the industry has doubled, and the number of software developers has almost doubled. The software and games industry also has the largest share of companies with more than 10 employees (7%).

Share of registered organizational units in individual branches of CCS, 2017 - 16% Software and games; 10% Advertising; 10% Design and visual arts; 9% Architecture; 5% Video and film; 4% Cultural and artistic education; 1% Music; 1% Radio and television; 3% Archives, libraries and cultural heritage.

One of the main characteristics of CCS companies is their small size. 97% of companies from CCS in Slovenia employ up to 9 employees, while 80% of companies employ only 1 person. This feature is not only a Slovenian specialty, but a situation that is completely comparable to the EU. Even there, as many as 95% of companies in CCS employ up to 9 employees, of which 70% of companies employ only 1 person, 9 and it should be emphasized that with appropriate support, small size is not an obstacle to further development. However, for the further development of the potential, additional empowerment of the cultural and creative sector is essential.

The structure by legal organizational forms shows that in Slovenia the field of CCS is dominated by independent entrepreneurs and limited liability companies. A significant share is occupied by the self-employed in culture (12%). In addition, the share of sole proprietors in the field of CCS is 56%, which is more than in the rest of the economy, where this share is 43%.

In 2017, the cultural and creative sector generated a total of EUR 2,964,164,438.53 in sales revenue, which is 2.7% of the revenue generated in the entire Slovenian economy. In generating revenues, CCS was more successful than the chemical industry, and at the same time the share of generated sales revenues in CCS is comparable to the revenues generated this year by the electrical appliances industry. These findings clearly confirm the scale and importance of CCS in the Slovenian economy.

In the entire economy, CCS accounts for 8.4% of all companies with income or employees. According to the company's business performance indicator, companies in CCS generated EBITDA of 256.3 million in 2017.15 This represented 3% of the total EBITDA generated in Slovenian companies. In 2017, the cultural and creative sector in Slovenia generated a total of 3.5% of total gross value added (GVA), 16 generated in Slovenian companies. GVA per employee in CCS amounted to EUR 45,527 and was higher than the average of the economy (EUR 43,210).

A comparison of CCS with some other industries in terms of generated EBITDA shows that CCS generates higher EBITDA from the chemical industry and from the production of computers, electronic and optical products. However, EBITDA generated in the manufacture of electrical appliances or construction is higher by only one percentage point[59].

3.1.4. Greece: Western Greece (PP4: Patras Science Park)

In order to identify the basic Business demographics for the Region, the main sources of data that were used, were those published and validated in the official charts and tables of the Hellenic Statistical Authority - ELSTAT. The available data found, were at a 3-digit level of economic Activity (NACE 2), since more detailed data for the 4-digit Activities are not publicly published.

[59] MAO, 2020; dr. Barbara Predan: “Kulturno-kreativne imperative” https://czk.si/gradiva/kulturno-kreativni-imperativ/ by Centre for Creativity/MAO and (MAO, 2020): Statistična analiza stanja kulturnega in kreativnega sektorja v Sloveniji 2008–2017 https://czk.si/gradiva/statisticna-analiza-kks-2008-2017/ by Centre for Creativity/MAO

In addition, weighting factors were applied, since not the entire production and economic activity in a 3-digit level classification, may be considered as creative. The weighting factors used are the same with those the Ministry of Culture used in the 2016 Mapping Study of the Culture and Creative Sector in Greece.

The size of the Sector as a GDP in mil Euros could not be identified, since there are no data available regarding the GDP per Subsector per Region. ELSTAT does not publish such narrow and specific details due to confidentiality restrictions, and the data are only available upon request and approval by the Authority's Board. Thus, we could not identify the contribution as e percentage to the Regional and National GDP and as a subsector size.

The CCI sector in the Region of Western Greece in 2017 consists of 1,918 companies, employing 3,216 employees, which is 1.8% of the entire Region's Workforce, while its total turnover is 78,678.17 mil.

Indicator	Value	Year	Source
Size of sector in million EUR	**no source**		
Size of sector in number of enterprises	**1,918**	2017	Hellenic Statistical Authority (table A1201_SBR01_TB_AN_00_2017_04_F_GR)
Contribution to regional GDP (size of sector as percentage of regional GDP)	**no source**		
Contribution to national GDP (size of sector as percentage of national GDP)	**no source**		
Number of employees of CCI enterprises	**3,216**	2017	Hellenic Statistical Authority (table A1201_SBR01_TB_AN_00_2017_04_F_GR)
Employees of CCI enterprises as percentage of regional workforce	**1.8%**	2017	Hellenic Statistical Authority (table

			A1201_SBR01_TB_AN_00_2017_04_F_GR)
Volume of sales by regional CCI enterprises in million EUR	**78,678.17**	2017	Hellenic Statistical Authority (table A1201_SBR01_TB_AN_00_2017_04_F_GR)
Size (in million EUR) of CCI subsectors			
Printing	**no source**		
Manufacturing	**no source**		
Publishing	**no source**		
Retail of Cultural Goods	**no source**		
Computer - Programming	**no source**		
Audio-visual - Multimedia	**no source**		
Media - Information	**no source**		
Architecture Activities	**no source**		
Advertising	**no source**		
Design - Photography	**no source**		
Arts & Entertainment	**no source**		
Museums & Libraries	**no source**		
Web Design	**no source**		
TOTAL			
Number of enterprises per CCI subsector			
Printing	**56**	2017	Hellenic Statistical Authority

Manufacturing	**16**	"	"
Publishing	**65**	"	"
Retail of Cultural Goods	**127**	"	"
Computer - Programming	**170**	"	"
Audio-visual - Multimedia	**31**	"	"
Media - Information	**65**	"	"
Architecture Activities	**807**	"	"
Advertising	**89**	"	"
Design - Photography	**133**	"	"
Arts & Entertainment	**180**	"	"
Museums & Libraries	**51**	"	"
Web Design	**128**	"	"
TOTAL	**1,918**		
Employment (in thousands) per CCI subsector			
Printing	**122**	2017	Hellenic Statistical Authority
Manufacturing	**21**	"	"
Publishing	**205**	"	"
Retail of Cultural Goods	**222**	"	"
Computer - Programming	**235**	"	"
Audio-visual - Multimedia	**47**	"	"
Media - Information	**113**	"	"
Architecture Activities	**897**	"	"

Advertising	**624**	"	"
Design - Photography	**174**	"	"
Arts & Entertainment	**294**	"	"
Museums & Libraries	**130**	"	"
Web Design	**132**	"	"
TOTAL	**3,216**		

3.1.5. Croatia: Dubrovnik Neretva County (PP6: DUNEA)

Regional and local governments financially and operationally support creative and cultural sector within yearly schemes, developing and implementing EU funded projects to boost innovation, excellence and promotion of the sector and capacity building actions. However, the connections between different actors is insufficient, lack of participatory approach and somewhere inadequate in comparison to market needs and trends.

Local budgets contribute with 56%, while Ministry of culture with 44% forming in total 2,3 billion kuna or 549 kuna per capita funds for culture (for 2013.). Considering fiscal power, local governments provide more funds, 6% of overall local budget expenditure for culture whereas the state contributes with 0,8% of overall budget expenditure.

Dubrovnik Neretva County's allocation for culture per capita in 2011 was 528.5 making it 9th in Croatia (out of 21 administrative units).

In 2012, the total gross value added of the sector amounted to 6.312 billion kuna, or 2.3 percent of the gross domestic product of the Republic of Croatia. At the end of 2014, 42,212 people were employed in the creative and cultural industries – 3,0 percent of the total employment of the Croatian economy.

Comparison of the structure of employed persons in CCI with the structure of employees of the total Croatian economy in 2014:

	CCI	HR
employed for legal persons	85,2 %	85,0 %
craftsman	5,9 %	4,3 %
freelance	4,12 %	1,5 %
employed for craftsman and freelance	4,7 %	7,6 %
TOTAL	100 %	100 %

FINANCIAL INDICATOR	MICRO	SMALL	MEDIUM	TOTAL
TOTAL INCOME (AOP177)	77.259.573,00	15.077.213,00	109.705.143,00	202.041.929,00
(J) INFORMATION AND COMMUNICATION	20.738.692,00	15.077.213,00	0,00	35.815.905,00
(J58) Publishing activities	9.832.894,00	6.047.410,00	0,00	15.880.304,00
(J581) Publishing of books, periodicals and other publishing activities	9.599.180,00	6.047.410,00	0,00	15.646.590,00
(J5811) Publishing of books	5.436.088,00	0,00	0,00	5.436.088,00
(J5814) Publishing of magazines and periodicals	3.163.885,00	6.047.410,00	0,00	9.211.295,00
(J5819) Other publishing activities	999.207,00	0,00	0,00	999.207,00
(J582) Software publishing	233.714,00	0,00	0,00	233.714,00
(J5829) Release of other software	233.714,00	0,00	0,00	233.714,00
(J59) Production of film, video, television programmes, sound recording adn music publishing activities	4.523.892,00	9.029.803,00	0,00	13.553.695,00
(J591) Production and distribution of film, video and TV programme	3.523.376,00	9.029.803,00	0,00	12.553.179,00
(J5911) Production of film, video and TV programme	2.517.526,00	9.029.803,00	0,00	11.547.329,00
(J5913) Distribution of film, video and TV programme	1.005.850,00	0,00	0,00	1.005.850,00
(J592) Sound recording and music publishing activities	1.000.516,00	0,00	0,00	1.000.516,00
(J5920) Sound recording and music publishing activities	1.000.516,00	0,00	0,00	1.000.516,00
(J63) Information service activities	6.381.906,00	0,00	0,00	6.381.906,00

(J631) Data processing server services and related activities; internet portals	6.381.906,00	0,00	0,00	6.381.906,00
(J6311) Data processing, server services and related activities	5.180.477,00	0,00	0,00	5.180.477,00
(J6312) Internet portals	1.201.429,00	0,00	0,00	1.201.429,00
(M) PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES	53.340.201,00	0,00	109.705.143,00	163.045.344,00
(M70) Management;	516.445,00	0,00	0,00	516.445,00
(M702) Management – advising	516.445,00	0,00	0,00	516.445,00
(M7021) Public relations and communication activities	516.445,00	0,00	0,00	516.445,00
(M71) Architectural and engineering activities; technical testing and analysis	39.890.533,00	0,00	109.705.143,00	149.595.676,00
(M711) Architectural and engineering activities and related technical consultancy	39.890.533,00	0,00	109.705.143,00	149.595.676,00
(M7111) Architectural activities	39.890.533,00	0,00	109.705.143,00	149.595.676,00
(M73) Promotion (advertising and propaganda) and market research	10.506.498,00	0,00	0,00	10.506.498,00
(M731) Promotion (advertising and propaganda)	10.506.498,00	0,00	0,00	10.506.498,00
(M7311) Advertising agencies (advertising and propaganda)	7.935.952,00	0,00	0,00	7.935.952,00
(M7312) Media advertising	2.570.546,00	0,00	0,00	2.570.546,00
(M74) Other professional, scientific and technical activities	2.426.725,00	0,00	0,00	2.426.725,00
(M741) Specialized design activities	702.852,00	0,00	0,00	702.852,00
(M7410) Specialized design activities	702.852,00	0,00	0,00	702.852,00
(M742) Photography	1.723.873,00	0,00	0,00	1.723.873,00
(M7420) Photography	1.723.873,00	0,00	0,00	1.723.873,00
(R) ARTS, ENTERTAINMENT AND RECREATION	3.180.680,00	0,00	0,00	3.180.680,00
(R90) Creative, artistic and entertainment activities	1.650.197,00	0,00	0,00	1.650.197,00
(R900) Creative, artistic and entertainment activities	1.650.197,00	0,00	0,00	1.650.197,00
(R9001) Performing arts	1.084.282,00	0,00	0,00	1.084.282,00
(R9002) Supporting activities in performing arts	299.957,00	0,00	0,00	299.957,00
(R9003) Artistic creation	265.958,00	0,00	0,00	265.958,00

(R91) Libraries, archives, museums and other cultural activities	1.530.483,00	0,00	0,00	1.530.483,00
(R910) Libraries, archives, museums and other cultural activities	1.530.483,00	0,00	0,00	1.530.483,00
(R9102) Museum activities	1.317.323,00	0,00	0,00	1.317.323,00
(R9103) Work of historical places and buildings and similar attractions for visitors	213.160,00	0,00	0,00	213.160,00
NUMBER OF EMPLOYEES	262	22	114	398
(J) INFORMATION AND COMMUNICATION	68	22	0	90
(J58) Publishing activities	32	21	0	53
(J581) Publishing of books, periodicals and other publishing activities	28	21	0	49
(J5811) Publishing of books	13	0	0	13
(J5814) Publishing of magazines and periodicals	11	21	0	32
(J5819) Other publishing activities	4	0	0	4
(J582) Software publishing	4	0	0	4
(J5829) Release of other software	4	0	0	4
(J59) Production of film, video, television programmes, sound recording adn music publishing activities	14	1	0	15
(J591) Production and distribution of film, video and TV programme	11	1	0	12
(J5911) Production of film, video and TV programme	9	1	0	10
(J5913) Distribution of film, video and TV programme	2	0	0	2
(J592) Sound recording and music publishing activities	3	0	0	3
(J5920) Sound recording and music publishing activities	3	0	0	3
(J63) Information service activities	22	0	0	22
(J631) Data processing server services and related activities; internet portals	22	0	0	22
(J6311) Data processing, server services and related activities	13	0	0	13
(J6312) Internet portals	9	0	0	9

(M) PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES	185	0	114	299
(M70) Management;	4	0	0	4
(M702) Management – advising	4	0	0	4
(M7021) Public relations and communication activities	4	0	0	4
(M71) Architectural and engineering activities; technical testing and analysis	128	0	114	242
(M711) Architectural and engineering activities and related technical consultancy	128	0	114	242
(M7111) Architectural activities	128	0	114	242
(M73) Promotion (advertising and propaganda) and market research	39	0	0	39
(M731) Promotion (advertising and propaganda)	39	0	0	39
(M7311) Advertising agencies (advertising and propaganda)	29	0	0	29
(M7312) Media advertising	10	0	0	10
(M74) Other professional, scientific and technical activities	14	0	0	14
(M741) Specialized design activities	4	0	0	4
(M7410) Specialized design activities	4	0	0	4
(M742) Photography	10	0	0	10
(M7420) Photography	10	0	0	10
(R) ARTS, ENTERTAINMENT AND RECREATION	9	0	0	9
(R90) Creative, artistic and entertainment activities	3	0	0	3
(R900) Creative, artistic and entertainment activities	3	0	0	3
(R9001) Performing arts	0	0	0	0
(R9002) Supporting activities in performing arts	1	0	0	1
(R9003) Artistic creation	2	0	0	2
(R91) Libraries, archives, museums and other cultural activities	6	0	0	6
(R910) Libraries, archives, museums and other cultural activities	6	0	0	6
(R9102) Museum activities	4	0	0	4

(R9103) Work of historical places and buildings and similar attractions for visitors	2	0	0	2
NUMBER OF COMPANIES - (J) INFORMATION AND COMMUNICATION	38	2	0	40
NUMBER OF COMPANIES - (M) PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES	115	0	1	116
NUMBER OF COMPANIES - (R) ARTS, ENTERTAINMENT AND RECREATION	9	0	0	9
NUMBER OF COMPANIES	162	2	1	165

3.1.6. Albania: Region Vlora (PP7: RDNC)

Indicator	Value	Year	Source
Size of sector in million EUR	**435897.14**	2018	INSTAT
Size of sector in number of enterprises	674	2018	INSTAT
Contribution to regional GDP (size of sector as percentage of regional GDP)	1.9%	2018	INSTAT
Contribution to national GDP (size of sector as percentage of national GDP)	2 %	2018	INSTAT
Number of employees of CCI enterprises	229	2018	INSTAT
Employees of CCI enterprises as percentage of regional workforce	0,7%	2018	INSTAT
Volume of sales by regional CCI enterprises in million EUR	106 324.58 Euro	2018	INSTAT
Size (in million EUR) of CCI subsectors	There are no data regarding the CCI subsectors. 75% of total incomes comes from cultural tourism (museums, archeological sites, churches etc.) Around 10 % from cultural activities (opera, theater, cinema, festivals) Around 5% from handcraft activities. Other CCI subsectors covers 10% of total incomes (music, dance, photography, art galleries, interior design, textile mode)		

Number of enterprises per CCI subsector	No data		
Employment (in thousands) per CCI subsector	No data		
… (other indicators)[8]			

3.1.7. Bosnia and Herzegovina (PP8: SEBS)

This section provided the insight into business demographics of the CCI sector. As stated in the section Introduction the relevant data about CCI sector do not exist. Therefore, it is a difficult task to outline and/or evaluate the CCI's contribution to national economic growth. Furthermore, there is a lack of mapping studies of CCI sector that could provide information about the basic features of CCI and the importance of these industries to the national economy.

Indicator	Value	Source Year
Size of sector **in million EUR**	Not available	-
Size of sector **in number of enterprises**	3.836	2015 UNCTAD
Contribution to regional GDP **(size of sector as percentage of regional GDP)**	Not available	-
Contribution to national GDP **(size of sector as percentage of national GDP)**	5,72%	2011 UNESCO
Number of employees of CCI enterprises	Not available	-
Employees of CCI enterprises as percentage of regional workforce	Not available	-
Volume of sales by regional CCI enterprises **in million EUR**	Not available	-

Size of CCI subsectors **in million EUR**	Subdivision not available	-
Number of enterprises per CCI subsector	Not available	-
Employment **(in thousands)** per CCI subsector	Not available	-
… (other indicators)[60]	Creative Economy Trade Performance: Export: 164,84 Million US$ (2014) Imports: 239,45 Million US$ (2014)	UNCTAD

3.2. CCI links to cultural heritage preservation-valorisation and sustainable tourism in the region

In this sub-section, the partners elaborate the connection between CCI and cultural heritage preservation-valorisation and sustainable tourism promotion in their countries/regions. The evidence are provided of such linkages i.e. activities that bring CCI closer to cultural heritage and sustainable tourism promotion, such as regional policies promoting innovation in regional cultural heritage exploitation and regional sustainable tourism; innovative and creative solutions / products developed by regional CCI enterprises and examples of collaboration between the public and private sector in the areas of CCI and tourism.

[60] These should be potential indicators that describe the demographics of the CCI sector in the study area.

3.2.1. Italy: Emilia-Romagna Region (PP1: MCBO)

The following table aims to provide a short description of the linkage of CCI with cultural heritage preservation-valorisation and sustainable tourism, at metropolitan and regional level, looking at policies and ongoing projects.

Example of linkage	Description	Source
S3	At Regional level, the S3 aims at the development of new technologies and digitalization for tangible and intangible heritage (*smart cultural heritage*); furthermore, within the identification of new targets, it highlights the importance of the use of this vision to let the culture become a relevant part of tourism.	Regional S3 (p.46)
EmiliaRomagnaCreativa	The online platform promotes cultural events in the whole region and works as a means to attract tourists, and offers a database of funding opportunities for CCI. It has been started in 2016 by the E-R Regional Department of Culture, in collaboration with ATER (Regional Multidicliplinary circuit. Theatres and Seasons), ERT (Emilia Romagna Theater Foundation) and IBACN (Institute for cultural, natural and artistic heritage), as part of a reorganization project for cultural web communication. The platform is organized in 7 channels: Cinema, Shows, Billboard, Radio Emilia Romagna, Memory, Art and Exhibitions, Readings.	EmiliaRomagnaCreativa
Value chains of the Cluster CREATE: 1. FASHION 2. TOURISM and URBAN REACTIVATION	CREATE is the E-R Cultural and Creative Industries association. It counts about 70 members: more than an half of the members are SMEs and large companies; the others are the most important public and private laboratories and research centres, training centres and other entities	1. Fashion 2. Tourism and urban reactivation

	like foundations, academics and municipalities particularly active. Among the value chains of its interest emerge: 1. SO - Fashion Archives: recognize, consolidate, organize and enhance the archives to give value to companies and the territory and attract a niche tourism; 2. SO - Tourism: the supply chain, multi-channel platforms and open data for promotion; Urban reactivation and co-design.	
Metropolitan Strategic Plan (MSP), Priority 1 (Metropolitan Bologna: sustainable, responsible and attractive)	At Metropolitan level, within the touristic priority of MCBO, is explicitly mentioned how the territory as touristic destination necessitates of a strong transversal integration, in particular the connection of the touristic products with the elements that contribute to create an authentic experience: cultural excellences, environmental excellences and the historical centres.	Metropolitan Strategic Plan (*inter alia*, p. 31, 32, 11)
Operative annual plan, composed of local promotion touristic program and Promo-commercial touristic program	At Metropolitan level, MCBO yearly publishes call for proposals (both for public and private agents) for the support of local cultural/artistic/entertainment activities over the territory, with the aim to contribute to the development of the territorial attractiveness and implement MCBO's touristic strategy	Local promotion touristic program 2020 Promo-commercial touristic program Multiannual guidelines
Italian UNESCO Creative Cities	Bologna became a UNESCO Creative City of Music in 2006 when its rich musical tradition and its lively musical scene have been internationally recognized. The city is currently leading the Coordination of the 9 Italian UNESCO Creative Cities that consider creativity and innovation as key	Bologna Città della Musica

	tools for the cultural, social and economic development of their territories. Such collaboration aims to support the development of the UNESCO Creative Cities Network both at national and international level, to develop an integrated connection between culture, economic development and tourism, and to become a platform of reflection and research in the area of new economies.	
DMO (Bologna Welcome) as activator of cultural and creative activities in function of tourism promotion of the territory	At Metropolitan level, One of the roles of MCBO's DMO is to actively research new cultural/creative activities to exploit for promotional and touristic purposes. The already active CCIs are promoted in DMO's catalogues.	Stakeoholder interview (Bologna Welcome)
Incredibol! Call for proposals	INCREDIBOL! (l'INnovazione CREativa DI BOLogna – or "Bologna's creative innovation") is a project started by the City of Bologna in 2010, which uses a simple formula: small grants + spaces + tailor-made services. Every year it launches an open call for CCI projects as a driver for innovation and economic development. Some of the winner proposed ideas linked to tourism: - "Experiential tourism and cultural heritage" project (Incredibol! Call for proposal 2016); - App News Appennino - Wellcome Italia Srl, creator of a project of tourist visits within the greater Emilia-Romagna companies	Winning companies edition 2016 Winning companies edition 2018

3.2.2. Italy: Friuli Venezia Giulia Autonomous Region (PP2: FVG AR)

CCIs links to cultural heritage preservation-valorisation and sustainable tourism in the FVG AR region concerns different area and activities. The possible synergies between the creative macro-sector and tourism are multilevel because they develop B2B (think of the design for hospitality, publishing and ICT for the production of tourist content, cinema for product placement etc.), and B2C where ICC become a real tourist attraction (just think of Wine & food tourism and decades-long renowned Jazz & Wine festival). Thanks to the productive wealth and tourist attractions, the territory of the FVG Region undoubtedly constitutes an ideal testing laboratory to test these synergies.

Advertising agencies	Creation of on-line and off-line media campaigns to promote the cultural product relating to the tourist destination FVG	https://www.turismofvg.it/it/46674/Press https://www.turismofvg.it/Comunicazione/Area-B2B https://www.ikon.it/it/progetti/promoturismo-fvg
Photographic activities	Campagne shooting fotografico per la valorizzazione del patrimonio culturale regionale	https://www.turismofvg.it/Fotogallery https://www.turismofvg.it/
Organization of conferences and fairs	National and international b2b and b2c fairs for the promotion of regional cultural heritage; workshops for tour operators (b2b); educational for tour operators, advertising operators and press	https://www.turismofvg.it/Comunicazione/Area-B2B

Museum system activities	Promotion through the web portal of regional museum activities; organization of guided tours; insertion in FVGcard	https://www.turismofvg.it/ https://www.turismofvg.it/Arte-e-Cultura https://www.turismofvg.it/category/art-culture/ https://www.turismofvg.it/Eventi/ListaEventi? Tipologia=49 https://www.turismofvg.it/Offerte/FVG-Card
FVGCARD	Passepartout that facilitates the use of all the historical, architectural and naturalistic heritage of the region (use through free or discounted offers)	https://www.turismofvg.it/Offerte/FVG-Card
GUIDED TOURS	Calendar of guided tours Italian / English in the main cities of art, in UNESCO sites, in villages, in some museums. Services provided by professional tour guides. The visits are also accessible to people with motor, visual, cognitive and relational disabilities	https://www.turismofvg.it/Offerte/Visite-guidate
Multisensory experiences in 15 accessible villages of the FVG	Different itineraries that allow you to immerse yourself in the special atmosphere of each place, through experiences that involve all the senses. You can listen, touch,	See note n.35

	see, taste or appreciate with your sense of smell.	
Accessible itineraries in the 2 FVG 's Parks and 9 Natural Reserves	Accessible visitor centers • Presence of tactile tanks, stuffed animals and plastic to support tactile visits • Multimedia sound contents (animal sounds, sounds of nature, stories) to support tactile visits	See note n.35

Data provided by Promoturismo.

