

**RESTART\_4Danube**  
**Boosting cREative induSTries in urbAn Regeneration for a stronger  
Danube region**

D.T1.1.1

Danubian baseline study

Status quo, challenges, needs – synthesis of local studies from 10 Danubian countries

## Document Control Sheet

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### 1.1.3 List of Abbreviations

CCIs	Culture and Creative Industries
R&D	Research and Development
HEIs	Higher Education Institutions
SMEs	Small and Medium Enterprises
UPB	Universitatea POLITEHNICA București
PBN	Pannon Business Network Association
SASS	School of Advanced Social Studies
S2i	Steinbeis 2i GmbH
IPA Craiova	Research and development company, engineering and manufacturing for automation equipment's and systems
UM	University of Maribor
CCE	Croatian Chamber of Economy
CCI-Vratsa	Chamber of Commerce and Industry – Vratsa
CUAS	Carinthian University of Applied Sciences
LCM Craiova	Local Council of Craiova Municipality
MOM	Municipality of Maribor
VMÖH	Self-Government Office of Vas County
NERDA	Development Association NERDA
ODIMM	Organization for Small and Medium Enterprises Sector Development
NOVUM	Informational Center for Innovation and Development – "NOVUM"
KNT	Administration of the regional government of Carinthia
MDRAP	Ministry of Regional Development and Public Administration of Romania
Tehnopol	Tallinn Science Park Tehnopol
MEEC – MGPO	Ministry of Economy, Entrepreneurship and Crafts of the Republic of Croatia
NICH	Nova Iskra Creative Hub
MONG	City of Nova Gorica
IACH	Business Incubator Cahul
AI; AR/VR	Artificial Intelligence; Artificial Reality/Virtual Reality
ICT	Information and Communication Technology
NGO	Non-Governmental Organisation

ESIF	European Social Investment Fund
SaaS	Software as a Service
GDP	Gross Domestic Product
B2B	Business to Business
EEN	Enterprise Europe Network
IPR	Intellectual Property Rights
BSO	Business Support Organisation
ECoC	European Capital of Culture

## 2 Executive Summary

This report **identifies the main characteristics of the cultural and creative sector in the regions of the Danube countries**. Elaborated the CCIs ecosystem as social fields where stakeholders interact with each other and the results are depended on broad range of factors; ranging from mental predispositions, through networking to institutional framework, enabled us to monitor the patterns of the developed ecosystems.

In terms of **innovative profile of the areas**, the main conclusions are that people do recognise themselves as innovative and creative; presence of higher institutions in the regions have positive impact to CCIs; in terms of entrepreneurial activity the support of local authorities is recognised. The main issues the sector faces are: the size of the actors, who usually operate either as freelancers or as micro companies. As such they find trouble when accessing funding (all level funding, from national to EU); hand in hand the overburdening of staff is detected. Size is recognised as competence to adapt the rapid changes of the global trends. Overall, sector is small, it has issued in gaining more recognition and it suffers the lack of venture capital. Also, discrepancy between core-peripheral regions is noted.

In terms of **institutional framework**, the issues with proper legislative framework are outlined, but strong support from the authorities is detected, even if sometimes stakeholders do not trust the authorities. The industrial legacy is in major parts recognised as potential interesting but different experiences show, in general, the potential is not realised. Additionally, CCIs are usually not independently elaborated in Policy Action Plans even if they are mentioned in several types of developmental strategies. Several regions have potential to attract talented people, usually core regions with peripheral regions having issues with depopulation. Attaining talented people is sometimes difficult also due to bureaucratic complications.

When it comes to **networking**, the stakeholders of the CCIs show high levels of trust and willingness to cooperate. Sometimes the platforms for exchanging the information are missing, but operating in small environments, stakeholders tend to know each other.

**Attitudes of people towards**, creativity and entrepreneurship are in general positive, attitudes towards learning are also positive with great discrepancies regarding the level of knowledge people have in different parts of the Danube region. Competition is in general regarded as positive. On the other hand, low engagement in cooperation is noted, so called 'survival culture' instead of 'long-term planning' is noted and also fear of failure in terms of attempting something new is seen.

The **impacts of COVID-19** were severe with cultural sector facing tremendous consequences due to cancelation of physical events. On the other hand, all services related to digitalisation have flourished tremendously. The authorities have provided help but due to some characteristics of the sector the help was inadequate.

### 3 Introduction

The present deliverable entitled D.T1.1.1 Danubian baseline study is a joint effort of all partners of the Restart\_4Danube project. The deliverable will serve to feed with information Output T1.1 and will therefore contribute towards Programme output indicator no 1 – Number of strategies for improving the institutional and infrastructural framework conditions for research and innovation. Additionally, the results elaborated in the present deliverable contribute towards development of PA 7 (knowledge society), PA 8 (competitiveness or enterprises) and PA 9 (people and skills) of the EUSDR since these are all the fields that were taken into account when study was prepared. Good insights from the mentioned fields will ease the further project work, when tailoring the actions and activities.

The aims of the deliverable are to provide the reader with comprehensible outline of the dynamics happening in the field of CCIs in Danube region but also not to forget to outline regional differences withing Danube region countries.

In the first section of the deliverable, the rationale for the approach is elaborated, with full elaboration of the methodology for data collection and instructions for partners on data collection. The Annex I, Annex II and Annex III are enclosed to this deliverable as they were used for data collection.

The Danubian base line study offer thorough insights to strengths and weaknesses of CCIs sector assessing the innovation profile of regions, assessing the institutional framework, assessing the networks and finally values and perception of people. Finally, the impacts of COVID-19 are assessed.

All the evaluations were graded by the stakeholders participating in focus groups and radar diagrams were prepared, to visualise the situations at different levels. Finally, the conclusions offer a joint overview of the status of the CCIs ecosystem in the regions of the Danube countries.



#### 4 Review of cultural and creative industries in urban communities

Below is presented the methodology proposed to collect information and map the CCIs of Danube. The methodology was developed for the purpose of Restart\_4Danube project and is partly looking up with methodology developed by British council (BOP Consulting, 2010). The mapping of cultural industries was developed in Great Britain in 1990s, with notion that mapping extends “*well beyond the production of actual maps. It is shorthand for a whole series of analytic methods for collecting and presenting information on the range and scope of the creative industries. Mapping is intended especially to give an overview of the industries’ economic value, particularly in places where relatively little is known about them*” (ibid. p.11).

##### 4.1 Methodology proposed for mapping CCIs in Danube region

To fully elaborate the overview of the cultural and creative industries in Danubian urban settings the below elaborated methodology was implemented. The work was twofold oriented, addressing different aspects and foreseeing the implementation of different techniques of data collection and analysis.

The first step of mapping activities was based on the extraction of data from publicly available sources, primarily through online search collection of secondary data available through national/regional/city data repositories. This work will contribute to elaboration of D.T1.1.2., and to Output T1.1 (Common strategy on creative urban regeneration for the Danube).

The second step foresees the analyses of the creative ecosystems for 10 Danubian countries. The responsible partners provided their inputs and are listed in Table 2. The individual group discussions were organised with stakeholders of quadruple helix. 4-6 people were selected for each group discussion and in-depth information will be collected on respect of three main aspects shaping the creative ecosystem – following the conceptualisation of social fields. A special section was dedicated to COVID-19 impacts, consequences and mitigation plans.

##### 4.1.1 Timeline of activities

In Table 1, the timeline of the activities is outlined.

Table 1: Timeline of activities in collection of information

	Activity	Tool to be used	Due date
1.	Analysis of the background	Template: Annex 1 (all partners contributed)	End of November 2020
2.	Analysis of existing creative ecosystems <ul style="list-style-type: none"> <li>- Stakeholders analysis</li> <li>- Skills analysis</li> <li>- Covid-19 impacts analysis</li> </ul>	Template: Annex 2 Focus group with quadruple helix representatives applying Annex 2 questions (all partners contributed)	Mid December 2020
4.	Preparation of joint report and comparative study	SASS methodology	End of December 2020

#### 4.1.2 Distribution of work

As listed in Table 2, each of the designated project partners has the task in providing mapping for their respective county.

Table 2: Distribution of work

<b>Country</b>	<b>Project partners</b>
Austria	CUAS
Bosnia and Herzegovina	NERDA
Bulgaria	CCI Vratsa (help from Municipality Vratsa)
Croatia	CCE (support Rijeka, MEEC-MGPO)
Germany	S2i
Hungary	PBN (support VMÖH)
Moldova	ODIMM (support IACH)
Romania	UPB (support IPA Craiova, LCM Craiova, MDRAP)
Slovenia	SASS (support UM, MOM, MONG)
Ukraine	NOVUM (support Uzhgorod City council)

#### 4.2 Analysis of the background

Desktop research (literature review, analysis of official governmental data, analysis of non-governmental data, case studies) will provide information on the following topics to feed this chapter of the study:

- Definition of cultural and creative industries in Danube region countries;
- Services and creative industries in national/regional/local innovation strategy;
- Services and creative industries in national/regional/local cultural strategy;
- Services and creative industries in national/regional/local industrial strategy;
- Existing policies and measures to support CCIs;
- Policy instruments (financial instruments).

The template for completing the task is available in Annex I, part I.1. The collected information served as inputs for development of D.T1.1.2 Compendium of good practices for strengthening CCIs in Danube Urban communities.

#### 4.3 Mapping the creative ecosystem

Mapping the creative ecosystems of Danube urban communities via desk top work providing info over:

- Defining key stakeholders in each of the urban settings of the Danube region countries;
- Key strategic alliances in each of the urban settings of the Danube region countries;
- Existing partnerships in each of the urban settings of the Danube region countries;
- Listing good practices for strengthening CCIs (will feed D.T1.1.2).

Information is gathered and reported via report template presented in Part I.2 of Annex I. Information gathered via Annex I will feed D.T1.1.2. - Compendium of good practices for strengthening CCIs in Danube Urban communities.

Target groups for filling in questionnaire are youngsters and members of general public who are interested in culture and creativity and are possibly looking for an opportunity to become more familiar with CCIs and wish to work in CCIs topics in the future.

#### 4.4 Analysing creative urban ecosystems

Analysis of creative urban ecosystem is based on group discussions with relevant stakeholders and target groups over the topics dealing with different aspects of creativity, local characteristics, existing knowledge and propensity towards incorporating CCIs into relevant development policies. The discussants are to debate on and evaluate (scoring from 1-4) different aspects of existing creative urban eco-systems. The topics for discussion are the following:

- General aspects about CCIs and innovation profile of city/region;
- Questions on existing urban ecosystem;
- Questions on cooperation and collaboration;
- Questions on values and perceptions;
- Questions on impact of Covid-19 on CCIs.

##### 4.4.1 Guideline on how to conduct a group discussion

Group discussions are a valuable tool to conduct the mapping since they enable the possibility to discuss and exchange opinions over debated topic. This approach is fully taken into consideration when preparing the protocol for mapping, since it allows the discussants to analyse potentially relevant aspects not foreseen initially. In order to get the best possible information, the approach proposed is to form a group of discussants coming from different stakeholder (target) groups:

- Local/regional/national public authority;
- Higher education and research;
- Enterprise and/or SME;
- General public.

Interviewing process:

1. The group interview will be conducted in a setting where interviewees will feel comfortable and relaxed. This is usually neutral terrain (e.g. university building), in a room with round table and chairs. You may offer them drinks and snacks to relax.
2. The interview is conducted in English (preferable) or in national language, if participants cannot or refuse to be interviewed in English.
2. The interview is recorded. You should get their consent in advance, to avoid any issues before the interview is conducted. If necessary, you may again provide assurance of complete anonymity. To avoid technical issues, use two recording devices simultaneously. After the interview transcribe the entire interview.
3. It will be used the interview guide (Annex II) for every group interview. Interview guide is a set of questions through which the discussants must debate upon during the group interview. This will ensure comparison of information in different countries. If possible, try to encourage and moderate meaningful discussion between interview participants. This can help us get additional information about situation in specific countries.

4. The interview guide also includes score for each of the main questions, between 1 and 4. The participants have to reach a consensus on a specific score. Please note that this score is not the main goal of these questions, so we ask the participants to decide on a score only after we have discussed each question in detail.

5. The results of group interviews which will be e-mail transmitted to D.T1.1.1 main author - SASS, as follows:

- Recording and complete transcript of the interview;
- Filled in interview guide (Annex II) in English. This includes - for each main question - sections on strengths, weaknesses, additional comments and scoring.

## 5 Danubian baseline study

### 5.1 Defining the CCIs ecosystem as a social field

Methodology and approach for outlining the situations with respect to position of cultural and creative industries is based on sociological conceptualisation of social fields. In scientific literature, social fields have proven its value in conceptualising the dynamics occurring at specific social settings, encompassing the mindset of actors (through cognitive frames), the relationships between actors (through networks) and institutional framework conditions (through institutions).

The theory of social fields aims to address the broadest of questions aiming to explain both the micro and macro approaches in social sciences. Many authors use the concepts of social fields as centres of their thought when thinking about society (Fligstein, 2015; Savage, 2010; Rončević, 2012; Fligstein and McAdam, 2012, Cepoi and Golob, 2017). Moreover, the social field's approach is useful also when addressing topics from the field of sociology of culture (Savage and Silva, 2013), economic sociology (Bourdieu, 2010) organizational studies (DiMaggio and Powell, 1983), gambling (Besednjak Valič, 2014), diffusion of HPC Technology (Kolar, 2020) and sociology (Beckert, 2010; Savage 2010; Savage and Gayo, 2011).

In their corpus, Fligstein and McAdam (2012) elaborate the concept of strategic action fields, which can be defined as meso-level social orders and are regarded as a fundamental building block of modern political/organizational life in the fields of economics, civil society, and state (ibid., p.3). In fact, they speak of a state as a system of strategic social fields, interlaced, and in constant overlapping. In such setting, interactions between collective actors happen on the basis of rules and shared meanings (ibid). Since social fields are not static and are always changing, every state has a number of social fields in emergence, in existence, and in crisis.

Speaking of social fields, either called simply fields (Bourdieu, 1994, 2012) or organizational fields (DiMaggio in Powel, 1983), we cannot avoid outlining basic social forces that shape every working social entity and a social entity in-the-making. Sociological theory, explaining the economic effects (results), presupposes, and names three social forces that influence an individual action. Beckert (2010) identified these types of social forces as social networks, institutions, and cognitive frames (p. 605). The mentioned three social forces are the ones that shape the topography of the field contributing towards its sustainability and change (ibid, p.612). Institutions limit the scope of actions and providing frameworks to determine the relations between actors, networks position actors towards one another defining the relationships of cooperation, mutual collaboration, or competitions on the other hand. Cognitive frames provide necessary mental toolkit (Modic and Rončević, 2018) on the micro level for individual actors to get engaged and active in the social field. The necessary mental toolkit for operating at a specific social field enables the actor to understand the rules of the game at that specific field and to read and interpret the relevant strategies (ibid, p. 105) and rules of conduct at a specific field.

Following all said things, it is inevitable, the Danubian baseline study was conducted, following the principles of social field and defining the Creative ecosystem of the Danube regions as regional creative social fields.

### 5.1.1 Operationalisation of the CCIs ecosystems

When following the approach of social fields, the individual premises of the social field need to be defined. For the purposes of the present overview, the following operationalisation was implemented.

**The innovation profile** is defined through assessment of level of innovation in the area; ability of region to collect, disseminate and process information; involvement of enterprises in R&D in the area; orientation of CCIs towards R&D in the area.

The **Ecosystem** is defined through institutional framework firstly assessing the role of HEIs in the area; status of industrial legacy; and inclusion of CCIs in relevant innovation, cultural, industrial or other developmental policies. Additionally, the ecosystem is evaluated through capability of the area to attract and attain talented people.

The assessment of **collaboration and cooperation** actually deals with questions of networking among stakeholders, levels of collaborations, or questions on trust among stakeholders.

The **values and perceptions** show the mental toolkit of the stakeholders and here we assess the attitudes towards creativity and entrepreneurship, but also the attitudes towards learning and competition. A share of CCIs among the start-ups in the area was assessed.

Finally, the **impacts of COVID-19** were evaluated with assessment of severity of immediate impacts, assessment of mitigation measures of the local authorities, and finally the assessment of discrepancies among sectors of CCIs was requested.

## 5.2 CCI and innovative profile in the region

Making a thorough research through the 10 countries of the Danube regions main conclusions regarding the innovation profile of the regions are presented as follows.

People living in Danubian countries are generally recognised as creative and innovative, such observations come from nearly all countries involved in present study. However, levels of innovation are different with some countries recognise it as high (Austria, Germany<sup>1</sup>) and seem as being lower (Croatia).

Presence of HEI institutions is recognised as essential to drive the innovation and creativity in the regions/municipalities (Austria, Germany, Slovenia, Ukraine, Moldova). Also, support from local authorities is recognised as important in shaping the innovation and more especially the entrepreneurial and start-up sector (Austria, Slovenia). The main characteristic of the CCI sector is being dominated by micro enterprises and self-employed persons (Croatia, Slovenia) and some due to its small size are not able to obtain incentives or compete successfully in project calls (Croatia, Slovenia) issues with overburdened staff is mentioned in Hungary, Slovenia and Romania, also. On the other hand, SMEs in CCI sector are smaller companies, more agile and prone to change and improve their business models, but in Moldova they face the situation where CCIs operate as freelancers on a “black market”.

When it comes to specific strengths of the CCI sector, different specialisations are recognised, like: software, games, architecture, design (Austria, also Germany, Ukraine), web marketing, digitalisation (B&H, Germany), film and media (Germany, also Ukraine), film and multimedia and fashion (Slovenia, Ukraine) and music, where there are good job opportunities all along the value chain (Ukraine), strong focus on manufacturing AI (Germany - Karlsruhe), photography, film producing, 3D animations (Hungary), software, publishing and advertising and ICT applications (Romania, Ukraine), strong and growing ICT sector is emphasised in Ukraine.

Public discussions were organised to discuss the topics of CCI and CCI are usually part of local cultural policies. Actors of CCI are well connected between each other, they know each other well (Moldova, Slovenia). Lack of institutional monitoring and potential support for the sector is mentioned in B&H and Moldova, lack of clustering (B&H), R&D is done spontaneously, without clearly defined strategies (B&H, Bulgaria, Moldova), additionally in Moldova majority of research is done for foreign owned companies.

In Croatia and B&H lack of investment in R&D is noted, especially in state-owned companies but this is not the case in Hungary. R&D as result of internal processes in detected in Romania, with smaller companies facing human capital issues of overburdened staff (Slovenia). In both countries the recognition of CCI is noted in privately owned companies (also in Bulgaria) and within large companies (Germany, Slovenia). EU policies and national findings are available to support the sectors of CCI (Bulgaria, Slovenia especially emphasise this reliance on funding, Croatia, Moldova).

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<sup>1</sup> Throughout the text, The Germany was not analysed as a whole, but rather the Baden-Württemberg region was discussed. Where the discussion focuses on Karlsruhe, it is explicitly mentioned.

Creativity in terms of reinterpreting old traditions is recognised in Hungary, where all actors are recognised as opened to innovation. Strong cultural foundations are mentioned in Ukraine as well. Good personal connections are outlined in Hungary, also as prerogative for functioning innovation system (Romania, detects the insufficiencies in this regard). The good information flow is needed for efficient innovation system (Slovenia, Romania), also sufficient amount of knowledge is present, partial involvement of innovation stakeholder in information flow is mentioned in Ukraine.

Slovenian CCIs sector has good connections internationally, also due to favourable geographical position (Maribor and Nova Gorica), globalisation as opportunity is mentioned in Ukraine, many projects are running to support the clustering of the actors of innovation and CCIs sector.

CCIs sector is overall recognised as a driver of innovation and actors in the field are highly creative persons, who have many skills and are adjusted to function in contemporary market-oriented field. On the other hand, there is a threat of raising inequalities due to already existing digital discrepancies (increased inequalities in access to on-line training programmes).

Among main weaknesses of the innovation profile of the regions for CCIs, financial issues were outlined with venture capital missing (Austria, Croatia) and finances (Moldova, Romania, Ukraine), also critical mass is missing with general public being seen as conservative (Austria, similar Bulgaria) elderly people are hard to motivate being opened to innovation (Hungary). As for the funding, in contrast, the EU funding is negatively impacting the quality of CCIs work, as noted in Eastern part of Slovenia. Additionally, the “fear” of “funding the projects just for the sake of funding attraction” was raised in Slovenia, in connection to the negative aspect of not having a proper development strategy.

CCIs are highly concentrated in urban area (emphasised in Austria, Bulgaria, Moldova). Issue with migration from rural environments to urban areas is present in Ukraine. Additionally, large differences in education are noted – between urban and rural areas – being detected in different countries (Austria, Ukraine), with high unemployment rate in rural regions outlined in Ukraine.

Rigid bureaucracy (Bulgaria, in parts also Slovenia), insufficient information on funding (Croatia, Germany) and lack of support from local authorities (Moldova) is noted, and in Slovenia so called, mental barriers are observed, in terms of “fear of failure” among people.

Companies are concentrated in low and medium-tech sectors (Croatia, Ukraine), trade and tourism (Croatia) and in Moldova the issue of preferred imports of technologies is mentioned, as the R&D investments are too costly for companies to be able to afford it (also Romania), issues with old technologies are mentioned in Slovenia, where companies are at very different levels of innovation.

Insufficient flow of information and dissemination (Romania, Hungary, Slovenia, mainly through internet and that is not favourable for the elderly - Ukraine), not all key actors are involved in key networks (Germany) similarly, in Romania there is a need to include lineages with HEI when developing strategically, cross-sectorial R&D, additionally, there is little interest in cooperating with HEI sector (Moldova).