3.2.3. Slovenia (PP3: UIRS)

With the definition of the Center for Creativity (CzK) of central areas of CCS in Slovenia which include cultural heritage and cultural tourism**,** as well as other fields like architecture, advertising, design, visual arts, archives and library activities, the field of books, cultural and artistic education, music, performing and intermedia arts, media, software and games, film and AV activity – and others. CzK mission is to develop and supports projects that take shape at the intersection of different creative disciplines, art, experimentation, entrepreneurship, and business, and have not yet received a system-wide public funding. CzK promotes interdisciplinary co-operation and the development of projects that are commercially viable, increase added value and contribute to social progress and welfare. As one of the cornerstones of the development of the society, creativity plays an important role in addressing key environmental, economic, and societal challenges that lie ahead. The mission of the CzK is to establish systemic measures for the successful development of the sector and to ensure its spill-overs to other sectors[61].

CzK provides linkage to of CCI with cultural heritage preservation-valorisation and sustainable tourism through its programs:

[61] Center za kreativnost, MAO, 2020**;** https://czk.si/

- support activities and programs of The Centre For Creativity platform - organizing education and networking, pursuing internationalization, conducting research, managing the online platform and providing online offerings, and promoting the cultural and creative sector.
- Public grants "Promotion of creative cultural industries", led by the Ministry of Culture of the Republic of Slovenia, for the development of creative companies, projects and ideas and stronger cooperation between the economy and the creative sector. Where also ideas and companies dealing with cultural heritage preservation-valorisation and sustainable tourism are eligible. In fact in 2019 open call from projects selected and funded applicants from Cultural tourism or with projects from this filed - were very successful. At least 7 projects from this field were funded out of total 30 projects selected and funded[62].

3.2.4. Greece: Western Greece (PP4: Patras Science Park)

In Priority 2 of the RIS3 Strategy, RWG places Tourism & Culture sectors together and prepares strategies and policies considering these sectors as one of the main sectors for the region's development.

Establishment of the RWG Film Office is one of the most recent and promising innovative actions of the Region of Western Greece, for promoting the region's cultural heritage by attracting and supporting new Film and other Audio-visual Productions in the area.

Finally, Patras Carnival could be identified as an example of public and private collaboration promoting local Heritage offering a Cultural product promoting tourism in the area.

Example of linkage	Description	Source
RIS3-Smart Specialisation Strategy	Regional Policy: The RWG RIS3 Strategy, focuses on Tourism & Culture sectors as the main sectors for the Region's development	Strategies for Smart Specialisation RIS3 of RWG

[62] https://czk.si/podprti_projekti/

		http://dytikiellada.gr/wp-content/uploads/2016/01/RIS3_ΔΕ_2-2015.pdf
Film Office of the Region of Western Greece (CIAK project)	Regional Policy-Service: The RWG office for managing cinema requests and production support.	Region of Western Greece Press release. https://www.pde.gov.gr/gr/enimerosi/film-office.html
Patras Carnival	Public - Private Collaboration: Promotion of local Heritage through a Cultural product promoting tourism.	Municipality of Patras, Carnival Organisation. https://www.carnivalpatras.gr/en/

3.2.5. Croatia: Dubrovnik Neretva County (PP6: DUNEA)

Dubrovnik Neretva Region and other stakeholders have been engaged in development of projects with the aim of intertwining CCI and cultural heritage preservation-valorisation and sustainable tourism, especially through EU funded projects.

Example of linkage	Description	Source
Printing	Design and development of promotional material on cultural heritage routes	https://www.rural-dubrovnik-neretva.hr/images/brosure/brochure_tombstones.pdf https://www.rural-dubrovnik-neretva.hr/images/brosure/brochure_tombstones_neretva.pdf https://www.rural-dubrovnik-neretva.hr/images/brosure/brochure_tombstones_konavle.pdf

		https://www.rural-dubrovnik-neretva.hr/images/brosure/brochure_tombstones_primorje.pdf https://bluemed.interreg-med.eu/fileadmin/user_upload/Sites/Sustainable_Tourism/Projects/BLUEMED/BLUEMED_BROCHURE-FINAL.pdf
VR equipment	Presentation of underwater archaeological site Cavtat	https://bluemed.interreg-med.eu/news-events/news/detail/actualites/croatian-bluemed-kac-opened-in-pridvorje/ http://tzdubrovnik.hr/pano_dubrovnik.html
Film, video and television program production activities	Creation of promotional videos dedicated to the cities of art, UNESCO sites, the historical, archaeological, architectural and naturalistic heritage of the region	https://vimeo.com/157702207 https://vimeo.com/289054867 https://youtu.be/_zZecynDp6I https://youtu.be/9LjRVlFJ8OI https://youtu.be/UWjJ-vSC4pU https://www.facebook.com/croatia.hr/videos/964361190686485/UzpfSTU4OTIzNzY3MTEyMjA1OToyOTMwNDk2MTU2OTk2MTg3/
Cinema, video and television program distribution activities	Transmission of tourism promotion videos of the regional heritage through social channels, at international promotional tourism fairs and during major events	https://republic.hrt.hr/ https://www.thedubrovniktimes.com/news/dubrovnik/item/6351-dubrovnik-neretva-county-tourist-board-attends-the-most-important-tourism-fair
Advertising	Creation of on-line and off-line media campaigns to promote the cultural	https://www.facebook.com/ExperienceDubrovnik/

agencies	product relating to the tourist destination DNC	http://www.tzdubrovnik.hr/lang/en/get/kultura_i_povijest/75283/respect_the_city.html
Photographic activities	Photo exhibition, extreme photography	http://portofdreamers.com/exhibition-photo-the-cultural-life-of-russian-emigrants-in-dubrovnik-and-the-legacy-of-ballerina-olga-solovyova/ https://majastrgarkurecic.com/project/04-dubrovnik/ https://www.facebook.com/stormchasersdubrovnik/
Organization of conferences and fairs	National and international B2B and B2C fairs for the promotion of regional cultural heritage; workshops for tour operators (B2B); educational for tour operators, advertising operators and press	https://www.facebook.com/dubrovnikfestiwine/ https://dubrovacki.slobodnadalmacija.hr/dubrovnik/zupanija/dubrovnik/kora-organizira-besplatnu-edukaciju-za-turisticke-vodice-i-voditelje-turistickih-poslovnica-agencija-623527
Museum system activities	Promotion through the web portal of regional museum activities; organization of guided tours	https://www.facebook.com/momadubrovnik
DUBROVNIKCARD	Passepartout that facilitates the use of all the historical, architectural and naturalistic heritage of the region (use through free or	http://www.dubrovnikcard.com/

	discounted offers)	
GUIDED TOURS	Calendar of guided tours Italian / English in the main cities of art, in UNESCO sites, in villages, in some museums. Services provided by professional tour guides. The visits are also accessible to people with motor, visual, cognitive and relational disabilities	https://www.vodici-dubrovnik.hr/en/index.php
Accessible **itineraries in visitor centres**	Accessible visitor centers • Presence of tactile tanks, stuffed animals and plastic to support tactile visits • Multimedia sound contents (animal sounds, sounds of nature, stories) to support tactile visits	http://www.historical-trails.com/
Crafts	Heritage based product design and production	https://naturadalmatia.hr/hr/ https://www.damijenestoslatko.com/en/lifestyle-en/morana-depoli-peruna-ceramics/

3.2.6. Albania: Region Vlora (PP7: RDNC)

The Law “On Cultural Heritage” aims to promulgate and protect the cultural heritage in the territory of the Republic of Albania. This Law, in relation to the field of territorial planning and development, defines inter alia:

- the cases of construction in public or private properties, which must obtain written approval from the National Council of Restorations and the National Council of Archeology;
- cases of excavations, restorations, uses and any other action in the cultural monuments, as well as any alteration on the ground under their protection, to be done with the authorization of the National Council of Restoration, Archaeological Institute, Archaeological Service Agency;
- the rules and types of constructional interventions in the Museum Areas, museum ensembles, historical centers, archaeological parks.

The Law “On Tourism” stipulates inter alia the principles of tourism development planning, which are drafted in accordance with the General National Plan, the procedure for prioritizing tourism development, the drafting and content of the national plan on tourism sector as well as the procedure for drafting the plan for priority areas of tourism development.

The Strategic Plan of Vlora Region 2010-2020 has been approved from the Regional Council on March 2011. The Strategic Plan was seen as an absolute priority for most territories based on the development of a stable and sustainable economy base. In that respect the Albanian government has adopted a development policy focused on investments in key infrastructure and has promoted leading sectors in the economy that demonstrate regional comparative advantage. Vlora Region government units have shown a continuous interest in being part of an integrated development in compliance with the National Tourism Strategy and the National Strategy for Development and Integration.

Vlora Regional Strategic Plan has defined three main scenarios for development respectively:

A. *Scenario 1) Tourism development* - Tourism is the leading sector in Vlora Region economy as well as the main catalyst of economic growth. However, hitherto a clear strategy for tourist development has not been established. The "beach tourism" has played the leading role, with negative effects on the environment. Nonetheless the Region has a variety of potential tourist attractors (cultural heritage, natural areas, traditions and food) and hence has the opportunity to move towards responsible and sustainable tourism, generating income and employment whilst respecting the environment and the local culture.

B. *Scenario 2) Rural development and agro-business* - Rural activities are an important part of regional culture and identity. However, the environmental issues regarding the rural sector such as the lack of water, wastewater and solid waste management systems should be addressed immediately in view that the natural environment is a potential source of income for rural areas both through its ability to affect the quality of food products and through its attractiveness for tourism. The challenge is thus to achieve an overall environmental sustainability in regional rural activities, balancing innovation and tradition and enhancing the quality and the security of typical local products.
C. *Scenario 3) Services, networks and light industry* - Vlora Region lacks the basic services systems. Infrastructure problems have a negative effect on economic activities, which cannot be developed without an adequate energy supply and reliable communication systems. Ongoing policies have acknowledged, to some extents, the necessity to upgrade infrastructure and services networks, while keeping an eye on environmental sustainability. The risk is that the lack of financial resources can cause delays in the implementation of the strategies hence leading to short-term solutions and losing sight of the overall sustainability and coordination of interventions. The challenge is to continue to coordinate all the relevant components of the Scenario, so that all sector policies converge on the same objectives and are coherent amidst each other.

To achieve a more diversified development and avoid the unbalances that a single sector development can cause, these Scenarios were carried out simultaneously, in an integrated and complementary manner, making sustainability the central thread of regional development.

3.2.7. Bosnia and Herzegovina (PP8: SEBS)

The following table aims to provide a short description of the linkage of CCI with cultural heritage preservation-valorisation and sustainable tourism, placing particular focus to the events and projects.

Example of linkage	Description	Source
Kreativna BiH	#KreativnaBiH is a campaign of the EU Office and the EU Info Centre in Bosnia and Herzegovina promoting the results of EU assistance to the culture and creative sectors in Bosnia and Herzegovina. The campaign will focus on results and initiatives of the European Union produced so far to improve and strengthen cooperation in CCI sector.	https://euinfo.ba/en/kreativna-bih-2/
Sarajevo Film Festival	Sarajevo Film Festival is an international film festival with a great focus on the region of South-East, shining an international spotlight on films, talent, and future projects from the region. The premier and the largest film festival in the Balkans region, Sarajevo Film Festival is also one of the largest in Europe and became the most honored festival in all of Bosnia and Herzegovina. Apart from the performances on the main stage, the regional shows and the 'Panorama', host some of the world's best documentaries. This event is the best venue to get a taste of the works of some of southeast Europe's best filmmakers.	https://www.sff.ba/
Sarajevo Winter Festival	The longest of all Sarajevo festivals, the International winter festival of Sarajevo, lasting over two months, has become an inseparable part of the Bosnian capital city and a symbol of Bosnian cultural creativity. The festival is held between February and March every year with at least one event on the agenda daily. This is a festival that includes many genres of art. The performances include music concerts, contemporary art shows, sculpture exhibitions, modern dancing and cultural shows among various others.	http://sarajevskazima.ba/en/

Mess Theater Festival, Sarajevo	MESS, which stands for Small Experimental Stage, offers theater and modern dance performances that are hand-selected from all Europe. This theatre festival takes place every October in Sarajevo and exists since 1960. Theatre and modern dance performances are chosen from all over Europe and performed in their original languages, sometimes with local language translation displayed above the stage	https://mess.ba/
Summer on Vrbas, Banja Luka	The traditional event "Summer on Vrbas" is held in the second half of July under the walls of Kastel fortress in Bosnia's most interesting city – Banja Luka. The main activities of the event are dayak and kayak racing boats, jumping from the City bridge, as well as performances of cultural, artistic and musical groups. It is the perfect combination of cultural pursuits with athletic events that make this event unique.	http://www.banjaluka-turizam.com/index.php/en/july/item/2080-summer-at-vrbas
The Nights of Bascarsija	The Nights of Bascarsija is the largest cultural event – summer festival devoted to culture held in Sarajevo. The Festival is held each year between July 1st and 31st with events held at various locations throughout Sarajevo. Every year, Bascarshija Nights offers top performances from the world of opera, ballet, and theater, as well as concerts, literary evenings, children's programs and film screening.	http://www.sarajevo-tourism.com/nights-of-bascarsija
Project "Youth inspired by Heritage"	Association „Bosnian Handicrafts" (BHCrafts) in cooperation with the Foundation Cultural Heritage without Borders Bosnia and Herzegovina (CHwB BiH) and Pravo Ljudski Film Festival will implement a project focused on youth and heritage. Through various activities, the „Youth in Crafts"project aims to present young people, among which a large number of unemployed, cultural heritage as an inspiration and source of economic development.	http://chwb.org/bih/

3.3. Main CCI stakeholders in the region

In the following sub-section, the partners aim to, categorize and classify the main stakeholders involved in the CCI sector in the region, and to describe their role(s) and responsibilities within the

CCI sector and/or cultural heritage preservation-valorization and sustainable tourism and (in the regional policymaking process for CCI.

It should be noted that the stakeholders are categorized as follows: CCI enterprise; Policymaking body; Business representative; Higher education institution and Civil society organization.

Also, the description of the stakeholders' "role" refers to: 1) their responsibilities within the CCI sector (e.g., policymaking, consulting, supporting business entities) and 2) if applicable, their role in the regional policy-making process for the CCI sector.

In their elaborations, partners used the classification of stakeholders based on "primary – secondary stakeholder" model. Within the context of the present study, primary stakeholders are those who have a vested interest and a direct involvement in the CCI sector, can influence the policy-making process in the CCI sector and can substantially influence the linkage between CCI and cultural heritage preservation-valorisation and sustainable tourism. Secondary stakeholders are those whose involvement and/or influence in policy-making regarding the CCI sector, cultural heritage preservation-valorisation and sustainable tourism is not of crucial importance nor does it influence substantially the linkage between CCI, cultural heritage and sustainable tourism.

3.3.1. Italy: Emilia-Romagna Region (PP1: MCBO)

In the table below is presented the list of some of the main stakeholders in the CCI sector on our territory. Cooperation among regional stakeholders for the promotion and sharing of initiatives, ideas, projects and products in the field of Culture and Creative Industries (CCI) is an essential step in the process of strengthening regional identity and progressing in the field. A close collaboration has the potential to drive a positive change on the territory and the Emilia-Romagna region and the Metropolitan city of Bologna are a fertile ground for driving evolution and growth.

It is crucial to keep generating opportunities in informal spaces for interdisciplinary collaborations among people, aiming at experimenting CCI innovative solutions and exploring with citizens new form of expressions. The development of CCI is closely linked to economic growth and the social growth of the communities concerned. The sector, indeed, is intrinsically linked to its environment: stakeholders feed on local socio-economic relations of that specific land, the roots of the sector's stakeholders, the close relationship with the education and training sector, the Clusters, the Makers, the Fablabs, the public and private realities, the associations are the frame where the progress happens. Tourism is considered as one of the sector where CCIs can generate an impact.

The following table lists the primary stakeholders mapped and some examples of secondary ones. The metropolitan environment is quite rich and effervescent; in this sense, this table needs to be considered as an open one.

CCI stakeholder identification, categorisation, role description and classification for region Emilia - Romagna					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
Emilia Romagna Region	Policymaking body – Regional authority body	Policymaking	Policy makers/ Direct involvement in the policy development	Primary	It develops and coordinates the strategy and the policies in the CCI sector
ART-ER	Policymaking body – Regional authority body	Policymaking	Policy makers/ Direct involvement in the policy development	Primary	It supports the ER Region in the development of CCI policies
BOLOGNA WELCOME	Tourism promotion body at local level	DMO, Destination Marketing Organization -	Support to the policy development in the Bologna territory	Primary	It promotes CCI products and supports the territory in the elaboration of CCI products.

		Support to business entities			It can influence the linkage between CCI and sustainable tourism.
[IBC](#)	Policymaking - Regional authority body	Policy maker at regional level	Direct involvement in the policy development	Primary	It operates as technical-scientific body and programming tool of the Region in the field of artistic, natural, book and documentary heritage.
[CREATE](#)	Association of public and private bodies	Support to the regional industrial strategic sector	Support to the policy development in the Emilia-Romagna region	Primary	It is one of the key players in the regional innovation ecosystem. It allows the connection of regional creative organisations through the Open innovation principle.
[APT](#)	Tourism promotion body at regional level	Connection of the tourism sector with the CCI one to catch up with experiential tourists	Support to the Emilia-Romagna region	Primary	It has a strong interest in the development of CCI sector for the evolution of an ecosystem full of creative products, innovation, digital communication, e-commerce,... in the tourism sector. **1.** https://trasparenza.aptservizi.com/attivita-e-procedimenti/attivita-realizzata-base-convenzioni-triennali-e-programmi-annuali/attivita

					2. https://trasparenza.aptservizi.com/sites/default/files/2018-11/PIANO-APT-2018_def.pdf
MAKER	CCI enterprises association	Innovation driver	/	Primary	Maker is one of the best example of creative community.
INCREDIBOL	Business support organization	Support to business at local level	Policy maker	Primary	Incredibol is directly involved in the development of the creative industry as a whole.
DAR - Dipartimento delle Arti (Arts department of UNIBO)	University of Bologna	Cultural and creative projects activator / Education and training	/	Primary	DAR offers the whole spectrum of artistic studies, and designs and promotes events related to various artistic, cultural and social expressions through DAMSLab, Centro La Soffitta, and CUBE. Its two specialized libraries, the labs spread across the buildings, the PhD course in Performative, Media and Visual Arts and the Specialization School in Historic and Artistic Heritage make DAR one of the most important institutions devoted to the study of arts on an international level, and a very relevant stakeholder in CCI sector
CAST (Centre of Advanced	University of Bologna	coordinate and strengthen research,	/		CAST was born as a combination of research and higher education in the field of tourism, intended not as an independent subject, but

Studies in Tourism)		dissemination and lifelong learning in the field of tourism.			as a field of study. In this view, it offers joint initiatives connecting economic, business, statistical, socio-political, historic, geographic, juridical and institutional aspects of the tourism sector, making CAST the only institutional entity of its kind in Italy and a relevant stakeholder to explore the linkage between CCIs and tourism.
PANEBARCO	Enterprise	Multimedia productions – promotional audio and video animations	/	Secondary	CCI enterprise. Company website: https://www.panebarco.it/
HUMARKER	Enterprise	Augmented reality for cultural promotion, geo-localization, interactive museums	/	Secondary	CCI enterprise. Company website: http://humarker.com/
E-SOFT	Enterprise	Software development,	/	Secondary	CCI enterprise. Company website:

		consultancy for interoperability of information and content			http://www.e-soft.it/
EMHEALIA	Enterprise	Diffusion of perfumes and synchronizatio n with apps and AR contents	/	Secondary	CCI enterprise. Company website: http://www.emhealia.com/
MANGO	Enterprise	Mobile apps and mobile solutions	/	Secondary	CCI enterprise. Company website: https://mangomobi.com/
BEAUTRIP	Enterprise	Cultural experiential tourism and online courses	/	Secondary	CCI enterprise. Company website: https://beautrip.it/
YOOMEE	Enterprise	Augmented reality solutions	/	Secondary	CCI enterpris. Company website: https://yoomee.it/
COREPIXX	Enterprise	Interactive experiences –	/	Secondary	CCI enterprise. Company website:

		Multimedia monitors – totems - artwalls			https://www.corepixx.com/
E-Making	Enterprise	3D Modelling		Secondary	CCI enterprise. Company website: https://www.e-making.it/
APPENNINO SLOW	Tourism promotion body at local level	Connection of the tourism sector with the CCI one to catch up with experiential tourists	/	Secondary	Appennino Slow can contribute in the development of the CCI sector and its linkage with the tourism one in the Apennine area.
BAM! Strategie culturali	Cooperative	Consultant for institutions and enterprises on cultural management	/	Secondary	It supports institutions and cultural projects in the development of their cultural strategy.
PEDALALENTA	Association promoting bike tours	It acts as an activator in the "Pianura" territory	/	Secondary	It would be interesting if the association worked in developing the bike-tourism on its territory (Pianura) and switched to a for-profit activity.

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FOIATONDA	Cooperative	Promotion of the cultural heritage of the Apennine area	/	Secondary	It is involved in and contributes to the development of the tourism sector
Mercato ritrovato	Not-for-profit association	Promotion of the food culture	/	Secondary	It promotes and spreads the food culture.
Centro Studi Claterna Giorgio Bardella e Aureliano Dondi	Cultural association	Promoting research, educational and tourism activities to valorise an archaeological park in the metropolitan area	/	Secondary	Composed of archaeologists, experts and enthusiasts, it promotes the valorisation of the archaeological park of Claterna located in the municipality of Ozzano.
GAL Appennino (Local Action Group	Public-Private consortium	GAL manages PSR's 2014-2020 resources for the Apennines Area. Currently the resources	/	Secondary	GAL is a very relevant player for the valorisation of the sustainable touristic offers, and they support the development of new and innovative touristic products.

		are used for qualification, growth and commercial valorisation of sustainable tourism offers and typical agro-food local products.			
Teatro delle Ariette	Cultural association	The Teatro delle Ariette is not only a theatre company, it is an experience, a daily practice in search of the "place" where art, life and work coexist and coincide.	/	Secondary	The association makes theatre in houses, bakeries, hospitals, schools, streets, squares, even in the fields and in the middle of the countryside, but also in theatres and in important national and European theatre festivals and exhibitions.

3.3.2. Italy: Friuli Venezia Giulia Autonomous Region (PP2: FVG AR)

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
Regional Department for Sport Culture	Policymaking body	Development of Laws and Regulations for cultural heritage, cultural activities and CCIs. Contributions (cultural activities, foundations, organizations, associations) and fund management. Elaboration and / or	Directorate for Sport Culture and Linguistic Communities elaborates and implements the relevant legislation for cultural heritage, cultural activities and part of CCIs.	- Primary	Legislator for the Sector, as well as one of the main implementing body of relevant regional policies, programmes and initiatives for CH and CCIs.

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
		Participation in European Projects connected to the CCIs			
Regional Department for Production Activities	Policymaking body	Development of Laws and Regulations affecting SMEs in creative industries (ITC; audiovisual; broadcasting and communication; etc.) and Tourism.	Central Directorate for Production Activities elaborates and implements part of the relevant legislation for SMEs in tourism sector and creative industries.	- Primary	Legislator for the Sector, as well as one of the main implementing body of relevant regional policies, programs and initiatives for CCIs and tourism.

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
		Provision of contributions and management of programs for innovation and research investments, competitiveness, managerial training, etc.			
Regional Department for Employment, Education, Training and Family Affairs	Policymaking body	Development of Laws and Regulations in the field of competence. Promotion of projects, initiatives and	It elaborates part of the relevant legislation for employment and education in the field of CCI	- Primary	Legislator for the Employment Sector, as well as one of the main implementing body of relevant regional policies, programs and initiatives for CCIs and tourism.

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
		funding in the policy field of competence.			
Agenzia Lavoro & SviluppoImpresa	Regional Agency	Implementation of policies to support the attractiveness of the territory and regional entrepreneurship	It supports the Region in the planning and design of the employment and investment policies of the regional entrepreneurial system.	- Primary	It can provide support to the Region in order to plan regional investment policies.
INFORMEST - Agenzia per lo Sviluppo e la Cooperazione Economica Internazionale	Development Agency	Leader of the regional culture cluster. Support to regional culture directorate in the	Facilitator, fund-raising and participation in the policy debate for the new programming period 2021-2027	- Primary	Thanks to the culture cluster it can directly influence the CCI sector

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
		development and implementation of CCI-related EU funded projects. It performs survey and analysis regarding regional CCIs			
CONFAPI FVG - Associazione PMI del FVG	Association of SMEs, it represents more than a thousand of SME operating also in creativity-driven industries	It includes SMEs of the CCI sector	It has a direct influence on CCI related businesses and it can influence decision-making in this sector	- Primary	It can provide support to businesses for the development of new initiatives/ linkages with CH or sustainable tourism

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
Confindustria F.V.G. - Piccola Industria	Association of SMEs, it is a section of the regional Association of Industrialists dealing with SMEs	It includes SMEs of the CCI sector	It has a direct influence on CCI related businesses and it can influence decision-making in this sector	- Primary	It can provide support to businesses for the development of new initiatives/ linkages with CH or sustainable tourism
ASSOCIAZIONE LAVORATORI dell'AUDIOVISIVO del FRIULI VENEZIA GIULIA - "ALA-FVG"	Association of workers of the regional audio-visual sector	It represents workers of the CCI sector	It can shape policy-making and creation of new relations or initiatives	- Secondary	It has a direct influence on CCI workers, indirect influence on policy level
Autorità di gestione POR FESR	Managing Authority of the ERDF Regional Operative Programme	To take into due consideration requests from the CCI sector and support	It implements policy choices in terms of funding in the CCI sector	- Primary	It can provide adequate funds and opportunities on the basis of the CCI sector's development

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
		them with adequate funds within the regional programme			
FONDAZIONE ISTITUTO SUPERIORE PER LE TECNOLOGIE DELL'INFORMAZIONE E DELLA COMUNICAZIONE J.F.KENNEDY	University consortium/ higher education institution	It can stimulate research and project development in the field of CCI	No role in policy making	- Secondary	It can propose new methods to create new links or exploit existing ones and facilitate dialogue among different CCI actors
CAMERA DI COMMERCIO DI VENEZIA GIULIA	Chambers of Commerce, Industry and Crafts	It can address directly SMEs of the CCI sector and the regional system	It can provide support to businesses for the development of new	- Secondary	It can play a facilitation role

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
		is managing tools and financial incentives aimed to improve entrepreneurship and internationalization skills and capacities among SMEs	initiatives/ linkages with CH or sustainable tourism		
CAMERA DI COMMERCIO DI UDINE E PORDENONE	Chambers of Commerce, Industry and Crafts	It can address directly SMEs of the CCI sector and the regional system is managing tools and	It can provide support to businesses for the development of new initiatives/ linkages with CH or sustainable tourism	- Secondary	It can play a facilitation role

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
		financial incentives aimed to improve entrepreneurship and internationalization skills and capacities among SMEs			
EVE S.r.l.	Private body representing performing arts	It can address economic operators of the CCI sector	It can address policy-making and creation of new relations or initiatives	- Secondary	It has a direct influence on CCI, indirect influence on policy level
ASSOCIAZIONE ETRARTE	Private no-profit organisation related to performing arts	It can address economic	It can address policy-making and creation of	- Secondary	It has a direct influence on CCI, indirect influence on policy level

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
		operators of the CCI sector	new relations or initiatives		
ASSOCIAZIONE MORE MUSIC	Private no-profit organisation related to performing arts	It can address economic operators of the CCI sector	It can address policy-making and creation of new relations or initiatives	- Secondary	It has a direct influence on CCI, indirect influence on policy level
ASSOCIAZIONE CULTURALE MODO	Private no-profit organisation related to performing arts	It can address economic operators of the CCI sector	It can address policy-making and creation of new relations or initiatives	- Secondary	It has a direct influence on CCI, indirect influence on policy level
Associazione Culturale Quarantasettezeroquattro	Private no-profit organisation related to performing arts	It can address economic operators of the CCI sector, its objective is to support emerging	It can address policy-making and creation of new relations or initiatives	- Secondary	It has a direct influence on CCI, indirect influence on policy level

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
		artists and offering quality content, collaborating with professionals and aiming at sustainable projects that want to dialogue with the involved communities			
ERPAC - ERPAC Ente Regionale PAtrimonio Culturale	Regional body in charge of safeguarding and promoting Cultural Heritage, it also manages the	It provides the link with public tangible cultural	It can influence policy-making at the level of management of CH	- Primary	It has a direct influence on CH and a secondary potential influence on sustainable tourism

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
	residences of performing arts at Villa Manin	heritage of the Region			
ENTE REGIONALE TEATRALE DEL FRIULI VENEZIA GIULIA	Regional body in charge of theatre production	It provides the link with cultural heritage (theatre)	It can influence policy-making at the level of management of CH	- Primary	It has a direct influence on CH and a secondary potential influence on sustainable tourism
FRIULI VENEZIA GIULIA FILM COMMISSION	Regional body in charge of attracting film and audio-visual productions to be shot in the territory	It provides the link with cultural heritage (cinema)	It can influence policy-making at the level of management of CH	- Primary	It has a direct influence on CH and a secondary potential influence on sustainable tourism
FONDAZIONE FRIULI	Banking foundation, member of Funder35, the	It can finance projects and	No role	- Secondary	It can facilitate dialogue and secure financial support to new initiatives

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
	multi-year project sponsored by ACRI (Association of Foundations and Savings Banks) to support and accompany the cultural and creative young enterprises	initiatives in the CCI sector			
FONDAZIONE CARIGO	Banking foundation, active in the financing of initiatives and cultural events, as well as in the preservation and	It can finance projects and initiatives in the CCI sector	No role	- Secondary	It can facilitate dialogue and secure financial support to new initiatives

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
	promotion of cultural heritage				
FONDAZIONE CRTRIESTE	Banking foundation, active in the financing of initiatives and cultural events, as well as in the preservation and promotion of cultural heritage	It can finance projects and initiatives in the CCI sector	No role	- Secondary	It can facilitate dialogue and secure financial support to new initiatives
FONDAZIONE AQUILEIA	Archaeological Heritage Foundation	It promotes the valorisation of a UNESCO site	It can promote at policy level the need to invest on linkages between CCI and CH	- Primary	Participates in several regional tables and discussions and can promote CCI in these contexts

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
POLO YOUNG - Consorzio di Pordenone per la formazione superiore, gli studi universitari e la ricerca.	Business incubator, managed by the Consortium of Pordenone for higher education, graduate studies and research, is a cultural incubator dedicated to young start-ups and cultural and creative enterprises of the region	It facilitates innovation also in the CCI sector	It can promote the need to support CCI at policy level	- Primary	Participates in several regional tables and discussions and can promote CCI in these contexts
Innovation Factory, in-house company di AREA Science Park	Business incubator	It facilitates innovation also in the CCI sector	It can promote the need to support CCI at policy level	- Primary	Participates in several regional tables and discussions and can promote CCI in these contexts

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
FRIULI INNOVAZIONE	Centre for research and technology transfer that is placed in the Digital Technology District, DI.TE.DI. It also manages the business incubator Techno Seed	It facilitates innovation also in the CCI sector	It can promote the need to support CCI at policy level	- Primary	Participates in several regional tables and discussions and can promote CCI in these contexts
POLO TECNOLOGICO DI PORDENONE “Andrea Galvani”	Business incubator, it focuses on co-working spaces, Innovative materials, Internationalization of innovative start-ups	It facilitates innovation also in the CCI sector	It can promote the need to support CCI at policy level	- Primary	Participates in several regional tables and discussions and can promote CCI in these contexts

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
BIC	Business incubator, it includes a cluster on tourism and culture	It facilitates innovation also in the CCI sector	It can promote the need to support CCI at policy level	- Primary	Participates in several regional tables and discussions and can promote CCI in these contexts
Unioncamere FVG	Body belonging to the Chamber of Commerce system	It can address directly SMEs of the CCI sector	It can provide support to businesses for the development of new initiatives/ linkages with CH or sustainable tourism	- Secondary	It can play a facilitation role
Università degli Studi di Trieste	Higher education institution	It can stimulate research and project development in the field of CCI	No role in policy making	- Secondary	It can propose new methods to create new links or exploit existing ones and facilitate dialogue among different CCI actors
Università di Udine	Higher education institution	It can stimulate research and project	No role in policy making	- Secondary	It can propose new methods to create new links or exploit existing ones and facilitate dialogue among different CCI actors

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
		development in the field of CCI			
Promoturismo FVG	DMO for the FVG Autonomous Region	It can provide the linkages to sustainable tourism strategies and initiatives	It can influence policy making in the field of sustainable tourism	- Primary	It can facilitate dialogue and linkages between CCI and the tourism industry
Friulia SpA	Financial institution created by the FVG Autonomous Region	It can provide financial partnership to CCI businesses	No role in policy making	- Secondary	It can facilitate business creation and secure credit for CCI
Confartigianato FVG	Regional association representing small craft businesses in the region	It includes SMEs of the CCI sector	It has a direct influence on CCI related businesses and it can influence decision-making in this sector	- Primary	It can provide support to businesses for the development of new initiatives/ linkages with CH or sustainable tourism

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
CNA FVG	Regional association representing small craft businesses and SMEs in the region	It includes SMEs of the CCI sector	It has a direct influence on CCI related businesses and it can influence decision-making in this sector	- Primary	It can provide support to businesses for the development of new initiatives/ linkages with CH or sustainable tourism
Fondazione Pordenonelegge.it	Cultural foundation	It promotes the importance of culture through a well-known literary festival	It can promote linkages and initiatives in the CCI sector	- Primary	It can facilitate linkages between CCI and cultural operators
Mediocredito FVG	Banking institution	It can provide financial partnership to CCI businesses	No role in policy making	- Secondary	It can facilitate business creation and secure credit for CCI
IL PAFF - Palazzo Arte Fumetto Friuli	Cultural institution	It hosts important comics	It can promote linkages and initiatives in the CCI sector	- Primary	It can facilitate linkages between CCI and cultural operators

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
		exhibition well-known at international level. It can promote new collaborations and ensure visibility outside the Region			
Soprintendenza Archeologia, belle arti e paesaggio del Friuli Venezia Giulia	Superintendence for archeology, art and landscape of FVG	It depends from the Ministry of Culture and supervises the application of National legislations on the safeguard and protection	It can play an important advisory role on CCI policy-making as its competences are referred to the national level	- Primary	It can facilitate linkages, initiatives and connection to National level policy and funding

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
		of the artistic, historic, archeologic and architectonic heritage			
Legambiente FVG	Environmental association	It does not have a direct role in CCI sector	No role for CCI sector	- Secondary	It can provide linkages with sustainable tourism offer
FIAB FVG	Environmental association	It does not have a direct role in CCI sector	No role for CCI sector	- Secondary	It can provide linkages with sustainable tourism offer
Fondo per l'ambiente Italiano FAI-FVG	Environmental association	It does not have a direct role in CCI sector	No role for CCI sector	- Secondary	It can provide linkages with sustainable tourism offer

CCI stakeholder identification, categorisation, role description and classification for region Friuli Venezia Giulia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
Italia Nostra FVG	Environmental association	It does not have a direct role in CCI sector	No role for CCI sector	- Secondary	It can provide linkages with sustainable tourism offer

3.3.3. Slovenia (PP3: UIRS)

CCI stakeholder identification, categorisation, role description and classification for region Slovenia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
Soča Valley Tourist Board		Tourist destination manager and			

		product designers			
Triglav national park		An intermediate platform between the state and tourism			
Walk of peace foundation		Foundation’s main role is to develop the “walk of peace trail” as a brand but also to help protect and maintain the cultural heritage of the WW1 in their local area.			
The Julian Alps Community		Connecting the Goriška and Gorenjska regions),			

		Municipalities - support member at the local level			
Museums (regional and national) MAO, Kobarid museum and local public institutions Ljubljanski grad, Festival Ljubljana and other cultural/creative festivals, events		Content, program and promotion providers			
Ministry of Economic Development and Technology MGRT		Co-financing, supporting and developing tourism			

Slovenian Tourist Board		Gives guidelines and tenders/calls for new products, helps create new content on this topic, promotion of tourism			
Ministry of Culture		Co-finance CCI, different calls to co-fund cultural heritage renewal, co-financig of exhibitions, expert support for the UNESCO nominations, ...			
Ministry of Education,		Co-financing part of our			

Science and Sport		Foundation's programme regarding the defence, (co-financing different research projects, taking care of the WW1 cemeteries, promotion of the cultural heritage for the regional development (On the NUTS3 level)			
Defence Ministry		Co-finance a proper memory for soldiers involved in the WW1 battles, co-financing			

		also the research in this topic			
Regional development agency (NUTS3)		Help CCIs with applications for co-financing on national and EU level, CLLD and LEADER programs. Include CCIs in the preparation of the new generation of the regional development programme. Develop and support intermunicipal development programmes.			
UNESCO Office		Performs expert and			

		administrative tasks for the Slovenian National Commission for UNESCO. Also supports CCIs with nominations of heritage sites for the UNESCO list.			
ICOMOS - Slovenian National Association for Monuments and Monumental Areas		Promotes cultural heritage preservation (mostly monuments, support municipalities in preparing tenders for the monuments preservation, support CCIs in			

		the development of the cultural tourism			
Regional Tourist Offices (tourism Ljubljana ect) and different association (touristic, historic)		Promote tourist destinations			
ZRC SAZU (research centre of the Slovenian Academy of Sciences and Arts (mostly Milko Kos historic institute)					

Regionals Development Agencies		With CCI, develop and support intermunicipal development programmes.			
Centre For Creativity /MAO		Supports with education, networking, promotion of the sector and provides content support at the co-financing of CCS with Ministry for Culture			

Heritage of Mercury. Almadén and Idrija (2012); Prehistoric Pile Dwellings around the Alps (2011); Ancient and Primeval Beech Forests of the Carpathians and Other Regions of Europe (2007,2011,2017); Škocjan Caves (1986); Fuzina Hills in Bohinj (1994); Franja Partisan Hospital (2000); Classical Karst(2015);		Slovene locations or organiations nominating or leading locations for the UNESCO world natural and cultural heritage https://www.slovenia.info/en/places-to-go/attractions/unesco-world-heritage			

The Walk of Peace from the Alps to the Adriatic – Heritage of the First World War (2016); The timeless, humanistic architecture of Jože Plečnik (2018)					
Cities promoting itself as cultural or creative destinations like Ptuj, Ljubljana, Škofja Loka, Radovljica, ect.		Cities putting cultural and heritage tourism and content in the hart of their promotion and strategy			
Soča Valley Development Centre /					

Posoški razvojni center soča					

3.3.4. Greece: Western Greece (PP4: Patras Science Park)

CCI stakeholder identification, categorisation, role description and classification for region Slovenia					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
Region of Western Greece	Policymaking body	Policymaking	Main regional policy maker	Primary	Design the regional policy
Chamber of Achaia	Business representative	Supporting business entities	-	Primary	Implements European projects for CCI and tourism sector
Patras Carnival Community Enterprise	Policymaking body	Policymaking	-	Primary	Organises the Patras Carnival Institution
Ephorate of Antiquities of Achaia	Policymaking body	Preserving Cultural Heritage	-	Primary	Managing the archaeological sites and monuments of Achaia
EPTA	CCI enterprise	Supporting / hosting artists	-	Secondary	Providing local artists the chance to network
Mosaic//Culture and Creativity	CCI enterprise	Consulting public sector / supporting business entities	-	Primary	Direct involvement in the CCI sector
Hellenic Open University	Higher education institution	Educating / training of CCI ecosystem	-	Primary	Departments of Cultural Studies and Cultural Managements have a unique expertise in educating members of CCI ecosystem

University of Patras	Higher education institution	Educating / training of CCI ecosystem	Partner of the regional policy making for innovation and technology	Primary	Influence regional policy / educating members of CCI ecosystem
Art in Progress	Civil society organisation	Organising large scale events	-	Secondary	Organises the Patras Street Art Festival
Kalavrita Municipal Public Benefit Caves Lake	Policymaking body	Preserving natural heritage	-	Secondary	A municipal institution for a natural monument and o cultural tourism destination, with no other impact in regional policy
Cultural Organisation of Municipality of Patras	Policymaking body	Policymaking	-	Primary	Designs Patras' cultural policy / cooperating with other policymaking institutions for tourism and culture
Municipal Museum of the Kalavritan Holocaust	Policymaking body	Preserving local history	-	Secondary	The most important cultural institution in Kalavrita, with no other impact in regional policy
Oenoxenia, Aigialeia	Policymaking body	Networking local wine ecosystem	-	Secondary	Networking members of the food sub-sector / organises a wine tourism institution
National Park of Kotychi-Strofylia Wetlands	Policymaking body	Preserving natural heritage	-	Secondary	A public institution that manages the most important natural ecosystem in Achaia.
Kotsanas Museum of Ancient Greek	CCI enterprise	Preserving cultural heritage / Cooperating with	-	Primary	Attracts cultural tourism / preserving part of the ancient cultural heritage

Technology		others museums and institutions in Greece and overseas			
Ephorate of Antiquities of Ancient Olympia	Policymaking body	Preserving Cultural Heritage	-	Primary	Manages the archaeological sites and museum of Ancient Olympia
Olympia Film Festival	CCI enterprise	Organising the Olympia International Film Festival for children and young people	-	Secondary	One of the few international cultural institutions of the region, consultant in regional policy making process for film and cultural tourism issues
Diexodos – Center of History and Arts / Messolonghi	CCI enterprise	Highlighting local history and cultural heritage	-	Secondary	Attracts cultural tourism in the region
Ephorate of Antiquities of Aetoloakarnania	Policymaking body	Preserving Cultural Heritage	-	Primary	Manages the archaeological sites and monuments of Aetoloakarnania
Messolonghi Lagoon Administration Authority	Policymaking body	Preserving natural heritage	-	Secondary	A public institution that manages one of the most important natural ecosystem of the region.

3.3.5. Croatia: Dubrovnik Neretva County (PP6: DUNEA)

CCI stakeholder identification, categorisation, role description and classification for region Dubrovnik Neretva County

Name of stakeholder	Stakeholder type	Role and responsibilities in the CCI sector	Role in the regional policy-making process for CCI	Classification	Justification for classification
Dubrovnik Neretva County	regional authority	policy-making	Implementation of national policies on regional level; development of regional policies. Contributions (cultural activities, foundations, organizations, associations) and fund management. Elaboration and / or Participation in European Projects connected to the CCIs	- Primary	
Administrative Department of Education, culture, science and sports	regional authority	policy-making	Implementation of national policies on regional level; development of regional policies. Contributions (cultural activities, foundations, organizations, associations) and fund management. Elaboration and / or Participation in European Projects connected to the CCIs	- Primary	
City of Dubrovnik	local authority	policy-making	Implementation of national policies on local level; development of local policies. Contributions (cultural activities, foundations, organizations, associations) and fund management. Elaboration and / or Participation in European Projects connected to the CCIs.	- Primary	
Administrative Department for	local authority	policy-making	Implementation of national policies on local level; development of local policies. Contributions (cultural activities, foundations,	- Primary	

Culture and Heritage			organizations, associations) and fund management. Elaboration and / or Participation in European Projects connected to the CCIs		
Administrative Department for Tourism, Economy and Sea	local authority	policy-making	Implementation of national policies on local level; development of local policies. Contributions (cultural activities, foundations, organizations, associations) and fund management. Elaboration and / or Participation in European Projects connected to the CCIs.	- Primary	
Youth Council of the City of Dubrovnik	local authority	policy-making	Implementation of national policies on local level; development of local policies. Contributions (cultural activities, foundations, organizations, associations) and fund management. Elaboration and / or Participation in European Projects connected to the CCIs	- Primary	
Dubrovnik Libraries	public organization		Implementation of CCI related policies through organization's activities.	- Primary	
Dubrovnik Museums – Cultural History Museum	public organization		Implementation of CCI related policies through organization's activities	- Primary	
Dubrovnik Museums –	public organization		Implementation of CCI related policies through organization's activities	- Primary	

Maritime Museum					
Dubrovnik Museums – Ethnographic Museum	public organization		Implementation of CCI related policies through organization's activities	- Primary	
Dubrovnik Museums – Archaeological Museum	public organization		Implementation of CCI related policies through organization's activities	- Primary	
Dubrovnik Symphony Orchestra	public organization		Implementation of CCI related policies through organization's activities	- Primary	
Marin Držić Theatre	public organization		Implementation of CCI related policies through organization's activities	- Primary	
Museum of Modern Art Dubrovnik	public organization		Implementation of CCI related policies through organization's activities	- Primary	
House of Marin Držić	public organization		Implementation of CCI related policies through organization's activities	- Primary	
Natural History Museum Dubrovnik	public organization		Implementation of CCI related policies through organization's activities	- Primary	
Dubrovnik Summer Festival	public organization		Implementation of CCI related policies through organization's activities.	- Primary	

Public institution Dubrovnik Cinema	public organization		Implementation of CCI related policies through organization's activities	- Primary	
Folklore Ensemble Linđo	public organization		Implementation of CCI related policies through organization's activities	- Primary	
Institute for Restoration of Dubrovnik	public organization		Implementation of CCI related policies through organization's activities	- Primary	
Museum of Homeland War Dubrovnik	public organization		Implementation of CCI related policies through organization's activities	- Primary	
Public institution Lokrum Island	public organization		Implementation of CCI related policies through organization's activities	- Primary	
City of Korčula	local authority	policy-making	Implementation of national policies on local level; development of local policies. Contributions (cultural activities, foundations, organizations, associations) and fund management. Elaboration and / or Participation in European Projects connected to the CCIs	- Primary	
City of Ploče	local authority	policy-making	Implementation of national policies on local level; development of local policies. Contributions (cultural activities, foundations, organizations, associations) and fund	- Primary	

			management. Elaboration and / or Participation in European Projects connected to the CCIs.		
City of Metković	local authority	policy-making	Implementation of national policies on local level; development of local policies. Contributions (cultural activities, foundations, organizations, associations) and fund management. Elaboration and / or Participation in European Projects connected to the CCIs.	- Primary	
City of Opuzen	local authority	policy-making	Implementation of national policies on local level; development of local policies. Contributions (cultural activities, foundations, organizations, associations) and fund management. Elaboration and / or Participation in European Projects connected to the CCIs.	- Primary	
17 Municipalities	local authority	policy-making	Implementation of national policies on local level; development of local policies. Contributions (cultural activities, foundations, organizations, associations) and fund management. Elaboration and / or Participation in European Projects connected to the CCIs.	- Primary	
Regional Development Agency	regional organization	consulting	Implementation of national policies on regional level; development of regional policies. Contributions (cultural activities,	- Primary	

Dubrovnik Neretva County - DUNEA			foundations, organizations, associations) and fund management. Elaboration and / or Participation in European Projects connected to the CCIs.		
Entrepreneurial centre Dubrovnik	regional organization	supporting business entities	Implementation of national policies on regional level. Contributions (cultural activities, start-ups) and fund management. Elaboration and / or Participation in European Projects connected to the CCIs.	- Primary	
Love Stories Museum	CCI enterprise			- Primary	
Red History Museum	CCI enterprise			- Primary	
Narona Archeological Museum	public organization		Implementation of CCI related policies through organization's activities	- Primary	
Konavle Heritage Museum	public organization		Implementation of CCI related policies through organization's activities	- Primary	
Natural History Museum Metković	public organization		Implementation of CCI related policies through organization's activities	- Primary	
Maritime Museum Orebić	public organization		Implementation of CCI related policies through organization's activities	- Primary	
Croatian Conservation	public organization		Implementation of CCI related policies through organization's activities	- Secondary	

Institute – Dubrovnik					
University of Dubrovnik	public university	- Advisory		- Secondary	
Centre for Competence for Tourism and Hospitality Dubrovnik	public educational organization		Implementation of CCI related policies through organization’s activities	- Secondary	
Rochester Institute of Technology Croatia – Dubrovnik	private university			- Secondary	
Dubrovnik Diocese	religious organization			- Secondary	
Dubrovnik Synagogue	religious organization			- Secondary	
Serbian Orthodox Parish of Dubrovnik	religious organization			- Secondary	
Islamic Community Dubrovnik	religious organization			- Primary	

Dubrovnik and Neretva County Tourist Board	regional organization			- Primary	
Dubrovnik Tourist Board	local organization			- Primary	
18 local Tourism Boards	local organization			- Primary	
City of Dubrovnik Development Agency DURA	public local organization	consulting		- Primary	
Ministry of Culture	national public body	policy-making		- Primary	
Dubrovnik Neretva County Institute for Special Planning	regional public organization			- Primary	
Association DEŠA Dubrovnik	civil society organization		Implementation of CCI related policies through organization's activities	- Primary	
Lazareti – Creative Hub of Dubrovnik			Implementation of CCI related policies through organization's activities	- Primary	
Midsummer Scene Dubrovnik	CCI enterprise			- Primary	

Dubrovnik City Walls	civil society organization		Implementation of CCI related policies through organization's activities	- Primary	
Foundation Blaga Djela	private foundation			- Secondary	
Foundation Kaboga Stiftung	private foundation			- Secondary	
Chamber of Commerce Dubrovnik	public organization	supporting business entities		- Primary	
Chamber of Crafts Dubrovnik	public organization	supporting business entities		- Primary	
Youth Association Orlando	civil society organization		Implementation of CCI related policies through organization's activities	- Primary	
Association DEŠA Dubrovačko Primorje	civil society organization		Implementation of CCI related policies through organization's activities	- Primary	
Storm Chasers Dubrovnik	informal group			- Primary	
Student Theatre Lero	civil society organization		Implementation of CCI related policies through organization's activities	- Primary	
Theatre Kolarini	civil society organization		Implementation of CCI related policies through organization's activities	- Primary	

Association of technical culture Dubrovnik	civil society organization		Implementation of CCI related policies through organization’s activities. Funding for CCI	- Primary	
Association of technical culture Dubrovnik Neretva County	civil society organization		Implementation of CCI related policies through organization’s activities. Funding for CCI	- Primary	
Audio-visual Centre Dubrovnik	civil society organization		Implementation of CCI related policies through organization’s activities	- Primary	
Art Workshop Lazareti	civil society organization		Implementation of CCI related policies through organization’s activities	- Primary	
Restaurant Pantarul	CCI enterprise			- Primary	
Craft & Stones	CCI enterprise			- Primary	
Dubrovnik Beer Company	CCI enterprise			- Secondary	
Bread Bastard's Sourd ough Guerilla	CCI enterprise			- Secondary	
Mala Truba	CCI enterprise			- Secondary	
Klapa Kaše	CCI enterprise			- Primary	