Hungary also faces the weak presence of digital sciences, lack of cooperation, lack of orientation towards science. Similar situation is observed in Ukraine, with additional focus on low levels of



education and threat of emigration. Observation from Romania shows that mechanism of innovation in CCIs is not always the same as in R&D.

The notions from Slovenia show, innovations sometimes struggle to reach the market and oftentimes innovation do not reach the market at all.

Important notion coming from Slovenia is on different mind-sets of people operating CCIs and in entrepreneurial field. To reach the understanding between both sectors implies much effort to be invested in proper dissemination of information and to establish proper cooperation. CCIs actors need to increase their entrepreneurial knowledge (Slovenia).

### 5.2.1 Danubian Countries strengths and weaknesses

<b>Country</b>	<b>Strengths</b>	<b>Weaknesses</b>
Austria	<p>Even if the CCIs are low-represented and practically unknown in Villach, the level of innovation is high. Some innovative players in business and industry exist, but not especially in CCIs. Urban areas, creative potential and creative SMEs are available. The broad band internet in Villach was strengthened, extremely. There is a high level of research and innovation in Villach. The Carinthia University of Applied Science has only few partnerships with important stakeholders from CCIs sectors and innovative SMEs. The municipality of Villach boosts start-ups, financially.</p> <p>Different financing systems exist, are known and clear. Information and access are possible with the help of networks and lobbies. National, regional and local grants run well.</p> <p>High level of research and development in Villach and Carinthia, due to Carinthia University of Applied Science (CUAS), Silicon Alps and University of Klagenfurt (AAU). Interested enterprises are involved in research and development and network with universities as research institutes. The University of Klagenfurt, in the field of cultural studies, realized an innovative art base research project for the cultural sector.</p>	<p>CCIs are in urban areas in Austria (Vienna) and Carinthia (Klagenfurt). 60-70% of CCIs in Carinthia are settled in Klagenfurt. Venture capital is missing. A critical mass and the required ecosystem are missing. Cultural industry is rarely represented in Villach. Innovation in culture is marginal, due to the fact that the public is very conservative. The allocated budget is low and structures of financial grants and transparency are missing.</p> <p>Financial boost for the cultural industry are rare. Sponsorships are given by national authorities, mainly.</p> <p>CCIs are rarely involved in research and development processes, except for some branches like software. Specialists and financial help are missing.</p> <p>Some branches in CCIs have not realized any research projects yet.</p>

	<p>Software and games, architecture and design realize research and development projects. Art based research for cultural industry exists. Some branches have already established research projects in their daily working processes.</p>	
<p>Bosnia and Herzegovina</p>	<p>Residents of B&amp;H, especially in the fields of culture and arts, marketing and tourism, have the ability and creativity to innovate in their areas of operation. In line with European and world trends, they try to introduce innovative ways of marketing products and services and to bring their work closer to their customers. This process is slow but efficient. Much progress has been made in digitization, web marketing, guerrilla marketing, and it is especially effective in tourism, virtual tours and 3D displays of tourist destinations and displays of cultural heritage.</p> <p>People in B&amp;H are highly creative, but they still need more training and workshops participation.</p> <p>After the inclusion of the CCIs sector in the strategy of cultural policy in B&amp;H, information about the CCIs was disseminated, IT hubs were created, as well as NGOs dealing with the cultural industry. Although there was a lack of financial, partnership and technological support from the state, CCIs survived in entrepreneurship mostly through foreign investment. Round tables and public discussions were held on the topic of CCIs, its role and importance in the economic development of B&amp;H.</p> <p>The Ministry of Civil Affairs of Bosnia and Herzegovina, Federal Ministry of Culture and Sports and Ministry of Education and Culture of the Republic of Srpska oversee the development, informing and statistical monitoring of the economic development of the CCIs. The CPU (Centre for Policy and</p>	<p>The biggest problem with the implementation and further development of innovations is the large difference in the education of the population between urban and rural areas. Culture and art, as well as other branches of the economy, are highly centralized in the urban area. Any innovation can only be achieved within city limits. For any innovation to be efficient, need customers who will embrace it. Serious efforts are needed to educate the population outside urban areas, so that CCIs can be formed and business innovations gradually introduced. For example, e-banking was introduced 10 years ago and now is used by less than 10% of the population.</p> <p>There is no government institution or NGO that maintains statistics or any information on the number, status or business performance of CCIs in B&amp;H. No CCIs mapping was performed to gain insight into the sector; there is no information on the number of CCIs actors, their location and their financial operations. Clustering was also not done.</p> <p>State-owned enterprises do not pay any attention to R&amp;D. Their marketing, way of doing business, visibility, visual identity is still based on marketing tools from the 20th century. CCIs are seen as “dangerous” businesses, and they don’t accept any kind of innovation.</p> <p>All research activities in CCIs are spontaneously, without a clear necessary strategy.</p>

	<p>Management) as an NGO has had the greatest influence on informing the public about the CCIs.</p> <p>Many private sector firms recognize the need for R&amp;D and thus hire CCIs specialists for their own needs. Enterprises with higher financial resources create their CCIs as new jobs to improve their business. This type of development and research is particularly prominent in the field of marketing and design.</p> <p>CCIs follow European trends, following the example of CCIs from other countries, in order to remain competitive in their field of activity on the foreign market.</p>	
Bulgaria	<p>In recent years the cultural and creative industries in Bulgaria are increasingly being perceived as a sector with an important contribution to local, regional and national development and having a positive impact on the local labour market.</p> <p>They are a significant sector of the Bulgarian economy. Creative industries create a larger share of the gross domestic product from economic sectors such as mining, hotels and restaurants, etc. In 2019, the creative industries generated 5.54% of the gross value added in the country and provided employment to 4.92% of the employed.</p> <p>Main strengths in recent years are:</p> <ul style="list-style-type: none"> <li>-One of the most dynamically developing economic industries.</li> <li>-Investments in new technologies is raising the qualification of the staff.</li> <li>-Rich tangible and intangible cultural heritage.</li> <li>-Many places that can benefit from innovations in creative industries and EU and national policies stimulate innovation.</li> </ul>	<p>Foreign investments in creative activities in Bulgaria are almost entirely concentrated in the capital Sofia.</p> <p>Efforts for the stimulation of the creative industry at national level are minimal compared to other economic sectors (also due to the COVID-19 situation).</p> <p>Weak law enforcement in the field of intellectual property.</p> <p>Lack of knowledge and skills in the field of intellectual property management and entrepreneurship.</p> <p>The creative sector in Bulgaria is very fragmented and dispersed.</p> <p>Insufficient communication and technological infrastructure.</p> <p>Lack of information and capacity of attracting EU Structural Funds.</p> <p>Sometimes local organs can make innovation difficult due to bureaucracy.</p>

	<p>-Creative industries have high potential for added value with innovations.</p> <p>In Bulgaria very successful is functioning The National Culture Fund - established by the virtue of Culture Protection and Development Act, with main objective to support the development of culture by raising, managing and spending funds for the purpose of pursuing the national policy in the field of culture (individual artists, private, municipal and state cultural organizations are equally eligible to apply for it). Many people find it very helpful and benefits fully.</p> <p>Cultural and creative industries in Sofia have become the foundation for a new type of informed urban cultural policy, and the subsequent educational and academic activities have built and continue to build bridges for partnerships.</p> <p>Also in the capital Sofia had been established the CREATECH hub, which unites innovatively-oriented creative and technological gurus, working together and using technology as a tool to discover new forms of creative expression.</p> <p>Other preconditions for the successful creative industries are:</p> <ul style="list-style-type: none"> <li>-A variety of suitable places for the dissemination to happen effectively e.g. theatres, cinemas, community centres etc.</li> <li>-Many possibilities for R&amp;D activities in both suburban and urban areas in the region.</li> <li>-Part of the CCIs is constantly and successfully learning towards engaging in R&amp;D an innovation.</li> </ul>	<p>There is relatively limited amount of people who are interested in the CCIs; therefore the target group is limited.</p> <p>Poor involvement of enterprises in R&amp;D activities.</p> <p>The engaged in R&amp;D activities CCIs are not enough to create a positive impact in the bigger scheme of things.</p>
Croatia	Investment in R&D increased substantially, but largely thanks to	Difficulties in finding sources of funding, the problem of double taxation.

	<p>ESIF funds, while efficiency of spending is low. In 2018, overall investment in R&amp;D jumped to 0.97% of GDP, up from 0.86% in 2017. Croatian companies are concentrated in low- to medium-tech sectors, and government support to R&amp;D-based innovative firms is lacking. According to the European Innovation Scoreboard, Croatia is a moderate innovator.</p> <p>The creative potential of the sector and the transformational power of the sector is the basis for greater cooperation with other sectors and activities. Sector is dominated by micro-enterprises and an above-average number of self-employed.</p> <p>Investment in R&amp;D increased substantially, but largely thanks to ESIF funds. State-owned enterprises, which contribute around one fifth of the national economy turnover, lack incentives for competition through innovation and research. Croatian firms, especially smaller and younger companies, indicate a positive link between R&amp;D-based innovation and productivity growth.</p> <p>CCIs sector can be a carrier of innovation, participate in innovation and development processes of other sectors and participate in the modernization of the Croatian economic structure.</p>	<p>Croatia's best scores are on non-R&amp;D innovation and its weakest points are in knowledge-intensive service exports and venture capital expenditure. Companies are concentrated in low and medium-tech sectors, notably in trade and tourism, which affects the current low level of investment in R&amp;D.</p> <p>Insufficient information of key players on funding opportunities, heterogeneity and fragmentation of the CCIs sector.</p> <p>Low levels of investment in research and development with low business sector involvement. Nonetheless, government support programmes are heavily skewed towards helping mature and larger companies, with less support given to diversification and new ventures.</p> <p>The potential has not yet been fully exploited, there is significant space for improvement.</p>
Germany	<p>Karlsruhe is quite technically focused, with many games, apps development and SaaS companies based here. There is therefore a lot of creativity but also technical knowledge. In the wider Baden-Württemberg region, there is also a wider focus on other CCIs such as film and media, with some of the best film universities in Germany (if not the world) being based here (Offenburg and Ludwigsburg).</p>	<p>There is not much funding put into this area specifically when compared to other regions across Germany. The societal make up of this part of Germany is quite wealthy but the focus tends to be on more scientific areas as well as manufacturing due to car industry being based here.</p> <p>Not all key players are covered in the network and there can be fractures in communication and therefore support.</p>

	<p>There is also a strong focus on AI in this area, with Karlsruhe being designated as an AI region of Germany and incubators such as Cyberlab focusing on supporting such technologies.</p> <p>Karlsruhe is also a UNESCO city of Media Arts and the ZKM Museum is classed within the top 5 museums in the world.</p> <p>There is a good network of organisations around BW, generally coordinated via the MFG organisation. The Schlachthof Creative Industries Quarter in Karlsruhe is good at supporting creative SMEs.</p> <p>This region is very innovative across a range of sectors, with manufacturing, AI and software being core areas. There are therefore some large companies based in this area which have their own R&amp;D focuses and contribute to the overall technical and creative culture in the region. Companies such as Porsche, Daimler, PTV Group etc.</p> <p>There are many different CCIs represented in the area e.g. film, media, AI, gaming, software, apps/web development, digitalisation agencies. Non-science focused. However, the volume is not great enough to draw the bigger R&amp;D activities. Their connection to the local area is not certain other than location.</p>	<p>The games industry in particular is more segregated from the other creative industries. Tangible wide dissemination of national and EU level information and support is not as coordinated as it should be.</p> <p>There could be a better and wider cohesion across the regions companies and start-ups, but this would require investment and resources to support and coordinate.</p> <p>The CCIs in the region do not get the kudos they deserve, and therefore the attention, support or funding. The sector is strong but not large here.</p>
Hungary	<p>The inhabitants are creative in the Western part of Hungary, which is proved by the several cultural events and programs – especially in the cities. Bringing historical traditions to life – that’s what characterizes the life here. The technological innovations help them to explore new areas of creativity: in photography, film producing, 3D animations etc.</p>	<p>Communication channels put their focus more on the young generations – a lot of information is available on the internet, which is not an appropriate solution for the elderly. In our aging society it needs a better solution. People (especially the elderly) are not very open to innovation, being relative difficult to be motivated.</p>

<p>A great number of civil organisations are operating in cities; inhabitants have a general interest towards cultural programmes.</p> <p>Boosting digital innovation has a real future in this region – 3D technologies aren't foreign expressions anymore, and the companies, public authorities start to apply the new technologies. SMEs, entrepreneurs and public authorities are open to innovation; they're the most relevant stakeholders of this topic. There are close personal connections between the participants, webpages of the cities and institutions are upgraded continuously.</p> <p>Hungary's overall vision is support Hungarian manufacturing companies in the shift towards new production modes. Territorial Innovation Platforms were organized in the recent 12 months, to act as acceleration centres of the paradigm change. The enterprises are open to R&amp;D areas; there are more and more business support opportunities on the market, which are surrounded by interest and a small-scale participation in R&amp;D networks is usual. Employees have constantly training opportunities. A high number of employees own a diploma from a cultural institution, they are highly educated workers with specialized knowledge.</p> <p>Szombathely City takes part in ICC (Intelligent Cities Challenge) program; the application of the city was already selected. It shows the territorial commitment to advanced technologies.</p> <p>More and more cities / programs have their own mobile device applications which are useful both for local people and for tourists. These applications</p>	<p>Lack of institutional background makes strategy and capacity building more difficult.</p> <p>Local civilians' knowledge and experience cannot prevail effectively.</p> <p>In relation to digital innovations, it is hard to gain knowledge from several sources, there are just few actors who are implementing Industry4.0 solutions.</p> <p>Few resources to gain knowledge are available.</p> <p>Just a few numbers of collaborations are fixed in contracts.</p> <p>Dissemination is not efficient.</p> <p>SMEs, enterprises have no time for innovation, processes are less known for patenting and only bigger companies have (human and/or funding) resources to implement R&amp;D in their work. The other sectors lack resources for R&amp;D activities, therefore weak participation is usual.</p> <p>Other barriers are:</p> <ul style="list-style-type: none"> <li>-Lack of resources (human / funding).</li> <li>-Low return is expected for the implemented work.</li> <li>-Shortcomings in marketing.</li> <li>-Lack of cooperation, lack of orientation towards science.</li> <li>-Weak presence of digital sciences and research.</li> </ul>
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	<p>show news about actual programs, attractions in the related area. Example from Szombathely City: <a href="http://szombathelypont.hu/">http://szombathelypont.hu/</a>, having highly qualified professionals in non-applied research, too.</p>	
Moldova	<p>Citizens are positive toward innovation and try to involve. There are many cultural opportunities because of the strong cultural and creative background and associations (over 50 craftsmen, over 40 folk dance and music ensembles). There are good connections between the academic actors, the creative sector and other main actors and talented human resources.</p> <p>The advantageous geographic position of Cahul, as part of Danube and Black Sea initiatives, offers opportunities for participation in innovation forums and events. IT and cybernetics innovations are quite accessible for the general public.</p> <p>University B.P.Hasdeu from Cahul is a capable centre for R&amp;D. There were several joint cultural projects Romania - Ukraine - Moldova, funded from European resources, allowing experience exchange between professors and students from the professional schools in the creative field. Citizens of Cahul are in general creative people, doing much even from few resources. Due to the extreme circumstances caused by the pandemic, craft activities, HoReCa, tourism etc. got combined, resulting in innovative approaches. The Cahul Business Incubator residents have innovating attitudes, even though at small scale. The CCIs have changed a lot and in a positive manner their promotion and</p>	<p>There are no databases or enough data available in order to evaluate the innovation capacity. Lack of support from the public authorities. Poor access to finance and economic hardships countrywide.</p> <p>There are no databases with concrete information regarding the appliance of innovations in the CCIs sector and the available funding opportunities. There are many professionals who choose to work as freelancers without registering the business, so the data about the sector is fragmentary and obtained through estimations. The only information that can be found is from the category "trends in innovation", with reference to the field of IT and cybernetics. The lack of a specific National Strategy on CCIs and insufficient data provided by the Government. The lack of data poses problems when it comes to applying project proposals since there is no common sense on what is innovative and what is not.</p> <p>SMEs prefer to buy already existing technologies than to research themselves. The University B.P.Hasdeu from Cahul is the only researching institution in the city. The business sector is not very interested in collaborating with the University. There is a lack of financial resources engaged for innovation in the educational institutions and at the level of SMEs.</p>



	<p>advertising tactics, especially because of dealing with COVID - 19.</p>	<p>Lack of basic infrastructure and living conditions as essential needs. Most of the research institutions are concentrated in the capital and are prone to investigate for international funding organizations that pay them better, focusing less on the urgent country needs.</p> <p>CCIs are not much involved in R&amp;D activities at large scale due to lack of finances and motivation.</p>
<p>Romania</p>	<p>Creativity is traditionally considered as a native strong characteristic of Romanian inhabitants, being also closely connected to urbanization, when more urbanized nations scoring higher on the GCI - <u>Global Creativity Index</u>, associated with higher levels of social equality.</p> <p>There are some on-line resources for CCIs, innovation and entrepreneurship.</p> <p>40.52% of all innovation activities in Romanian SMEs are carried out through internal (individually) R&amp;D processes. Second option with (30.05%) is represented by adapting innovation and novelty developed by other organization and enterprises followed by integral absorption (“poaching”) of innovation developed by others (21.95%). Only few enterprises (7.48%) think that cooperation with others is a viable approach to undertake R&amp;D activities.</p> <p>The most successful CCIs in Romania are software, publishing &amp; advertising industries. Other relevant industries are: movie, media, performing arts and music industries. Thus, CCIs often offer products and services closely dependent on the characteristics of the surrounding cultural system (such as language, history, or values, among others). Therefore, the estimated local</p>	<p>The relative weak performances of the innovation activity in Romania may be explained by reasons related to underfunding and weaknesses of the human resources involved in the research processes, also determined by some structural aspects of regional economies and by the indirect influence exerted by certain aspects of regional cultural matrix.</p> <p>Unfortunately, not many structured information is available about potential partnerships, available know-how &amp; technologies, offered in a structured manner or updated regularly.</p> <p>More structured and updated sources of information are needed, especially focused on CCIs and related economic fields of interest (innovation &amp; entrepreneurship).</p> <p>In regard to the barriers to innovation entrepreneurs from SMEs are to be mentioned the high cost implied by R&amp;D activities (56.32%), not enough company funds for research (40.77%), the incertitude associated with the market demand for new and innovative products. Least mentioned was the lack of adequate human resources (8.49%).</p> <p>The insufficient funding for R&amp;D dedicated to SMEs is the main barrier to increase their innovation capacity. More specific, i.e. for the CCIs companies that</p>

	<p>communities effect could be reflecting the existence of certain “homogeneous regional markets” rather than knowledge spill overs, tightly associated with R&amp;D activities, being less specialised/more embedded across different talent within the firms, so making it more difficult to identify separately.</p> <p>The ICT field of activity is strongly developed in Romania, as a basis for building a digital economy, but many support instruments are still missing, especially a fully functional innovation ecosystem where CCIs to play a clear role.</p>	<p>have a R&amp;D capacity is difficult to run such activities, because the human resources are allocated mainly to productive or commercial activities, leaving very little staff available to handle the R&amp;D part.</p> <p>The actual digital economy era is based on a “cultural industry”, combined with digital technology; we need to strengthen the intellectual property protection, improve the talent training system, policies and management mechanisms to develop CCIs, these aspects being relative insufficiently developed in Romania. Also, traditional methods of managing and funding R&amp;D may not always work in the creative industries, lacking the capacity for strategic, cross-sectorial R&amp;D, including linkages with universities.</p>
Slovenia	<p>People are innovative and creative. There are ideas but they are not realized. Things are getting better; people start seeing potential. Younger generations are very creative, but they get frightened.</p> <p>Many good ideas – best practices. Information is available but subjected to individual engagement. University has a good information flow. Between the same groups of stakeholders, the information flow is very good.</p> <p>Little innovation within several companies.</p> <p>There is enough knowledge, also cases of good practices.</p> <p>ICT sector works together with the university.</p> <p>Development is good, CCIs always develop new services.</p> <p>Strong international connections, also due to geographical position near the border. Many connections with Italian side.</p> <p>Italian culture is strongly creative in terms of design.</p> <p>A lot of potential that is not used.</p>	<p>Innovativeness is not embodied, it is not visible, innovations are not supported enough to be able to be developed. University surprises us, once in a while, with ideas but before innovation reaches the market they get lost. Systemic barriers and also mental barriers exist; there is not enough energy and willingness to be implemented. This is maybe also as the relict of a past system. Lack of funding is an obstacle.</p> <p>Fear of failure in terms of entrepreneurial fail, the region has faced the past of economic difficulties and the fear remains.</p> <p>Also in companies there is also lack of time, due to work responsibilities and lack of funds to commercialize the innovative idea or product. Also issues with old technologies.</p> <p>Information is not disseminated properly. Information is not connected (information from UM does not disseminate properly). Information flow among triple helix stakeholders is not adequate.</p>