Klapa Regusavecchia	CCI enterprise			- Primary	
25 KUD	CCI enterprise			- Primary	
PALDAR Jewellery	CCI enterprise			- Primary	
Clara Stones Jewellery	CCI enterprise			- Primary	
Life According to KAWA	CCI enterprise			- Primary	
Dubrovnik Treasures	CCI enterprise			- Primary	
Vicious Delicious	CCI enterprise			- Primary	
Peruna	CCI enterprise			- Primary	
Poeticacao	CCI enterprise			- Primary	
Haunted Dubrovnik	CCI enterprise			- Primary	
Architects' Ass ociation of Dub rovnik	professional organization	supporting business entities		- Secondary	
Local Action Group 5			Implementation of CCI related policies through organization's activities	- Secondary	
Embassy Films	CCI enterprise			- Primary	

Association Agrotourism Konavle	heritage based non-for-profit tourism organization		Implementation of CCI related policies through organization's activities	- Secondary	
Tourist Guides Association "Dubrovnik"	professional organization		Implementation of CCI related policies through organization's activities	- Primary	

3.3.6. Albania: Region Vlora (PP7: RDNC)

CCI stakeholder identification, categorisation, role description and classification for region Vlora					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
Anila Hitaj	Regional Council of Vlora	Tourism expert/ public institution			
Teli Bita	Saranda Municipality	Tourism specialist/ public institution			
Orgest Feimi	DRKK (Regional Directorate of Culture and Heritage)	Regional directorate/ public institution			
Muzeu i Pavaresise	Independence Museum	Heritage/ Cultural Site			

Skender Spahiu	Historic and Archeological Museum	Heritage/ Cultural Site			
Sokol Cukani	Vlora Municipality	Tourism specialist/ public institution			
Qani Balla	Naim Frasheri Artistic School	Artistic School			
Kristo Selenica	Internacional School	Artistic Conservatory			
Dhimitraq Furxhiu	Culture Director at the Municipality of Vlora	Culture Directorate Sector Vlora Municipality / Public Institution			
Gentjan Canaj	QKF (Children's Cultural Centre)	Children Cultural Centre / Public Institution			
Viktor Lagji	Vlora Regional Youth Centre	Public Institution			
Studio Lution	Studio Lution	Visual arts			
Fori Kotro	Studio Kotro	Visual arts			
Studio Bleta	Studio Bleta	Visual arts			
Juli Runa	Studio Axhushi	Visual arts			
	Pixel Studio	Visual arts			

Altin Serani	Adventure Tourism Photography	Visual arts			
Kujtim Sako	Dance & Folk Dance Academy	Performing arts			
Erjona Ismaili / Ledia	Fuego Latino	Performing arts			
Eluert Bajrami	Folk Dance	Performing arts			
Anxhela Kapllani	Dancer	Performing arts			
Ansambli Amantia	Folk Dance	Performing arts			
Istref Dobi	Musician	Performing arts			
Thanas Caci	Cultural Centre “Resonance”	Performing arts			
Aulon Naci	Musician	Performing arts			
Sejmen Gjokoli	Aulona Folk Group	Performing arts			
Magdalena Mina	Artisan	Heritage / Traditional cultural expressions			
Axhem Binaj	Wood works	Heritage / Traditional cultural expressions			
Robert Dafa	Glass works	Heritage / Traditional cultural expressions			

Dorjana	Souvenir shop	Heritage / Traditional cultural expressions			
Vladimir Kamberi	Souvenir shop	Heritage / Traditional cultural expressions			
Avenir Troqe	Sculptor, Painter, Musician	Heritage / Traditional cultural expressions			
Aurora Neloj	Artisan soap and cream production	Heritage / Traditional cultural expressions			
Roland Runaj	Painter	Visual arts			
Bedrana	Painter				
Edi Kojani	Painter	Visual arts			
Agron Jakupi	Painter & Architect	Visual arts			
Agron Dine	Painter	Visual arts			
Agim Haxhiraj	Painter & Engineer	Visual arts			
Orget Ibrahimi	Manga Design	Visual arts			
Dhimiter Lati	PlusArch Atelier	Design/ Creativity services			
Piro Stefa	Architect	Design/ Creativity services			

Matilda Panahori	Architect	Design/ Creativity services			
Blerina Bilani	Architect	Design/ Creativity services			
Saimir Cuci	Studio Sai	Design/ Creativity services			
Gentjan Canaj	Idea 2 Group	Design/ Creativity services			
Vasil Bedinaj	Regina City Group	Creativity services			
Rezarta Agalliu	Legambiente Vlora	NGO			
Voice of Roma	Voice of Roma	NGO			
Edlira Haliti (Kapllani)	Albanian Association	NGO			
The polyphonic group “Ismail Qemali”, Kaninë	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Kudhes-Grehot-Sevaster,	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Dukat	Polyphonic Group	Heritage / Performing arts			

The polyphonic group of Drashovica	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Argjiro	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Lapardha	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Brataj	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of "10 Shqiponjat e Terbacit"	Polyphonic Group	Heritage / Performing arts			
The polyphonic group "Krojet e Velçës, Velçë	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Selenicë	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Vranisht	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Himara	Polyphonic Group	Heritage / Performing arts			
The polyphonic group "Pavaresia", Vlore	Polyphonic Group	Heritage / Performing arts			

The polyphonic group Ali Asllani, Kote	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Tragjas	Polyphonic Group	Heritage / Performing arts			
The polyphonic group “Çipini”, Vlorë	Polyphonic Group	Heritage / Performing arts			
The polyphonic group “Bilbili”, Vlorë	Polyphonic Group	Heritage / Performing arts			
The polyphonic group “Jehona Labe”, Dukat	Polyphonic Group	Heritage / Performing arts			
The polyphonic group “Vatra Labe”	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Vezhdanisht	Polyphonic Group	Heritage / Performing arts			
The polyphonic group “Ballkoni i Vlorës”	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Trevllazër	Polyphonic Group	Heritage / Performing arts			

The polyphonic group of Ramice	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Vajzë	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Gorrisht	Polyphonic Group	Heritage / Performing arts			
The polyphonic group “Të Rinjtë e Armenit”, Armen	Polyphonic Group	Heritage / Performing arts			
The polyphonic group “Buronjat Labe”	Polyphonic Group	Heritage / Performing arts			
The polyphonic group “Krahu i Shqiponjës”	Polyphonic Group	Heritage / Performing arts			
The polyphonic group “Bejkë e Bardhë”, Pilur	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Konispol	Polyphonic Group	Heritage / Performing arts			
The polyphonic group “Kaonët”, Delvinë	Polyphonic Group	Heritage / Performing arts			
The polyphonic group “Zëri i Bilbilit”, Sarandë	Polyphonic Group	Heritage / Performing arts			

The polyphonic group “Zëri i Bilbilit, Të Rinjtë”, Sarandë	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Finiq	Polyphonic Group	Heritage / Performing arts			
The polyphonic group Jehona Labae	Polyphonic Group	Heritage / Performing arts			
The polyphonic group Ergjeria	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of bence	Polyphonic Group	Heritage / Performing arts			
The polyphonic group Bijte e Tepelenes	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Cfake	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Derveni	Polyphonic Group	Heritage / Performing arts			
The polyphonic group Dhervi	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Selo-Vriseva	Polyphonic Group	Heritage / Performing arts			

The polyphonic group of Tepelena (city)	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of Kalivac	Polyphonic Group	Heritage / Performing arts			
The polyphonic group of "Vatra Labe" , Tepelene	Polyphonic Group	Heritage / Performing arts			
Lunxheria Ansamble	Polyphonic Group	Heritage / Performing arts			

3.3.7. Bosnia and Herzegovina (PP8: SEBS)

The development of CCI in Bosnia and Herzegovina became very important given the magnitude of the potential of the CCI sector and its contribution to the country's economic and social development. Since the development of the CCI sector has driven by stakeholders (academics, business and government), it is necessary to establish strong collaboration between all relevant stakeholders. The collaboration between all relevant key players in the CCI sector will provide the platform for sharing policy initiatives, projects and products in the field of CCI.

The following table lists the primary stakeholders mapped and some examples of secondary ones Since CCI sector is heterogeneous and includes diverse stakeholders the table with listed stakeholders should not be considered as definitive in its content.

CCI stakeholder identification, categorisation, role description and classification for region Bosnia and Herzegovina					
Name of stakeholder	**Stakeholder type**	**Role and responsibilities in the CCI sector**	**Role in the regional policy-making process for CCI**	**Classification**	**Justification for classification**
Federal Minister of Culture and Sport	Policymaking body - regional level	Policymaking	Policy makers/ Direct involvement in the policy development	Primary	It develops and coordinates the strategy and the policies in the CCI sector It is responsible for: protection and preservation of cultural, historical and natural heritage, work of museums, cultural archives, libraries, musical, artistic, film and other cultural institutions
The Ministry of Education and Culture Republika Srpska	Policymaking body – regional level	Policymaking	Policy makers/ Direct involvement in the policy development	Primary	It develops and coordinates the strategy and the policies in the CCI sector It is responsible for: protection and preservation of cultural, historical and natural heritage, work of museums, cultural archives, libraries, musical, artistic, film and other cultural institutions
Cantons (10 Cantons)	Policymaking body-internediate/cantonal level	Policymaking	Policy makers/ Direct involvement in the policy development	Primary	Ministries at the cantonal level are responsible for policy-making in the CCI sector at the cantonal level
FBiH's Municipalities	Policymaking body – local level	Policymaking	Policy makers/ Direct involvement in the policy development	Primary	It develops the strategy and the policy level in the CCI sector at the local level in Federation BiH

Republika Srpska's Municipalities	Policymaking body – local level	Policymaking	Policy makers/ Direct involvement in the policy development	Primary	It develops the strategy and the policy level in the CCI sector at the local level in Republika Srpska
Federal Ministry of environment and tourism.	Policymaking body – regional/entity level	Policymaking	Policy makers/ Direct involvement in the policy development	Primary	It develops and coordinates the strategy and the policies in the tourism sector in Federation BiH
Ministry of Trade and Tourism republika Srpska	Policymaking body – regional/entity level	Policymaking	Policy makers/ Direct involvement in the policy development	Primary	It develops and coordinates the strategy and the policies in the tourism sector in Republika Srpska
Tourism Association of Cantons in Federation B&H: - Sarajevo Canton - Una-Sana Canton - Tuzla Canton - Zenica-Doboj Canton - Middle Bosnia Canton	Tourism promotion body at regional level	DMO, Destination Marketing	Promotion of tourism at cantonal level	Primary	It can influence the linkage between CCI and sustainable tourism

- Herzegovina-Neretva Canton - Western Herzegovina Canton - Bosnia-Podrinje Canton					
The Tourist Association of Republika Srpska	Tourism promotion body at entity level	DMO, Destination Marketing Organization -	Promotion of tourism at entity level	Primary	It can influence the linkage between CCI and sustainable tourism
The History Museum of Bosnia and Herzegovina	Museum	Preserving cultural and historical heritage	-	Secondary	It develops different programs and activities in order to help visitors talk about the past, present, and future through the museum collections.
The National Museum of Bosnia and Herzegovina	Museum	Preserving cultural and historical heritage	-	Secondary	It develops different programs and activities in order to help visitors talk about the past, present, and future through the museum collections.
Museum Sarajevo	Museum	Preserving cultural and historical heritage		Secondary	The museum has six branches: Brusa Bezistan, Museums of Jews of BiH, Svrzo House, Despić House, "Sarajevo 1878-1918" Museum, and Museum "Alija Izetbegović"

Museum of Republika Srpska	Museum	Preserving cultural and historical heritage		Secondary	It develops different programs and activities in order to help visitors talk about the past, present, and future through the museum collections.
Museum of Literature and Theatre Arts of Bosnia and Herzegovina.	Museum	Preserving cultural and historical heritage		Secondary	The museum is housed in an old house under the protection of the state, which belong to the Sarajevo family Despić. For all the time of existance, the building is being adopted to Museum needs, in 1992 the ground floor has been rebuilt to Gallery “Mak” – an exhibition space that significantly enhanced the museum activites, and provide richer publications.
The Sarajevo Museum of XIV Winter Olympic Games	Museum	Preserving cultural and historical heritage		Secondary	The concept of the Olympic Museum is to present the Olympic spirit and affirm humane values and noble side of sports and culture through accomplishments achieved at the XIV Winter Olympic Games.
National Gallery of Bosnia and Herzegovina	Gallery	Preserving cultural and historical heritage	-	Secondary	It offers exhibition and events, educational programs,
Sarajevo Film Festival	CCI enterprise	Organizing the regional film festival	-	Secondary	It links CCI sector with tourism sector

The MESS International Theatre Festival (MESS)	CCI enterprise	Organizing international theatre festival	-	Secondary	It links CCI sector with tourism sector
The Association of Bosnian Crafts/BH Crafts	Enterprise	Social entrepreneurship and licensed fair trade producer of handmade garments and fashion accessories inspired by cultural and historical heritage	Production of handmade garments and fashion accessories inspired by cultural and historical heritage	Primary	It allows the protection of cultural and historical heritage through development of social craft entrepreneurship
Centre for Policy and Governance	NGO	Policymaking – lobbing	Supporting and promoting sustainable development processes in BiH	Primary	A think- tank established in 2009, with the goal to support and promote sustainable development processes in BiH by creating and advocating for advanced economic and social development policies
The foundation Cultural Heritage without Borders (CHwB)	NGO	Preserving cultural and historical heritage	Involvement in the protection of tangible and intangible cultural heritage	Primary	NGO interested in the development of strategy and policy in CCI sector

AKCIJA Sarajevo	NGO	Policymaking-lobbing	Development and promotion of independent and alternative youth culture, wit	Secondary	NGO interested in the development of strategy and policy in CCI sector http://akcija.org.ba/about-us
University of Sarajevo	Higher education institution	Educating / training of CCI ecosystem	Partner of the regional policy making for innovation and technology	Primary	Influence regional policy / educating members of CCI ecosystem
Bit Alliance	The association of IT companies in B&H	Policy making – lobbing	Development of IT solutions to players in CCI sector		

4. CCI and regional competitiveness

In this section partners aim to provide discussion on the linkages between CCI and regional competitiveness. In specific, the discussion aims to shed light to the following questions:

i) If (and if yes, how) various conditions in the region affect CCI and its linkage to cultural heritage preservation and sustainable tourism; and

ii) If (and if yes, how) CCI and its linkage to cultural heritage preservation and sustainable tourism affect various dimensions of regional competitiveness.

Project level view

CCI and regional competitiveness	
Analysis of Emilia-Romagna Region (1)	Regional conditions affecting CCI are: access to finance, human resources, especially education and research, level of regional innovation and digitalisation, mobility access/limitations and overall market conditions and the position of CCI within.
Analysis of Friuli Venezia Giulia Autonomous Region	Access to finance, options for crowdfunding, human resources, especially access to education/training and research, level of regional innovation and digitalisation, access to broadband connection and overall strategic significance of CCI industries as export-oriented industries.
Analysis of Slovenia	Lack of regional policies, a need for improvement of the image of region(s), education as an important factor to CCI as well as protection of the cultural heritage/cultural elements of a region.
Analysis of Region of Western Greece	Regional conditions affecting CCI are: access to finance, human resources, especially education and research, Level of regional innovation and digitalisation, mobility access/limitations and overall market conditions and the position of CCI within (same as (1)).
Analysis of Dubrovnik Neretva County	Regional conditions affecting CCI are: access to finance, human resources, especially education and research, level of regional innovation and digitalisation, mobility access/limitations and overall market conditions and the position of CCI within (same as (1)).
Analysis of Albania: Vlore region	Several brought and adopted key strategic documents at national and regional level have put forth CCI and tourism industry bearing in mind the starting point of the country.

Analysis of BiH	Same as (1) together with lack of CCI policy, lack of specialised educational programmes supporting entrepreneurship in CCI sector, migration of talents and young people abroad but also a growing ICT sector.

4.1. Impact of regional conditions on CCI and its linkage to cultural heritage preservation and sustainable tourism

4.1.1. Italy: Emilia-Romagna Region (PP1: MCBO)

The growth of these sectors is increasingly essential to strengthen the competitiveness and regeneration of other components of the regional economy, in addition to their own competitiveness, in particular those with less intensity of research and technological innovation (the most typical sectors of Made in Italy, tourism, etc. ...), as well as to enhance the material and intangible cultural heritage of our territory[63].

We can say that a supportive regional ecosystem affects the development of the CCI sector and, as a result, it can have a positive impact on tourism. A rich regional ecosystem of innovation is responsible for the efficient development of creativity in that territory that may be used for experiential tourism development. Again, the territorial education system merges tourism and cultural heritage with creativity subjects. Finance supports a specific axis devoted to culture and then it turns out that a number of start-ups awarded with Research and Innovation resources were creative instead.

Here below the table on regional conditions affecting CCI.

Regional conditions affecting CCI	Description	Source / Reference / Evidence
Access to finance	Funding for CCI comes from the ROP-ERDF: - 8% (37.589.526€) of total ERDF resources assigned to the region in the Operational programme 2014-2020 have been allocated in the priority axis 5. - Call for proposal: ○ Out of the first 85 start-up projects that have been supported by the Region, 16 are clearly	- ROP (AXIS 5) - Call for proposals - AXIS 1 Activity 1.4.1

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	attributable to the cultural and creative industries. These have mobilized about 1.3 million Euros of regional contributions and over 2 million total investments, involving, already from the project presentation phase, 20 additional human resources compared to the partners of the start-ups[64]. In 2019 the total funding allocated by the Emilia-Romagna Region to the performing art sector amounted to 24,568,310 Euros, up 12% compared to the previous year. Comment: few funding to small and micro realities rather than select a few "local champions".	- Orange Economy Report - EmiliaRomagnaCreativa Funding Report - Stakeholder interview - (Bologna Welcome)
Human resources	- The Regional policy: Education and Research in E-R; - Within the flourishing context of the University of Bologna, relevant departments in this context are the Department of the Arts (DAR) and the Centre of Advanced Studies in Tourism (CAST). DAR was born in 2012, when the Department of Visual Arts and the Department of Drama and Music Studies were merged. Most of the faculty members specializing in artistic disciplines work within this department, as well as a number of other teachers who mainly focus on other subjects, so as to create a wider scientific and didactic project. The Centre of Advanced Studies in Tourism (CAST) was established in February 2014 at the Rimini Campus of Bologna University. Its goal is to coordinate and strengthen research, dissemination and lifelong learning in the field of tourism. Another department that is worth mentioning si the	- ER Education and Research - University of Bologna - Bachelor - Economics of tourism (Bachelor) - Industrial design (Bachelor) - University of Bologna - Master - Bologna business school - Inter-university collaborations - Polytechnic network - Stakeholder interview (Bologna Welcome) - Emilia-Romagna Innovation and Talents

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	Department of Architecture which proposes from A.A. 2016-2017 the Master's Degree in Advanced Design with the aim to provide training to designers who are experts in design innovation for the creation of new products and services. Within this context, some relevant university programs are: ○ Economics of Tourism (Bachelor) ○ International tourism and leisure industries (Bachelor) ○ Tourism enhancement and cultural heritage management (Master I livello) ○ Business management - tourism, heritage and events (Master Business School) ○ MBA in Design, fashion and luxury goods - Collaboration among the University of Bologna-UNESCO: ○ UNITWIN/UNESCO Chairs Programme - ERT, Emilia Romagna Teatro Fondazione (one of the seven Italian National Theatres), manages various theatres in Emilia Romagna, which 2 of them are located in Bologna. One of the main activities of ERT is in the field of theatre education: ERT manages the Scuola di Teatro Iolanda Gazzerro for young artists, and a one-year specialization course open to candidates having a theatre school diploma or any professional theatre experience. - At professional level, the increasing number of human resources in the sectors has to be attributed also to the **call for proposals** of the Region, as the one mentioned in the above paragraph "Access to finance" - The **Clusters** operate to encourage and support the development and emergence of initiatives in the field	

	of higher education and human resources development - Within the regional innovation ecosystem, one of the main activities of the **fablabs** is training: they offer a wide range of training opportunities with reference to the use of hardware and software tools, the acquisition of craft techniques, the development of projects and the creation of products - **Polytechnic Network**: within it we find the ITS Foundation "*Tecnologie industrie creative*" and the ITS Foundation "*Tecnologie innovative per i beni e le attività culturali, turismo e benessere*". The Politecnica Network is part of ER Educazione e Ricerca Emilia-Romagna, a system that responds to the precise commitment to invest in education and research and offer people opportunities to acquire broad and innovative professional skills, express potential, intelligence, creativity and talent and grow in a European dimension, in comparison and dialogue with experiences gained elsewhere. Spillover effect: local and regional policies can be built to generate spillover effects meaning the acquisition of knowledge and competences in both CCI and tourism contexts starting from reasoned placements and/or traineeships.	
Level of regional innovation and digitalisation	Innovation and digitalisation come from: - The Regional policy promotion of innovation and digitalisation (this is for the development of innovation and digitalisation in all sectors, not only for CCI) - The Emilia-Romagna Digital Agenda (ADER) - The Open innovation systems: Cluster CREATE and Maker networks. New skills and expertise required are mostly connected to digital.	- Digitalisation by the regional policy (ROP AXIS 2) - ADER - Cluster CREATE & MAK-ER - Emilia-Romagna Innovation and Talents

Market conditions for CCI products / services	- The market positioning is subject to the dynamics of innovation in the sector; - A negative impact of the COVID19 pandemic which has a strong power on the market dynamics' evolutions in terms of uncertainty; - A positive factor is the very strong demand for cultural services; - A very diffuse supply side in CCI sector (many small companies which represent the 99% of the CCI market)	Stakeholder interview (ART-ER, Bologna Welcome)
… (other factors)[65]		
Mobility	- Huge impact of the airport and its fast growth (Marconi as air-hub for Emilia Romagna) in tourism of the area - Great impact of the High-speed trains: Bologna as National hub between North-South and East-West of Italy	Regional observatory on tourism of the Union of Chambers of Commerce of Emilia Romagna[66]: Focus on Art Cities and Bologna Airport
	COVID19 has had a huge impact on the attempt of "*Amazonization*" of the products released in and for the Apennines area (See below for "*Amazonization*" concept): the transportation system indeed has been affected by the pandemic and the attempt to let the Apennine area be more reachable by public transportation is at the moment suspended.	Stakeholder interview (Bologna Welcome)

4.1.2. Italy: Friuli Venezia Giulia Autonomous Region (PP2: FVG AR)

The regional context of access to credit for CCIs is certainly one of the factors that have the greatest impact on the possibilities of connecting ICCs with cultural heritage and sustainable tourism. Access to ICC funding in the FVG Region is limited. The investors are more interested in certain sub-sectors

[65] These should be regional conditions that potentially affect CCI and its linkage to cultural heritage preservation and sustainable tourism

[66] Annual reports available at the following institutional site: https://www.ucer.camcom.it/osservatori-regionali/os-turistico

of the ICC which promise one greater profitability in terms of growth of the market and ROI (film / media, games, creative services with a digital dimension or software based on video games). Other sectors of the ICC receive poor structural support through funding direct audiences (art, fashion, etc.). In strengthening the existing funding opportunities and in introducing new ones, regional authorities must play a crucial role in stimulating private investment and promoting PPPs able to target needs of SMEs, through grants, guarantee mechanisms, equity financing, crowdfunding[67].

In FVG AR region are no companies, private institutions, associations, foundations, specialized or focused on Cultural and Creative Sectors financing. BANFVG is the first Business Angel Network in the Friuli Venezia Giulia Autonomous Region . It is born of the collaboration between BAN Italia and Cramars. The objective of BANFVG is to cross the best business ideas with potential investors.

As for crowdfunding, there are 11 reward-based platform focusing, partially or exclusively in project related to CCSs. An, hybrid platform, “Fall in love with culture” is the first portal of crowdfunding (reward and donation) devoted to the promotion of Italian culture[68]. The activation of the link with the Cultural Heritage follows an inverse direction. the Cultural assets and the Cultural Heritage, financed by multi-year programs aimed at the recovery, conservation and enhancement of the assets of the cultural heritage (archaeological heritage, fortified architecture, industrial archaeology , historic houses and gardens, buildings of artistic and architectural value as well as movable cultural heritage) activate (Calls; tenders; ect.) links of operational cooperation with the CCIs on recovery, conservation and enhancement of the assets.

Another relevant regional condition concerns human resources availability. The tertiary level educational offer for culture, creativity and tourism in FVG AR is quite articulated: Conservation and Restoration School of Villa Manin in Passariano, Civic Academy of Dramatic Art Nico Pepe, Conservatory of Music “Giuseppe Tartini” in Trieste and the State Music Conservatory of Udine “Jacopo Tomadini” are offering courses; Udine University is offering 3 Bachelors and 1 MoA course and 2 specific PhD courses. Trieste University is offering 1 specific Phd Course and the University

[67]“Strategic document of the Autonomous Region of Friuli Venezia Giulia for policies in favor of culture and creativity” http://www.regione.fvg.it/rafvg/export/sites/default/RAFVG/cultura-sport/progetti-bandi-europei/FOGLIA2/allegati/%20Allegato_1_alla_Delibera_2442-2018x0.1x.pdf

[68] "Fall in love with Culture” https://www.innamoratidellacultura.it/

Consortium of Pordenone is managing 3 MoA courses[69]. The University Master in "Tourism enhancement of environmental and cultural heritage", organized by the University of Udine - Departments of Economic and Statistical Sciences, History and Protection of Cultural Heritage and Human Sciences, currently not activated, should also be mentioned.

FVG AR's integrated measures of active policies for work in the field of cultural, artistic and tourism heritage are articulated in 21 courses[70]. Regarding the upper secondary educational level Higher Technical Institutes (HTIs) are offering 4 Diplomas (Diploma in Graphic and Communication; Diploma in Furnishing and Interiors; Diploma in industrial and craft production; Diploma in Fashion System). Higher Technical Education and Training (IFTS) paths aim to train professionals at post-secondary level, aimed at technical, in-depth and targeted professional training, offer 3 courses.

A third significant regional condition concerns the Level of regional innovation and digitalisation. In the Regional Innovation Scoreboard 2019[71] FVG ranks in 102nd position compared to all EU-28 regions. FVG region, thanks to an RII of 92,6, is a Strong Innovator or Innovation Leader in a country that is a Moderate Innovator. R&D expenditure was equal in 2019 to 536 million €. In relation with the "percentage of SMEs with in-house innovation" on total SMEs, the FVG region was 23rd among the top 40. FVG ranked in 37th position in the International scientific co-publications per million Population Index. In 2017 (last year available), total R&D personnel and researchers (rd_p_persreg), measured as percentage of total employment was equal to 1,61% (EU-27: 1,41%). In the same year Intramural R&D expenditure per inhabitant was equal to 481,1 € (Italy 392,7 €; EU-27 629,2 €).

In 2018 76.1 families per 100 had Internet access and 55.2 per 100 had a fixed broadband connection (DSL, ADSL etc.). In 2019, 73.1 out of 100 companies have a website / home page or at least one

[69]"D. 3.2.1 Regional analysis _ LP, ChIMERA Innovative cultural and creative clusters in MED area https://chimera.interregmed.eu/fileadmin/user_upload/Sites/Social_and_Creative/Projects/ChIMERA/Reporting%20Document/%20Library/%201_RP/D.3.2.1_Regional_Analysis_LP.pdf

[70]"Integrated measures of active policies for work in the field of cultural, artistic and tourism heritage" https://www.regione.fvg.it/rafvg/cms/RAFVG/formazione-lavoro/tirocini-apprendistato/FOGLIA5/#id3

[71] Regional Innovation Scoreboard, report prepared by: Hugo Hollanders, Nordine Es-Sadki and Iris Merkelbach Maastricht University (Maastricht Economic and Social Research Institute on Innovation and Technology – MERIT) as part of the European Innovation Scoreboards (EIS) project for the European Commission, DG Internal Market, Industry, Entrepreneurship and SMEs, European Commission 2019. https://ec.europa.eu/growth/sites/growth/files/ris2019.pdf;

page on the Internet[72]. In 2019, 73.1 out of 100 companies have a website / home page or at least one page on the Internet[73].

A fourth relevant condition regard market conditions for CCI products / services, As regards the internal market, it should be noted that in FVG, in 2018 66.1 families out of 100 considered their economic resources to be excellent or adequate (Italy = 60.3). The average percentage expenditure of families for the Communication, Recreation and Culture, Hospitality and Catering expenditure chapters in 2018 was 12.9% (Italy = 12.1%)[74]. Uncertainty of business cycle – more pronounced since 2008 - and of the results of alternative forms of financing, as crowdfunding, adversely affected businesses activities sustainability and promotional events.

As regards foreign markets and therefore the internationalization capacity of the companies in the FVG Region, it should be noted that the cultural and creative system has a good export performance. However, exports and/or internationalisation capacity are concentrated in sub-sectors such as audio-visual, software and videogames and cinema. In other sub-sectors, CCIs business are dependent on local relational network and also do not have the size, internal expertise and competences, or information about potential foreign markets[75].

4.1.3. Slovenia (PP3: UIRS)

Some interviewers pointed out that Slovenia do not have a regional policy in this sense at all. At the NUTS3 statistical regions level, we only have a local-Municipal and national policy and some intermediate structures that compensate for the lack of regional policy (integration resulting from the need to connect areas). Lack of awareness for the potential of development and further assistance (from the national level) in the development of commercial products in this area. And other emphasised there are several levels of development documents (bottom – up):

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[72] "Region in figures 2019", https://www.regione.fvg.it/rafvg/export/sites/default/RAFVG/GEN/statistica/FOGLIA56/allegati/Regione_in_cifre_2019.pdf

[73] ISTAT - ICT in companies with at least 10 employees. Data extracted on 07 May 2020 14:25 UTC (GMT) from I.Stat

[74] "Region in figures 2019", https://www.regione.fvg.it/rafvg/export/sites/default/RAFVG/GEN/statistica/FOGLIA56/allegati/Regione_in_cifre_2019.pdf

[75] CRE:HUB Policies for CCIs: the hub for innovative regional development. Roadmap: Cultural and Creative Industry in FVG AR, June 2017. https://www.interregeurope.eu/fileadmin/user_upload/tx_tevprojects/library/file_1513602923.pdf

- development planning at the level of one tourist destination (eg Soča Valley),
- development planning at subregional / regional level (eg Julian Alps),
- Alpine Slovenia,
- The whole of Slovenia.
- At a lower level, the coherence is bigger (e.g. in Regional Development Programs this content (CCI) is covered).

Interviewers pointed out that improvement of the image of a region is considered as a most important impact of the promotion of the cultural heritage (UNESCO test list). But also increased regional income. Education on the impact of war for citizens, living standard and as such the promotion of peace. Their location attracts different armies to come and study the first "blitz krieg". At the state level more focus on nature and gastronomy (green destination) as a plus, but also a weak point, since it focuses only on few cultural heritage sites, mostly those who are also a natural heritage. Hidden heritage (WW1) is almost forgotten (not to be defined as dark tourism). At s statistical region level: focus on rich cultural heritage (French kings, Napoleon battles, castles, WW1, UNESCO sites) that is promoted in regional development programmes. Tourism becomes more and more important in the view of income and number of tourists, which generates more interest and focus on cultural heritage, too.

As an advantage, some interviewers see the focus on the protection of the cultural heritage or. cultural elements in protected areas (eg Triglav National Park) in addition to the main goal of preservation and protection of nature. This, in turn, represents the advantage of people staying within this area, which has so far not been exploited for tourism purposes, but has recently emerged in communication and marketing strategies. It may be missing only in product development. **Added value in economic terms**, reflected in the increased number of overnight stays, the extension of the season, the extension of the period spent by the visitor at the destination, Increase of visibility and change in communication and marketing.

4.1.4. Greece: Western Greece (PP4: Patras Science Park)

Regional conditions affecting CCI	Description	Source / Reference / Evidence
Access to finance	There is no easy access to alternative financial instruments - negative impact	Smart Specialization Strategy Regional Operational Plan of the Region of Western Greece
Human resources	The human resources of entrepreneurs and employees are considered high level – positive impact	Smart Specialization Strategy
Level of regional innovation and digitalisation	The existence of three universities and several innovation and entrepreneurial hubs creates positive prospects.	Expert interview / K. Zisimopoulou Smart Specialization Strategy Context Analysis
Market conditions for CCI products / services	The slow recovery from the recent financial crisis and the pandemic of covid-19 create negative conditions	Context Analysis

The existence of three universities and several innovation and entrepreneurial hubs is the most important advantage of the region in order to lead the CCI sector to innovative practices, use of new technologies and knowledge of the international environment, so that it can work more effectively in sustainable tourism development and cultural heritage preservation.

4.1.5. Croatia: Dubrovnik Neretva County (PP6: DUNEA)

Regional conditions affecting CCI	Description	Source / Reference / Evidence
Access to finance	Financing of CCI and its linkage to cultural heritage preservation and sustainable tourism is available through yearly finance schemes (awards for excellence, incentives for cultural / touristic content. Budgets are divided in separate sections of tourism, entrepreneurship and cultural heritage rather than encourage joint projects. Joint activities are done within EU funded projects.	Stakeholders interviews
Human resources	Available capacity building and life-long learning activities fail to focus on cultural management, cultural entrepreneurship and similar themes.	
Level of regional innovation and digitalisation	Regional innovation and digitalisation within the Smart Specialization Strategy has been implemented through establishment of Competence centre for tourism Dubrovnik. Innovative and digitalized products and services in Dubrovnik Neretva County, both public and private, are still in development and insufficient for market demands. DNC has included innovation and digitalisation in EU funded projects of different themes.	
Market conditions for CCI products / services	Tourism as industry represents market for CCI product / services in Dubrovnik Neretva County and as such can create disbalance in exploitation and protection of cultural heritage. Nevertheless, it can also be trigger for innovation in protection and presentation of culture and heritage via CCI.	

4.1.6. Albania: Region Vlora (PP7: RDNC)

In the Adriatic-Ionian landscape, Albania represents a rather peculiar case. The nation has a very rich heritage but has suffered considerably from a long period of isolation (1950–1990), during which concerns for the slowdown of economic development and the increase of poverty among the community overshadowed heritage-related matters. More recently, there have been many positive achievements in raising awareness of the role of preservation, restoration, and rehabilitation of cultural resources, but, despite its rich heritage, the country is still lacking in sector-specific strategies. The guide to the cultural policy of the Albanian State simply affirmed the importance of cultural heritage for the democratic development of the nation and identified several objectives, without specifying any strategy for their realization.

Apart from the draft Sector Strategy on Cultural Heritage, as a component of the draft strategy for culture and arts, cultural heritage is integrated into wider policies and related documents, such as the Sector Strategy on Tourism 2007–2013 and the National Strategy for Development and Integration 2007–2013. This “indirect” attention towards heritage is reflected at the level of financing: cultural heritage receives funding mainly from the Ministry of Finance, sharing that institution’s attention with many other financial concerns.

At the international level, although the national cultural policy is built on European standards—with the goal of interrupting the country’s isolation from the world—many difficulties are to be observed in respect to other Balkan countries: in reconnecting with European models, principles, and milestones; in the alignment to main strategic documents; in terms of their signing or ratification, such as the Valletta, FARO, Granada, and Florence Conventions. In fact, in 2008, only 17 of the 37 UNESCO standard-setting instruments were estimated to have been ratified or accepted.

Along with international programs—such as SEE financing initiatives and calls—other clear signs of a proactive engagement in the formalization of an international dimension of processes are to be seen within Albania as can be read in the position expressed within the ICOMOS International Scientific Committee on Cultural Routes (CIIC) by Valter Shtylla (IMK). Since such an international dimension is a necessity, attention must be paid to the definition of strategies. The possible formalization of a common South-East European heritage can contribute to redefining financial resource allocation from within single countries towards assets outside national borders, which holds potential for a more balanced development of regional territories.

However, given the economic repercussions of heritage promotion on tourism-related sectors, such ambition risks remaining a mere intention on paper, against the unwillingness of some to renounce domestic investment in favor of other countries. Thus, it becomes essential that processes of value definition are carried out from the bottom up, led by communities influencing governments rather than expecting them to lead the way. In Albania, this means a reconciliation not only within the Albanian community with its heritage and past but also a reconciliation among the different SEE countries.

On the other hand, clear assessments are widely to be found in official declarations about the perception of culture as a strategic tool for democratic development and for the affirmation of the Albanian identity within the SEE region and within the whole European image. The nation is also committed to a strong decentralization effort, since Albanian cultural life has long remained concentrated within the capital, where most heritage-related institutions are located, which does not support enabling processes in local contexts.

4.1.7. Bosnia and Herzegovina (PP8: SEBS)

The CCI sector includes heterogeneous subsectors (e.g., music industry, film industry, performing arts, architecture market, design industry, etc.). Thus, it seems difficult to design policy at national, entity, and local level that will satisfy the needs of all entities. Although there is no specific policy regarding CCI sector, there are several initiatives, mostly project-driven, striving to promote the adoption of strategic planning within the CCI sector.

The development of cultural heritage entrepreneurship is a good opportunity for young creative people to do business. Cultural heritage entrepreneurship enables them to earn revenue from producing and selling crafted products inspired by cultural heritage (e.g., the jewelry inspired by the long history and tradition of BiH, unique handbags inspired by our tradition, clothing inspired by the centuries-old history, culture and tradition of Bosnia and Herzegovina, etc.). At the same time, cultural heritage entrepreneurship increases the awareness of cultural heritage and the importance of its preservation. Moreover, these hand-made products can be used as souvenirs.

Moreover, IT sector can contribute a lot to the economic and social development of BiH. The IT sector is particularly crucial for tourism development since augmented reality has become increasingly popular within the travel industry. The augmented reality enhances tourist/visitor experience by providing the visualization of images, slideshows, 3d models, animations in museums, galleries, heritage sites, etc.

Although CCI sector has potential for future development, there are no specific policies that are holistic and well-coordinated. Thus, the CCI sector is weak, fragmented and disorganized. Furthermore, there is a general lack of professionals in the cultural and creative industries, i.e. there is a lack of cultural managers, a lack of professional education of the workers, but also a lack of understanding of the field.

Specifically targeted encouragements and support opportunities schemes for CCI sectors are the conditions for the development of CCI sector. Currently, private enterprises in CCI sector have access to existing support schemes designed for all SMEs. However, given the non-traditional attributes of the CCI sector, it would be beneficial to create specific financial mechanisms for CCI. Moreover, it is necessary to provide funding sources (annual budget) for publicly financed institutions in the CCI sector (museum, galleries, etc.). By having available funds for regular activities, they will not focus on the "survival," and they will shift their efforts and creativity toward innovative solutions.

Here below the table on regional conditions affecting CCI.

Regional conditions affecting CCI	Description	Source / Reference / Evidence
Lack of CCI policy	The absence of strategic planning and policy-making in CCI sector (at national/entity/local level)	Stakeholder interviews
Access to finance	There is no easy access to alternative financial instruments - negative impact	Stakeholder interviews
Human resources	General lack of professionals in the cultural and creative industries (e.g., cultural managers) – negative impact	Stakeholder interviews Study CCI in Caton Sarajevo

Market conditions for CCI products/services	Small domestic market and lack government intervention supporting the internationalization of CCI enterprises – negative impact	Stakeholder interviews
Lack of specialised educational programmes supporting entrepreneurship in CCI sector	Lack of innovative undergraduate and graduate programmes about management and marketing in CCI sector - negative impact	Stakeholder interviews Study CCI in Caton Sarajevo
Migration of talents and young people abroad	Migration of talents and young people abroad – negative impact	
Growing ICT sector	The information and communications technology sector (ICT) is one of the fastest-growing sectors in Bosnia and Herzegovina – positive impact	

4.2. Impact of CCI and its linkage to cultural heritage preservation and sustainable tourism on regional competitiveness

4.2.1. Italy: Emilia-Romagna Region (PP1: MCBO)

CCI businesses along with suppliers and product/service users can contribute to the region's competitiveness supporting the development or directly being part of the regional ecosystem based on innovation and co-design, drawing together the path towards a more sustainable, fast-growing innovative and, today, resilient region.

The typical core aspect of CCI industries is the segment composed by Cultural and Creative companies in a strict sense, which means the ones which have a cultural and creative result as main output of their work, like Cinema, Theatre, Music. There's also another relevant part, which is the one that includes cultural and creative professional figures which work in non-CCI sectors (or more traditional contexts) and already contribute to Regional competiveness and generate a relevant economic impact on the territory; two typical examples are the figure of the designer in the mechanical sector (Lamborghini, Ducati, Ferrari) or the artist in the manufacturing sector (for bags, dresses and fashion in general). The CCI professional figures and the CCI sector has to be fully exploited thanks to their potential to boost a wide number and variety of economic sectors (beyond the already-influenced ones), crossing the border of the actual CCI sector. CCI also concretely contributes to the advancement of the region's business innovation through education and training system networks, building collaborations with public institution at different levels, generating widespread well-being and creative jobs and skills.

It is worth remembering that the housing and catering sector sustained the metropolitan economy and the competitiveness against the 2009 crisis that caused the death of a huge number of enterprises. The CCI sector kept high the number of employees: jobs in this sector were growing even in the presence of an overall decrease in the period 2008-2014, and with greater intensity in the following years.

4.2.2. Italy: Friuli Venezia Giulia Autonomous Region (PP2: FVG AR)

Regional competitiveness dimensions	Discussion of impact of CCI	Source / Reference / Evidence
Institutions (national, regional)	For what concern the Quality of Government of FVG AR: the Quality Pillar score is equal to 49,5 (0-100) and the rank is 135/202; the Impartiality Pillar score is 45,2 (0-100) and the rank is 135/202; the Corruption Pillar score is 40,3(0-100) and the rank is 131/202. FVG AR is not showing neither strengths nor weaknesses comparing to 15 regions with similar GDP per capita. The management of a series of cultural assets of international importance (UNESCO sites such as Aquileia, Cividale and Palmanova) required a participatory governance that involved all local stakeholders, including municipalities, the heritage sector cultural, enterprises and associations. This approach will become fundamental in the	European Quality of Government Index 2017[76]

[76] https://ec.europa.eu/regional_policy/it/information/maps/quality_of_governance#2

	management of Phase 2 related to the Covid-19 pandemic.	
Macroeconomic stability	Among the indicators that make up the compound index relating to the Macroeconomic Stability pillar, only the Export market share seems to correlate with an impact by tourism and CCIs. t is above all the production of design-driven goods and services that represent a significant component of regional exports. The wood-furniture sector represented in 2018 10.3% of regional manufacturing exports and 14.1% of all sector exports at national level. The regional sector of cultural and creative enterprises and tourism is characterized by a structured countercyclical capacity, demonstrated by data on added value and employment. On the period 2016-2019 added value average percentage growth of the whole FVG AR economy and CCIs sector was respectively 1,8% and 2,5%. Regarding employment, in the same period average percentage growth was respectively 1,2% and 1,6%.	"Io sono cultura 2019" "Macroeconomic Trends – Novembre 2019"[77] "The wood-furniture cluster in the Economy of Friuli Venezia Giulia"[78]
Infrastructure	The total road, rail and navigable inland waterways network of FVG AR was equal to 244 km in 2018. As regards the Infrastructure Pillar, FVG AR percentage of population within a 90-minute travel/population within a 120-km radius x 100 is between 70% and 80% of the total population. The number of air passengers	EUROSTAT Regional Database[79] Road Transport Performance in Europe[80]

[77] http://www.regione.fvg.it/rafvg/export/sites/default/RAFVG/GEN/statistica/FOGLIA51/allegati/Tendenze_macroeconomiche_nov19.pdf

[78] "Il cluster Legno Arredo nell'Economia del Friuli Venezia Giulia", Chamber of Commerce Pordenone-Udine, Office for Statistics and Prices, September 2019.

[79] https://ec.europa.eu/eurostat/web/regions/data/database

[80] "Road Transport Performance in Europe", Dijkstra L., Poelman H. and Ackermans L.; WP 01/2019, Directorate-General for Regional and Urban Policy.

	(thousands) carried by inhabitant was equal to 0,63 (EU=2,0). AS FVG AR is a region with a complex orography and mountainous area represent more than 50% of total surface. Some cultural assets suffer from some decentralization, especially those in the foothills. The pressure to strengthen the links is continuous. According to the Extraordinary Plan for Tourist Mobility 2017-2022 an analysis conducted on the accessibility of some important UNESCO sites, Capitals of CULTURE and EDEN destinations notes that the FVG AR system is characterized by good access times for public/private and rail transport services, since an infrastructure network is already present which allows a good level of accessibility for the last road mile. The fourth objective of the Plan - "Promote sustainable tourism mobility models" aims to support initiatives to promote active mobility and, above all, to connect these initiatives to the use of tourist experiences, through cycle and pedestrian paths equipped for the needs of tourists. Again according to the Extraordinary Plan for Tourism Mobility 2017-2022, the "connected" Transport and Tourism chain must also be strengthened with intermodal choices that also favor the gentle / slow mobility of river networks, cycle paths, disused railways, historical paths and roads both in the innovative forms of shared mobility (car sharing / car pooling).	Transport statistics at regional level[81] Extraordinary Plan for Tourist Mobility 2017-2022[82]

[81]https://ec.europa.eu/eurostat/statistics-explained/index.php/Transport_statistics_at_regional_level

[82]http://www.mit.gov.it/sites/default/files/media/normativa/2018-01/piano%20straordinario%20mobilit%C3%A0%20turistica%202017-2022%20v0.pdf

Health	In FVG AR life expectancy in 2018 was equal to 83,5%. In 2018 between 80.2 and 81.2 out of 100 people aged 14 and over said they were very or fairly satisfied with their health. As in most developed countries, the top three causes of death in FVGR are cardiovascular, oncological and respiratory diseases and, therefore, much effort is spent on health promotion programmes The budget for health care, health promotion, prevention and social policies is equivalent to 55% of that of the Regional Government. WinHealth project is focused on the development of winter tourism and healthy tourism based on medical-scientific evidence for the cross-border and sustainable enhancement of Alpine natural and cultural heritage.	Life Expectancy by age, sex and NUTS-2 region[83] WHO-RHN (Regions for Health Network)[84] Affordable and sustainable tourism in Friuli Venezia Giulia[85] www.winterhealth.eu
Basic education	In Italy the participation rate in job-related non-formal education and training sponsored by the employer was in 2016 (last Adult Education Survey) equal to 27,1 (EU-27=31,0). In FVG AR only 14,1% of people in the age cohort 25-64 searched for information on learning possibilities in Italy in 2016 (21,4% EU-27). Finally, again with reference to the Basic Education composite indicator, the share of people in Italy who self-reported that they do not know any foreign language (age cohort 25-64) in 2016 was equal to 38,6% (EU-27 37,3%). In Friuli Venezia Giulia you can choose between different types of professional training courses	EUROSTAT – Education and Training[86]

83 https://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=demo_r_mlifexp&lang=en

84 http://www.euro.who.int/en/about-us/networks/regions-for-health-network-rhn/activities/regional
- profiles/italy/friuli-venezia-giulia

85 http://vallidolomitifriulane.utifvg.it/fileadmin/user_vallidolomitifriulane/Interreg_Emotionway/workshop_febbraio_2020/Del_Bianco_Maniago_18.02.2020.pdf

86 https://ec.europa.eu/eurostat/web/education-and-training/data/database

	financed by regional / state funds. The Interprofessional Funds fund continuous training courses reserved for staff employed by the companies that adhere to the respective Funds. The courses can be independently organized by the companies, or can be organized within sectoral and territorial training plans. Companies often use professional training institutions to carry out these courses, the purpose of which is the updating and targeted improvement of skills. Normally these are short-term courses, to access the worker must be entered by the companies among the attending students.	
Higher education and lifelong learning	In FVG AR the percentage of population aged 25-64 with tertiary educational level in 2019 was equal to 20,6%, significantly lower than EU-27 figure (31,6%). In tertiary education there is a significant gender imbalance in favour of the female component (23.7% against 17,6% of males in 2019). Regarding LLL, it can be observed that the Participation rate in education and training of population aged 25-64 in 2019 was equal to 10,9, in line with EU-27 average rate (10,8). In the Region, the phenomenon of early school leaving (% of the population aged 18-24 having attained at most lower secondary school and not going further), contrary to the national figure, is more contained than the EU average. In 2019 the rate was 8.6 against 10.2 in the EU-27. The ICC's request for ad hoc and almost on-demand training, linked to the characteristics of the various sectors, must confront the inertia of the university education system, in which flexible and continuous forms of school-work alternation as in technical and	EUROSTAT Regional Database[87]

[87] https://ec.europa.eu/eurostat/web/regions/data/database

	vocational teaching are lacking. Also SMEs involvement in internships schemes (tertiary education) is missing.	
Labour market efficiency	In 2019 in FVG AR 66,6% of the persons aged 15-64 (excl. agriculture) was employed (EU-27: 59,6%). In the year total unemployment (as % of active total population of the same age cohort) was equal to 6,1% (EU-27: 6,7%). Female unemployment (as % of active female population of the same age cohort) was equal to 7,9% (EU-27: 7,1%). As male unemployment rate (as % of active total population of the same age cohort) in 2019 was in FVG AR equal to 4,7% (EU_27: 6,4%) it is clear that, even in the context of a good employment situation compared to the European average, there is a significant gender gap against the female component In 2019 the percentage of labour force unemployed for 12 months (as % of active population of the same age cohort) was 2,3% (EU-27: 2,8%). In FVG AR there is plenty of schemes and programs of active labour policies relating to different groups of workers (first entry into the world of work; retraining; reintegration; etc.) but few specific actions and tools for ICC and their professional profiles. So the main risks are on the one hand skills obsolescence dute to the lack of specific LLL schemes, on the other non-professionalization of young workers due to lack of a sectoral labour policies promoting the transition from the voluntary (grey economy) status to the labour market. The specific program 64/17 - "Integrated measures of active policies for work in the field of cultural, artistic and tourism assets", financed under the POR FSE 2014-2020, aims to train professional figures who can	Integrated measures of active policies for work in the field of cultural, artistic and tourism assets[88]

[88] https://www.regione.fvg.it/rafvg/cms/RAFVG/formazione-lavoro/tirocini-apprendistato/FOGLIA4/

	enhance the regional cultural system, identified in the management of cultural heritage, in non-industrial artistic productions, in the complex of activities getting inspired by culture and that contribute to conveying the meanings and values in the production of goods and services	
Market size	In 2018 FVG AR Explanatory texts Gross domestic product (GDP) at current market prices was equal to 38,02 bn euro. GDP per-capita in PPS was equal to 103 (EU-28=100). In 2017 the per capita income of households in FVG AR was equal to 21.474,6 € (EU-27 18.772,9 €). The FVG region is a richer region compared to the Italian average and in line with the European average. However, its propensity for cultural consumption is also higher than other comparatively richer Italian regions.	
Technological readiness	The 87% of FVG AR's households had broadband access in 2019; 88% of FVG AR's households had Internet access in 2019. In the same year 46% of resident Individuals ordered goods or services over the internet for private use (Italy 38%). ADfvg, Regional Digital Agenda define the policy and strategic framework for the digital growth of Friuli Venezia Giulia. ADFvg develops locally the guidelines of the European Digital Agenda[89] and of the national strategies for Digital Growth and the development of the Ultra Wide Band in Italy. Through the development of useful digital infrastructures and services, simple to use and accessible to all, the Agenda has, among	Regional Digital Agenda[90]

[89] Initiative of the Europe 2020 Strategy.