	<p>Candidacy for European capital of culture for 2025 as great opportunity – many connections were formed in the past years, there is optimism to take advantage of created synergies.</p> <p>Presence of University and other HEI in the city to be part of the cross-border ecosystem.</p> <p>Ex-center is in form of being established – as main hub for SMEs and CCIs.</p> <p>Many running projects from the field.</p> <p>Desire to act jointly, to complement each other and not to only compete.</p> <p>Strong support of the municipality, active in many fields.</p> <p>The ex-center initiative will overcome the issue of dispersed information.</p> <p>Municipality of Nova Gorica works as generator of a network – case of a situation with disabled persons, where the mayor engaged in activity to connect the stakeholders from the field.</p> <p>There are companies that can be traditional and open towards creativity, smaller companies are more agile for change. With Covid-19 situation: there is a discrepancy between those that are struggling and others that have flourished, especially those taking advantage of digitalisation and ICT sector, developers, applications, software.</p> <p>Teaching and training went all online.</p> <p>3 hubs are being created (two as project results and one connected to municipality initiative), there is much interest from the SME side to participate.</p> <p>Also, the Technology park has co-working space with many creative profiles – from designers to architects.</p> <p>All have desire to learn, also the entrepreneurial knowledge.</p> <p>A lot was done in the last 5 years to develop the situation.</p>	<p>CCIs are sometimes confused due to too much information and too many calls.</p> <p>Negative selection due to too much available funds (for Eastern cohesion region for developmental funds).</p> <p>Project funding just for the sake of funding and too little with long term purpose.</p> <p>SMEs or self-employed are not always eligible to apply for funding.</p> <p>Companies are not in the Slovenian peak of R&amp;D, the companies are at very different levels of innovation. Smaller companies have many problems, with overlapping of functions.</p> <p>Smaller companies, micro company's form CCIs do not engage in R&amp;D, any research is focused on sporadic and non-systematic market checking.</p> <p>Not enough funds for micro companies.</p> <p>Entrepreneurship is not connected with creativity; creativity and entrepreneurship seem as being in two parallel clouds.</p> <p>No deliberate interactions between SMEs and CCIs.</p> <p>Lack of a one joint point of reference – in a form of a hub.</p> <p>Much must be done, to nurture the networks.</p> <p>Very institutional view, each institution informs own users, a joint platform is missing to connect all stakeholders.</p> <p>Takes time, to interconnect the understanding between both spheres to understand the language they speak.</p> <p>Film as field with tradition, where is the potential, but the breakthrough was not done yet as in the field of multimedia.</p> <p>Sectors are still apart, CCIs uses other values, methods, seeming as if they speak different language.</p> <p>Difference between creative person who requires freedom to create and entrepreneur who is concerned with market demands and earning money for the products they sell. Mutual understanding of each other is required.</p>
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	<p>Many projects aiming at increasing the awareness and mutual understanding between CCIs in SMEs.</p> <p>CCIs are not afraid to check what is happening abroad, there are many experiences of artists working abroad. Firm commitment also of the municipality, in establishment of ex-center.</p> <p>CCIs sector has the ability to divide the work, even if majority of the sector are individuals.</p> <p>Also support of the Academia, and CCIs are past the past fame of being afraid to sell your skills and your creative work. Creatives have many skills and are adjusted to function in contemporary market-oriented work. Case of Valerie Wolf Gang as very recognised multimedia artist.</p>	<p>Existing projects contribute long term to increase the understanding.</p> <p>CCIs need to have the entrepreneurial knowledge – to know how to sell the creative idea. Creative persons demand being free to create and require freedom to create.</p> <p>All stakeholders have awareness raised about the importance of joint R&amp;D activities.</p>
Ukraine	<p>Ukraine has a strong scientific and technical base, inherited from the USSR. This applies to the rocket and space industry, aircraft construction and military-industrial complex, as well as the dynamic development of modern industries in the field of cultural and creative industry. Namely: architecture, gaming, design, film, literature, music, advertising, print media, TV and radio, visual arts and performing arts.</p> <p>Recently, the ICT sector is also developing dynamically.</p> <p>A large number of scientists, innovators and creative people.</p> <p>The situation in the city / region is slightly different from the general situation in the country. In some ways it is better than other regions and in some ways it is worse. The best is that in the city of Uzhgorod there is a national university, which graduates in various fields of specialities. In the market, are present ICT companies that need more and more new employees. But situation is worse, than</p>	<p>Some weak points are presented below:</p> <ul style="list-style-type: none"> <li>-Quite a low level of education for most population of Ukraine.</li> <li>-Weak material and technical base of Universities.</li> <li>-Poorly developed applied science.</li> <li>-Limited opportunities in loan and financial resources for enterprises.</li> <li>-Legislative regulation limitations.</li> <li>-Small and insolvent domestic market.</li> <li>-Insufficient integration with the EU and limited access to developed world markets.</li> <li>-Low efficiency level of Relevant stakeholders involved in the process.</li> <li>-In rural areas, access is only available to online platforms.</li> <li>-Complete lack of involvement of R&amp;D enterprises in rural areas.</li> <li>-Limited credit and financial resources for enterprises.</li> <li>-Small and insolvent domestic market.</li> <li>-Everything in the complex creates obstacles in the development of R&amp;D enterprises.</li> </ul> <p>The analysed area of CCIs has long been affected by emigration (very high net</p>

	<p>in the vast majority of Ukrainian big cities, where there is more human potential and the presence of powerful enterprises with demand for innovation.</p> <p>In education inequalities have increased as many are (partly) excluded from e-learning because of weak digital skills (persisting digital divide) and lack of smart devices. Rural areas, Roma communities and poor population are the most exposed to the negative effects of the pandemic in education.</p> <p>Profile associations and organizations are partially involved in the collection and dissemination of information on CCIs, entrepreneurship and innovation (such as applicability, funding opportunities, potential partners, available know-how, technologies, etc.). There are a number of online platforms. Universities are also active participants in these processes.</p> <p>Despite the low efficiency of local stakeholders involved in these processes, globalization provides opportunities to attract global players from all around the world.</p> <p>Research and development (R&amp;D) are at a fairly low level in the country, only certain sectors of the economy are actively involved in the processes, namely, those that are mostly concentrated in cities.</p> <p>The dynamics of creative services imports is declining for R&amp;D, audio-visual and related services and information services. The only growth direction is computer services. The most considerable contribution of imports and exports is shown by Computer services; while R&amp;D and audio visual and related services, however, occupy a large part, but they are not growing. At the same time,</p>	<p>migration rate), which is one of the main reasons of depopulating areas. The main migration targets are usually capital city and metropolis regions, better performing western regions. The target of the Ukrainian international migration also includes surrounding countries, partly Slovakia and Hungary too. Only the Ukrainian parts, namely Ivano-Frankivska, Chernivetska Region and Zakarpatska Regions have population surplus, due to slightly higher number of immigrants than emigrants.</p> <p>High unemployment is a profound problem across the majority of the analysed area. Unemployment is also a reflection of low educational attainment, unfavourable and economic structure, lack of major employer companies, and a real poverty threat. Based on the data given by the national statistical offices in Zakarpattia Region unemployment rate is 10.3%.</p> <p>CCIs mostly oriented towards non-applied research.</p>
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	<p>information services are almost at the same level nearly all the time.</p> <p>In any case, creative environment is a basis for the implementation and development of innovative and creative thinking, but at the same time itself undergoing transformation due to the impact of creative thinking, which reflects dynamic changes in the socio-economic, institutional and organizational areas. Interrelation between the constant use of innovation and creative approach to problem. Collectively these provide the country with strong cultural foundations as well as the inspiration, innovation and agility to underpin future economic growth and liveability. Consequently, there is a great potential for development not only of the creative industries themselves but also for creative projects in other sectors of the economy. Furthermore, keeping in mind the geographical proximity of Ukraine to the Western European countries, where the creative industries progress, it is also possible to apply their experience in this field.</p> <p>For instance, income generation and distribution in the popular music industry is broad-based and far-reaching.</p> <p>It has job opportunities for song writers, publishers, composers, arrangers, producers, recording and marketing companies, printers, hardware manufacturers, wholesalers and retailers of music recordings and instruments, studio and stage sound engineers, musicians, singers, dancers, promoters, talent scouts, entertainment writers and showbiz consultants, stage designers, lighting crew, structural engineers, advertising practitioners, media houses and many more professionals.</p>	
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	<p>CCIs are weakly focused on R&amp;D except for some industries such as gaming, cinema, TV and advertising where the results are good.</p> <p>The development of the film industry in Ukraine demonstrates positive dynamics. The driver of CCIs development in this sector is the fact that dozens of films and TV series are shot in Ukraine every year, in the shooting of which ICT companies and R&amp;D companies specializing in film and advertising production are also involved.</p>	
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### 5.2.2 Danubian scores on innovation profile

As elaborated in the chapter 3.4 the focus groups conducted demanded the discussants to evaluate the level of readiness for each of the posed questions. As the questions adequately described the innovative profile of a region the scores went as follows: score 1 was least developed and score 4 was most developed. The diagram below (see Fig. 1) therefore demonstrates the innovation profile of a region: the more open the more innovative.

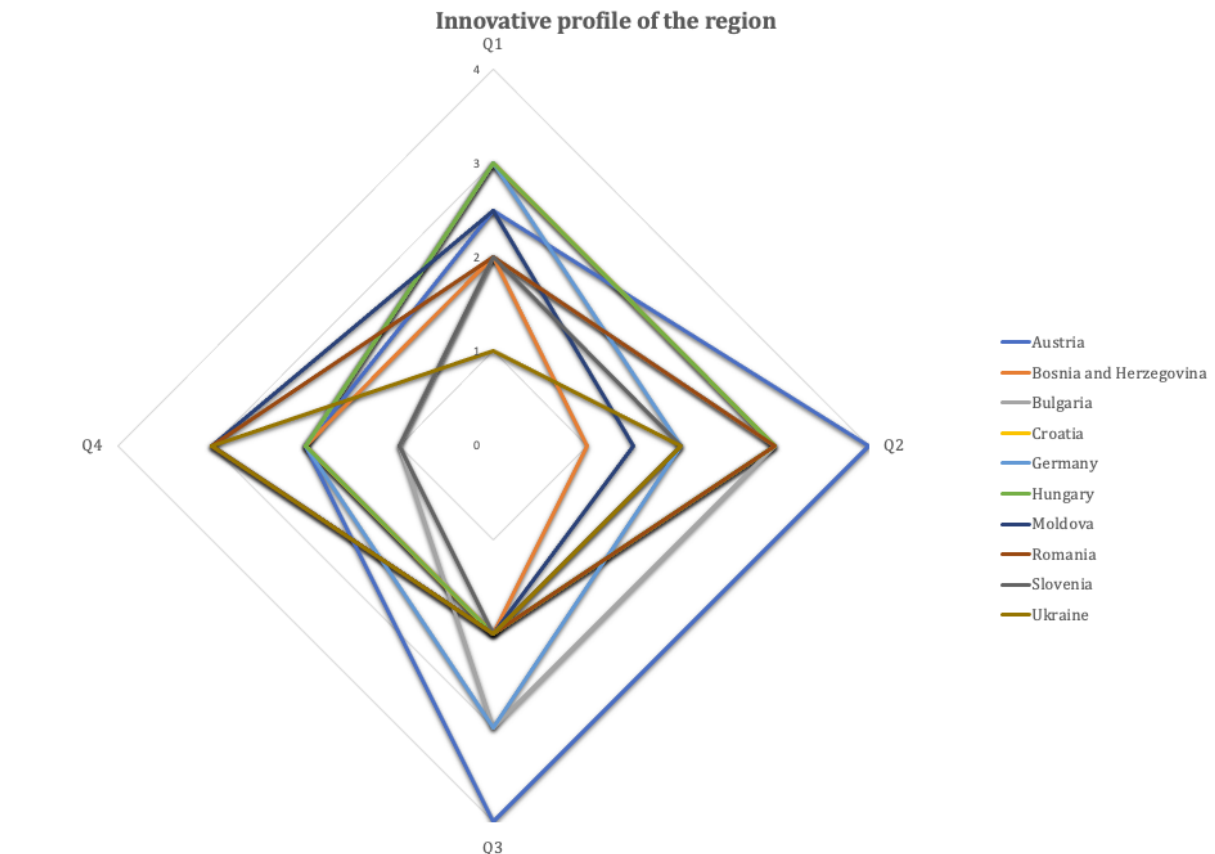


Figure 1 – Innovative profile of the region



### 5.3 Creative ecosystem of the Danubian regions – institutional framework conditions

Institutional framework is defined by the existing HEI in the region. The situation is favourable in Austria, Bulgaria, Slovenia, Germany (low focus on CCIs), and in B&H a strong private initiative in this respect is noted. Croatia has universities in all major cities. This is seen as positive. Good education programmes are also in software field and also media, marketing and design (Austria, B&H, Slovenia). In Slovenia there is the observation that one HEI educates the creative groups to think on how to sell their work. The HEIs programmes have the power to empower. In Slovenia local municipalities support CCIs. In Romania and Nova Gorica (Slovenia), CCIs sector is gaining prominence also through European capital of culture (with Timisoara gaining the title of European Capital of Culture in 2021 and Nova Gorica gaining the title for 2025), Favourable financial conditions either from national or EU funds are recognised in Germany and Slovenia.

The status of industrial legacy in the cities is very diverse, ranging from renewed and dedicated to different usages (Austria) to non-used, uninhabited and with no specific vision on what to do with it (B&H, Bulgaria, Moldova). Much regret over the lost knowledge is noted in Slovenia (Maribor). In Croatia, the industrial sights are considered as having valuable cultural and developmental potential. Several projects are running to renew and revitalise industrial legacy (Hungary). Local museum made some sporadic actions to save some of the heritage (Slovenia).

The institutional framework is also defined by different strategies, sometimes top-down approach from the EU policies is noted (Slovenia, Romania), with majority of countries not having elaborated Action Plans. Industrial strategy in Austria has the CCIs included, also Croatia, B&H does not have CCIs included in innovation policies, but some potential is noted in Bulgaria, Slovenia. Majority of regions have CCIs briefly mentioned in cultural policies, where realistic observation is, more focus could be allocated to a more profound integration of the sector (Croatia, in B&H there is an established Action plan to strengthen the CCIs at all levels). In Bulgaria CCIs are recognised by the Ministry of Culture as potential sector. In Germany, the sector is well elaborated in cultural policy. In B&H, the aim towards digitalisation is noted as promising at all levels. Much investment was done in city of Tuzla to promote the city as being cultural and touristic attractive also with the aim of re-industrialisation of the city. Infrastructure was renewed. In Cahul (Moldova) CCIs are not mentioned in most of the national strategies. In Romania the ICT sector was developed, due to national Smart specialisation strategy, and, in Slovenia, CCIs are addressed through different policies, but mainly through Cultural one. The same is also valid for Ukraine.

The question on attracting and attaining creative people is layered, with majority of regions reporting the capacity to attract people (Slovenia, B&H) and many report the difficulties in attaining talented people (Slovenia). Slovenia is attractive also for students from abroad who sometimes encounter issues with local bureaucracy. Regional centres do not have the problem in attaining talented people (B&H, Romania, Ukraine), in Croatia, the same goes for larger cities. In Croatia, there are some difficulties in attaining talented people. People are attracted by Carinthia (Austria) for family reasons (roots), the same goes for Szombathely (Hungary). In Carinthia, a Welcome centre operates to help people who are returning and remaining and in Hungary many locally specific programmes are implemented to attract people. In Bulgaria the attraction and attainment of people is recognised as easy and doable. Karlsruhe in Germany is reported to have issues in attracting and retaining talented people due to bigger cities nearby. Cahul is noted as attractive due to its cultural attraction and proximity to border, the latter is also a case for Slovenian towns of Maribor and Nova Gorica and for Uzhgorod in Ukraine. Strong start-up

communities are established in Nova Gorica and Maribor, also for CCIs. Erasmus programme is mentioned as positive for attracting foreign students to Slovenia.

In terms of institutional framework, many of educated people are not able to find jobs (B&H, Hungary, Romania), market for CCIs is small and some infrastructure facilities are missing (Austria, Hungary). Absence of HEI in the field of CCIs is noted in Szombathely (Hungary). There is little cooperation between HEIs and cultural institutions (Bulgaria and Romania). The CCIs sector is fragmented and little cooperation is noted in Bulgaria and Croatia and Moldova. In both countries the stakeholders need strengthening of cooperation. Lack of financial resources is noted in Croatia, Hungary, Moldova and in Germany where the danger of losing the CCIs sector due to prevalence and strengths of other sectors is also noted. Issues with proper education are noted in Romania, especially with entrepreneurial knowledge (also observed in Slovenia - Maribor). Unbalanced and insufficient support for projects is noted in Romania.

The industrial legacy of the cities is being abandoned, in some cases the issue is related to ownership (B&H, Ukraine, Slovenia – Nova Gorica) and, in others, with the need for big investments (Bulgaria, Moldova), and also places with industrial legacy were transformed in shopping centers (B&H, Slovenia – Nova Gorica).

Not enough involvement of CCIs into creation of policies relevant for the sector were noted (B&H, Bulgaria, Hungary, Cahul). Talented people for the field of CCIs tend to move to capital where CCIs are better developed (Germany). CCIs are not adequately elaborated in any of existing policies (Romania). Issues related to brain drain are noted in Romania. The sector is recognised as missing a holistic approach to be properly developed in Slovenia and Ukraine.

In terms of attracting talented people, proper housing policy is missing in Slovenia and more specifically, student accommodation issues of Nova Gorica are mentioned.

### 5.3.1 Danubian Countries Strengths and Weaknesses

Country	Strengths	Weaknesses
Austria	<p>In Carinthia, different possibilities for (higher) education and research exist. In general, the possibilities of education and qualification extend at the University of Klagenfurt and Carinthia University of Applied Science. Highly engaged in education in these industrial and cultural sectors are the vocational high schools of Carinthia, like commercial academy (HAK) and higher technical schools (HTL). Software and games have got educational programs on a high level, but less graduates. The University of Klagenfurt work on research and qualification in media, marketing and design.</p> <p>Industrial legacies do not have a high impact on regional development, even if they have got a potential. Some examples are the Carinthia University of Applied Science settled on the area of a former paper mill in Villach, the maker's space located in former garages of post cars in Klagenfurt, the Hafenstadt Klagenfurt and the vineyard in Taggenbrunn, which was a former castle. The Hafenstadt Klagenfurt and Taggenbrunn are both funded by private people.</p> <p>CCIs have a high impact on innovation.</p> <p>The implementation of CCIs in the cultural strategy is important.</p> <p>CCIs are implemented in the industrial strategy of Carinthia.</p> <p>Soft facts, like landscape, quality of life, family (roots), are pull factors for Carinthia. Many people, who want to settle in Carinthia, were grown up or have already lived in Carinthia. They</p>	<p>Differences between the branches.</p> <p>The market is too small for a high status. Legacies do not have a meaning for industry in Carinthia. Even if, the potential is high and especially the cultural industry needs locations. A medium sized stage, rehearsal rooms and alternatives to schools and gymnastic halls in schools for practising are completely missing.</p> <p>Due to the fact, that an innovation strategy does not exist, CCIs cannot be included. The inclusion of CCIs in innovation can be developed.</p> <p>A cultural strategy of the regional authorities does not exist.</p> <p>Differences between branches and their basic conditions. In some branches, the infrastructure, the offers by the economy and the support and network are rare.</p> <p>Carinthia has to extend the basic conditions for innovative and creative people and SMEs, in order to link them with Carinthia. The enterprises have to be creative, to persist. Lots of creative and innovative, but unused know-how exists. There are not enough employments.</p> <p>More than soft facts and private background should be responsible for the link of innovative and creative people and their enterprises to Carinthia.</p>

	<p>look for opportunities to return. Big industrial player (especially the Infineon in Villach) is a pull factor. Persons of the cultural industry come for temporary engagements or try to create creative and cultural locations in Carinthia.</p> <p>The Carinthian Welcome Center (CWC) is a service centre for people, who want to settle or return to Carinthia or who want to create an enterprise or resettle their enterprise in Carinthia. They support the start, give information according to chances and possibilities, create networks and share experiences. Additionally, they are in contact with stakeholder of different branches.</p> <p>Some initiatives – trying to pull creative people to Carinthia – have already existed, but have not been pursued.</p> <p>Soft and private facts link people to Carinthia.</p>	
Bosnia and Herzegovina	<p>A satisfactory number of Higher education institutions offer enough space for education in culture and art. In addition to state academies, more and more private faculties are being opened for various artistic, cultural, marketing and ICT branches, as the demand for this type of education is increasing. Although much of the curriculum and education system has been taken over from the era of Socialism, Higher education institutions are introducing innovations in the way of education, using digital techniques and equalizing the relationship between theory and practical work.</p> <p>As a former industrial centre of the ex-Yugoslavia, the city of Tuzla and the Tuzla region have a long industrial tradition. The city emerged as a settlement with rich deposits of coal and salt. Mining plants were built, followed by factories of various industries and thermal power plants. After the war in the 1990s, many</p>	<p>Students who graduate from art academies are left in the field of self-employment, freelancing, or give up their vocation due to inability to find employment. Academies have very little or no connection with cultural institutions, do not give any support for further cultural and creative development to individuals who graduate, nor do they design innovations and trainings that would help these individuals in further independent work.</p> <p>For many of these abandoned industrial premises, property-legal relations have not been resolved. The government, on whose land these abandoned facilities are located, is not showing enough determination to turn them into spaces with a different purpose; they do not see a perspective in creating an innovative space for CCIs. In cases where the government made an effort to resolve property-legal relations for an abandoned</p>