[90] Approved by a Regional Council Resolution in December 2015, https://adfvg.regione.fvg.it/.

	others, the objectives of promoting research and innovation and to favour tourism development and enhancement of cultural heritage.	
Business sophistication	The GVA in 2017 related to Financial and insurance activities; real estate activities; professional, scientific and technical activities; administrative and support service activities represented 26,6% of total regional GVA. In the same year, the employment related to the same activities represented 13,8% (EU.27 12,7%) of total FVG AR employment. The Regional Innovation Scoreboard shows that in 2019 the normalised indicator related to SMEs with innovation co-operation activities as share of total number of SMEs was 0,248 (EU-28 average=0,371). The Regional Innovation Scoreboard shows that in 2019 the normalised indicator related to SMEs introducing marketing or organisational innovation as share of total number of SMEs was 0,533 (EU-28 average=0,454).	RIS 2019-database[91]
Innovation	According to the to the Regional Innovation Scoreboard 2019, Friuli Venezia Giulia ranked as a strong innovator, the innovation performance has increased over time (7.7%). In fact, the Regional Innovation Index (RII) increased, in the period 2011-18, by 7.7 points, allowing Friuli Venezia Giulia to be the most innovative Italian region in 2019.	Regional Innovation Monitor Plus[92]

[91] https://ec.europa.eu/docsroom/documents/36081

[92] https://ec.europa.eu/growth/tools-databases/regional-innovation-monitor/base-profile/friuli-venezia-giulia

	If compared to the Italian average, Friuli Venezia Giulia stays always ahead in all the factors that are composing the RII.	

4.2.3. Slovenia (PP3: UIRS)

State level: funds for the revitalisation of cultural heritage are getting in decline after the financial crisis in 2009. Some of those projects are co-financed by Interreg and cross border projects. Regarding the promotion of activities and products, the STO (Slovenian tourist organisation) puts more focus to the natural heritage (promotes Slovenia as a green destination), not enough to the cultural heritage. There is still a lot of potential there. Statistical region level: Same goes to the statistical region. More focus is on the tourist infrastructure, only then for the the cultural heritage. Not so much focus on the WW1 heritage (how to promote it to become interesting for tourist). That's why we focus on the new Walks of peace. Promotes peace, but also educates about history.

4.2.4. Greece: Western Greece (PP4: Patras Science Park)

Regional competitiveness dimensions	Discussion of impact of CCI	Source / Reference / Evidence
Institutions (national, regional)	Public sector institutions for tourism the promotion of cultural heritage (e.g. Antiquities Ephorates) and the tourism industry do not have a stable cooperation with the CCI sector – negative impact.	Context Analysis Expert interview / K. Zisimopoulou
Macroeconomic stability	Although the number of CCI enterprises is growing, there are no strong indications of economic stability in the sector. On the other side CCI sector helps the increase of employment rate in the region– both positive and negative impact.	Context Analysis Chapters 1-2 of the present study

		Expert interview / V. Papaioannou Expert interview / Ath. Koustas
Infrastructure	There is a development of tourism infrastructure and infrastructure for the promotion of cultural heritage – positive impact.	Context Analysis
Health	There is no evidence of positive or negative effect on this indicator.	-
Basic education	All people in the sector have completed basic education – positive impact.	Context Analysis
Higher education and lifelong learning	Most of the CCI stakeholders have a high level of education	Context Analysis
Labour market efficiency	The development of new CCI products and services resulting from the growth of creative businesses has a positive effect on the efficiency of the labor market.	Chapters 1-2 of the present study
Market size	The employment in the CCI sector is the 1.8% of the entire Regions Workforce, while its total turnover is 78,678.17 mil.	Sections 2 & 3 of the present study
Technological readiness	People in the sector believe that they need further training in the use of new technologies – negative impact.	Context Analysis
Business sophistication	There is a lack of business culture in the CCI ecosystem – negative impact.	Context Analysis
Innovation	There are signs of innovation, especially in the creative sub-sectors - positive impact.	Context Analysis

While the growth of businesses and employees in the CCI sector creates positive prospects, the lack of business culture and the sector's inability to innovation and technology create the need for additional interventions by national and regional authorities.

4.2.5. Croatia: Dubrovnik Neretva County (PP6: DUNEA)

According to the interviewees, the impact of CCI and its linkage to cultural heritage preservation and sustainable tourism on regional competitiveness can be in raising the level of the destination as a brand. Through creation of value chain in tourism that includes agricultural activities, vernacular architecture, gastronomy, lifestyle and its interpretation through innovative, smart, green and sustainable products and services, Dubrovnik Neretva County could transform its tourism economy from mono economy to circular economy.

4.2.6. Albania: Region Vlora (PP7: RDNC)

The creativity of the sector nourishes copyright industries (audiovisual, games, music and publishing) as well as creative industries (fashion, design and architecture). Entertainment and cultural services support the growth in other fields such as digital technology, tourism or consumer electronics. The sector is a major purveyor of free-lance jobs and gathers a large number of micro enterprises networked and working in collaborative way. They are users and service oriented employing a work force that is highly skilled with a high level of motivation with project-based working routines at the forefront of new employment trends.

Investment in culture is often considered as secondary because of the elitist image of the sector or because spending in culture is perceived as a dispensable cost not an investment in the future that impacts economic and social development. Whilst cultural resources are easily associated with the protection of cultural heritage and the development of tourism, this constitutes a narrow approach on the impact of cultural investment. There is now ample evidence that culture contributes widely to economic development, employment, innovation, knowledge, entrepreneurship, education, social cohesion and diplomacy. Therefore culture influences numerous policy areas. The proposed strategy is aimed at mainstreaming cultural consideration in decision making on a wide range of policy domains notably education, tourism and innovation policy.

Culture is a major contributor to territorial attractiveness. The extent of the cultural offer is key to attract foreign investment, creative talents and give a positive image. It serves in building national confidence by reinforcing the sense of pride and ownership. Culture based creativity is at the heart of the digital, experience and creative economy that determines a country's competitiveness. Culture based creativity relates to non-technological forms of innovation that serve the development of products and services that are creative, aesthetic or provide meanings. Whether citizens or consumers are looking increasingly for the authentic and the meaningful. The cultural sector also drives social entrepreneurship, the sharing economy thus intrinsically linked with the deployment of new services with added value.

4.2.7. Bosnia and Herzegovina (PP8: SEBS)

Regional competitiveness dimensions	Discussion of impact of CCI	Source / Reference / Evidence
Collaboration between public, private and NGO in CCI sector and tourism sector	The lack of formal mechanism of collaboration between public, private and NGO in CCI and tourism sector – negative impact	Stakeholder interview / CHwB
Employment	The linkage between CCI and sustainable tourism development creates new job and reduces the level of unemployment, particularly among young people	Stakeholder interview / CHwB
Tourism infrastructure	Continuous development of tourism infrastructure - positive impact.	Strategy of Development Federation BiH 2011 – 2027
Quality of life	The development of CCI sector and tourism sector enhances the quality of life among residents - positive impact	Stakeholder interview / CHwB
High quality arts education	Art undergraduate and graduate level education is available – positive impact.	Study CCI in Canton Sarajevo

Entrepreneurship in CCI sector	There is a lack of entrepreneurship culture among players in CCI sector – negative impact.	Stakeholder interview / CHwB
Innovatiion of products and business models	Opportunities for innovations (products and business models across CCI sub-sectors - positive impact.	Study CCI in Canton Sarajevo Stakeholder interviews

5. Factors that facilitate or hinder the use of CCI products / services in cultural heritage and sustainable tourism

In this section partners aim to identify and discuss the factors that enable or hinder the use of CCI product/services in cultural heritage and sustainable tourism.

Project level view

Factors that facilitate or hinder the use of CCI products / services in cultural heritage and sustainable tourism	
Analysis of Emilia-Romagna Region	Several facilitating factors were identified: Multi-professionalism, Balance between the standardization of a product and the peculiarity of the territory, Innovative models for the creation of economic value starting from culture, Role played by the public sector, Widespread cultural consumption, Interconnection of the sectors with the opportunities of the digitalization, Destination Bologna as a new product Hindering factors are: Public offices structure, Mobility in the Apennine area, obstacles occurred during COVID19 pandemic, Lack of associations capable to transform their activities into business, Lack of “mainstream” cultural experiences/local role models
Analysis of Friuli Venezia Giulia Autonomous Region	Following factors were recognised: Activation of tourist spending by the Cultural and Creative Production System, Cultural Heritage and Tourism Digitalisation and Gamification programs and projects, Clustering of CCIs - FVG Regional Cluster Culture and Creativity, Support to cultural and creative start-ups able to offer products and services dedicated to CH and tourism, Technological Development trajectories of the S3 related to CCIs and Tourism, Aggregations of CCIs, cultural assets, public and

	private bodies etc., and Clustering and Branding Natural and Cultural Heritage Hindering factors are: unawareness of CCI industries of their capabilities and opportunities, procurement-related administrative obstacles, Weak entrepreneurial skills, Inappropriate administrative-fiscal framework, Lack of a systemic tool and approach and Insufficient cross-border cooperation initiatives
Analysis of Slovenia	Identified factors are: public co-funding, multidisciplinary teams (i.e. primary education) and diversification of providers Hindering factors are: Lack of financial supports, lack knowledge of several stakeholders, lack of promotion and infrastructural issues
Analysis of Region of Western Greece	Several factors were identified: Cultural institutions, Heritage capital, Transport and tourism infrastructures, Design, branding and advertising sub-sector, Public funds, Differentiation of tourism strategy and Creative Hubs Hindering factors are: late and inadequate adoption of a sectoral policy, lack of ecosystem approach, lack of strategic partnership between CCI and tourism sectors, lack of cooperation between cultural heritage institutions and CCI sector and lack of cultural activities' record
Analysis of Dubrovnik Neretva County	Identified factors are: Trends in tourism/tourism market demands, Increase of involvement of local communities in protection of local heritage, Availability of technology for cultural and creative content production and networking between public, private and NGO sector Hindering factors are: policy division between culture and heritage and tourism and business, obstacles related to accessibility of cultural monument and ancient cities, few opportunities for management and improvement of HR, lack of Business plans and professionalism in marketing and promotion and large number of tangible cultural sites are still not protected, marked, valorised and promoted
Analysis of Albania: Vlore region	Identified factors are: Demand from domestic and foreign tourists and from tourism operators and tourism agencies, Internationalization/ participation in international events like folk festivals, typical products fair, music, and theater competitions, Great interest from the regional community to preserve and promote cultural heritage, Interest from NGO-s and private companies to manage the cultural sites and Promotion of new artists and handicraft sector. Hindering factors are: Accessibility of cultural monument and ancient cities, management of human resources and financial means, missing business plans, lack of professionalism in marketing and promotion strategy, poor physical conditions of cultural sites and monuments, poor management of cultural sites, lack of favourable legal framework, limited number of skilled employees.

Analysis of BiH	Several identified factors are: Cultural institutions, Cultural heritage, Foreign funded cultural centres Hindering factors are: Lack of synergy between CCI sector and tourism sector, lack of mapping studies in CCI sector, lack of funding sources (annual budget) for publicly financed institutions in the CCI sector (museum, galleries, etc.) and lack of skills and competencies required to digital transformation

5.1. Main factors enabling the use of CCI products / services in cultural heritage and sustainable tourism promotion

5.1.1. Italy: Emilia-Romagna Region (PP1: MCBO)

Factor	Description	Source
Multi-professionalism	Different professional paths that can be absorbed in the CCI sector: to bring together the bearers of artistic and humanistic skills with those of digital and technological and managerial technologies, in order to create companies that are increasingly capable of being sustainable and competitive. It could be suitable also for the tourism sector. Another aspect that has to be considered when speaking about professions, is the topic mentioned in paragraph 4.1: nowadays, new skills and expertise required are mostly connected to digital.	- Orange Economy report - Stakeholder interview (Bologna Welcome) - Emilia-Romagna Innovation and Talents
Balance between the *standardization* of a product and the peculiarity of the territory	Repetitiveness of a product: a product has to be potentially replicable to be inserted in a catalogue but at the same time has to respect the environment where it is born.	Stakeholder interview (Bologna Welcome)

Innovative models for the creation of economic value starting from culture	It understands the potential of an entity to develop new economic benefits for a specific area and/or looks for entities that weren't even born with a for-profit vocation but can invest in the production of an economic value.	Stakeholder interview (Bologna Welcome)
Role played by the public sector	To re-define the public mechanism in order to go beyond the pure mechanism of incentives and funds towards a collaborative system based on co-design.	- CREATE and all clusters) - MAKER - Destination bologna Stakeholder interview (Bologna Welcome)
Widespread cultural consumption	Bologna is made of a positive *humus* that has to be boosted and linked with the Bologna destination storytelling. This factor can also be a disadvantage.	Stakeholder interview (Bologna Welcome)
Interconnection of the sectors with the opportunities of the digitalization	Need of stronger levels of interaction between CCI and other sectors, such as ICT. Having a cultural and creative industry that is able to properly connect with the innovation system and the wider production system, should produce the effects of increasing the overall quality of current production	- Orange economy report - Stakeholder interview (ART-ER)
Destination Bologna as a new product	Established by Regional Law in 2016, its purpose is to promote tourism in the entire territory of Bologna and its specific features. In 2018 Bologna Metropolitan Tourist Destination signed an agreement with Modena for the promotion and enhancement of four specific products: Motor Valley, Food and Wine, White Apennines (mountain ski area) and Major Events.	- Regional law 4/2016 - Agreement with Modena - Stakeholder interview (Bologna Welcome)

	The touristic destination is known for 5 years and consequently is perceived as something new and attractive.	

5.1.2. Italy: Friuli Venezia Giulia Autonomous Region (PP2: FVG AR)

Factor	Description	Source
Activation of tourist spending by the Cultural and Creative Production System	The Cultural and Creative production system relates closely to the tourist activity of regions. There is a specific link connecting a part of tourism to attractiveness of the local historical and artistic heritage and to CCIs product and services connected to it. Many productions, especially those related to the Made in Italy, in themselves constitute a specific motivation of interest to tourists. In FVG AR tourist expenditure activated by the Cultural and Creative production system represents 54.1% of the total tourist expenditure; this percentage is the highest among the Italian regions.	Io sono Cultura 2019
Cultural Heritage and Tourism Digitalisation and Gamification programs and projects	The strategic plan for the digitalization of Italian tourism envisages three areas of intervention: interoperability and big data; digital development; promotion and marketing. These three areas are divided into 30 concrete actions destined to be carried out by the new ENIT (Italian National Tourist Board). The actions of the Plan will be primarily oriented towards the development of	Strategic Plan For The Digitization Of Italian Tourism [93] Italian Videogame Program[94]

[93] Document edited by the Laboratory for Digital Tourism (TDLab), an initiative of the Ministry of Goods and Activities Cultural and Tourism established by Ministerial Decree on April 3, 2014.
https://www.beniculturali.it/mibac/multimedia/MiBAC/documents/1460024515998_TD_Lab.pdf

[94] https://ivipro.it/en/home-en/

	network services aimed at enhancing the investments planned in the digital infrastructure, through the direct involvement of regional and local realities. This orientation is declined through the formula of "*creating a digital ecosystem of culture and tourism*" which it should helping to bridge the "digital divide" that affects national operators with respect to the main European partners. The Italian Videogame Program (IVIPRO) goal is to facilitate the production of titles set in Italy and to map Italy's territory and cultural heritage from a videogame-oriented perspective, identifying the most suitable locations for videogames and cataloguing places and stories. The research and cataloguing results feeds into a database linked to regional Film Commission: a tool available to the institutions and the Italian and foreign developers. The IVIPRO mapping work started from Friuli-Venezia Giulia, Lombardy, Tuscany and Trentino.	Strategic Tourism Development Plan 2017-2022[95]
Clustering of CCIs - FVG Regional Cluster Culture and Creativity	The FVG regional cluster Culture and Creativity was recently created to establish and consolidate a network of companies and operators active in the cultural and creative sectors by offering a series of services (consultancy, tax, etc.), aggregating skills, organizing events (Bar-Camp, etc.) and, in this way, strengthening the image and promotion of a sector identified as	Regional Cluster Culture and Creativity[96]

[95] https://www.beniculturali.it/mibac/multimedia/MiBAC/documents/1481892223634_PST_2017_IT.pdf

[96] https://www.areasciencepark.it/imprese-culturali-e-creative/cluster-cultura-e-creativita/

	"strategic" for the smart and sustainable growth of the Friuli Venezia Giulia Autonomous Region . Those operating in the following areas of activity can join the cluster: conservation/enhancement of the historical and artistic heritage (eg museums, libraries, archives, monuments); Performing arts, namely visual arts and live performances; cultural goods and services replicable production (eg: cinema, radio-TV, video games and software, publishing and printing, music); Creative industry belonging to the world of services as communication, architecture, design.	
Support to cultural and creative start-ups able to offer products and services dedicated to CH and tourism	Cultural and creative start-ups have the capacity to offer innovative products and services along value chains centred on cultural assets and cultural tourism venues (including CH). As part of the POR FESR 2014-2020, 3 Calls[97] were implemented to finance customized pre-incubation, incubation or acceleration and business consolidation programs, granted in favour of cultural and creative businesses, as well as existing tourism businesses, concerning the business development of projects characterized by a significant value or by a relevant cultural and / or creative connotation	Incubatori FVG BIC[98]; Innovation Factory[99]; Friuli Innovazione[100];Technological Pole of Pordenone [101]; Area Science Park

[97] https://www.regione.fvg.it/rafvg/cms/RAFVG/cultura-sport/attivita-culturali/FOGLIA303/ ;…/FOGLIA304/; … …/FOGLIA308/
[98] https://www.incubatori.fvg.it/en/
[99] http://if.areasciencepark.it/
[100] https://friulinnovazione.it/en/
[101] https://www.polo.pn.it/

	The 60 projects selected by the tenders in the two-year period 2018-2019 are developed thanks to the business support services offered by the certified regional incubators (BIC, Friuli Innovazione, Innovation Factory, Polo Tecnologico of Pordenone), under the coordination of Area Science Park, partner of the Region for carrying out the activities.	
Technological Development trajectories of the S3 related to CCIs and Tourism.	One of the 5 thematic areas identified by the regional research and innovation strategy for the intelligent specialization of Friuli - Venezia Giulia is the thematic area "Culture, Creativity and Tourism" to which three relevant trajectories of technological development connect: 1) Technologies for conservation and enhancement of goods and products. These are all the technologies necessary to carry out interventions, also at an operational level, to evaluate the state of conservation of the cultural asset and analyze the morphological-structural characteristics and properties of the materials that make up the asset itself[102] ; 2) Geomatics and image processing. These are all the techniques related to the processing of images through electronic calculation, such as the detection and representation of the computerized drawing, i.e. video-graphics[103]. 3) Social and sharing platforms. We refer to all the platforms that "manage" the	Smart Specialisation Strategy FVG – Abstract[105]

[102]The technologies referred to are the technologies for carrying out interventions in the fields of cultural heritage detection, risk assessment, definition of intervention and diagnostics projects aimed at stopping degradation and instability, restoration of supports information and related information content.

[103] The technologies referred to are the technologies for metric and thematic acquisition, integration, treatment, analysis, archiving and distribution of geo-referenced spatial data continuously in digital format.

[105]https://www.regione.fvg.it/rafvg/export/sites/default/RAFVG/fondi-europei-fvg-internazionale/Strategia-specializzazione-intelligente/allegati/15022016_Abstract_S3_inglese.pdf

	main social tools (for example, Facebook, Twitter and Google+). They are technologies, for example, capable of analysing, optimizing the performance of sites as well as intervening and moderating discussions in the various networks.[104]	
Aggregations of CCIs, cultural assets, public and private bodies etc.	Musicae-Cultural District of the Piano, adapting to the new needs of the "music market" and the public, aims at strengthening cultural bodies and entertainment companies and improving the use of cultural heritage, through the increase of collaboration between same subjects, also with the involvement of the local authorities of reference. The "Piano Competition and International Festival of Friuli - Venezia Giulia" organized by Piano Fvg, the "Live Wood" event proposed by the Municipality of Sacile and "A river of Notes" of the Friends of Musica Romagnoli of Sacile and the numerous partners, public and private bodies involved give substance to a synergy between these elements, to effectively connote the peculiarity of the territory in the artisanal and intellectual field. This creates a specific model of "cultural and economic district" of which the piano is an element of attraction and of socioeconomic and artistic development.	The Cultural District Musicae [106]
Clustering and Branding Natural and Cultural Heritage	Clustering: Natural and Cultural Heritage is often scattered. If sites can be pooled together and branded, they may collectively provide interest to attract a critical mass of	https://www.turismofvg.it/Evento/189040/Archeobus

[104] These are particularly popular technologies in the field of tourism (think of the hotel reviews, the numerous Facebook pages dedicated to the degree of satisfaction of tourists with respect to the different places to stay).

[106] http://www.musicaefvg.it/

	tourists. Aquileia is included on the World Heritage List since 1998 and recently another urban center, less than 20 km from Aquileia, entered WHL: Palmanova. The nearby summer holiday resort of Grado, famous for its beaches, and the proximity to Trieste and Venice can facilitate a tourist visit to Aquileia. CCIs have found innovative ways for transport and communications. CCIs Zeroidee, developed the "ARCHEOBUS" project on the Grado-Aquileia route; it is an experience of a guided tour, where each traveller is given a pair of headphones, with a narrating voice accompanying him, freeing his imagination and making him follow a journey in which art and public space become contaminated. 4 DODO, a company that deals with new types of multimedia communication related to culture and which is based in a a small city close to Aquileia. 4 DODO was involved in the exhibition that the Aquileia Foundation brought to Rome "Aquileia 2200". An editorial project entitled" "The Lions of the time, Archeo-stories of Friuli Venezia Giulia" which saw the participation of designers and regional bodies	http://www.ipac.regione.fvg.it/aspx/Progetti.aspx?idCon=321&idAmb=132&idMenu=-1&liv=0&sTem= https://www.4dodo.com/portfolio/267/

5.1.3. Slovenia (PP3: UIRS)

Interviewers pointed out involvement in strategic documents and consequently public co-funding is vital factors enabling the use of CCI products / services in cultural heritage and sustainable tourism promotion. However, a good support of a multidisciplinary teams, that enables development of such services and products into real life is also crucial. Meaning educational and other supporting activities that would enable those teams.

Other points interviewers stated were to follow the wishes and demands of tourists / visitors; diversification of providers (due to the very survival of providers) – the success stories of some providers. And to allow the market to develop products in the direction of perceived needs of visitors - that visitors should be offered different forms of experience also in order to better protect nature.