	<p>factories were abandoned. To this day, they remain uninhabited, unused and have not been given a different purpose.</p> <p>From a typical mining city, Tuzla has become a very interesting tourist destination in B&amp;H and beyond, with the introduction of innovations and the involvement of CCIs. Such an expansion of the touristic offer and changes in industrial and economic development took place precisely in cooperation with local and regional CCIs. As a medium-term goal, ICT hubs have been formed, which would support the further development of the community in terms of digital innovations. The City has a need to digitize public institutions, which would be a long-term plan to integrate CCIs into the City's innovative strategy.</p> <p>Action Plan of the B&amp;H Cultural Policy Strategy, published in 2011, listed the CCIs as an important sector in B&amp;H's economic development. Their priorities include strengthening the cultural industries sector, strengthening the capacity of cultural tourism and strengthening the capacity of cultural institutions. The strengthening of cultural industries is set through the priority needs of establishing clusters of cultural industries and standardizing the measurement of sectoral operations through the envisaged special sector within cultural statistics.</p> <p>Measures to achieve goals and priorities include increasing the number of companies in the cultural industries, changing the number of employees, introducing new jobs and increasing cultural spending. Action plans are also planned at all levels of government, training of public servants on copyright issues and application of legislation.</p> <p>Tuzla and Tuzla Canton has always been an industrial region of Bosnia and</p>	<p>building, that space was sold for the needs of building a shopping centre.</p> <p>CCIs that were involved in the processes, development and innovation strategy have not received adequate awards and recognitions. Their benefit is still not recognized as the industry of the future.</p> <p>Education of the population in the field of digitalization is needed. More investment in CCIs is needed.</p> <p>This part of the B&amp;H Cultural Policy Strategy has never been implemented. No administrative body recognizes creative industries for their competences, nor in the sense of existing departments, functions, etc. which deal systematically with issues of their development. Similarly, as in the countries in the region (e.g. Croatia, Montenegro, Macedonia), no state body, as a subject of its competencies, has a cultural or creative industry policy, including the implementation of strategic projects for the development of these activities. The problem is that there are no official statistics on economic gain in the field of culture, except for the funds provided by the budget of governments and local communities.</p> <p>Although CCIs are included in some Action plans for the last 10 years, there is no administrative body on the state level that recognize cultural industries and therefore a cultural policy strategy has never been implemented.</p> <p>Excellent short-term plan was changing the way the City Authorities think about CCIs as a future industry on which to base the economic development of the City of Tuzla and the Tuzla region, and building the infrastructural conditions for the</p>
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	<p>Herzegovina where mining, energy, chemical and food industries predominate. After the war in B&amp;H, during the transition period, many factories were closed, and the general economic situation was in sharp decline. At the beginning of the 21st century, the city authorities recognize this problem and innovate in an industrial sense, building Tuzla as a potential tourist and cultural centre of B&amp;H. New cultural institutions, art academies are being established, new and existing festivals are being organized, ICT hubs are being built. The infrastructure and the necessary conditions have been created for the industry to make a complete turn, from the mining and energy region to the cultural and creative industry.</p> <p>Tuzla has higher education institutions that attract young creative people in need of education in the field of CCIs. The population of the Tuzla Canton region gravitates towards Tuzla as a regional, economic and industrial centre. As a result, the opportunity for professional development is significantly increased compared to suburban communities. By opening ICT hubs, numerous NGO's, exchange of knowledge and experiences, opportunities for start-up entrepreneurship, Tuzla provides a better quality of life and a greater opportunity for employment and training.</p> <p>Tuzla, as a regional centre, attracts young and creative people. Various higher education institutions offer a very good education system.</p>	<p>development of CCIs. However, the financial resources for that development have been reduced every year, and the existence of certain cultural institutions and events has been called into question. The medium-term goal of maintaining and strengthening cultural and creative industries has not been met, precisely because of the lack of a long-term plan and implementation of the idea of CCIs becoming the leading industry in the Tuzla region.</p> <p>In the absence of a proper CCIs development strategy, job opportunities in the public sector, insufficient financial support from city authorities for start-up entrepreneurship, creative people very rarely remain in this region.</p> <p>The lack of a cultural strategy, as well as a strategy for the development of CCIs, is the main culprit for the departure of creative people from the city of Tuzla. Gravity goes to the capital B&amp;H Sarajevo, where the standard of living is twice as high as in Tuzla. The migration of the population from B&amp;H to European countries is constantly increasing, due to political insecurity, lack of employment, low recognition of creative work.</p>
Bulgaria	Main instrument for support of CCIs is National Strategy for Development of The Creative Industries in Bulgaria - it aims to capitalize the creative industries in Bulgaria, providing an opportunity for artists to acquire	Although there are many people and institutions that can improve the CCIs R&D, trainings and educational base, they are somewhat stagnant and unwilling to take matter in their own

	<p>entrepreneurial knowledge and business to fully recognize and realize the economic potential of creativity based on effective protection of intellectual property. The expected result of its implementation is full use of the potential of the creative industries for the development of the Bulgarian economy and culture by creating new jobs, expanding the internal market with quality goods and services, increased exports, increased tax revenues and by promoting Bulgarian culture. The strategy is aimed at creating real preconditions for the development of creativity in market conditions by encouraging entrepreneurship, building a balanced system for protection of intellectual property and effective mechanisms for protection of the national cultural heritage.</p> <p>Many places are suitable for either reconstructions or renovations to fit the purpose of the CCIs. Most of them are either state or municipality owned and easy to acquire.</p> <p>Also there are different programs and measures, which support creative industries, as follows: -National Culture Fund Bulgaria - official arts council for Bulgaria. It supports on national level the creation, development and distribution of Bulgarian culture and arts in the country and abroad. The fund assures following programme supports: DEBUTS, CRITICISM, CULTURAL HERITAGE, MOBILITY, AUDIENCE, and SOCIALLY ENGAGED ARTS. -Sofia Culture Program, which aims to encourage cultural organizations to search for solutions and implement projects that allow them to develop their creative activities (also during a pandemic and under certain constraints).</p>	<p>hands and start working together for the good of the industry. “Every man for himself” type of work and refusal to form alliances.</p> <p>Many of them are in a condition that requires large investments into rebuilding/renovating. Eventual bureaucracy and poor communications within the state and municipal authorities might be a weak point.</p> <p>The inclusion of CCIs in the local and regional innovation strategies to this date is limited. Financial support is scarce and insufficient.</p> <p>Many improvement plans are still in the development process. Limited reach of policies that intended at helping CCIs.</p>
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	<p>Upcoming support for CCIs is the establishment of “Media Motor Europe Innovation Hub” in Sofia - at the beginning of 2020 started the implementation of an international project, funded under Horizon 2020. The project plans to build a strong and vibrant European media-tech and deep-tech ecosystem targeting the media and the creative industries. It will assist high-potential start-ups and scale-ups to get to the market and to connect with Investor Networks. Leading players from the media industry ecosystem in Bulgaria will be involved in close cooperation, including media companies, universities, R&amp;D organizations, deep-tech companies and experts, business accelerators and incubators, business mentors, and consultants. Support and assistance will receive a group of deep-tech and innovative companies with significant R&amp;D and market potential from Bulgaria.</p> <p>There are great opportunities for including CCIs more actively in the local and regional innovation strategies. In some cases, there are partnerships created between municipalities and CCIs.</p> <p>In recent times, CCIs are being more than ever prioritized by policy makers. Set as a target for improvement by the Ministry of Culture.</p> <p>Easy migration and settlement of foreign artists. High quality of life can be achieved with a reasonable amount of resources. Foreign fresh ideas are always welcomed by local CCIs.</p> <p>Once established, pay, prospects and further settlement into the segment is easy and doable.</p>	
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	<p>There are incredibly academically capable people that can bring great insights on CCIs, and also there are many academic institutions that specialize in creative and cultural activities: Master's degrees in New Bulgarian University, University of World and National Economy; The University of Veliko Tarnovo; Varna University of management, etc.</p>	
Croatia	<p>CCIs specialists are highly educated professionals who work with universities (more often than in other sectors) and intensively use new products, processes and technologies of other companies in their work. Different possibilities for higher education and research exist in Croatia; universities are mostly associated with big cities especially Zagreb, Rijeka, Split and Osijek.</p> <p>The majority of all industrial complexes regarded as heritage sites are nowadays located in the wider city center area and are commonly considered valuable cultural and development potential. The City authorities are decisive, liable and the most influential component in the process of heritage preservation as well as the creation of future directions for changing the perspectives of the industrial legacy.</p> <p>National innovation strategy of the Republic of Croatia for the period 2014-2020 defines the long-term development and systematic encouragement of innovation as fundamental values of the success of the economy, but also of society as a whole. The innovation strategy is improving the innovation system and the legislative and fiscal framework, determines the method of communication and models of cooperation between the public, scientific research and business sectors in order to develop new products,</p>	<p>It could be offered more support of the state in R&amp;D opportunities in CCIs.</p> <p>Lack of financial resources for reconstruction.</p> <p>The creative industry is fragmented, organizationally and statistically and in that sense is not covered with national innovation strategy, but although it is very general formulated in some parts that can be found in it.</p> <p>Strengthening institutional and infrastructural support in the development of the creative and cultural industries are key factors in economic growth and the inflow of new investments into the creative and cultural industries. In accordance with the needs of the Sector, further development and improvement of infrastructure and business support institutions is intended for the development of the industry itself and connecting the creative and cultural industries with other industrial sectors.</p> <p>Strengthening institutional and infrastructural support in the development of the creative and cultural industries are key factors in economic growth and the inflow of new investments into the creative and cultural industries.</p> <p>Still most people leave Croatia than immigrate to it.</p>

	<p>services, business processes and technology, and also the application of scientific research results in the economy and society as a whole. The main strategic goal is to increase the level of competitiveness of the Croatian economy and increase social welfare as a result of investing in knowledge, creativity and innovation.</p> <p>Strategic plan from Ministry of culture contains two general objectives. First general objective is Development of cultural and artistic creation and production with six specific objectives: 1.1. Support for artistic creation, entrepreneurship and participation in culture; 1.2. Development of extra-institutional (independent) culture and visual art; 1.3. Encouraging the development of the performing arts; 1.4. Improvement of audio-visual activities and media; 1.5. Development of literary-publishing and library activities; 1.6. Encouraging the development of cultural events from the national; importance and status in the Republic of Croatia and abroad.</p> <p>Second general objective is to Protect and preserve cultural heritage with five specific objectives: 2.1. Development of the service for protection and preservation of cultural heritage Of the Republic of Croatia; 2.2. An optimal model of cultural protection and management; 2.3. Development of museums activity; 2.4. Development of the archive service with the provision of conditions for regular download archive material; 2.5. Availability of cultural heritage in the digital environment.</p> <p>Industrial Strategy defines the basic goal of Croatian industry for the period 2014-2020, and it reads: repositioning the identified strategic activities on the global value chain according to the development of activities that create added value. In addition to the basic</p>	
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	<p>ones, other goals are defined, which are: growth of industrial production volume at an average annual rate of 2.85%, growth in the number of new employees by 85,619 by the end of 2020, of which at least 30% are highly educated, labour productivity growth by 68.9% in the period 2014-2020 and an increase in exports in the period 2014-2020 by 30% and a change in the structure of exports in favour of exports of high value-added products. Creative industries are included in strategy through areas of activity of the European Commission for promotion competitiveness of the industry.</p> <p>Larger cities attract talented people and provide them professional development.</p>	
Germany	<p>There are a couple of strong film universities in the region. Other, leading universities are not focused on CCIs.</p> <p>Industrial legacy is strong with the bike and car being manufactured here. Automated transport is therefore a strong R&amp;D outcome in this region.</p> <p>The regional government is aware of the importance of CCIs for economic and social strength. There is money flowing into agencies and organisations to support.</p> <p>There is a good cultural strategy in the area, and certain companies and aspects of the sector are included.</p> <p>This region struggles to attract talented people in the CCIs areas due to the strong cities surrounding which offer a greater creative culture and support. However, the gaming and SaaS sector is strong here and therefore talent is great in this area.</p> <p>Only in the areas when this region is strong as mentioned above.</p>	<p>Not enough academic focus on CCIs in this area.</p> <p>The transport sector is so strong here that some of the other sectors, including CCIs, can be lost.</p> <p>The money flowing into the government agencies can be too low to have a great impact, and therefore miss some important opportunities.</p> <p>However, not all CCIs can be or are represented.</p> <p>More technical CCIs are active, rather than artistic, when compared to other regions.</p> <p>For CCIs talents that want to move up in their sector, they tend to move to other cities, such as Berlin. This creates a talent drain in other areas though.</p>

<p>Hungary</p>	<p>Educational base is given across the country, i.e. portfolio of the local university (International Studies - Master program) – is not specifically about CCIs but provides supportive, linked programs.</p> <p>In HEIs students can establish good personal connections, and they can work with professionally good professors.</p> <p>There are a lot of old factory buildings from the 20th century in Vas County. We have /had more programs which aimed to redefine or renew these old places:</p> <ul style="list-style-type: none"> <li>• The MAPS - Military Assets as Public Spaces project was working on redefining the military heritage and an action planning was built for that purpose.</li> <li>• Rehabilitation of former shoe factory areas was a huge project in City of Körmend. The utilization of the area was important for cultural and economic recovery purposes, too; event and festival center tasks can be performed there in the future.</li> <li>• There are plans for the revitalization of former industrial sites in City of Kőszeg (Felt Factory; Watermill).</li> <li>• The Kőszeg Brewery heritage is alive: Kőszeg beer as a brand is resurrected, but the factory is lost, producing is not here.</li> </ul> <p>More and more areas plan with smart solutions – to build a smart service /smart city / smart urban transport etc. The innovation factor in these efforts is quite high.</p> <p>Innovation strategies were made during the years (for instances Castle of Sárvár City).</p> <p>Famous thermal baths with a long history play an important role in the region.</p>	<p>Lot of quick courses instead of “more year studies” can destroy quality of trainings.</p> <p>Small market, small university partial effects on CCI business development. Studies do not necessarily cover the employer’s expectations in this field.</p> <ul style="list-style-type: none"> <li>• Buildings are in ruined state - they have high maintenance costs.</li> <li>• The buildings are under historic protection – legal obligations.</li> <li>• Complex ownerships of the buildings (state – municipalities – private).</li> <li>• Capital intensive projects and the timing are questionable.</li> <li>• City of Kőszeg has legacy in textile industry and nowadays it is lost, too.</li> </ul> <p>Other weak points are:</p> <ul style="list-style-type: none"> <li>-Lack of incubation facilities.</li> <li>-Common regional cultural strategy does not know – cities have own strategies.</li> <li>-Implementation of the strategy is not always possible by own resources.</li> <li>-Lack of specialized trainings.</li> <li>-Common regional industrial strategy does not exist, because cities have their own strategies.</li> <li>-Few possibilities of work.</li> <li>-Small market, small variety, few chances for spill-over effects.</li> <li>-Financial recognition of employees in the cultural area is mediocre.</li> <li>-Studying in bigger cities, settling there after graduation.</li> </ul>
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	<p>The City of Szombathely places great emphasis on the development of rehabilitation opportunities related to these spas in the cultural strategy. 3D walks in museums are available in Szombathely. Cultural institutions have medium term objectives.</p> <p>City of Szombathely plans to strengthen the health industry, and the above mentioned thermal baths have a huge role in the field of rehabilitation.</p> <p>There are a lot of awards / titles which boost competition and attract talented people. A very prestigious award is the <b>Prima Primissima</b> award: <a href="https://www.primaprimissima.hu/">https://www.primaprimissima.hu/</a></p> <p>The award goes every year to those people who are prominent in the fields of domestic science, art, culture and sports. Junior Prima award goes to the young generations and there is a Prima award for the counties' outstanding talents.</p> <p>Other awards in the region, with which talented people are recognized:</p> <ul style="list-style-type: none"> <li>• The man of the year from Vas County</li> <li>• Lifetime award for the culture of Szombathely City</li> </ul> <p>Other aspects:</p> <p>-Attractive surroundings to live here with family or live alone and create: closeness of the nature, calmness, closeness of Austria - best facilities.</p> <p>-Institutions have innovative, initiator employees, employees of cultural institutions take part in trainings regularly.</p> <p>“Szombathely is waiting you back” - Scholarship program for full-time students residing in Szombathely who are starting or continuing their studies in order to obtain their first degree in the shortage professions in the region. Young generations can start adult life with perfect living conditions.</p>	
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	Lot of them return because of strong family links.	
Moldova	<p>Some strong points are:</p> <ul style="list-style-type: none"> <li>-Capable and talented human resources able to do research.</li> <li>-High cultural and creative potential of the citizens in the southern region.</li> <li>-Cahul has an industrial area, with abandoned buildings with potential to be used for CCIs development.</li> <li>-The Program for Socio-economic development of Cahul district encompasses the priority of development of a cultural environment which promotes artistic creativity.</li> <li>-Starting in 2021, it is planned to create and write separate strategies, including in the field of culture.</li> <li>-Favourable geographical position - the city is located at the intersection of 3 countries (Moldova, Romania and Ukraine) and has large cities nearby, such as Galati, Braila, Odessa.</li> <li>-Culture-friendly environment (dance ensembles with international merits; fashion brands).</li> <li>-Educational institutions are very open to help, even if they do not have enough financial possibilities.</li> <li>-There is potential and talented people to work with.</li> <li>-There are several houses of arts/culture and creative centres for children.</li> <li>-Foreign companies (Italian, German, Turkish) have opened branches in Cahul.</li> </ul>	<p>Some weak points are:</p> <ul style="list-style-type: none"> <li>- Insufficient financial resources are a barrier for engaging in R&amp;D activities and reduce the motivation.</li> <li>- The University B.P.Hasdeu from Cahul is the only research institution in the city.</li> <li>- The business sector is not very interested in collaborating with the University.</li> <li>- The buildings are difficult to rehabilitate; authorities and entrepreneurs can't afford it.</li> <li>- There is no specific regional or local innovation strategy targeting Cahul.</li> <li>- Even though Cahul is the only city with creative profile in Moldova, the Program for Socio-economic development of Cahul doesn't mention anything about CCIs sector.</li> <li>- There is no specific regional or local cultural strategy targeting Cahul.</li> <li>- There is no specific regional or local industrial strategy targeting Cahul.</li> <li>- Insufficient funding opportunities.</li> <li>- The infrastructure in the field of CCIs is not highly-developed.</li> </ul>
Romania	<p>One <u>short training course</u>, offered by the "Politehnica" University of Timisoara in partnership with the Intercultural Institute of Timisoara is designed for people with interests in creative industries. The core of the program is business, management and communication know-how, entrepreneurship and digital competences for those who want to make a living within the wide definition of creative industries, emphasizing the</p>	<p>Just isolated and few education and training opportunities exist today, at the level of public HEI in Romania. Some private initiatives try to compensate this deficit, but insufficient to the demand level in this topic of CCIs. Promoting classroom environments that ensure active learning and encourage students to make use of creativity in conjunction with other skills is one of the actual challenges; additionally, programs for</p>

	<p>need for the promotion of a pro-creativity culture, which stimulates the flourishing of creativity among teachers and students.</p> <p>More specific, in technical universities from Romania there is a strong educational framework based on scientific novelties, which helps, i.e. architect teams working on projects for new “Aula” Buildings to use innovative finishing techniques, space design etc., destined to accommodate a wide range of cultural phenomena which adds value to the creative and educational process, inclusively by attracting young people to art and culture. Another attribute of such modern “Aula” buildings is the communion between green spaces and buildings locations, which allows students to study / work in friendly / „natural“ environments.</p> <p>The machine-building and metal-processing industry remains the main branch of the industrial economy, accounting for about one-fifth of bulk industrial production. There has been a strong tendency to concentrate on such modern branches as the electronics industry, as well as to widen and diversify the range of production. Beginning in the 1990s, foreign electronic manufacturers opened facilities in Romania, attracted by low labour costs and the proximity to western European markets. The ranking of the Romanian cities by their creative economy index shows that the first five creative cities were important industrial centres during the socialist period (and some of them still are).</p> <p>In Romania, the sector of CCIs has made remarkable progress in the last years, contributing with 7% of its GDP. An innovation-driven economy, based on CCIs, has exhibited relative strong global pipelines but weak local buzz,</p>	<p>LLP in the field of CCIs are practically non-existent in Romania.</p> <p>At the beginning of the 21st century, much heavy industry was standing idle or operating well below capacity. Light industry, on the other hand, proved to be a hopeful prospect, attracting some foreign joint-venture investment. There is a link between the process of deindustrialization in the post-socialist period and the number of small firms that operate in CCIs.</p> <p>Insufficient and unbalanced support projects - incubators, technology transfer centres, science and technology parks - are running based on public policy tools managed by Regional Dev. Agencies able to form in the future, a complex and comprehensive support ecosystem for CCIs, to the extent that such initiatives could be interconnected.</p> <p>The cultural sector of Romania does not benefit from a strategic document assumed by the government on medium or long term in order to be implemented nationally, regionally and locally by the authorities.</p> <p>Managing industrial transition process, directed towards all policymakers seeking to improve the “what” and “how” of policies that promote industrial change, insufficiently identifies in our country / regions how regions can become more competitive and more resilient in the context of major shifts brought about by globalisation, decarbonisation and on-going technological change, based on CCIs support.</p> <p>The well-educated labour phenomenon had a double route in Romania, after 1989: from the small</p>
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	<p>considering a variety approaches to enhance the local buzz, specifically the social networks and innovation milieu of a city/region. In Regional Operational Program (POR), <u>Priority Axis 1: Promoting innovation in enterprises</u>, through innovation support and technology transfer regarding the regional Smart Specialization Strategy, Investment Priority 1.1 addresses directly many domains, including CCIs.</p> <p>CCIs have a transversal, supporting role for promoting the role of culture in the context of sustainable development, support creative economy, increasing access to culture, diversity of expressions, cultural integration of the Romanian culture in the international cultural circuit and also increasing the quality of services provided by public administration in culture and better functioning of institutions for cultural development, better conditions for the creators, the use of new information and communication technologies in culture and training in the field.</p> <p>By assuming the concept of Open Art City and obtaining the title of European Capital of Culture in 2021 represent an outstanding opportunity for the economic development of Timisoara City, especially for the development of CCIs in the sectors such as arts and culture, sports, amusement and recreation.</p> <p>In the programming period 2014-2020, <u>Smart Specialisation Strategies (S3) in Romania</u> have been implemented both at national and at regional level, each level being guided by specific methodologies for the identification and operationalization of priorities, and performing distinct activities. CCIs were present at national and regional levels, especially concerning ICT applications and other economic activity domains, strongly linked to regional / local</p>	<p>towns to the big cities and abroad (the so-called brain drain). Between 1990 and 1996, over 40% of the total Romanian emigrants to Canada, Switzerland and UK was well-educated people. There is also a lack of specialists in some particular fields of film production such as casting, costumes, scenography, make-up artists, sound specialists, and this sometimes affects the quality of the movies.</p> <p>A lack of „courage“ is shown by companies to make a tight connection between them and universities, with emphasis put on attracting students to research and creation / innovation, so that they can easily be integrated into the labour market after graduation.</p> <p>Still, the human resources involved in basic creative activities register proportions below 8% of the entire active population, as compared to the EU developed regions or the most developed Romanian region where we encounter proportions over 20%. Industrialisation and de-industrialisation had obvious effects on the human resources in the CCIs, materialised in the decrease of the number of employees or in the non-adaptation of the jobs to the requirements of the free market and new technologies.</p>
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	<p>cultural, educational, business environment etc. specificities. <u>The Working Group on Understanding and Managing Industrial Transitions</u>, where representatives from Romania are contributing, will support regional (and where appropriate national) authorities facing major industrial transitions by charting actionable paths towards employment-intensive economic growth.</p> <p>Romanian cities are in competition to attract well-educated and creative people not only with other Romanian cities, but especially with the cities from abroad.</p> <p>The most developed regions in Romania have higher shares of human resources involved in technical, scientific and basic creative activities. Thus, the innovative companies, especially those active in CCIs, choose the regions having a reliable and flexible potential to provide local talents and manpower having specialized skills and competences in their field of activity.</p> <p>Today more and more companies are willing to invest in research and innovation in CCIs (mainly software applications), in collaboration with graduate students, i.e. young professors participate in incubation programs in Romania (e.g. Innovation Labs and Future Makers), with a significant involvement of large companies in these programs (e.g. Orange, BRD, Carrefour, etc.), but still these implications are relative rare and occasional, not systematic.</p>	
Slovenia	<p>Universities are aware of constant change in the field of creativity. Also, universities have developed several programmes and also the specialised program for visual arts, and also aware that graduates also need to be able to sell their work.</p> <p>Programs of the universities to broaden and empowered to function at all levels of the society, including reflection of</p>	<p>Many places are abandoned. Not enough awareness about CCIs.</p> <p>Sorrow is the place of Remiza, that functions today as a store. And creative sector feels pain seeing such usage of heritage.</p> <p>There is need to see broadly and seek for potentials through tourism, industrial heritage in furniture design by Meblo. Heritage could be awakened,</p>

	<p>own work in terms of accepting constructive criticism.</p> <p>Municipality has supported tertiary education, also financially in the past years.</p> <p>Also, informal education – case of Popri start-up programme for primary and secondary school pupils. Students lack participation.</p> <p>Museum of Goriška was engaged in preserving some of the heritage.</p> <p>Industrial legacy can work as potential for creative sector to expand and explore. Spaces are very inspirational and challenging for a creative environment.</p> <p>The municipality implemented the Urban strategy, outlining the development of Smart specialisation, and it includes CCIs, but only indirectly through indirect goals.</p> <p>The Strategy is in process of updating. Much cooperation through project applications (i.e. European Capital of Culture).</p> <p>Impact of EU and its policies, awareness is top-down, the awareness on importance and potential of CCIs is coming from EU. National level has less awareness and subsequently the local level even less.</p> <p>A signal – European capital of culture signals the Nova Gorica has potential.</p> <p>Local programme for culture exists and cultural sector is well defined through very specific goals.</p> <p>Youth strategy will give more impacts to the sector – is in preparation.</p> <p>While preparing the candidature for European capital of culture much connections and awareness was raised on importance of CCIs.</p> <p>The identity of the municipality is understood as cultural and creative city. Aim to involve CCIs in other strategies, also within the strategy for elderly, emphasis on cross fertilisation of sectors.</p>	<p>even with EU funds. More actors could be connected to explore further potentials.</p> <p>More importance on reading the needs of the people and less implementation in the strategies.</p> <p>The sector needs to have a holistic approach also through housing, education etc.</p> <p>Too little emphasis on creative sector in that same programme (local plan for culture).</p> <p>More emphasis on own uniqueness – the Goriška has wider potential and focus would be welcome to identify the main potential also for wider recognition.</p> <p>Students have issues with student work, students have issues with obtaining permission (issues with Administrative unit, too rigid bureaucracy and procedures), “coloured” students feel being supervised by police.</p> <p>There is no campus, no student dorms, issues with attracting Erasmus students who are not able to get accommodation.</p> <p>Many foreign students, also from India and Nepal, many students via Erasmus programme, after initial shock of living a small city, they love it.</p> <p>It is easier to attract than to attain.</p> <p>Bureaucracy is too rigid, especially when speaking foreign language.</p> <p>Issues with housing, not only for students, also for young families.</p> <p>Students do not have one-stop-shop organisation with information.</p> <p>Much can be done to attain the local young people. Need for cooperation between inhabitants – a common meeting point to interact, also for CCIs.</p> <p>People need to feel welcome and at home.</p> <p>Several university graduates lack entrepreneurial knowledge, especially from CCIs.</p>
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	<p>Foreign students report local inhabitants talk about culture and they find it important.</p> <p>Some topics are addressed in Regional developmental plan, strong aim to connect with nearby municipality of Ajdovščina, Vipava, Šempeter.</p> <p>Nova Gorica desires to be regional centre.</p> <p>Strong identity and pride of inhabitants over the region.</p> <p>HEIs are in the city (lots of good and qualitative study programmes, from different fields, from natural sciences to social sciences), students come and go, but also stay.</p> <p>Talented people have moved to Nova Gorica and stay because they created families.</p> <p>City is attractive.</p> <p>High awareness on municipal level to improve the conditions.</p> <p>Nature and location, cross border cooperation is a big strength point.</p> <p>University of Maribor is a valuable player in the city, the university has positive experiences, works together with companies, has tradition and knowledge. University includes students in development projects.</p> <p>Programmes from the field of entrepreneurship were developed as part of non-formal education.</p> <p>UM is a good team player in the region.</p> <p>Strategies and directions on how to maintain it are already established.</p> <p>Parts will be dedicated to CCIs. Melje (area) is a wonderful part of the town and there are plans to revitalise it.</p> <p>CCIs are recognised only, not further developed.</p> <p>Local programme for culture exists.</p> <p>Municipality introduced scholarships for cultural workers to mitigate Covid-19 situation.</p> <p>A network of regional developmental agencies exists and they could participate in development and</p>	<p>CCIs should start connecting with persons who have complementary knowledge (e.g. economists). People in CCIs are very individual and they oftentimes underestimate other profiles.</p> <p>Entrepreneurial thinking (and spirit) in CCIs is oftentimes underestimated.</p> <p>Also, not all students have the entrepreneurial spirit.</p> <p>Best negative example: 4 students who are cooperating in sharing experiences but they develop their own brands.</p> <p>Suggestion: to establish the support in form of scholarships; it seems as being forgotten. Much of the skills have disappeared in terms of intangible industrial heritage.</p> <p>There is potential for further development of Kibla gallery that demands big spaces for productions.</p> <p>Many strategies and not enough knowledge whether CCIs are included.</p> <p>Lack of Action Plans.</p> <p>Local programme for culture did not have developed the part on creative industries.</p> <p>Not enough knowledge on what creative industries are, low awareness among people.</p> <p>There is a distinction between cultural sector that is well taken care of, and creative sector is more connected to industry.</p> <p>System of mentorship could be introduced, by people who would be dealing with implementation.</p> <p>On the city level, there is a lack of persons who would coordinate different stakeholders operating on the field.</p> <p>Many sectors and actions are not connected (to form a start-up ecosystem).</p> <p>Individuals and creative people might feel alone in the system. Creative people are creative for intrinsic motivation; they do not care about material world.</p>
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	<p>awareness raising. Cooperation was already established.</p> <p>Favourable geographical position (close to Graz, Venice).</p> <p>Many empty spaces in the city (could be used for CCIs), industrial heritage.</p> <p>Possibilities for education, to gain knowledge, university in the city. Good and internationally recognised lecturers deliver lectures at the university.</p> <p>PODIM conference – is relevant and attracts people (entrepreneurs, investors, lecturers), Festival LENT attracts people, and people respond.</p> <p>PODIM is biggest national start-up conference.</p> <p>Inhabitants are very self-critical, and there is not enough self-confidence.</p> <p>Big potential. Peaceful for creativity. People like to stay.</p> <p>Quality of life is good, many cultural events.</p> <p>Those who have met the city like to come back.</p> <p>Creative people have “artistic soul” and they oftentimes do not think about how to earn money – art and creativity is more important to them.</p> <p>Over 100 nationalities live in Maribor, according to a social research.</p>	<p>In terms of employment the city can't compete with the capital where all well-paid jobs are.</p> <p>Not easy to find a job in Maribor.</p>
Ukraine	<p>Universities have a key role.</p> <p>Ukraine was part of the USSR, which inherited powerful industrial enterprises. There are many production areas and premises.</p> <p>Some strategies / programs are presented below:</p> <ul style="list-style-type: none"> <li>-Strategy for the development of the Transcarpathian region until 2020.</li> <li>-Program of socio-economic and cultural development of the Transcarpathian region for 2019 – 2020.</li> <li>-Comprehensive program for the preservation and use of cultural</li> </ul>	<p>The educational challenges include: most CCIs subject areas are not taught any more as core-curricular subjects in primary school are not examinable, thereby receiving minimal attention; most of the key subject areas of CCIs are not part of the curriculum at secondary school level; CCIs does not occupy a significant position in tertiary education, and indeed few higher education institutions train in CCIs.</p> <p>This need for higher education training and consequent professionalism presents itself as one of the major challenges regarding youth empowerment.</p> <p>The bulk of production areas and premises inherited from large</p>

	<p>heritage of the Transcarpathian region for 2016 – 2020. -Uzhgorod City Development Strategy – 2030.</p> <p>The University of Culture and Arts is located in Uzhgorod, which attracts various talents from all over the region. The region also has a well-developed social events (e.g. wedding) industry, which provides job opportunities for presenters, musicians, florists, song writers, publishers, composers, arrangers, producers, recording and marketing companies, printers, studio and stage sound engineers, musicians, singers, dancers, promoters, talent scouts, entertainment writers and showbiz consultants, stage designers, lighting crew, structural engineers, advertising practitioners, media houses and many more professionals.</p> <p>Ukraine is home to a dynamic and distinctive indigenous culture and people of different nationalities. Being rich in cultural traditions and historical events of international significance, it remains the center of preservation of national identity and uniqueness, as well as the bearer of creative ideas inherent to the Ukrainian people. The country possesses talented people and creative potential, cultural background, growth in demand for creative content, and technology progress. These advantages can help Ukraine to benefit creatively, culturally, economically, and socially.</p> <p>Choosing the place of living creators estimate not only opportunities for work but also lifestyle (musical milieu, arts, technologies, various types of sports). In Ukraine, such places can be found just in big cities (Kyiv, Odessa, Dnipro, Lviv), while small cities and towns creative people seeking to leave.</p>	<p>enterprises are not used. Unfortunately, due to dubious privatization schemes, most belong to private owners who want to make extra profits from the possibility of using them.</p> <p>At the local and regional level, the development of CCIs is not mentioned separately, but only in the context of cultural development and development of innovations, which are part of the overall development strategies.</p> <p>Despite the great potential, the creative and cultural industries are not adequately explored as a form of economic empowerment on local and regional level.</p> <p>Enforce legislation for streamlining the industry; provide tax incentives for investors in local CCIs; establish systems to ensure investors feel comfortable and safe in the local operating environment; eliminate corruption and other forms of extortion; focus efforts on bilateral trade agreements to ensure greater and easier access to markets for local CCIs; and include creative and cultural subject areas in education to provide for talent development from an early age.</p> <p>The age structure of the population within the analysed area has been changing; in general the share of elderly people is growing in parallel with the decreasing of the young generations. Based on the distribution of various age groups, the age cohorts of under 25 are not populous, and the share of adults, middle aged people are relatively high. The most populous age groups are around the age 30-34. Low wages and purchasing power is noticed.</p>
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### 5.3.2 Danubian scores on the creative ecosystems

As elaborated in the chapter 3.4 the focus groups conducted demanded the discussants to evaluate the level of development for each of the posed questions. As the questions adequately described the CCIs ecosystem the scores went as follows: score 1 was least developed and score 4 was most developed. The diagram below (see Fig. 2) therefore demonstrates the CCIs ecosystem: the more open the more favourable.

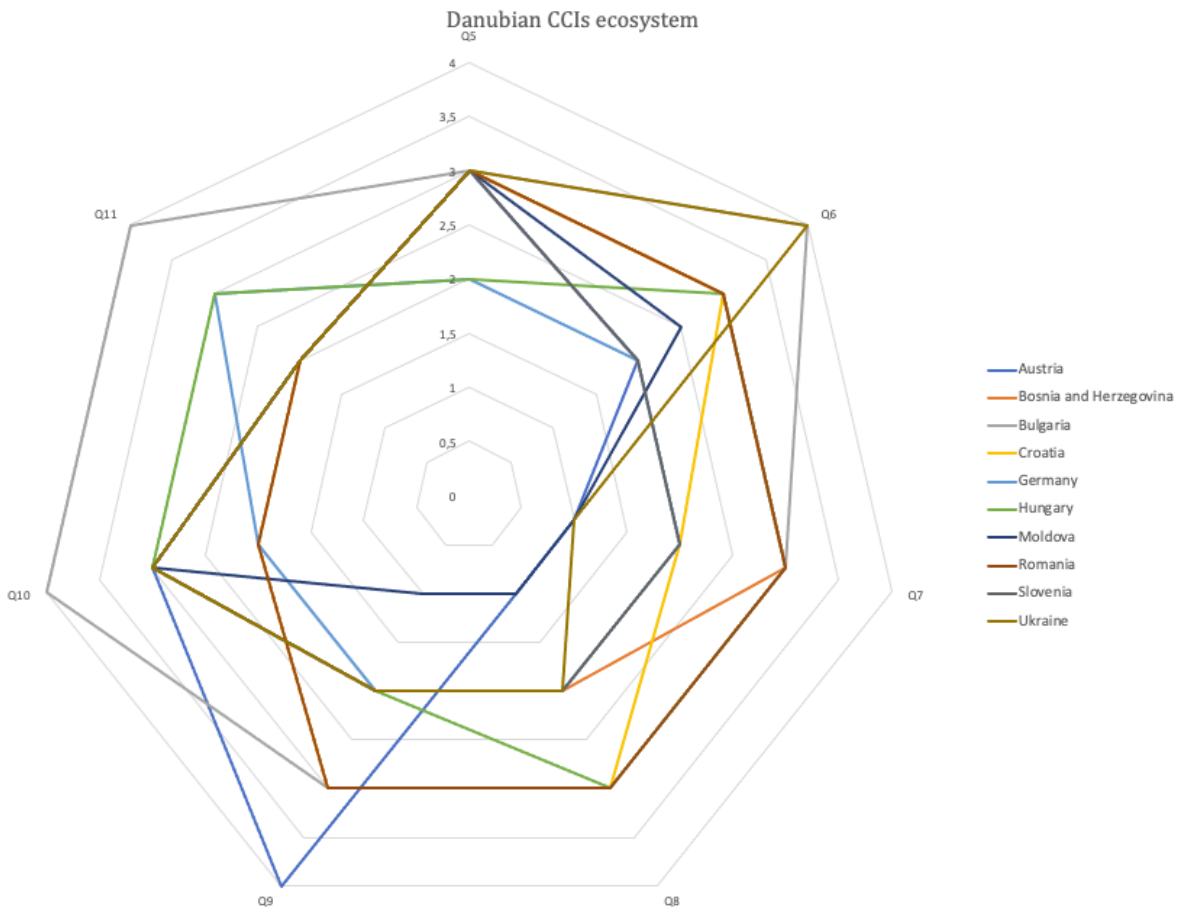


Figure 2 – Danubian CCIs ecosystem

## 5.4 Cooperation and collaboration within the Danubian regions - networks

When comes to question on how networks among stakeholders in the field of CCIs contribute to establishment of favourable ecosystem for CCIs, it is recognised that cooperation is prerogative for joint actions. In Austria, many institutions are involved in establishing the cooperation links, also in Slovenia, Germany, Moldova and Croatia. In B&H main cooperation are formed through joint actions such as theatre or film festivals. Also, cooperation is achieved through EU project collaborations (Hungary, B&H) or inter-entity collaborations (B&H); when it comes to cooperation, clustering is detected in Romania, stakeholders from Slovenia also expect the clustering to start after the joint reference point for CCIs stakeholders is created. Local authorities are working to be a contributor to the processes of clustering (Romania, Slovenia). Cooperation between HEIs and companies is detected in Slovenia, also in the fields of CCIs (in Nova Gorica). In Slovenia, CCIs are also open to international cooperation – as consequence of geographical positions of both Nova Gorica and Maribor.

Cooperation is recognised as factor of success, with high flexibility being important (Austria), similarly in Bulgaria, NGOs from the field of CCIs are always open for cooperation (also in Hungary). In Germany, the main carrier of cooperation is business success potential. Additionally, there are high levels of inter-sectorial trust among CCIs in Bulgaria and Croatia, with trust being strengthened through collaboration (Slovenia). Much emphasis is put in networking activities for the stakeholders for the sector in Germany but networking required resources and CCIs usually lack resources. Also, trust is hard to achieve in Germany, but the present level is good. Notion of good personal connections was revealed in Hungary. Similarly, in Moldova, people know each other and trust is easier to achieve in such circumstances. In Slovenia high levels of trust are detected on all fields, with respect to tourism.

Good showcases of collaboration are detected among HEIs and students (Romania, Slovenia); however, the low social capital (low levels of trust) is detected in Romania. In Ukraine, the positive competition is noted with sufficient level of trust and cooperation.

In Austria, they recognise that critical mass is missing, also time allocated for systematic networking is sometimes missing (in Austria); cooperation arises from individual need of stakeholders (also Ukraine). Critical mass is missing also in B&H and Ukraine, where companies do not recognise the benefits of collaboration with CCIs. Major part of Collaboration is spontaneous and without strategy (B&H). There is a lack of long-term cooperation in Slovenia – there is too much project-based cooperation instead of long-term collaborations.

Many freelancers operating as lonely riders are noted (B&H, Moldova). There is low level of trust in B&H, with many state actors perceiving creativity as a threat to the traditional modes of working. Political situation in B&H is not supportive in building trust among the 3 divided nations. Distrust is present towards stakeholders affiliated with local or national authorities in Bulgaria.

When it comes to cooperation, unresolved issues related to the IPR matters can hinder cooperation in Croatia. In Slovenia, sometimes, there is distrust between smaller and bigger actors with potential danger of idea copying. Co-working spaces are seen as potential resolution of such distrusts.