5.1.4. Greece: Western Greece (PP4: Patras Science Park)

Factor	Description	Source
Cultural institutions	There are three international institutions and initiatives in the region (Patras carnival, Olympia Film Festival and Patras Street Art Festival) that can enhance cultural tourism in the region	Patras Carnival, http://www.carnivalpatras.gr Olympia International Film Festival, https://olympiafestival.gr Art Walk, http://www.artinprogress.eu/el/artwalk Expert interview / K. Zisimopoulou
Heritage capital	Archaeological sites and monuments (e.g. Ancient Olympia), and the historical load of the region (mainly connected with the Greek Revolution of 1821) are very attractive to	Ministry of Culture and Sports, http://odysseus.culture.gr Ministry of Education, http://museduc.gr/docs/Istoria/C/045-064_C_GYM_KEF_03.pdf

	visitors and tourists and inspire artists and creators.	Expert interview / Ath. Koustas
Transport and tourism infrastructures	New transport infrastructure in the region and the growth of tourist sector create new markets for CCI products/services.	Observatory of Road Networks in Western Greece and Peloponnese, www.poadep.gr INSETE study
Design, branding and advertising sub-sector	High level of Design, branding and advertising sub-sector is a powerful factor of linkage between CCI and tourism	Context Analysis
Public funds	There are numerous ongoing and future EU funded projects focusing on CCIs in the region, while a lot of NSRF current and future funds are dedicated to the sector.	Expert interview / K. Zisimopoulou Expert interview / Ath. Koustas Region of Western Greece, www.pde.gov.gr / Chamber of Achaia, www.e-a.gr / Chamber of Hleia, http://www.heliachamber.gr/ / Chamber of Aetoloakarnania, www.epimetol.gr
Differentiation of tourism strategy	Local authorities and the tourism sector aim to change the orientation of the tourism strategy in the region, developing thematic forms of tourism (medical/spa, athletic, scientific, religious, winter, cultural, wine etc.) as well as the tourism of experience. CCI stakeholders can	Regional Operational Plan of the Region of Western Greece

	play an important role in achieving this goal.	
Creative Hubs	Five local CCI hubs are to be created in the 4 major cities of the region in the framework of Interreg V-A Greece-Italy Programme 2014-2020.	Expert interview / V. Papaioannou Expert interview / K. Zisimopoulou

The most important factor that enables the use of CCI products/services in cultural heritage and sustainable tourism promotion is the opportunities that exist in recent years for funding through European projects and other financial instruments.

5.1.5. Croatia: Dubrovnik Neretva County (PP6: DUNEA)

According to interviewees some of the main factors enabling the use of CCI products are:

- Trends in tourism / tourism market demands
- Increase of involvement of local communities in protection of local heritage
- Availability of technology for cultural and creative content production.

They also state that the main strong points of the regional policy on CCI is development of new projects that strengthened the role of CCI in the region, raise awareness on the concept and scope of CCI (as it is not widely understood term) and foster networking between different actors – public, non governmental and private.

5.1.6. Albania: Region Vlora (PP7: RDNC)

According to the interviewees some of the main factors enabling the use of CCI products are

1. Demand from domestic and foreign tourists
2. Demand from tourism operators and tourism agencies
3. Internationalization/ participation in international events like folk festivals, typical products fair, music, and theater competitions.
4. Great interest from the regional community to preserve and promote cultural heritage

5. Interest from NGO-s and private companies to manage the cultural sites.
6. Promotion of new artists and handicraft sector

5.1.7. Bosnia and Herzegovina (PP8: SEBS)

Factor	Description	Source
Cultural institutions	A large number of cultural institution (public institutions)	Context Analysis
Cultural heritage	Rich cultural heritage	Stakeholder interview Culture Development Strategy BiH
Foreign funded cultural centers	Foreign funded cultural centers operating within universities (British Council, Goethe Institute, Confucius Institutes, etc.) are liminal cases offering research and consulting services as well as educational and cultural activities	Context Analysis

5.2. Main factors hindering the use of CCI products / services in cultural heritage and sustainable tourism promotion

5.2.1. Italy: Emilia-Romagna Region (PP1: MCBO)

Factor	Description	Source

Public offices structure	Need of a tighter dialogue among public administration and CCI. Administrative procedures and responsibilities working on CCI and tourism sector are unconnected	- Orange economy report - Stakeholder interview (Bologna Welcome)
Mobility in the Apennine area	Mobility can affect the potential of the Apennine area in terms of number of tourists that will join the area due the difficulties in reaching the receptive structure.	- Stakeholder interview (Bologna Welcome)
Contingent aspects: lack of in-presence sociality during the COVID19 pandemic	With the pandemic, not-in-presence sociality has increased immeasurably, but much of what we have in the region is based on sociality in presence.	Stakeholder interview (ART-ER)
Lack of associations capable to transform their activities into business	A lot of realities are not for profit organizations. Working on the territory, sometimes just a little step forward is missing to create business.	Stakeholder interview (Bologna Welcome)
Lack of "mainstream" cultural experiences	Lack of a "local champion" that can be immediately recognized abroad as a strong symbolic representation of the territory	Stakeholder interview (Bologna Welcome)
Widespread cultural consumptions	Diffusion mixed to impalpability that is hard to promote. This factor can also be an advantage.	- Orange economy report[107] - Stakeholder interview (Bologna Welcome)

5.2.2. Italy: Friuli Venezia Giulia Autonomous Region (PP2: FVG AR)

Factor	Description	Source

[107] Orange economy report, Vol I, part III

Cultural Barriers of CCIs towards CH "market"	A part of businesses, particularly craft businesses, is unaware of their cultural and creative potential and related opportunities for business expansion / evolution toward the cultural Heritage	Peer Reviews Joint Report[108]
The rotation principle of the New Italian Procurement Code	New public procurement law requires turnover of the beneficiaries of the public tenders. This is an obstacle for continuous cooperation, particularly between CCIs and Cultural Heritage institutions, mainly public. Moreover, the public procurement law tends to favour forms of business associations that the local CCIs doesn't know how to manage.	https://www.diritto.it/la-portata-operativa-del-principio-di-rotazione-negli-affidamenti-sotto-soglia/
Weak entrepreneurial skills	Inadequate managerial skills; inadequate business models (the most common legal form between some CCIs sub-sectors is the "non-recognized association") and Insufficient ability to network make CCIs unready and unable to seize the opportunities offered by the sector of sustainable cultural heritage and tourism which often require the ability to network or become a consortium to offer competitive services / products.	CRE:HUB Policies for CCIs: the hub for innovative regional development. Roadmap: Cultural and Creative Industry in FVG AR, June 2017.
Inappropriate administrative-fiscal framework	The administrative-fiscal framework for no-profit organisations (prevalent form for CCIs) is poorly structured. Therefore it allows practices that discourage transition to more suitable legal forms for business activities, with not only effects on employment (job insecurity, casual work, etc.), but it makes cooperation with more structured entities present in tourism and in the cultural heritage sector impractical.	CRE:HUB Policies for CCIs: the hub for innovative regional development. Roadmap: Cultural and Creative Industry in FVG AR, June 2017.
Lack of a systemic tool and approach	A policy approach/tool able to address systemically the diverse needs (weaknesses) and peculiarities of the CCI - like the meta-district approach promoting cross-	CRE:HUB Policies for CCIs: the hub for innovative regional development.

108 The CRE:HUB Joint Report of Peer Reviews was published to demonstrate the results of all on-field visits conducted during the project implementation. Report was elaborated by Friuli Venetia Giulia Autonomous Region (Italy) with the technical support of University of Latvia. https://www.jf.lu.lv/en/par-mums/mediji/zinas/zina/t/44744/

	sectoral synergies and the combination of needed services and resources - is missing	Roadmap: Cultural and Creative Industry in FVG AR, June 2017.
Insufficient cross-border cooperation initiatives	FVG AR is a medium-small border region by Italian standards. Regarding the development of flows of sustainable cultural tourism involving innovative and creative solutions, it is necessary to implement transnational cooperation between the actors involved for a coherent development of these connections. For example, it is necessary to develop cooperation. Awareness, knowledge, and accessibility to cross-border cultural heritage through the development of a cross-border network of museums with high digital content.	"Swot Analysis for Synergy Activation in Cross-Border Tourism"[109]

5.2.3. Slovenia (PP3: UIRS)

Lack of financial supports, lack knowledge of several stakeholders was identified as of the main reasons factors hindering the use of CCI products / services in cultural heritage and sustainable tourism promotion. However, when this kind of new tools and services are developed, you also need promotion and support for users to install new apps or new digital services and start using them.

You also need proper infrastructure for example, in some remote areas, the use of CCI technology uses too much phone battery, so it would be helpful to install GSM repetitors. And lack of all those factors is often a problem. The price - these products are usually more expensive because they require more staff costs. And current products and services are not developed enough to be very attractive.

5.2.4. Greece: Western Greece (PP4: Patras Science Park)

Factor	Description	Source

[109] "L'analisi Swot per l'attivazione di sinergie nel turismo transfrontaliero", Zago Moreno, I.U.I.E.S. JOURNAL, 2011.

Late and inadequate adoption of a sectoral policy	Until 2015 there hasn't been a clear Policy or a specific Action Plan for the CCI sector of the regional and municipality authorities	Regional Operational Plan of the Region of Western Greece Expert interview / Ath. Koustas Expert interview / K. Zisimopoulou
Lack of ecosystem approach	CCI stakeholders have not realized the existence of the specific ecosystem they belong to, nor the possibility of horizontal co-operations between its members.	Context Analysis
There is no strategic partnership between CCI and tourism sectors	Creative tourism has not yet developed in the region and modern artistic creation is not considered as a tourist attraction.	Context Analysis Expert interview / V. Papaioannou Expert interview / K. Zisimopoulou
Lack of cooperation between cultural heritage institutions and CCI sector	New technologies and social networks are not involved in the field of protection and promotion of cultural heritage and there is no presence of the private sector (businesses and independent creators/artists), which could contribute.	Context Analysis Expert interview / K. Zisimopoulou
Lack of cultural activities' record	The lack of a complete record of all cultural activities in the region creates	Expert interview / Ath. Koustas

	serious difficulty in directing specific actions to ensure effectiveness	

The first of the problems that needs to be solved is the lack of constant cooperation between the creative sector and the tourism and cultural heritage institutions.

5.2.5. Croatia: Dubrovnik Neretva County (PP6: DUNEA)

According to interviewees some of the main factors hindering the use of CCI products are:

- Accessibility of cultural monument and ancient cities
- there are few opportunities for management and improvement of HR
- Business plans are missing
- Marketing and promotion are not professional
- Large number of tangible cultural sites are still not protected, marked, valorised and promoted

Interviewees also point that regional policies separate terms culture and heritage, on one hand and business and tourism on the other. State and the city are still not familiarized with the term cultural entrepreneurship. Therefore, regional policies mainly aim public cultural organizations. But, measures for the financial sustainability and market value are underdeveloped. Business supporting organizations have insufficient capacities to tackle challenges of CCI sector.

5.2.6. Albania: Region Vlora (PP7: RDNC)

- Accessibility of cultural monument and ancient cities.
- Management of human resources and financial means
- Business plans are missing
- Marketing and promotion strategy is not professional
- Bad physical conditions of cultural sites and monuments
- Poor management of cultural sites.
- The law does not create a favorable legal environment for private companies or NGO-s acting as social enterprises.
- Limited number of employees

- Location of cultural sites.

5.2.7. Bosnia and Herzegovina (PP8: SEBS)

Factor	Description	Source
Lack of synergy between CCI sector and tourism sector	The synergy between the CCI sector and tourism is possible only if the priorities and activities of both sectors are synchronized and if they complement each other	Stakeholder Interview, CHwB
Lack of mapping studies in CCI sector	It is necessary to map all actors in the CCI sector, investigate their development needs, and based on that, formulate appropriate policies.	Stakeholder Interview, CHwB
Funding sources (annual budget) for publicly financed institutions in the CCI sector (museum, galleries, etc.).	Publicly financed institutions are engaged in projects that are not in line with their mission and/or strategic goals since they are motivated to get funds. Thus, it is necessary to increase the annual budget for publicly financed institutions in the CCI sector	Stakeholder Interview, CHwB
Skills and competencies required to digital transformation	Development of CCI sector should focus on fostering digital and transferable skills and competencies among all plyers in CCI and tourism sector	Stakeholder Interview, CHwB

5.3. Does the regional development policy envisage the strengthening of the linkage between CCI and cultural heritage and sustainable tourism promotion? If yes, how?

5.3.1. Italy: Emilia-Romagna Region (PP1: MCBO)

The ICC sector is already included in the regional and metropolitan policy priorities and will continue to be so in the future, as well as its link with the tourism sector. It is fundamental to highlight that the Regional S3 strategy considers the CCI sector as one of the two high-potential sectors which drive social innovation, strongly supported by the strategy. Together with the pillars of Emilia Romagna Economy (Mechanics, Agro-food and Constructions), wellness sector and CCI sector represent the key sectors on which the whole strategy is focused on. The S3 strategy will be indeed reconfirmed within the next operational program and regional priorities

At Metropolitan level, the strategy, the guidelines and the policies aim to a local sustainable tourism, cultural-creative oriented, together with a more selected kind of tourism, slow and careful of the territory. In fact, the aim is to exploit the flourishing cultural and creative context of MCBO to boost a more tailored and quality-oriented tourism. The strategic document to promote the territory of Bologna as Destination Bologna are the multiannual Guidelines, where it is stated that the image and experience of the Destination Bologna has to be played on some "umbrella" quality concepts, common to all tourism development policy and all products.

5.3.2. Italy: Friuli Venezia Giulia Autonomous Region (PP2: FVG AR)

The theme of sustainable and inclusive growth, capable of enhancing the resources of the territory, is central to the Regional Planning of Cohesion Policies 2021-2027. In this perspective, FVG AR recognizes that the protection and enhancement of natural and cultural assets present at the local level are the founding elements on which to identify endogenous development processes. Particular attention will be paid to the issues of accessibility and mobility, in particular slow mobility, capable of activating forms of sustainable tourism, which are also growing rapidly throughout Europe, which can be accompanied by more traditional tourist flows. The activation of intelligent mobility services able to meet the needs of greater connectivity of urban / rural systems, as well as investments aimed at overcoming the digital divide, which still constitutes a strong obstacle to the development of economic activities and maintenance of the population in particular in rural and marginal areas.

5.3.3. Slovenia (PP3: UIRS)

Interviewers noted the incentives to CCI enterprises by the Ministry of culture and Centre for Creativity (CZK.si), some EU funded projects promote the digitalisation of cultural heritage and its promotion for tourism and promotes new approaches, educate…. And influence the development of regional policy for statistical regions – NUTS3.

Preparation of the new Strategy Tourism 4.0 as a follow-up will upgrade the "policy level support). There is a strong focus on cultural tourism, (development and promotion of the cultural tourism of Slovenia). New National Program for Culture 2020–2027 draft paper envisage stronger cooperation with the creative and cultural tourism[110].

5.3.4. Greece: Western Greece (PP4: Patras Science Park)

The regional government has only during the last five years adopted the need to integrate the CCI sector into regional policy development. The main tools of this adoption are the financial support of creative enterprises in Western Greece through national and European resources, the implementation of European projects for the CCI sector and the creation of five creative hubs in the four major urban centres. All of these actions are in the initial or intermediate stage of their implementation, so there is not enough data to evaluate their effectiveness.

5.3.5. Croatia: Dubrovnik Neretva County (PP6: DUNEA)

Existing regional development policy include strengthening of the linkage between CCI and cultural heritage and sustainable tourism promotion within three priorities: Increase competitiveness and establish sustainable economic growth and development; Improvement od sustainable management of space, resources and infrastructure; Improvement of quality of life and strengthen institutional capacities human and social resources. County Development Strategy Dubrovnik Neretva County 2016 – 2020 is expiring by the end of 2020 and it will be replaced with Development plan of the Dubrovnik Neretva County by 2027 incorporating policies of the national strategies and other documentation as well as local strategic documentation: Strategic plan of Ministry of culture 2019 – 2021, Strategy for Development of the Culture of the City of Dubrovnik 2015 – 2025. Also,

[110] Internal Document 2 MAO, 2020. Working draft of National Program for Culture 2020–2027, 2020; MAO

Smart Specialization Strategy of the Republic of Croatia and Tourism Development Strategy are in power by the end of 2020. Regional Agency DUNEA is in charge of the process of development of the Plan. Thematic Working Group for education, science, culture and sport has been established involving key actors: Dubrovnik Neretva County, County Council od school principals, University of Dubrovnik, Association for Technical Culture Dubrovnik Neretva County, Association of Sports of DNC, Youth Council of DNC, Centre of competence for tourism, Regional Agency DUNEA. So far, the regional development policies have been effective in strengthening the linkage between CCI and cultural heritage and sustainable tourism but the implementation lacked participative and inclusive approach. Within the working group as well as Local Community of Practice established within the CREATURES the quality of implementation of policies will be improved.

5.3.6. Albania: Region Vlora (PP7: RDNC)

The Regional Strategic Plan takes in consideration the linkage between two strategic lines: SG 1 – Community based tourism and SG 5 – Enhance of Cultural Regional Heritage and the respective action plans to implement the above mentioned strategic lines that envisage the strengthening of the linkage between the CCI and cultural heritage and sustainable tourism promotion.

5.3.7. Bosnia and Herzegovina (PP8: SEBS)

Given the lack of strategic planning, the CCI sector's development arises from individual initiatives of entities doing business in CCI (public, private and NGOs). Thus, the informal linkages between entities in CCI and their cooperation in the implementation of projects are the main pillars of the current development of the CCI sector. The lack of policy mechanism for collaboration/coordination between CCI sector and tourism sector hinders the opportunities for the synergy of these two sectors.

S.W.O.T. ANALYSIS

1. Regional presentation

Emilia–Romagna is a region located in Northern Italy, with about 4.4 million inhabitants (Eurostat, 2018). It is one of the most developed regions in Europe in terms of competitiveness, GDP, and unemployment rates, and a leading Italian region in terms of per capita income. The Capital of the Region is Bologna. The vast and diversified cultural and natural heritage of Emilia-Romagna qualifies the region as one of the most beautiful destinations in Italy and in the world, hosting UNESCO sites, historical cities, mountains, beaches, and widespread quality entertainment. Small and medium-sized enterprises - SMEs - are the driving force of the economy, with about 75% of the total regional employees, fostering an extraordinary spread of wealth across the entire regional territory. The cultural and creative industries in the region play a key role in the development and quality of life of the local community. The CCI sector covers cultural and artistic enterprises, the media and cultural industries, multimedia and ICT creative services, artistic hand-made products. In a more general sense, the CCI sector comprises the innovative high-tech companies, the fashion industry, furniture, and all other products connected with design. The region is also characterized by a strong offer of cultural festivals ranging from classical and electronic music to theatre and movies.

Autonomous Friuli Venezia Giulia is one of the five autonomous regions with a special statute and it is Italy's most North-Eastern region. Friuli Venezia Giulia covers an area of 7,708 km2 (about 3,000 sq. miles), it is the fourth-smallest region of the country and has about 1.2 million inhabitants. It borders with Austria to the North and Slovenia to the East. To the South it faces the Adriatic Sea and to the West its internal border with the Veneto region. The Capital of the region is Trieste. The main economic specializations in the Autonomous FVG region, identified in the Regional Operational Programme (ROP) 2014-2020 are wood-furniture sector, manufacture of metal products, manufacture of machinery and equipment, food and beverage industry, ICT, metallurgy, and shipbuilding. The CCIs sector is mainly defined by tourism and creativity-driven productive service industries. The creative-driven productive service industries are those manufacturing activities which, although not directly involved in cultural and creative activities, benefit from them. The core activities are those of the creative industries (architecture and design; communication), the cultural industries (cinema, radio, TV; video games and software; music; publishing and printing; performing arts: historical and artistic heritage). In terms of tourism, this region ranks second in Italy, while artisanship plays an important role in the region's productive sectors.

Slovenia is bordered by Italy to the west, Austria to the north, Hungary to the northeast, Croatia to the southeast, and the Adriatic Sea to the southwest. Slovenia covers 20,271 square kilometers and has a population of 2.095 million. With excellent infrastructure, a well-educated work force, and a strategic location between the Balkans and Western Europe, Slovenia has one of the highest per capita GDP in Central Europe, despite having suffered a protracted recession in the 2008-09 period in the wake of the global financial crisis. The Slovenian economy recovered quickly after 2014, and its competitive position improved
as well. As economic growth accelerated, the EU average gap in terms of per capita GDP declined post-2016, but it remains wider than before the crisis. The most important sectors of Slovenia's economy are industry, wholesale and retail trade, transport, accommodation, and food services. In the Slovenian economy, the cultural and creative sector accounts for 10.5% (24,062) of all registered organizational units.

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The Region of Western Greece (RWG) is one of 13 regions of Greece. It is a secondary local government organization covering the north-western part of the Peloponnese and the west part of Central Greece. Its population is almost 680,000 (679,796 according to the 2011 census) and occupies an area of 11,300 km^2. Most enterprises located in the Western Greece Region, that are active in all sectors of the economy, are small and medium-sized The CCI sector in the Region of western Greece in 2017 appears to be consisted of 1,918 companies, employing 3,216 employees, which is 1.8% of the entire Regions Workforce, while its total turnover is 78,678.17 mil. In addition, the vast majority of CCI stakeholders belong to the public sector or the municipal and regional authorities of the region. This means that there is a deficit in the participation of private enterprises and civil society organizations in policy planning for the creative and tourism sectors.

The Dubrovnik Neretva County is the southernmost region of the Republic of Croatia that consists of a relatively narrow longitudinal coastal area with a string of offshore islands and closer islands (most notably Korčula, Mljet, Lastovo and the Elaphiti Island group) and the area of Lower Neretva with its gravitating coastal zone. The region is divided by the state borderline with Bosnia and Herzegovina. Its main economic activities are the tourism and hospitality industries and maritime shipping. The area also has significant agricultural potential in the Neretva River delta and on the Pelješac Peninsula, known for its production of high-quality wines. In terms of tourism, Dubrovnik's famous medieval old town (a UNESCO World Heritage Site 1979) and the nearby island of Korčula has positioned Dubrovnik and the county as a high-end European and global tourist destination.

Albania is a small country situated in South-Eastern Europe in the West of Balkan Peninsula. It encompasses an area of 28,748 square kilometers and the country has a population of 2.862.427 inhabitants. Agriculture dominates the economy and employs about half of the workforce, but services and tourism are increasingly important. Albania remains one of Europe’s poorest countries, with sluggish economic growth hindered by a large informal economy and weak energy and transportation infrastructure. High unemployment and a lack of opportunity encourage substantial emigration.

Bosnia and Herzegovina is a Southeastern European country located in the western Balkans, bordering Croatia, Montenegro, and Serbia. The country has a population of 3.53 million inhabitants. National Capital and and largest city is Sarajevo. Bosnia and Herzegovina is an upper-middle-income country that has accomplished a great deal since the mid-1990s. Today, it is an EU potential candidate country and is now embarking on a new growth model amid a period of slow growth and the global financial crisis. Since the economy still lacks competitiveness, the government launched a structural reforms program for 2019-2021 to boost private investments and exports. The service sector contributes to 55% of GDP and more than half of total employment (52.3%). The CCI sector is also influenced by all the factors that hinder the country's economic development and competitiveness. The policy context for the CCIs and tourism sector is deeply rooted in the social, economic, cultural, and political changes and challenges of Bosnia and Herzegovina.

2. Common prospects and challenges faced by the countries/regions

The joint SWOT of CREATURES project partners shows that despite the different stages of development and recognition of CCIs within the CREATURES project area, all project partners share common strengths, weaknesses, opportunities, and treats in terms of fostering the linkages between CCIs and sustainable/experiential tourism. Joint advantageous (strengths), tendencies (opportunities), and challenges (weaknesses and threats) in the CREATURES project area are presented (please see Table 1-1) and described below.

Table 1-1: The Joint SWOT for CREATURES project partners

STRENGTHS	WEAKNESSES

▪ Rich cultural heritage, tangible and intangible, diverse cultural life and creative people resulting in a rich portfolio of cultural events and activities; ▪ Wide range of relevant stakeholders: scientific partners (universities, other institutions of higher education) offering study programmes in CCIs and tourism and numerous cultural institutions, organizations, and associations; ▪ Strong creative community: a significant number of companies and entrepreneurs operating in CCIs; ▪ Availability of infrastructures for the CCIs sector development (creative hubs, creative quarters, co-working spaces, business incubators, etc.) (*) ▪ Well-developed Innovation network and innovation ecosystems: strong linkage of CCI sector with institutions driving innovation (*) ▪ Strong orientation towards the development of CCIs and making linkages between CCIs and tourism sector;	▪ Lack, of, late or inadequate adoption of national/regional policy and strategy for CCIs development ▪ Quite weak inter-organisational networks in CCis: cooperation between different CCIs stakeholders (public institutions, enterprises, professional organisations, research and education institutions, etc.) representing various communities within the region is not always strong; ▪ Limited funding opportunities for CCIs; ▪ Limited entrepreneurial orientation among the creative culture community (creative workers); ▪ Low level of business experience and managerial skills among creative workers, small CC businesses and self-employed individuals (creative workers) have a low level of knowledge and lack of skills/competencies needed to build a sustainable business; ▪ Limited use of multi- media and digital technologies to promote touristic offers
OPPORTUNITIES	**TREATS**
▪ Improvement of the institutional and regulatory environment for CCIs; ▪ Introduction of the local, regional, national funding for CCIs business development (SMEs) or alternative financing models (business angels, crowdfunding's, etc.); ▪ Value chain mapping in CCIs ▪ Expansion of activity/employment of SMEs in CCIs (an increase of demand for creative industries products; including export activity); ▪ Digitalisation in tourism and development of experience tourism	▪ Uncertainty due to the current situation caused by the Covid-19 pandemic ▪ Data gap: Insufficient production and dissemination of data, analytical information and updated statistics in CCIs and tourism ▪ Brain-drain due to socio-economic conditions of the region (e.g., workforce migration out of the region) ▪ The aging population and depopulation of rural areas ▪ Competition form other countries

2.1 Identification of Strengths

Rich cultural heritage. All project partners identified that rich cultural heritage, both tangible and intangible, is considered to be asset for fostering sustainable and experiential tourism in the CREATURES area by exploiting CCIs potential. World Heritage sites, historical, archaeological, architectural heritage, and other cultural heritage attributes, including local food and beverages, are actively promoted by CREATURES partners. Moreover, all CREATURES partners mentioned that diverse intangible cultural heritage portfolio, including oral traditions and expressions, performing arts, social practices and festive events, and traditional craftsmanship, are considered to be the asset for potential CCIs- tourism linkages. Moreover, partners noted that cultural/artistic/creative events play an essential role in the development of the CCIs and tourism sector, providing direct income to cultural producers and tourism businesses and acting as a 'bridge" between players in the CCIs and tourism sector.