### 5.4.1 Danubian Countries Strengths and Weaknesses of collaboration networks

Country	Strengths	Weaknesses
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Austria	<p>The chamber of commerce (WKO) is relevant for events, networks and awards in the CCIs. Every member of the chamber pays a member contribution, reinvested in the CCIs. It is built on a system of solidarity, in order to help especially SMEs. Initiatives, like the Carinthian International Center (CIC), and other initiatives of regional and local authorities exist. The public is relevant for the cultural industry, especially.</p> <p>Cooperation is an important aspect for the CCIs and can be a factor of success. Cooperation is a learning process with a high potential. SMEs and the cultural industry depend on cooperation. Different initiatives exist in Carinthia, like “innovation challenge” of the junior chamber Austria, where bigger partner network with SMEs, start-up investments and realize projects. Lasting projects are evolved there. The Silicon Alps Cluster needs SMEs to get networks and projects funded.</p> <p>Stakeholders are aware of the meaning of cooperation. High flexibility is the basic condition.</p>	<p>Critical mass is missing. Networks in different sectors and on different authority levels exist.</p> <p>Structure for cooperation and partner for cooperation are sometimes missing in Carinthia. It depends on the availability of time and personal resources. This can be a problem, mainly in SMEs. The success depends on the players. Short term projects are hard to realize with regional and local authorities.</p> <p>Regional and local authorities are not flexible enough. The market in Carinthia is small.</p> <p>The need of cooperation depends on the stakeholder, their interests and the economic status and the pressure for innovation.</p>
Bosnia and Herzegovina	<p>Private companies have recognized the need to cooperate with CCIs in the field of marketing; the education system is increasingly working to introduce creative innovations in the teaching process. City authorities use CCIs for tourism promotion; NGOs promote CCIs as the economy of the future.</p> <p>Cultural and artistic events such as festivals greatly increase cooperation between stakeholders. Co-productions are being created, especially in the fields of film and theatre. Healthy competition in the field of art leads to healthy competition between countries, increasing the development of CCIs. As an example, we can mention</p>	<p>Still, a large number of companies and institutions do not accept creative innovation, do not support the development of CCI, because they see them as a threat. They do not see the need for innovation, they do not want to change their way of doing business, which would require a change in the way of thinking and education of employees. Any cooperation with CCIs is spontaneous and there is no elaborated strategy. Authorities do not support the development of CCIs and start-ups sufficiently.</p> <p>Many freelancers who are not networked are not competitive. There is no legislation on freelancers. The state does not realize the huge potential in</p>



	<p>the Sarajevo Film Festival, which has become very recognized in the world, and all festivals in the area want to reach that level; or Rijeka in Croatia, which in 2020 was the European Capital of Culture, so cities in B&amp;H and Serbia want to achieve that.</p> <p>Co-production cooperation and European projects foster cooperation between CCIs. Inter-entity cooperation projects try to create trust between CCIs from different B&amp;H regions.</p>	<p>the festival activity, as well as in the film industry, and does not invest enough financial resources in those sectors.</p> <p>There is a big difference in trust and cooperation between government-funded institutions and NGOs. State cultural institutions mostly work in the same way as they did in the 80s and 90s and consider innovation in their activities as a threat. NGOs bring innovation to the field of culture and the arts and there is a great deal of mistrust. The political situation in B&amp;H, which divides the population into 3 nations (Bosniaks, Serbs and Croats), still does not sufficiently support cooperation between these regions.</p>
Bulgaria	<p>NGOs, B2B networks actively contribute to the wellbeing of CCIs. The above mentioned are always open for new partnerships.</p> <p>Cooperation between stakeholders in the CCIs is strong. Collaboration is the key, stakeholders are very aware of this and they seize the opportunity fully. The above mentioned strengths drive the added value up.</p> <p>Another useful network is the participation of EEN Bulgaria in Sector Group “Creative Industries”, which aims are: To put to the fore the creative talent of the European regions through the respective companies in the field and promotion of their work; To look for opportunities for financing of the creative industries at a regional, national and European level; To encourage the business cooperation in the sector; To inform the European Commission about the problems which the creative industries face.</p> <p>Relative openness and availability to build trust between stakeholders.</p>	<p>Spill over effects is present. Negative events all over the world can affect negatively the industry.</p> <p>Stakeholders affiliated with local and national authorities might be confronted with lack of trust, due to the actual status quo.</p>

	Lack of confidence on the state and country authorities create strong inter-stakeholder alliances and connections.	
Croatia	<p>Croatian Chamber of Economy has an association of creative and cultural industries which brings together all the main actors from that sector. Association provides education, trainings, workshops, vouchers, internationalization, strategic connections and work on sector development for its members.</p> <p>Cooperation on various projects which brings added value to stakeholders. Cooperation is intense within the cultural and creative sector itself and with other sectors.</p> <p>The creative and cultural industry in the Republic of Croatia is recognized as one of the main carriers of excellence through the development of ideas and innovations that can contribute to strengthening the competitiveness of other economic sectors in the Republic of Croatia and creating greater added value of products and service. There exists trust between actors in CCIs industry.</p>	<p>Further development and improvement of infrastructure and business support institutions intended for the development of the industry itself and the connection of the creative and cultural industry with other industrial sectors and awareness raising is needed.</p> <p>Lack of financial support.</p> <p>Unresolved issues with IPR matters.</p>
Germany	<p>There are networks to support CCIs that move across BSO organisations and institutions.</p> <p>In the various CCIs subsectors, companies know of each other and can, on occasion cooperate.</p> <p>There are events to help support companies to meet and get to know each other, with the hope to support collaboration.</p> <p>Trust is a difficult word to answer. They work together and network together, but there is and will always be competition. However, the level of</p>	<p>Networks to support CCIs are not comprehensive enough.</p> <p>However, most cooperation are just running their businesses and striving to be commercial, so it depends on if cooperation is needed for commercial success.</p> <p>Events to help companies aren't cross-coordinated, in order to penetrate deep enough into the volume of companies based here.</p> <p>Resources are not great enough to have the impact it could do.</p>

	<p>'trust' here, is relatively good for such an ecosystem.</p>	<p>More opportunities for networking needed with greater resourcing to support.</p>
Hungary	<p>People respect traditions. Hungarian culture, and the networks can help to bring history, arts closer to children and young adults. We can say that attitude toward cooperation exists.</p> <p>The Local Flavours project aims to strengthen these networks.</p> <p>Common strategy building exists in Vas county seat. Local actors usually cooperate with each other especially when the task or work is for local purposes. For traditional celebrations the cooperation of NGOs, local businesses is common (E.g. Brand of Kőszeg Wine).</p> <p>Sárvár City's political leadership and the city council support innovations and help discover the resources. Local organizations are highly motivated to cooperate with each other.</p> <p>Stakeholders are motivated, trust each other and support innovations. Good personal connections are important.</p>	<p>Cooperation is not in the frame of a formal system.</p> <p>Few opportunities for institutionalized aid / funding are available.</p> <p>Lot of initiatives are just in the initial phase, rather pop-up projects, without a clear strategy.</p> <p>It is difficult to include civilians.</p>
Moldova	<ul style="list-style-type: none"> <li>- There is collaboration between the actors;</li> <li>- People know each other and are receptive to each other's problems and challenges.</li> <li>- Members of the Cahul Creative Cluster are skilled and open to realising as much initiatives as possible.</li> <li>- In general, there is collaboration, trust and constructive competition;</li> <li>- The private sector is open to help and support arts and cultural initiatives financially;</li> </ul>	<ul style="list-style-type: none"> <li>- The Government has insufficiently contributed to the regional development;</li> <li>- The COVID-19 crisis creates obstacles in using the usual communication channels;</li> <li>- General public doesn't show much interest or enthusiasm to take part in the decision-making processes and public consultations;</li> <li>- They are no Exclusive Economic Zones or Industrial Parks in the area.</li> <li>- The Cahul Creative Cluster, established only in 2018, is a new structure and didn't manage to make huge progresses</li> </ul>

	<p>- There is a positive collaboration between public authorities and entrepreneurs because of the need of constant communication.</p>	<p>due to the pandemic conditions. Many planned activities, such as study visits for experience exchange had been placed on hold; - No spill-over effects yet.</p> <p>- Insufficient financial assistance from public authorities, which reduces the credibility and cooperation initiatives.</p>
Romania	<p>Various stakeholders of local cultural ecosystem are united by their shared common cultural identity and values; therefore CCIs are connected to their local cultural ecosystem by sharing values in order to enhance the support for a favourable ecosystem. Creation of cultural value of the territory and enhancement of cultural identity, both referring to the tangible and intangible cultural heritage, are significant criteria for the ecosystem to grant financial support to CCIs entrepreneurs</p> <p>According to European Cluster Observatory and European Cluster Excellence, in Romania there are 38 innovative clusters, unevenly distributed by development regions, depending on the concentration of companies from CCIs, i.e. ICT being present in North West, North Eastern, Bucharest-Ilfov &amp; Western Regions.</p> <p>Local authorities from Romania, as well as the regional and other level of government are today more and more focused on providing the opportunities for actors in the regional system of innovation to interact between themselves and gradually build the trust relationship that are essential for further development of its CCIs, i.e. ICT sector, for collaboration and cooperation within the cluster-type networks.</p> <p>One best practice example relies to an architect's team that worked on the</p>	<p>There is a misalignment between the perspective of the resource allocators of the local ecosystems and that of the local entrepreneurs in the CCIs sector in the importance attributed to the creation of value for the territory and the enhancement of local cultural identity. The joint effort of companies (both local and foreign), universities, local government and civil society is necessary to overcome the obstacles, i.e., relatively low entrepreneurial spirit, a mismatch between educational offer and job demand, lack of ICT skilled people in local administration, and slow starting cooperation between the actors involved in the local clusters.</p> <p>The poor propensity towards collaboration and cooperation in the context of economic and innovation clusters is connected to the lack of trust between the actors involved, the poor quality and efficiency of governance.</p> <p>Development of entrepreneurial culture necessary for the generation of ideas and creation of opportunities, the openness towards ideas and cooperation possibilities with entities outside the region/country etc. is hindered by the poor knowledge of the concept and also by some defaults related to the cultural environment: social capital, trust, openness, democracy, entrepreneurial culture etc.</p>

	<p>project of a new “Aula” Building from UPB’s campus, that collaborated with the architecture students from the final years of the study program (4 and 5), actively involved in direct participation at activities on-site. Thus, emphasis was placed on mutual trust between teacher and student, on the exchange of information and on the advantages that each of the parties has (the teacher has the technical information and is willing to pass it on, and the student comes with the willingness to gain new knowledge and competences in architectural design processes).</p>	
Slovenia	<p>There is a desire to cooperate, industry reaches out for university. With more cooperation stakeholders get to know each other to better serve each other’s needs.</p> <p>Several projects done with students to increase academia-economy cooperation.</p> <p>Easy to find partners for project work.</p> <p>Easy to find partners to cooperation.</p> <p>Established partnerships are well functioning.</p> <p>Cooperation is getting better, all stakeholders are engaged and interested. Everyone sees potential and good results – many good practises (tourism sector). Cooperation also outside the municipality.</p> <p>Strong network of support institutions, to help the stakeholders (in terms of finances, presentations abroad).</p> <p>High trust in creative sector with respect to tourism.</p> <p>Best case of successful cooperation between an NGO, city municipality and CCIs – also outside region.</p> <p>There are connections, already awareness that someone exists is a good sign. A lot of project work contributed to getting the actors</p>	<p>The levels of cooperation are still too low.</p> <p>Cooperation depends on individual motivations, if motivations, there is enough openness to cooperation.</p> <p>Lack of long-term cooperation, need to be defined.</p> <p>Concerns with IPR issues.</p> <p>Sometimes people do not trust each other (creative ideas can get copied).</p> <p>Lack of trust between largest established actors with respect to smaller ones.</p> <p>Joint platform for communication is missing. The Goriška HUB (ex-center) could be the opportunity for this.</p> <p>Too much individualistic actions, also within a scope of the project. Once the clustering happens it is easier to define actors and their potential. Project collaborations serve also as training in understanding each other.</p> <p>Many cases of good collaboration do not serve for other developments; i.e., in co-working space many collaboration is running but such good practice does not get into public.</p> <p>They know each other, no negative competitiveness, they rather learn from each other, even supplement each other where necessary.</p>

	<p>acquainted. Synergies are happening and are positive. There is a lot of potential opening up. Several cases of good cooperation between stakeholders i.e. students of the university with SMEs, also care institutions are cooperating with NGOs. Such good practices could be implemented on different levels and fields. Good start-up scene, with very active mentors from different fields of CCIs. Case of good practice: high school pupils together with SMEs prepared Christmas decorations where running a stationary bike helps create electricity to light Christmas lights in the city centre. Trust as basic for connecting each other. Trust is created through experience.</p>	<p>Trust among stakeholders is increasing in the past years, but it should be more deepened.</p>
Ukraine	<p>They are all interconnected and interdependent.  There is healthy competition that helps develop innovation.  Sufficient level of trust and cooperation.</p>	<p>Lack of legislation and weak economy. The development of the export-oriented economy in Ukraine does not support the creative initiatives. The creative industries in here are a type of socio-cultural practices with the integrating creative component, which often borders on the experiment, innovation, but, therefore, not always pursues commercial objectives. Ukraine is a relatively isolated and small market compared to those of Europe, North America or Australia, and the impact of the creative sector on the economy is the lowest.  Taking into account the changes in GDP per capital between 2014 and 2017, Ukraine was heavily affected by the Russian-Ukrainian War experienced a severe shrinkage (Nearly -30%).</p>

### 5.4.2 Danubian scores on the cooperation and collaboration

As elaborated in the chapter 3.4 the focus groups conducted demanded the discussants to evaluate the level of cooperation and collaboration. As the questions adequately described the levels of collaboration and cooperation the scores went as follows: score 1 was least developed and score 4 was most developed. The diagram below (see Fig. 3) therefore demonstrates the collaboration and cooperation: the more open the more favourable.

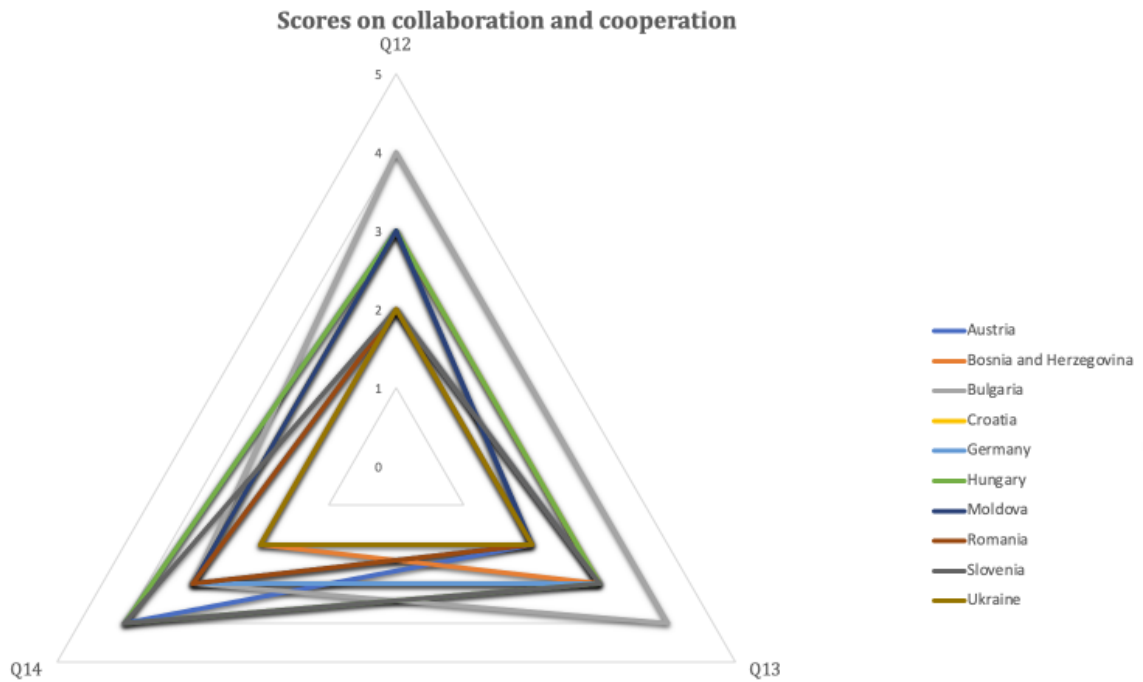


Figure 3 – Scores on collaboration and cooperation

## 5.5 Danubian values and perceptions – Danubian Cognitive frames

In terms of attitudes of the general public, the attitude towards creativity and entrepreneurship is generally very positive. People are aware of the importance of both. In Ukraine the media plays important role in presenting entrepreneurship as desirable. Zakarpattya region has high level of entrepreneurship. However, there is a great distinction in perceptions towards culture. In Austria they report low awareness of the importance of innovation, and creativity within culture. In Slovenia, they report severe negative public opinion against culture as useless but culture is well known among people. In Slovenia creativity is understood in terms of personal preferences and not something market oriented.

In Germany (Karlsruhe) a strong support for culture is noted, also in Hungary, where they note a strong connection of cultural sector with tourism. A trend where diaspora is helping with establishing new companies is noted in B&H. In Bulgaria the question of what people find innovative and creative is emphasised. In Moldova openness to foreign countries is noted in the field of culture.

The attitudes towards learning are positive among all countries, in Slovenia (Nova Gorica) the high engagement in elderly in lifelong learning is noted (also in urban parts of Hungary), and the young are noted as somehow not interesting in their desire to learn. At contrary, great desire to learn is present among young people of B&H, Hungary and in Croatia, where they are embracing new technologies very rapidly (also in Ukraine), highly specialised knowledge of CCIs is mentioned in Hungary. Lack of entrepreneurial knowledge in HEIs studies is noted in Maribor (Slovenia) and CCIs seek knowledge through workshops and trainings. Awareness of the need to interconnect the knowledge of creativity and entrepreneurship is noted in Slovenia.

When it comes to competition, the positive healthy competition is noted in all countries. Good start up environment is mentioned in Austria, Slovenia, in parts of Croatia and in Moldova (Cahul) and Romania as well. Entrepreneurial spirit among youth is noted in Hungary and Ukraine. Smaller companies from CCIs sector rarely get supported outside of public financing (Germany) but there are some incubators that support CCIs. As 'improvisation culture' is describing Romanian culture and this works favourably on CCIs entrepreneurial activities.

Competence of reflection upon own work and collaborations is mentioned in B&H and this contributes towards healthy competition, also in Slovenia and Ukraine. Generally, higher levels of knowledge are detected among CCIs sector in B&H.

Low visibility of cultural possibilities and innovation projects is noted in Austria, along with lack of critical mass. Negative competition can hinder the good relations and cooperation practices. In Germany low inter-connectivity is reported.

In some parts of the countries, the problem of poverty is emphasised (Bulgaria, Ukraine) that hinders the creativity and innovation. Start-ups experience lack of national legislation and support in Bulgaria and Ukraine, more engagement from the authorities is missing also in Romania. In Croatia, there is a negative perception on entrepreneurship that includes high taxation. Some levels of distrust to authorities are noted in Romania where levels of 'survival culture' is noted as comparison to 'long-term planning culture'. Other cultural traits are also observed: fear of failure (Romania, Slovenia), fear of competition, fear of criticism, lack of pride when doing something



well (Romania). A phenomenon named as ‘start-up drain’ is noted in Romania with start-ups migrating to other countries.

Competition is sometimes felt as unwanted in Bulgaria. In Cahul (Moldova) issues in defining what is creative along with low levels of education from the field are noted along with lack of proper legislation. Issues with legislation are noted in Slovenia also.

### 5.5.1 Danubian Countries Strengths and Weaknesses on values and perceptions

<b>Country</b>	<b>Strengths</b>	<b>Weaknesses</b>
Austria	<p>The public does not know the creative industries by name but is aware of their meaning. There is a high awareness for innovation. Meaning and importance for innovation and entrepreneurship are clear for the public.</p> <p>The difference between creative and cultural industry in Austria is enormous. Awareness and importance for creative industry and their innovation and entrepreneurship capacity is high. Compared to the cultural industry, where the meaning of innovation is clear, creativity and entrepreneurship concepts are marginal in the public.</p> <p>The willingness to learn is high. In the last years the awareness for innovation, CCIs and their importance increased. In higher education institutes, professorships were created. Enterprises from Carinthia become international visible. Some are highly rated international. Some win awards in Austria. Some expand.</p> <p>Competitions between enterprises of the CCIs are important for their visibility, to show their outstanding capacity and to rate the differences. SMEs present their singularity in competitions.</p> <p>Some examples for competitions in Austria are CREOS (for marketing and media), national award for innovation, digitisation and regional award for research in Carinthia.</p>	<p>Cultural possibilities and innovation projects in culture are little noticed. Due to the fact that the cultural industry needs the public, innovation, creative projects and entrepreneurship hardly exist.</p> <p>Positive value of competition in creative industry compared to negative value of competition in cultural industry.</p> <p>Critical mass is missing and the market is too small and limited for start-ups in Carinthia. Even if regional and local authorities try to fund start-ups, private investments (over 100.000€) and business angels are missing.</p> <p>Different initiatives concerning visibility and settlement of start-ups in Carinthia have not been sustainable. Such initiatives and investments depend on the politics.</p>

	Regional authorities and small private investments try to support start-ups in Carinthia.	
Bosnia and Herzegovina	<p>In the post-war period, part of the population started to establish private companies, and moved away from the communist-socialist way of thinking. Such a trend has been increasing rapidly and now the number of private and state-owned enterprises is equal. Individuals who are creative and could not express this creativity in working in state-owned companies have decided to take this step, introducing innovations in their business and opening space for foreign markets. Recently, the diaspora has had a strong influence, investing funds and opening companies in B&amp;H, and bringing innovations and experiences from the countries in which they live.</p> <p>Part of the population, especially young people, is open to learning and embracing new technologies and innovations. They want to keep up with the times, they are adapting to European trends in all areas of life, including CCIs. They have no prejudices, they just want to progress and develop.</p> <p>CCIs among themselves are competent and reflect positively on their development. Numerous networks of CCIs themselves make clustering and hold educational seminars to help other CCIs that do not have enough experience and competitiveness.</p> <p>Knowledge and education of entrepreneurs is much higher with CCIs in relation to other start-ups, as well as the access to markets, so they have better chance to succeed.</p>	<p>A large part of the population still works in the public sector, where they do not have access to innovation, nor are they educated in the process of improving their activities. The common attitude is to go to work, earn a monthly salary, without giving suggestions and new ideas.</p> <p>The majority of the population is still trapped in prejudices. Every innovation is a burden for them, because it requires the need for additional education. They think of innovations as things imposed on them by foreign countries. The vast majority do not speak foreign languages and are computer illiterate. There is not enough political will to educate the population and prepare it for the upcoming innovations.</p> <p>Government-funded cultural institutions see the CCIs as a threat, as they cannot be competent in the market in terms of innovative marketing of innovations in culture, mobility and modernity. Distrust and a large gap between NGOs and government-funded cultural institutions have very negative connotations on the further development strategy of CCIs.</p> <p>There is no start-up community, no policies to support start-ups, access to finances does almost not exist and start-ups are doomed to very unfavourable loans that often lead to their demise.</p> <p>There is no strategy for promotion of start-ups in the CCIs sector.</p>
Bulgaria	Depending on the region and its demographics, the attitude of the	There are some regions where the lifestyle of the people is so poor and

	<p>population towards creativity and entrepreneurship can be very positive. The demographics and lifestyle of the community in most regions of the country can bring the threshold of what people find innovative and creative to a very low level.</p> <p>Attitude and culture of the targeted society is suitable for accepting new ideas relatively easy. If an innovation is easy to understand, it will easily be accepted by most of the population.</p> <p>Competition might bring many new things and might benefit from innovation in CCIs.</p> <p>EU backs up start-ups very reliably. Low competition welcomes new players. Highly volatile and innovation needing sector.</p>	<p>basic that creativity and innovative spirit is not sought after.</p> <p>There is a given demographic subgroup of people who might struggle with innovation. In smaller regions, the CCIs consist mainly of the mentioned people.</p> <p>Competition is sometimes seen as something unwanted, especially in the creative industry because of lacking regulation and the highly volatile sector.</p> <p>Not so stable national legislation support. Incomplete set of national tools to support start-ups.</p>
Croatia	<p>From a scientific point of view, it is considered that the products of creative thoughts contain originality and appropriateness, while from an everyday point of view, creativity would mean creating something new or combining something old to create something completely new. Creativity is usually associated with art and literature, but it is actually a unique part of many other segments such as business, economics, industrial design, architecture, and so on.</p> <p>There is a lot of trainings and education in creative fields on national and regional levels. Willingness to learn is high.</p> <p>Most of the companies see competition as a positive factor for their development.</p> <p>National and regional policies supporting start-ups. As an example we have Start-up Incubator Rijeka as a support center for people who want to develop their entrepreneurial ideas independently or within a team and start their own</p>	<p>The business sector in Croatia has itself identified negative perceptions on entrepreneurship and an unfavourable business climate as an obstacle to entrepreneurial activity.</p> <p>There are many initiatives at the local level but not so much on the national level.</p> <p>Negative entrepreneurial climate in the country is associated with high taxation system.</p>

	business. There are numerous start-up incubators and hubs across the country.	
Germany	<p>The CCIs are supported when it is relevant and brought to the surface. The museums and galleries are strongly supported here. There is also a good range of festivals which are well supported but not in large volumes.</p> <p>There are limited options for smaller companies or CCIs sectors outside of public facing activities to be represented.</p> <p>The museums in particular are strong in providing training and learning, especially ZKM which is connected to a local university.</p> <p>Not enough inter-connectivity between institutions.</p> <p>Positive when this draws talent and raises resources and support.</p> <p>There are a few incubators in the region which include the support of CCIs. These are successful and well-developed and delivered.</p>	<p>Some weak points are:</p> <ul style="list-style-type: none"> <li>-There are limited options for smaller companies or CCIs sectors outside of public facing activities to be represented.</li> <li>-Not enough inter-connectivity between institutions.</li> <li>-Negative when a global pandemic hits and everyone is struggle to survive.</li> <li>-Not enough of them with a focus on CCIs in particular.</li> </ul>
Hungary	<p>Hungary is proud of the history, the museums culture is advanced. Lot of programs, festivals are organized with the topic of history. A few examples in Szombathely City: Saint Martin Day's programs; Easter traditions in the village museum of Szombathely, Savaria Historical Carnival in Szombathely. The Savaria Historical Carnival is a historical time travel in Szombathely, where the 2000-year-old history of the city comes to life. Central Europe's largest costume, historical celebration offers real tourist attractions, a real cultural adventure.</p> <p>For young generations – there are a lot of famous music festivals across the county – the most famous is Sziget.</p> <p>There is a niche market which could pay for the quality but the number of these firms is few.</p>	<p>It is hard to reach &amp; recruit children/younger generations to visit museums.</p> <p>People like the cultural events and happenings; however their willingness to pay is moderate.</p> <p>Lack of funding. Common neglect, passivity. Volunteering is not at a sufficient level.</p> <p>Events are popular, but long-term trainings are not popular even if priceless.</p> <p>Low number of new patents in Hungary – lack of knowledge or lack of structured process? Lack of competition.</p>

	<p>The population is interested in the visiting the museums, local events, and the programmes provided by the members of tourism.</p> <p>Sárvár City experiences that the importance and role of cultural tourism is spectacularly growing within the sector of tourism.</p> <p>Lots of people follow the “long life learning” idea: it has a definitive role in the lives of the grown up populous of the urban areas.</p> <p>Entrepreneurs try to implement new processes, products.</p> <p>iASK’s (Institute of Advanced Studies Kőszeg) has open lectures, researcher’s night.</p> <p>The involved, reached younger people are willing to take part in the implementation of cultural innovations.</p> <p>As a whole: the region is ambitious and open-minded.</p> <p>Entrepreneurial spirit is high among people, especially among younger generations.</p> <p>Handmade and homemade products are even more widespread – a lot of self-employed people start activities in this way.</p> <p>Digitalization, smart products, 3D films and AR/VR technologies are very popular new professions.</p> <p>Informatics, digitalization started to spread among students and entrepreneurs, and these areas can mean added value to CCIs.</p>	<p>Multinationals (with mass products) lead the market.</p> <p>Start-up community as such doesn’t exist in the cities of Western Hungary.</p>
Moldova	<p>The artists are open to sharing their works worldwide, especially the actors from the theatre in Cahul, who have numerous participations abroad.</p> <p>The social responsibility and behaviour towards the environment, arts and culture is gradually improving.</p> <p>New buildings for CCIs are under construction (i.e., a new theatre is on the way to be built).</p>	<p>People in Cahul still doesn’t perceive what is creativity, they don’t have strong educational background in this domain yet.</p> <p>The culture of communication is not well-developed, as well as people aren’t very involved in the community.</p>

	<p>The Cahul Business Incubator and the Creative Cluster facilitate the development of synergies and promote a responsible attitude.</p> <p>Within the Business Incubator there are several residents SMEs that focus their activity on training and education in creative fields (for example, the Kids Academy).</p> <p>The majority of the entrepreneurs see competition as an opportunity.</p> <p>The presence of a Business Incubator and a Creative Cluster are opportunities for people willing to start a business.</p> <p>Cahul is home to a substantial number of start-ups (around 90% of the residents in the Cahul Business Incubator are start-ups).</p>	<p>There is no specific legislation on CCIs, as well as it doesn't receive strong attention from the City Hall or Local Council. This hinders the possibility of developing attitudes and will to learn.</p>
Romania	<p>Romanian local culture is relative "encyclopaedic", not specialized, which is very useful for the transition period, in which a business promoter has to solve a great deal of problems in the most diverse domains. Living in a culture which favours the improvisation, the Romanian entrepreneur paradoxically found it an opportunity, especially since he had started with all odds against him when compared with his Western European competitor, armed with know-how, funding or the back-up of his country of origin.</p> <p>One of the major global trends of creative industries is to approach increasingly the general commercial dynamics of any other economic sector. This is exemplified in the notable tendency of Romania to become specialised exporter of some creative products (i.e. traditional clothes, software applications etc.), while other countries become major markets of consumers, innovation orientation being recognized as such, e.g.: today, the predominance of specialization in advertising and media are driven by the</p>	<p>Part of the current problems (lack of seriousness and of punctuality, the severe lack of aspiration for the long-term planning) originates from the fact that the Romanian mind-set is the product of a culture that was centred on the idea of survival, a non-developmental culture. Romanian people need to be freed from the prison of their complexes, derived from the exacerbation of certain defects that are otherwise common to the whole human race: passivity, lack of solidarity, fear of competition, of failure, lacking the pride of doing something well.</p> <p>Is necessary to increase the effort of public institutions to support emerging economic sectors by properly identifying and evaluating the specific potential of all the creative businesses. At this moment in Romania there is no clear evidence of the dynamic of creative sectors, at the national level. The specificities and comparative advantage of each region can be better assessed, and</p>

	<p>urban environment within which they exist.</p> <p>The clustering phenomenon in the CCIs domains has strongly developed at the local and regional level. The clusters have a positive influence not only on innovation and competitiveness, but also on the increase of business dynamics on a long term. Integrated in a network, the companies have greater chances of survival in a competition environment, than if they were to remain isolated. The most developed CCIs are software, video and computer games, publishing, architecture and advertising, where competition is very strong. Thus, creative activities are polarized around Romania's large cities, many of these cities developing new tools and facilities to foster the sustainable development and the internationalization of CCIs</p> <p>Start-ups have been increasing as the National ICT Market Study finds that the number of start-ups in Cluj-Napoca almost trebled between 2011 and 2016 (an increase of 281%) – the trend is valid at the national level, but in Cluj-Napoca it is more obvious. In 2019 Cluj-Napoca hosted more than 15% of start-ups in Romania, with a higher per capita figure than anywhere in Romania, including Bucharest. Of the 11 business incubators/accelerators in ICT in Romania, 5 were from Cluj-Napoca. Although Romanian government provides as high as 1:1 matching fund, a big incentive for start-ups, entrepreneurs still distrust the government.</p>	<p>arguments, supporting a contextual approach to the regulation and development of creative industries, claim the need to account for regional specificity when designing public policies.</p> <p>In order to support competition, and correcting the actual situation, local authorities should encourage the establishment of (1) more incubators /accelerators /co-sharing spaces for both formal and informal social networking and commercial collaboration; (2) support localized social institutions, such as alumni association, industrial association, to improve the thickness of the networks; and (3) consider to involve local ICT elites as well as returnees in monitoring the implementation of the strategic planning process and focus on building a city-region that is great to live and work not only for today's need, but also for tomorrow's.</p> <p>SMEs creators / producers of e-learning platforms from Romania are frequently obliged to choose a niche market, because it is not possible for them to fight with the big providers of relative free (academic use) of e-learning platforms; referring to unfair competition in the IT field, especially in terms of human resources.</p> <p>The start-up directory in 2019 showed that Cluj-Napoca had about 40 start-ups, 15% of all of Romania. There is a phenomenon called “start-up drain” in Cluj-Napoca, illustrating that most start-ups were migrating. For instance, in Sofia, Belgrade, 15 start-ups were actually originated from Cluj-Napoca. One factor was that as most ICT revenue had come from outsourcing, the local mentality had been oriented towards jobs</p>
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		rather than projects, an orientation that may kill creativity.
Slovenia	<p>Culture is well recognised among the general population, creative industries are not well recognised (even among creative themselves). Attitude is positive among those that recognise it. Big requests for less formal education programmes, in shape of seminars, trainings with mentors. People understand creativity in terms of personal hobbies, not being aware about market dynamics and competition in the market. Little self-criticism in creative market. PODIM national start-up conference tailors the content for CCIs. Students are taught to understating the public position of art. Students are oriented towards entrepreneurship in their studies. Creativity and entrepreneurship are highly appreciated. Results show, this connection is appreciated. Older people are very included in long-life learning but very few youth organisations do similar. Young are more burdened with their everyday activities. Apathy is seen with young. School system is focused only on school goals, and much work has to be done to relax them to be interested in more than only school goals. Middle aged lack time to be more engaged. Presence of HEIs contributes towards development of the awareness. Attituded and readiness is high. Knowledge is easy to be accessed. Life skills give people confidence. Competition is desired, many cases of good practices of positive competition exist. Many cases when a creative person is also entrepreneur. Designers and architects, ICTsts, are creatives and lot of them are entrepreneurial. Also, traditional start-ups learn from creatives. Great interconnectedness of knowledge.</p>	<p>Some weak points are: -Creative industries are not well recognised, potential is not full visible, some companies do not know the benefits of including creatives into development of their products. -In certain sectors - orientation towards receiving the diploma but less emphasis on good knowledge. Inability to implement theoretical knowledge in practice. -Little problem learning in formal education. -Low motivation towards new knowledge - need to exit from comfort zone. -Low awareness about the need to develop long-term projects. -Cooperation is possible and is happening, but the market is not established to encourage competition. -Competition is in the field of marketing and design. -Little quantity to have real competition. -Tourism sector is very competitive in a negative way. - Field of fashion is not very competitive, as Slovenian fashion designer from the peripheral region having difficulties to present work in the capital region. -Better cooperation with other artists from abroad. -Creative start-ups are not as present as they should be. -Creative start-ups are not investors ready. People think start-ups are only from the field of technology. -Lack of cooperation with international environment - only focus on international projects. -CCIs in legislative terms oftentimes operate as NGOs or social companies; due to this reason, they do not see themselves as start-ups.</p>



	<p>Market dictates the adjustments and today the market demands creative solutions.</p>	<p>-Relationship towards culture is not good, it is too critical. It is a sphere that needs support.</p> <p>-General public need support and training to understand art. General public do not know/understand the field.</p> <p>-Attitudes towards culture is very low, also public comments are oriented towards culture as useless.</p> <p>-Issues due to COVID-19: film sector is in decline, since no funds were paid for the past work, artists are called as parasites in social media.</p> <p>-When preparing the ECOC candidacy a lot of thought was done on how to convince general public that ECOC will improve their life.</p> <p>-Rigid high school system orienting pupils towards goal-oriented thinking (learning for the diploma and not for knowledge). Little knowledge on entrepreneurship in schools, little awareness that entrepreneurial skills are for life (like how to obtain a loan).</p>
Ukraine	<p>Regional values about entrepreneurship include beliefs about entrepreneurship as a good career choice; whether entrepreneurs have high social status; the extent to which media represents entrepreneurship positively in an economy; maintaining a positive culture within the entrepreneurship ecosystem stimulates higher levels of creativity and innovation. Therefore, entrepreneurship is closely linked to creativity. The region has a fairly high level of entrepreneurship and a positive attitude towards creativity.</p> <p>Business and companies with a progressive philosophy, actively integrate CCIs in innovation activities.</p> <p>The development of ICT contributes to the development of creative technologies, which in turn provide new opportunities for ICT.</p>	<p>High illiteracy, low income negatively affects creativity and entrepreneurship.</p> <p>Various zones to support business development have been designated and created. Such zones may vary in terms of ownership, management, economic-legislative background, terminology. Huge differences persist in relation to their size, number of residing companies and the number of employees.</p> <p>Integration of CCIs sectors in innovation activities is at a very low level.</p> <p>In some cases, competition leads to the bankruptcy of certain market players.</p>

	<p>More positive than negative attitude is noticed. Of course, in each case, a negative perception of competition may prevail. Due to competition, the level of services in innovation, for networking, social interactions etc., and cooperation between individual entities is growing. No one has conducted such studies, so there are no exact figures.</p>	<p>There are almost no policies to support start-ups, entrepreneurial knowledge.</p>
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### 5.5.2 Danubian scores on values and perceptions

As elaborated in the chapter 3.4 the focus groups conducted demanded the discussants to evaluate the level of cooperation and collaboration. As the questions adequately described the specific values the scores went as follows: score 1 was least developed and score 4 was most developed. The diagram below (see Fig. 4) therefore demonstrates the values and perceptions: the more open the more favourable.

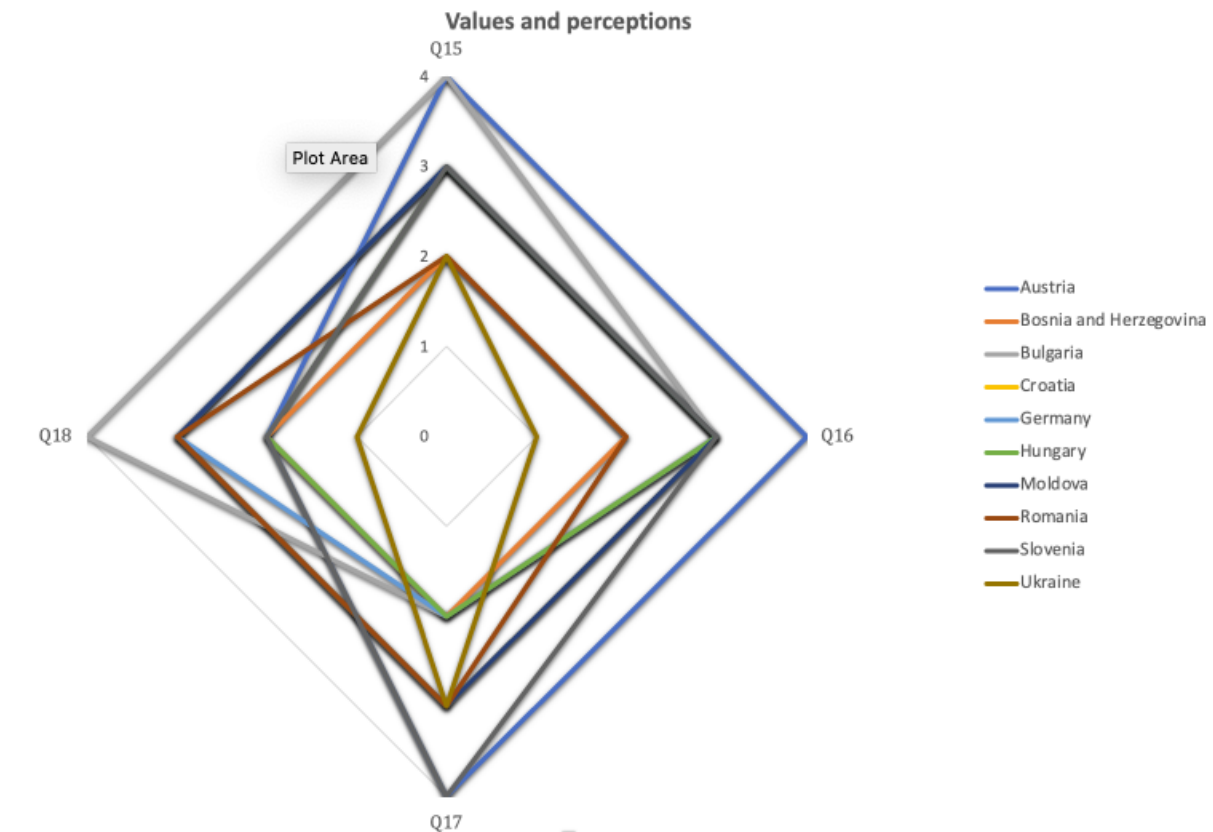


Figure 4 – Values and perceptions

## 5.6 Impacts of COVID-19 on cultural and creative industries in Danubian regions

When discussing first and immediate impacts of COVID-19 pandemics, in general, the opinions are that CCIs sector was impacted twofold, with cultural sector suffering huge negative impacts, where creative sector took the situation as opportunity to advance business due to digitalisation. In Slovenia, the flourishing of specific sectors is reported (also Austria, Croatia, Bulgaria, Germany and Moldova), and also qualitative reflection of the sector, especially in times of the spring 'lock down' when people took time off to reflect and create new products and project proposals. Using digitalisation as opportunity is reported also from B&H and many cultural and sport events were transmitted online in Hungary (but online festivals are not profitable enough to survive – in B&H also), digital marketing experienced growth but in some cases CCIs sector was left out of digitalisation opportunity. In Hungary severe effects were noted in tourism sector that relied on festivals activities. Tourism sector was impacted also in Moldova (in Moldova some novelties and innovations are reported, also intensified collaboration between stakeholders) and Ukraine. Following that, the events organisation sector, also musical sector is in all countries in severe trouble. Cultural sector in some counties reacted too slow and did not use the digitalisation to adapt (B&H).

A growth in online learning is noted in Slovenia and Romania, also students are suffering at Universities due to lack on face-to-face education as mentioned in Slovenia and Romania (in Slovenia film students cannot finish their studies since they cannot make a diploma film). Additionally, the level of development of the region contributes to its resilience against COVID-19 with more developed regions being more resilient and less developed regions being less. Severe threats of poverty due to non-favourable economic situation also prior to COVID-19 (B&H, Bulgaria, Ukraine) situations are noted in less developed regions.

Authorities prepared mitigation measures for cultural sector (in B&H, Bulgaria, Germany, Austria) and in Maribor (Slovenia) scholarships were introduced for cultural workers to pay additional trainings, private sector and SMEs also received at least some level of support in all countries. In cases where local funds did not decrease this is seen as favourable (Slovenia), but on the other hand, some funds were not paid to cultural sector (film makers) for already realised work.