Wide range of relevant stakeholder. Presence of scientific partners (universities, higher education institutions – HEIs) and numerous cultural institutions, organizations, and associations has been identified as asset in CREATURES project area. Universities and HEIs play a significant role in knowledge creation, diffusion and use, and in contributing to educated labour forces (university graduates) who can use technologies and develop new skills. A large number of cultural institutions, organizations, and associations in public, profit, and nonprofit sectors are engaging in cultural and creative activities and cooperate with businesses in tourism sector.

Strong creative community: significant number of companies and entrepreneurs operating in CCIs. Based on the data presented in the country/regional State of Art and SWOT Analysis reports, all CREATURES project partners have the potential and human resources to support broader development in the field of CCIs.

Availability of infrastructures for the CCIs sector development (creative hubs, creative quarters, co-working spaces, business incubators, etc.) and well-developed Innovation network and innovation ecosystems are characteristics of two project regions (Emilia–Romagna and Autonomous Friuli Venezia Giulia). Other regions are typically characterised by an underdeveloped ecosystem that does not have a clear picture of the position and the relevance of CCIs , a lack of training schemes, and incubation-acceleration programmes targeting creative workers.

Strong orientation towards the development of CCIs and making linkages between CCIs and tourism sector. Based on the data presented in the country/regional State of Art and SWOT Analysis reports, all CREATURES project partners have noted that national/regional/local governments have recognized the relevance of CCIs for economic growth and ancnowledged the potential of establishing linkages between CCIs and tourism.

2.2 Identification of Weaknesses

Lack, of, a late or inadequate adoption of national/regional policy and strategy for CCIs development. Government policies and strategies shape the government's overall economic development agenda and send strong signals to all industry sectors, including the CCI and tourism, on the kind of business and entrepreneurial activities that the government is willing to support. Developing policies and strategies regarding the CCI and tourism is crucial for the development of CCI/tourism linkages, given that public policies/strategies provide a clear articulation of the strategic directions in CCIs and tourism pursued by the government. In the country/regional SWOT Analysis reports, a lack of, a late or inadequate adoption of sectoral policies has been identified as a main hindering factor in establishing CCI/tourism sector linkages.

Quite weak inter-organisational networks in CCis. CCI sector is an appropriate environment for the formation of inter-organizational networks, as it is one of the economic sectors incorporating the diversity of activities, sectors, organizations, and partnerships. As all stakeholders in the CCI sector depend on each other to reach their objectives, it is necessary to establish alliances, partnerships or networks among them to be able to act and find common points of interest. Network organization and collaboration in the CC sector is extremely important since these networks promote the spread of information and strengthen connections between individuals and organizations, contribute to the development of CCIs and to the economic success of the regions in which they operate. Strong network ties between different CCIs stakeholders facilitate communication, cooperation, frequent exchanges of information, and greater dissemination of knowledge across various stakeholders. Networking is particularly important for entrepreneurs in CCis as this enables them to understand intra-organizations and interorganisation collaboration, the institutional contexts, and the timely and accurate information flows. Although the importance of business and social networking ties have been acknowledged in the country/regional SWOT Analysis reports, it has been mentioned these ties should be more substantial.

Limited funding opportunities for CCIs. There are three primary sources that entrepreneurs seek for when it comes to financial support - the banks, venture capitalists, and angel investors. Banks and venture capitalists tend to alleviate the risks by providing funds to businesses with certain track records and experience. Thus, they often offer funds to businesses at the later stage of development. For start-up businesses, the possible source comes from business angels who invest equity capital for the high growth venture in an early stage. Since businesses in CCIs are mostly project-based, entrepreneurs in CCis need the seed financing to start and develop the new project. The project is unique and new, with highly uncertain outcomes, which hinders their applications for capital investment to venture capitalists and banks. Therefore, due to its informal and private nature of the investment, business angels are the better option to seek for capital investment. Business angels often evaluate the new business idea in CCIs based on the following criteria: creativity - artist's talent and originality; marketability - artist's commercial potential, trustworthiness - confidence in artist's reliability, and passion - artist's commitment to their work (Ottavia, 2014). However, most creative entrepreneurs are beginners, short of skills necessary to effectively present the creative idea to potential investors to convince them that it is marketable. In terms of public funding, there is a lack of public funding schemas particularly designed for the start-up businesses in CCIs. In sum, compared to businesses in other sectors, start-up companies in CCIs have more obstacles to raise funds, which limits business growth and survival.

Limited entrepreneurial orientation among the creative culture community (creative workers). Unlike traditional industries - manufacturing, the main capital or resources of CCI are knowledge (know-how), creativity, and talent. Creative industries are grounded in personal ideas, talent, experience, and work. Since the CCI community consists mainly of independent artists and creators, who are not willing to act as entrepreneurs, it is not easy to unlock the potential of creative and cultural entrepreneurship. Moreover, CC businesses, particularly craft businesses, are unaware of their cultural and creative potential and related opportunities for business expansion. The lack of experience in business and the skills and capabilities needed to start a company leads to risk aversion and reduces the motivation to explore business opportunities.

Low level of business experience and managerial skills among creative workers. Creative entrepreneurs are mainly interested in the creative process, have typically fewer managerial skills and limited business experience and may have difficulties in communicating with businesses and managers. Furthermore, whereas entrepreneurs are primarily motivated by the financial rewards that the exploitation of new opportunities can produce, creative entrepreneurs generally crave either artistic freedom and/or the recognition of their peers. Thus, these entrepreneurs seek to limit their managerial responsibilities, leading to a predominance of freelancers and sole-proprietors and a lack of human capital resources in these companies. Lack of previous business experience and low managerial skills are common sources of underperformance of start-up companies in CCis. If this lack of managerial skills could be addressed, the chances of new ventures succeeding would be increased.

Limited use of multi- media and digital technologies to promote touristic offers. Technology has emerged as the driving and fundamental force for tourist destinations. Therefore, the tourism industry is subjected to the technological transformation that can make the conducting of a business easier and faster, and the transmission of information more convenient. Since the destination is understood to be a variety of individual products and opportunities for experiences, all these factors can be combined together to form the total experience of a place visited using digital technologies. In this context, a destination can use relevant digital tools and platforms that facilitate the dissemination of information and knowledge among stakeholders, thereby facilitating the interaction and integration of visitors within the surrounding space. Moreover, rapid evolution in technology has significantly advanced the conservation of cultural heritage in a digital format. Although the great potential of digital technologies in tourism has been identified in the project partner countries/regions, it has been noted that the exploitation of digital

2.3 Identification of Opportunities

Improvement the institutional and regulatory environment for CCIs. The development of potential linkage of the CCI to tourism development is highly influenced by the nature of the formal institutional environment in which economic players of the CCI sector and the tourism sector operate. Generally, when the formal institutional environment is perceived to be business-friendly, transparent, and supportive, economic players are more likely to be efficient, innovative, and competitive. The main elements of the formal institution environment that have been identified in the regional SWOT Analysis reports as being particularly relevant in creating synergistic links between CCI sector and the tourism sector are: rule of law, regulatory system, government policies, and business support infrastructure.

The rule of law, which embodies a well-functioning legal system, effective enforcement of contracts, and property rights protection, is considered a basic component of an institutional landscape that facilitates more efficient market exchange and creates the opportunity for potential synergistic links between CCI sector and the tourism sector. The rule of law leads to a less turbulent and more friendly institutional environment which allows economic players in both CCI and tourism sector to focus more on productive activities such as innovation, rather than on 'fire-fighting' schemes to combat unregulated opportunistic behaviors (e.g., violation of intellectual property rights, illegal deviations from agreed terms). In terms of the rule of law within the CCI sector, different conditions have been described in the country/regional SWOT Analysis reports. While in Emilia-Romagna Region, some important regional laws were issued on CCI topics during the 1990s. After that, a positive institutional framework was established in some countries/regions (Albania, Bosnia and Herzegovina, Slovenia) the development of an institutional framework is still in the nascent stage.

Regulatory system, including legal requirements for starting a business, applications for business permits and licenses, and tax administration, in the regional/country SWOT Analysis reports, has been characterized by bureaucratic inefficiencies. Bureaucratic inefficiencies increase the unnecessary costs, including direct financial costs and the time and effort spent to complete tedious and long-winded bureaucratic processes imposed by the government institutions. In all country/regional SWOT Analysis reports have been noted that the entrepreneurial activities of CCI and tourism businesses can be well-supported by the government with a quality regulatory system that does not impose financial (e.g., excessive fees) and non-financial (e.g., time and effort) costs.

In terms of government policies/strategies, the priority is to develop policies/strategies in CCI sectors (for project partners without policies/strategies) and integrate them with other sectors at national/regional/local level. Moreover, national/regional/local authorities and the tourism sector should aim to change the orientation of the tourism strateg, developing thematic forms of tourism (Slow/Circular/Green/Wine, etc.) as well as the tourism of experience. CCI stakeholders should play an important role in achieving this goal.

Business support refers to the extent to which the government extends various forms of assistance or incentives designed to support CCI and tourism businesses. Government-initiated business support programs provide CCI and tourism businesses with access to resources (not otherwise accessible to them) that are needed for CC and tourism entrepreneurial activities. Based on the country/regional State-of Art and SWOT Analysis reports we can see that in the last couple of years there has been increasing interest of governments to design specific programs that will provide small and medium enterprises in CCI sector and tourism sectors access to financial resources for starting or expanding a business. However, in some countries (e.g., Bosnia and Herzegovina) there is a lack of government programs and or funding schemes specifically targeting the CCI businesses and CCI -tourism sector linkages. However, it should be noted that government programs and funding schemes differ among countries/regions. For instance, in Emilia-Romagna Region and the Dubrovnik Neretva County, active government interventions narrowly targeted at developing new forms of cooperation between the CCI- tourism sector exist aiming to encourage the activities of cultural and creative start-ups that are able to offer products and services dedicated to cultural heritage and tourism.

Introduction of the local, regional, national funding for CCIs business development (SMEs) or alternative financing models (business angels, crowdfunding's, etc.). To combat the challenges related to the liimited funding opportunities for CCIs, it is necessary to introduce the local, regional, national funding for CCIs business development (SMEs) or alternative financing models (business angels, crowdfunding's, etc.). It would also be lucrative to develop business advisory services (coaching), which are among the most ubiquitous and persistent forms of government support for small businesses. Partially or fully publicly funded advisory services can foster entrepreneurial activity among creative culture community (creative workers).

Value chain mapping in CCIs. Value chain mapping in CCIs will reveal the complex and multifaceted interactions among a diversity of actors (institutions, organisations, companies) the socio-economic setting of CCIs. In other words, mapping value chains in CCIs will provide insights into who is who in the value chain of CCIs by identifying:

- The dynamic linkages between the activities of different actors. How are different links in a chain held together; what is the "glue"? When one link in a chain changes, what happens to the prior and subsequent links? Will new value windows for profit arise, or will the opportunities be closed in the case of change?
- Constraints and levels of inefficiencies that prevent the further addition of net value, innovation, and competitiveness. What missing links avoid the emergence of efficient clusters in CCIs? What actors are underperforming? What resources are inactive in the creative community, and could they be activated?
- Recognition of value created in and beyond CCIs. What are intrinsic interdependencies and flows generated in the supplier's part of the value chain?

Also, value chain mapping in CCIs will encourage partnerships and networking between various actors in CCIs and facilitate the organization of few large-scale (inter-sectoral and intergenerational) events connecting freely and informally businesses, artists, designers, culture and entertainment, public administrators, potential funders, etc.

Digitalisation and development of experiential tourism. The introduction and increased proliferation of technologies has had a significant impact on many industries, especially the tourism sector. The unique characteristics of mobile technologies, for example, ubiquity, flexibility, personalisation and dissemination make it a useful tool for both tourism suppliers and demanders/tourists.The increased awareness and use of digital technologies, have changed travel behaviours by revolutionising the way tourists search for information, make decisions, purchase tourism products and services, and find and explore reviews.Therefore, actors in tourism sector are constantly exploring the potential application of technologies to enhance tourist experiences. Within the tourism industry, augemented reality (AR) offers many opportunities to add value, providing tourists with a new and innovative way to explore unknown surroundings. AR offers the opportunity to create an augmented perception of reality, enhancing what the users see in the real world, or create an entirely artificial environment showing users what does not exist in the real world. By seamlessly blending computer simulations in real environments, AR creates an enhanced view of supplementing the users' environment with digital content, thus facilitating integration between physical and virtual worlds. AR enhances the real-world environment, providing context-sensitive information of the users immediate surroundings by overlaying computer-generated content (e.g. avatars, 3D models, interactive features) onto their direct view through a device. In particular, AR presents opportunities for museums to modernise their offer, providing more engaging and interactive content. Specifically in the cultural heritage tourism context, AR contributes to the enhanced tourist experience, secures the additional sources of revenue for businessess and decreases seasonality. All CREATURE project partners has acnkowledged that the use of the most innovative technologies in tourism can enhance the creation of new forms of experiential tourism and preservation of cultural herirage.

2.4 Identification of Threats

Uncertainty due to the current situation caused by the Covid-19 pandemic. The various extra-ordinary measures that many national authorities have resorted to to stop the spread of COVID-19 have changed the world in a way that would have been entirely unthought of a few months ago. National administrations quickly realised that the ease of travel – one of the comforts of modern life in the era of globalisation – is a main factor facilitating the outbreak. As a result, national borders have been closed, cross-border movement of people has been stopped and international transportation has been suspended. All these measures have been accompanied by adequate domestic efforts ranging from banning mass events and encouraging people to self-isolate to restrictive lockdowns imposed on entire countries. The closure of hotels, restaurants, entertainment centres, and various tourist attractions has put on hold the whole tourism and travel industry. Simultaneously, with international travel largely suspended, and domestic travel also largely restricted, distances between 'home' and 'away' have grown to an extent that they are often impossible to overcome. As a result, tourism as we knew it just a few months ago has ceased to exist. Since all these measures have inevitably led to putting many forms tourism acrivities on hold, national administrations have faced a challenge of saving their economies, incluiduing also the tourism sectors. Since governments need to prirotize the allocation of public funds across different sectors, it is not unceratin whether public funds will be enough for the restart of tourism sector and the further development of CCIs.

Data gap: Insufficient production and dissemination of data, analytical information, and updated statistics in CCIs and tourism. Although in some countries/regions some evaluations of CCI sector have been carried out, the exploration of the economic potential of CCIs is still impeded by a lack of similar data. The absence of data is the outcome of several issues associated to CCIs, namely a lack of universally accepted definition of CCIs and sub-sectors, differences in the scope of CCIs and difficulties related to the categorization of CCIs in the statistical sense as CCIs are not well-defined. Insufficient production and dissemination of data, analytical information, and updated statistics in CCIs and tourism limits the efficiency and calibration of policy interventions. In tourism, the use of arrivals as the only statistics to judge the success of destinations compromises their social and environmental sustainability. Also, the lack of statistical data on the CCI sector and tourism sector is a serious impediment to the development of these sectors. The absence of reliable data impedes evidence-based policy development for investments in the expansion of the CCI and tourism sectors

The lack of relevant data makes it impossible to know whether policy decisions and investments are having the desired outcomes.

Brain-drain due to socio-economic conditions of the region (e.g. workforce migration out of the region). Due to social, political, and financial distress, young people go abroad looking for appropriate positions, material resources, and salaries corresponding to their knowledge and experience. The problem of "brain drain" in is particularly worrying in four CREATURES project countries (Albania, Bosnia and Herzegovina, Greece, and Slovenia). This problem is often coupled with the challenges related to the phenomenon of the aging population and the depopulation of rural areas.

Competition from other countries. Competition is related to both sectors – CCIs and tourism sector. Competition with other EU regions to attract foreign investments in CCIs reduces the opportunity of penetration of CC businesses on foreign markets. In terms of tourism, mass tourism, highly seasoned crowds-outs investment in sustainable tourism.

Appendix 1: SWOT project partners countries

REGION	STRENGTHS	WEAKNESSES
EMILIA – ROMAGNA (ITALY)	Institutional support; Strong demand for CCI related products; Strong supply side of CCI related products; Well-developed Innovation network and innovation ecosystems; Significant number of relevant stakeholders Strong education and training ecosystem; Fast-growing market; Developed alternative mobility solutions (e.g. train, bike) for touristic paths	Public bodies' vertical administrative structure for different sectors; Bureaucratic issues; Mobility in the Apennine area; Limited use of multi-media and digital technologies to promote touristic offers; Lack of awareness to ecological/sustainability aspects related to tourism; Lack of a "cultural champion" to promote; Low average level of stay; Lack of tailored paths focusing on alternative experiences outside the mainstream offer.
FRIULI VENEZIA GIULIA AUTONOMOUS (ITALY)	Extended inter-sectoral chains (including CCIs and traditional craft sectors); Public support from regional directorate for culture; Strong audio-visual sector; Rich natural and cultural heritage; International dimension; Slow destination; Effective promotion of the territory.	Access to credit; Inadequate management skills and lack of appropriate networking that requires solid business models; Low confidence in the potential of CCIs to bring economic benefits; Lack of facilities and/or events to facilitate linkages and networking; Lack of services (fiscal, administrative, legal, etc.); Self- assessment of CCIs towards CH and tourism "market"
DUBROVNIK NERETVA COUNTY (CROATIA)	Traditional cultural events; Numerous cultural institutions; Inclusion of cultural events in the tourist offer; Support for cultural manifestations; Culture development platform; Rich cultural heritage; Developed programs for the preservation of cultural heritage; Tradition of winemaking and olive growing; Tradition in shipbuilding	Cultural events mostly in the summer; Lack of professional staff in culture; Inefficient organization system; Centralized cultural and tourist offer; Non-compliance with UNESCO guidelines; Insufficiently represented cultural heritage; Uneven economic development; Orientation to tourism and

	(small ships); Good potentials for the development of selective forms tourism.	service activities.
SLOVENIA	In terms of CCIs market, strong public financing of the cultural sector (culture as Slovenia's national interest) as well as internationally recognised individuals & SMEs in some industries; Tradition to foster competences and maintain trainings; Products & services suitable to be sold in the international market; Critical mass of infrastructure, institutions and firms; Availability of office/production spaces and modern technology; Active national professional associations; established events & awards facilitating CCIs awareness and promotion.	Unsuitable tax and labour legislation; Unsuitable IPR protection Unsuitable tax & labour legislation as well as Intellectual Property Rights protection; Small market; Low product& service prices obtained, competition based on price; Low demand for innovative products; Few competent intermediaries; Uneven relations in the value chain; Lack of critical mass (orientation on domestic market only) and strong trademarks; Heterogeneous quality of CCIs products& services; Poor marketing & business management skills; Educational system is not fostering creativity; Lack of specialised interdisciplinary educationa programmes; Lack of appropriate funding opportunities; Lack of support for internationalisation; Low concentration of infrastructure, institutions & firms outside of Ljubljana; Lack of spaces for networking; Support institutions are not coordinated; Low promotion & awareness about the role of CCIs as well as efforts to improve it; Lack of national level strategic document recognising the CCIs importance & support policies; Unsuitable public procurement criteria.

REGION OF WESTERN GREECE (GREECE)	Active Creative Community; Three Universities and a Large Academic Community; New transport infrastructures; Rich cultural heritage; Powerful agri-food sector; International Institutions of modern culture; The tradition of shadow theatre.	Limited cooperation of CCI community with academic institutions; Limited entrepreneurial spirit in the CCI community; Lack of ecosystem approach; Limited extroversion attitude; Limited investments from new PFs, VCs and BAs (in the CCI Sector startups); Absence of networking opportunities in the area for the CCI sector
ALBANIA	Rich historical, cultural and architectural heritage; Natural heritage (landscapes, natural site and coastal area); Relevant numbers of stakeholders interested in developing the CCIs; Various cultural events. Political will and government commitment to the creation of friendly institutional environment to support the development of CCIs.	Cultural Policy Strategy (national/entity/local level) needs to be developed; Lack of legislation and/or weak implementation resulting in uncontrolled and inappropriate development of CCIs; Insufficient understanding of the contribution of cultural investment to economic development, job creation or to social cohesion; Insufficient understanding of the contribution of independent cultural centres, incubators, hubs to the cultural performance and of their potential to retain/attract talents and contribute to entrepreneurship; Lack of statistical information on size of the sector and its contribution to the economy and employment;
BOSNIA AND HERZEGOVINA	Diverse and rich cultural heritage, cultural life and creative people developing CCIs Interest in and awareness of the CCIs is increasing; Relevant numbers of stakeholder interested in the development of the CCIs; Strong collaboration with international organizations in the area of CCIs; Good cooperation with higher	Lack of government institutional support to the CCI sector; Cultural Policy Strategy (national/entity/local level) needs to be developed ; Lack of mapping studies in the CCI sector; Limited access to finance among CCI entrepreneurs; Lack of funding sources (annual budget) for publicly financed institutions in the CCI sector (museum, galleries, etc.). ; Standard methodology to

	education institutions (HEIs); Established regional networks in the area of CCIs; The tradition of cultural events (film festivals and other art festivals).	track the development of the CCI sector needs to be developed ; Limited use of multi-media and digital technologies to promote cultural heritage and touristic offers.

REGION	OPPORTUNITIES	TREATS
EMILIA – ROMAGNA (ITALY)	Simplification/De-beurocratization; New models of touristic consumption; Digitalization of cultural heritage; Use of VR and Augmented Reality in the fruition of cultural experiences; Slow/Circular/Green activities as examples of resilience; Exploit the "Bologna experience" instead of a single cultural local champion.	Incapacity to reproduce the same growth rates as before the pandemic; Uncertainty due to the current pandemic situation; Decrease of international and national; CCI sector may not be a priority in the use of the recovery funding.
FRIULI VENEZIA GIULIA AUTONOMOUS (ITALY)	There are opportunities to develop specific legislation for CCIs SMEs related to tax issues (income tax deductions; cash taxes), There are opportunities to develop diverse hospitality solutions; Experiential tourism; Mapping of operators, skills and places to help networking; Possibility to activate alternative finance schemes and tools; Potential of rural areas to be exploited according to the LEADER approach.	Data gap; Competition with mass tourism destinations may negatively affect the quality and sustainability of tourist offer; Locked transition of tourism model; Further worsening of business confidence and increase of risk aversion - primarily of the innovative and creative startups

DUBROVNIK NERETVA COUNTY (CROATIA)	Financing from EU funds, government programs and other sources; Position of the County on the Adriatic-Ionian corridor; Development of alternative energy sources; Cultural treasures of the rural area; Digitalization of cultural heritage.	The aging population and depopulation of rural areas; Impossibility of new employment; Transboundary impacts on environmental; Negative impact of BREXIT on tourism; Visa regime for non-EU members; Departure of highly educated people.
SLOVENIA	Increasing demand for creative products; Digitalization; Availability of the ICT infrastructure; Cross Cutting Technologies across CI Sectors; Role of arts and design as driving forces in creativity.	Economic crisis (problems in private sector and lack of public funds at the national and EU level); Rapidly changing technologies; Fierce competition from other countries; Migration of talents to abroad; Inconsistent IPR & Copyright systems exist (contents are easy to copy); Socio-demographic factors (migration, aging); Trend toward precarisation of labour.
REGION OF WESTERN GREECE (GREECE)	Differentiation of tourism strategy; Sectoral policies; Creative Hubs Public funds for CCIs; Innovation and cluster practices; Digital transformation due to covid-19; The 2021-2027 Regional Reference Framework and the respective Regional Operation Programme of Western Greece.	Slow recovery from the economic recession; Brain-drain; Lack of support in the covid-19 crisis; Limitated knolwdge of CCI's added value; Increasing trend of disinvestment.
ALBANIA	EU funding to support tourism, cultural heritage, entrepreneurship, intercultural dialogue, civil society, heritage and innovation; Expansion of tourism infrastructure; Improvement the data collection system in CCI and tourism sector; Strengthning the synergy between CCIs and traditional industries	Scarce capacity to manage international funds; Tendency for uncontrolled construction, if persistent, will irreversibly deteriorate natural landscapes and destroy traditional buildings and local identity; Depopulation; Failure to introduce and enforce regulations – accommodation, heritage conservation, pollution, etc;

	in order to increase cooperation of various sectors ("crossover" effect); Development of CCIs related clusters.	Competition particularly from other Balkan Destinations
BOSNIA AND HERZEGOVINA	Design of policies in CCI and tourism sector; New models of linking culture with the tourism sector; Building capacities in the CCI sector; Digitalization of cultural heritage and the use of augmented reality to create memorable tourist experience.	Lack of government interventions/solutions to support tourism sectors in the uncertain times caused by COVID19-pandemic; Commodification of cultural heritage; Brain-drain of talented and young people Competition from Western Balkan destinations.

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