### 5.6.1 Danubian Countries Strengths and Weakness of situation related to COVID-19

<b>Country</b>	<b>Strengths</b>	<b>Weaknesses</b>
Austria	<p>The impact of COVID-19 on CCIs depends on the branches. On some branches, like the software industry, COVID-19 has got a positive effect. In general, the current situation is bad in the CCIs.</p> <p>National authorities released different measure for enterprises, for the cultural sector and for SMEs. Regional authorities offer additional financial help. The provided support protects enterprises, SMEs and people of the financial ruin.</p>	<p>The cultural industry in Austria is not resilient. Cultural events, innovations, projects and people of the cultural sector are completely broken.</p> <p>The question is, if the adopted measures are sufficient and will be extended after the COVID-19 restrictions for those, who need further help.</p> <p>Events concerning innovation and CCIs are cancelled at least until 2021.</p> <p>The differences are enormous. Some branches developed during COVID-19 restrictions. Other branches are destroyed.</p>
Bosnia and Herzegovina	<p>Covid-19 has affected all spheres of life, including the CCIs area. The immediate response to the pandemic was the digitalization of the communication systems, the adaptation of cultural institutions to the new conditions of operation. The ICT sector has greatly helped all institutions, companies, the city administration and other organizations to reorganize their way of working and redefine themselves to online platforms. A large number of CCIs did not change their way of working, because they had worked online before and thus communicated with their clients. Digital marketing has experienced expansion.</p> <p>The government has adopted a Local Action Plan on one-off assistance to cultural institutions, independent artists and cultural workers. One-off assistance was also provided to small and medium-sized enterprises, the private sector, which included part of the CCIs.</p> <p>The ICT sector, multimedia and similar sectors have experienced expansion. These CCIs clusters have had benefits</p>	<p>Cultural institutions did not adapt quickly enough to the new situation, and they experienced difficulties financially and programmatically. Some museums and art galleries had online exhibitions, digital tours, but managed to make a very small percentage of profits. Festivals that took place online experienced a financial collapse. As the whole economy is stagnant, certain CCIs clusters have been left without users of their services.</p> <p>Cultural institutions and many other CCIs have not been sufficiently trained and educated to respond to the Covid-19 challenge. Insufficient introduction of innovation into the field of action before the pandemic manifested itself in a poor response.</p> <p>All financial assistance received by CCIs from government authorities is insufficient in relation to losses. The already weak economic picture of the country is further weakened by the influence of Covid-19. The arts of culture and the CCIs have been on the margins of social and financial status, and austerity measures have always</p>

	<p>in all forms of action caused by the pandemic situation. This way of the “new normality” will contribute to a different understanding of the importance of the creative industry, the benefits of digitization and ICT education.</p>	<p>been carried out by the state precisely in these sectors.</p> <p>Economic situation in Bosnia and Herzegovina was already terrible before COVID-19. Most of the population are on the poverty line due to the pandemic and unfortunately mitigation of consequences to CCIs is only a secondary issue for the government and therefore receives insufficient amount of support.</p> <p>Certain sectors of CCIs are severely affected by the situation caused by Covid-19. Museums, art galleries, theatres, festivals and the film industry, which cannot have normal work and have not adapted to the situation quickly enough, are in big trouble. Attempts to organize online events went unnoticed and did not have satisfactory results. The financial stability of such CCIs becomes questionable.</p>
Bulgaria	<p>Some strong points are:</p> <ul style="list-style-type: none"> <li>-Good flexibility of the sector.</li> <li>-Help of the EU and local authorities.</li> <li>-Understanding from the community.</li> </ul> <p>CCIs were all, adequately targeted when coming up with the plan to help and support</p> <p>The multimedia and ICT sector were left relatively unaffected by Covid-19. Culture and the cultural and creative industries are among the most affected sectors in Bulgaria at the national level in the last months of the crisis caused by COVID-19.</p> <p>The measures taken at national level in Bulgaria:</p> <ol style="list-style-type: none"> <li>1) The programme of the Bulgarian Development Bank for guaranteeing interest-free loans to help people deprived of the</li> </ol>	<p>Some weak points / needs are:</p> <ul style="list-style-type: none"> <li>-Over-aggressive measures impact the industry more.</li> <li>-There is a need of more emergency funding from the authorities.</li> </ul> <p>Getting the financial help was hard, the funds were, most of the time, inadequate and hard to report and control.</p> <p>This created a discrepancy between cultural and creative industries. The cultural industries were heavily affected, whereas the creative industry sort of thrived.</p> <p>The current situation is also a kind of stress test for cultural policy in Bulgaria; the current picture shows very clearly that there are no instruments of cultural policy that would ensure the sustainable development of the sector.</p>

	<p>opportunity to work due to the pandemic of COVID-19.</p> <p>2) Support to micro and small enterprises to overcome the economic consequences of the COVID-19 pandemic, Operational Programme “Innovation and Competitiveness” 2014-2020.</p> <p>Other specific programmes and measures are:</p> <p>1) Measures aimed at state and municipal cultural institutes.</p> <p>2) National Culture Fund – Creative Scholarships Programme.</p> <p>3) Visual Arts Programme.</p>	
Croatia	<p>The government provides assistance to companies affected by the Corona crisis with a measure to preserve jobs and Covid-19 loans.</p> <p>ICT and gaming industries have not been so affected.</p>	<p>Most companies are deeply affected by this crisis, which can be seen in the GDP’s decrease.</p> <p>Only ICT and gaming industry could have some positive indicators in this crisis. All other parts of CCIs are deeply affected.</p> <p>Cultural industries (e.g. museums, theatres) have major consequences due to lock down.</p>
Germany	<p>Some, especially digital focused and SaaS companies are doing very well.</p> <p>Main support through federal government and banks.</p> <p>As mentioned above - some have accelerated due to positive evolution in online activity.</p>	<p>Other creative companies, especially those reliant on events, physical interactions etc., are very badly affected, with some closing.</p> <p>Not good enough to save some companies. Too long to roll out and not enough flexibility.</p> <p>Others have collapsed.</p>
Hungary	<p>Hungarian people are diligent and persistent: the crisis increased their creativity, entrepreneurs began to sell their goods on the Internet, and people took the advantages of online facilities. Alternative solutions came into life: e.g. live-streaming service from the theatres. Cultural events could be hold during summer which is normally the high season.</p> <p>The Nádasdy Cultural Centre (in City of Sárvár) has a strong digital presence.</p>	<p>COVID-19 changed the labour market of CCIs: lot of people became unemployed; lot of them had to change their workplaces. The epidemic situation doesn’t affect the same all CCIs. Cinemas, theatres were (and are) closed.</p> <p>Self-employed and small entrepreneurs got very bad conditions due to COVID-19.</p> <p>Tourism is a key factor and many big festivals, fairs have been cancelled.</p>

	<p>Public authorities have their own strategy even locally and on national level, too. Szombathely City elaborated a program which aim is to help the local workers who lost their jobs and to businesses &amp; employers in the city.</p> <p>The governmental and city councils support the general work in the country. Hungarian entrepreneurs can apply for many tenders.</p> <p>Team sports are allowed without audience. High adaptability of cultural institutions. Theatres and cinemas can't receive guests personally, thus alternative solutions came into life: e.g. live-streaming service from the theatres. Film industry and television programs are going, but the actors are PCR-tested regularly.</p>	<p>COVID-19 brought a major loss of incomes for the particularly affected industrial / CCIs areas. Therefore, the effectiveness of work has been also decreased, and the institutional community's connections have declined.</p> <p>The lost incomes cannot be recovered.</p> <p>Lot of cultural services are struggling with operational and financial problems. The museums are hardly affected. Lot of festivals, fairs have been cancelled. Events and exhibitions were closed and only a small part of them were possible to be postponed.</p> <p>The own incomes of most of the culture institution decreased by approx. 50%.</p>
Moldova	<p>Most of the entrepreneurs in Cahul were flexible enough to adapt to the new environment and even to apply innovations.</p> <p>There are measures in place and plans for combating the infection adopted by the authorities; however they don't target specifically the CCIs. Most of the entrepreneurs respect the restrictions and imposed measures in their activity.</p> <p>The creative industries, especially the ICT services had the opportunity of easily transferring their activity on-line.</p>	<p>Some key industries, especially tourism, HoReCa and other services had been harshly affected and lost investments and revenues.</p> <p>CCIs are not enough considered by the authorities for assistance in recovering from COVID-19 crisis.</p> <p>COVID-19 crisis has especially affected the cultural industries (museums, theatres and other art clubs/associations).</p>
Romania	<p>Investments saw positive growth, driven by the construction sector. ICT industry didn't suffer much, the remote-working mechanisms and the transition of economy to "on-line running" were favourable factors</p>	<p>Romania has been severely affected by the coronavirus crisis. GDP for the first half of 2020 fell by 4.6% year on year, with the key channels for this decline being lower consumption and a drop in exports. The unemployment rate rose to</p>

	<p>The government intervened to support liquidity and preserve jobs. The state's initial support package included, among other measures, partial coverage of wages for those who were in "technical unemployment" (their employment contracts had been temporarily suspended), state credit guarantees to support lending (particularly to small and medium-sized enterprises), the deferral of loan payments and the temporary suspension of certain tax payments. Since June, the government has focused on stimulating recovery and limiting unemployment. In this context, there are some key short-term priorities. First, Romania needs further action to strengthen good governance, through the reform of public administration and improvements to policymaking processes (including via digitalization). Second, given the significant gaps in the infrastructure sector, the positive trend of capital spending by the state over the past year should continue. However, it will be critical to ensure administrative capacity, including for the absorption of allocated EU funds. Lastly, medium-term fiscal sustainability will be important for the country's further transition towards a sustainable market economy.</p> <p>ICT sector and audio-video / on-line media are practically not affected, while all other CCIs domains being strongly negative affected. Current and upgraded information about COVID-19 are dynamically available in the web page: <a href="https://econ.ubbcluj.ro/coronavirus/">https://econ.ubbcluj.ro/coronavirus/</a></p> <p>In Pandemic conditions, making a brief analysis of the Romanian press industry, is noticed that on-line one is</p>	<p>5.4% in July 2020 (up from 3.7% in January 2020), with further job losses likely in the months ahead as government support schemes are phased out. Excepting ICT, all other CCIs domains were strongly affected (arts of all types, museums, theatres, cinema, education etc.).</p> <p>There is a great demand for on-line e-learning and e-commerce platforms. In the field of e-learning platforms, in Romania, there is no coherence in strategies and, especially during this Pandemic period, at the educational level, there is a strong need for quality content offered to both teachers and students. Also, there is a greater caution in the elaboration of all projects, i.e. architectural ones, due to the sanitary crisis, e.g. re-evaluation of air movement in indoor spaces. Consequently, students are more reluctant and apathetic in the frame of Covid-19 crisis, because they can no longer act physically in laboratories or have face-to-face normal activities.</p> <p>For this moment, no specific LAPs for CCIs mitigation actions for salvation are developed at the level of local / regional communities, but some specific initiatives are already starting. Today, the main focus is on health preservation, by combating SARS-Cov2 spreading in population and limiting negative health effects of COVID-19.</p> <p>These discrepancies between different domains of CCIs are somehow natural, but the weak "level of maturity" of our local / regional / national economy and the unbalanced degree of development of Romania's regions, including the level of education and discipline in respecting the official public health protection regulations, creates huge difficulties in passing well this Pandemic crisis.</p>
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	<p>growing, but still the highest income is brought by the printed press, with examples of the big newspapers worldwide (Times etc.). About the musical phenomenon and about the influence of the COVID-19 crisis on the music market, is noticed that artists no longer earn money from creating music but only from performing, so the lack of concerts due to the global health crisis strongly affects the music market. There is an unfair competition within the music industry, especially manifested by public authorities, which invites artists to perform at higher rates of fees than on the normal private market.</p>	
Slovenia	<p>Situation demanded creative solutions and new creative practices. Digitalisation, festivals were online, but also films are online, but being online is troublesome for all the people, since all the people are online all the time. Local community is aware of the situation. Local funds were not decreasing. Interreg programmes are prolonging the projects due to COVID-19 due to implementation issues. Ex-center project runs forward with no delays. IT technologies, applications, video makers have developed knowledge that will stay. Basics will have to be learned, on all levels of society. SMEs in this field will remain stable, also new skills and new jobs will be created to manage the digitalisation. SMEs had managed to digitalise their business were able to profit from the situation. First impact in digitalisation (cooperation, content, services, trainings) of everything. Proactive reaction by the municipality – providing scholarships for self-employed in culture. Municipality (initiative not coming from the sector for culture but from the) created a</p>	<p>First impacts were negative and demanding sever reflections of how all work was done (less touching of prototypes for example). Many funding was stopped, much problems with economic survival. Studies are suffering, for example: Film students have issues in finishing their studies (can't do a film) theory could be lectured online, but practical work is missing. Ministry of Culture reacted very negatively, cultural and creative sector suffered much. Local community has to serve all fields and aims to serve all spheres equally. Local community serves the basic social-economic issues with priority. Creative sector is worried; students who pay tuition are experiencing concerns not being able to receive the proper knowledge. Big presence of land-based casino industry in the region. Where digitalisation is not possible are struggling to survive. If this reality becomes new reality they will have to shift focus of work. People will not be able to live online. As a case of reflection – Valerie Wolf Gang – Love machine project, an AI and VR helmet to maintain feelings of love as</p>

	<p>funds reserve for scholarships for 33 artists based in Maribor municipality in the amount of 1500 Euro for own education and training.</p> <p>Some sectors are overwhelmed with work.</p> <p>Those that work online in the field of digitalisation have prospered.</p> <p>New creative practices – people had time to reflect in the spring time.</p>	<p>reflection of today's relations between people who are physically separated. Exchange of knowledge is necessary; networks are to remain maintained. Cooperation between stakeholders needs to be maintained.</p> <p>The impacts of COVID-19 – the spring 2020 dynamics was different and had potential for reflections, whereas the second wave of autumn 2020 is more insecure. Cooperation face-to-face cannot be exchanged with an online one fully.</p> <p>Also, people are not aware of Slovenian cultural products as we are flooded with American stories. American stories are not our stories, where Slovenian artists are telling Slovenian stories.</p> <p>At first, difficulties when making transition from physical stores to online commerce.</p> <p>Actors need to be aware of the changes happening.</p> <p>Musical sector, event organisation sector is broken down.</p> <p>Some systemic solutions could be found, some difficulties with projects implementation and funding on municipal level.</p> <p>Economy received much help from the state, but NGOs and associations had difficulties.</p> <p>In times of spring 2020 lock-down the creative sector had the time to reflect and to develop new ideas. A call for developmental funds for CCIs open in first half of year was very successful with 300 applications received. CCIs sector can respond very quickly if there are incentives.</p> <p>Maribor is a more peripheral region in comparison to Ljubljana, where the core is. People need to overcome the mentality of being disadvantaged.</p> <p>People need to be less self-critical; people are passionate and have enough stubbornness to implement ideas. People need more focus.</p>
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Ukraine	<p>All sectors that could go online have shifted to online opportunities. Besides the huge impact on the health sector, the COVID-19 outbreak is bringing considerable socio-economic disruption. The effects of the current crisis are affecting the cross-border dynamics and will certainly influence the socio-economic perspectives of all CCIs areas.</p> <p>Business itself finds crisis solutions for the opportunity to survive and work in the modern reality caused by the pandemic of Covid-19.</p> <p>Thanks to online opportunities, multimedia, advertising, ICT sector continue to develop. New features have been added.</p>	<p>Not everyone is able to use online opportunities</p> <p>The COVID-19 crisis, uncovered pre-existing gaps in poor social protection provision, employment protection. According to an assessment respondents indicated that the government's performance in these fields was often poor. Telework, home office gained high popularity, but many have been excluded from its positive effects. Vulnerable workers are bearing the brunt of the shock, with low-skilled workers and those in non-standard employment having been particularly exposed.</p> <p>There are no plans or real support from the authorities in the region to mitigate the consequences of Covid-19. In the second quarter of 2020, still marked by COVID-19 containment measures in the analysed area, seasonally adjusted GDP decreased by 11.7% compared with the previous quarter (Ukraine (-9.9%)). Consequently in the national economy GDP growth turned into decline and the tendencies are negative. Tourism and cultural industries are one of the sectors which will be suffering the most from the crisis.</p> <p>The offline sector such as museums, theatres, cinemas and others are in deep crisis.</p>
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### 5.6.2 Danubian scores on impacts of COVID-19

As elaborated in the chapter 3.4 the focus groups conducted demanded the discussants to evaluate the level of impacts of COVID-19. As the questions adequately described the impacts, the scores went as follows: score 1 was least impact and score 4 had the most impact. The diagram below (see Fig. 5) therefore demonstrates the impacts of COVID-19: the more open the more impacts.

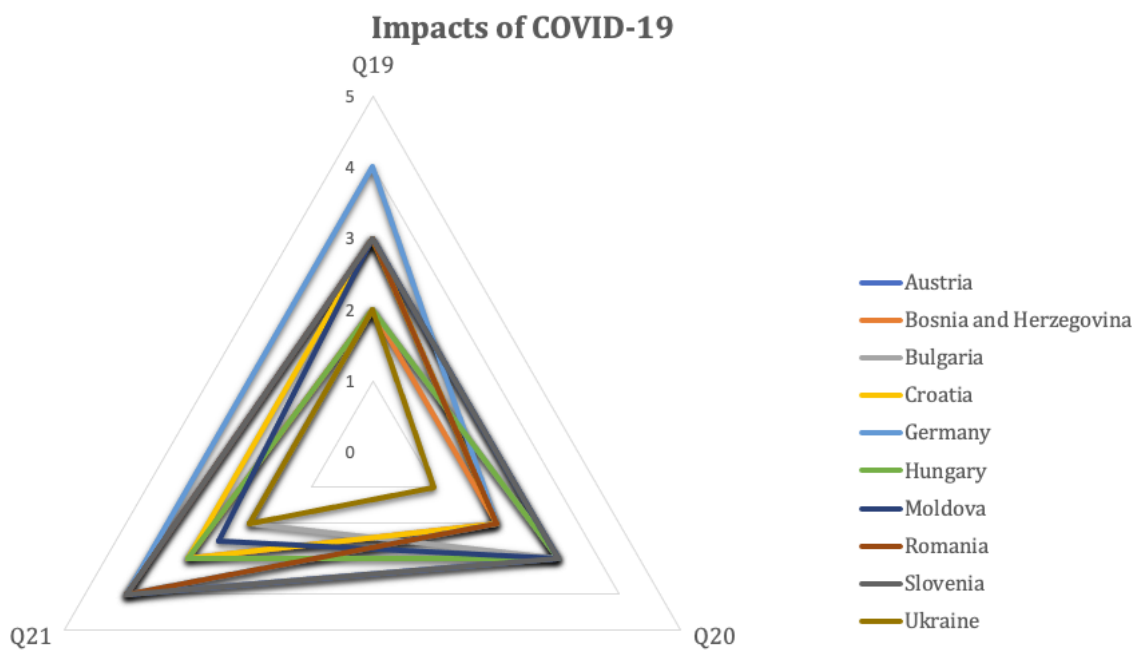


Figure 5 – Impacts of COVID-19

## 6 Overview and tentative conclusions

To assess the Cultural and Creative sector Ecosystem of the Danube region (in selected 10 countries) a social fields approach was used, since it is an only approach that enables joint assessment of:

- a) Innovation potential;
- b) CCI's Ecosystem;
- c) Attitudes towards cooperation and collaboration;
- d) Values and perceptions towards creativity and entrepreneurship, and
- e) Impacts of COVID-19.

A final overview of the Cultural and creative ecosystem of the Danube region shows somehow homogenic picture with similar dynamics on all compared levels. We acknowledge that best scores **on Innovation profile** of the Carinthia region in Austria, and modest assessments in B&H and Slovenia with other countries ranging in between.

When it comes to **CCI's ecosystem**, the most favourable conditions are detected in Bulgaria, and the least favourable conditions are detected in Moldova. Values for other countries range from 2,1 to 2,7 showing potential to increasingly improve the existing ecosystems.

In terms of **collaboration and cooperation**, the best scores are detected in Bulgaria and Hungary, with overall values higher than those evaluating CCI's ecosystem. Lowest scores on collaboration and cooperation are noted in Ukraine, Bosnia and Herzegovina, Romania and also Germany.

When discussing **values**, the attitudes towards creativity and entrepreneurship along with attitudes towards learning and competition were discussed. The start-ups in the field of CCI's were discussed also. The scores show, the most favourable attitudes are detected in Austria and Bulgaria, but also in Moldova, Croatia and Slovenia. Lowest scores are detected in Ukraine, Romania and Germany.

Lastly the **impacts of COVID-19** were assessed where the scores ranged lowest in Ukraine and Bosnia and Herzegovina to highest noted in Austria, Slovenia, Moldova and Croatia. In all countries the main conclusion was, the COVID-19 had big impacts on further separation of the cultural and creative sectors. Creative sectors with high access to digital technologies actually experienced large amounts of growth.

## 6.1 Scores on overall status of CCIs in Danube region (see Fig. 6)

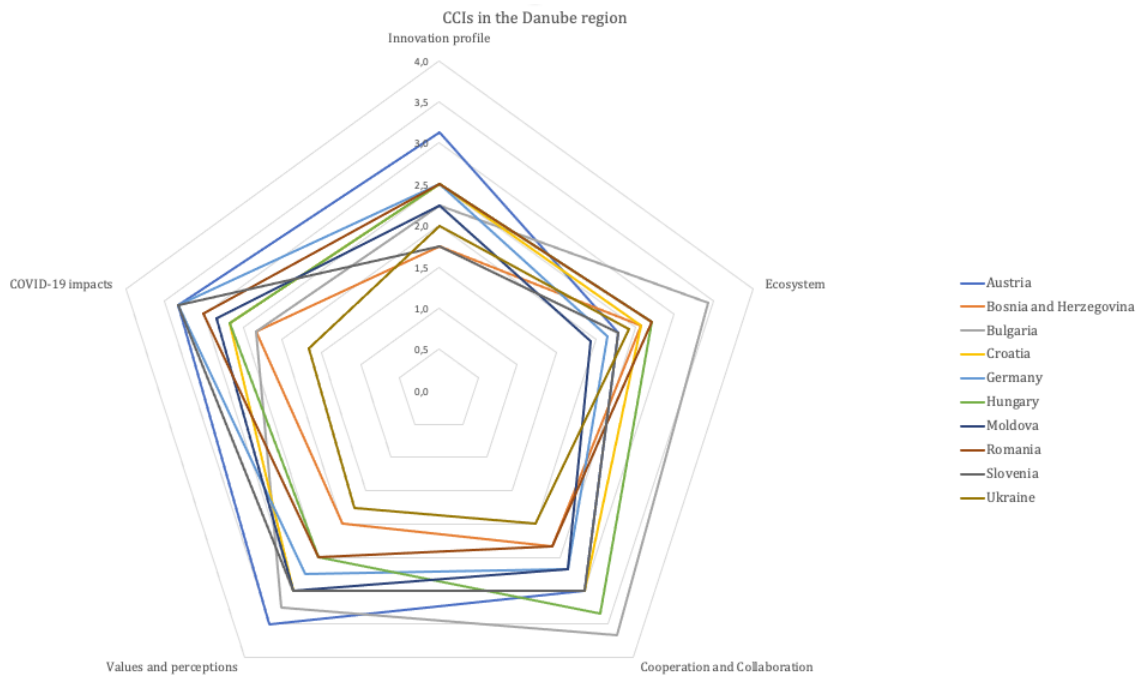


Figure 6 – CCIs in the Danube region

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**Annex I – Restart4Danube background analysis report guide**

Enclosed in separated document

**Annex II – Restart4Danube group discussions guide**

Enclosed in separated document

**Annex III – Restart4Danube radar diagrams template**

Enclosed in separated document