

Joint Study on CCSI Needs and Trends



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1. Introduction

1.1.Objectives of the Joint Study Report

The aim of the joint study is to identify the key transnational needs of the CCSI sector in the regions participating in the CCSI4CCSI project (Belgium, Croatia, Denmark, Greece, Poland), to understand regional differences, and to develop recommendations for common strategies to support and develop this sector.

By bringing together insights from diverse socio-economic and cultural contexts, the report serves several key purposes:

- **To identify common challenges and opportunities** shared by the Cultural and Creative Sectors and Industries (CCSI) across regions, as well as context-specific issues.
- **To compare and benchmark regional data** on CCSI needs, enabling a better understanding of strengths, gaps, and potential synergies.
- **To support peer learning and knowledge exchange** between regions, fostering collaboration and transfer of good practices.
- **To serve as a foundation for future interventions**, joint initiatives, and strategies tailored to the specific needs and potentials of the cultural and creative ecosystem in Europe.

Ultimately, the Joint Report contributes to building a more resilient, inclusive, and innovation-driven CCSI landscape across Europe.

1.2.Methodological Overview

In each region, the analysis of the needs of the Cultural and Creative Sectors and Industries (CCSI) was conducted using a common methodology developed within the CCSI4CCSI project. This process involved the following key steps:

1. **Contextual Analysis** – Each region began with desk research to understand its specific socio-economic and policy context related to CCSI. This included reviewing strategic documents, economic data, and existing cultural strategies.
2. **Stakeholder Mapping** – Regions identified and mapped relevant stakeholders from across the CCSI ecosystem, such as creators, institutions, public bodies, and creative industry hubs.

3. **Needs Identification Survey** – A standardized survey was distributed to CCSI stakeholders to gather data on challenges, development opportunities, and support needs. The survey included prioritization indicators (importance and time perspective).
4. **Focus Groups & LSG Meetings** – Qualitative insights were collected through focus groups and Local Stakeholder Group meetings. These discussions deepened understanding of local challenges and strategic needs.
5. **Data Analysis** – Quantitative survey results were analyzed statistically, while qualitative data from focus groups were thematically analyzed to identify recurring issues and region-specific insights.
6. **Regional Needs Report** – Each region compiled a comprehensive report summarizing key findings, regional challenges and opportunities, and recommendations for policy and support measures.
7. **Cross-Regional Sharing** – Results were shared across participating regions to validate findings, encourage feedback, and support mutual learning.

The joint study was based on a mixed-methods approach combining quantitative and qualitative elements. Building on the experience of previous regional needs assessments, the following actions were carried out:

1. **Comparative analysis of existing regional reports:** A detailed comparison of existing reports from all regions was conducted in order to identify common and diverging needs.
2. **Standardised questionnaire:** A common questionnaire was prepared and disseminated among CCSI stakeholders in all participating regions. The survey included questions about challenges, opportunities, needed support mechanisms, and opinions on future trends.
3. **Focus groups:** Each region conducted a focus group session with representatives of various stakeholder groups (creative professionals, cultural institutions, business sector, public authorities) from different regions, enabling an in-depth discussion on key challenges and opportunities.

Important aspects considered in the preparation of the joint study:

- **Unified definition of stakeholders:** A harmonised definition of CCSI stakeholders was adopted, taking into account the specificity of each region while ensuring comparability of results. Stakeholders included creative professionals, cultural institutions, public authorities, the business sector, NGOs, and educational institutions.

- **Consideration of regional specificities:** The study had to account for differences in regional context, the specific characteristics of local CCSI ecosystems, and varying socio-economic conditions.

Conducting such a joint allowed for a deeper understanding of the transnational challenges and opportunities of the CCSI sector, facilitate knowledge and experience exchange between regions, and contribute to the development of more effective and coordinated support strategies for this dynamically evolving sector.

2. Comparative Regional Analysis

This section presents a comparative overview of the participating regions, focusing on the structure and dynamics of their Cultural and Creative Sectors and Industries (CCSI). By examining key demographic, economic, and policy characteristics, the analysis highlights both common patterns and region-specific features. This comparison helps to better understand the diverse contexts in which the CCSI operates and informs the identification of shared challenges and tailored support needs.

2.1.Contextual Background

WEST FLANDERS PROVINCE



Population: 1,226,375 (2024) app. 10.5% of Belgium's total population

Key Industries: Life sciences, automotive, fintech, media and entertainment, agricultural science, logistics

Key Creative Sectors: The province is known for its textile industry, particularly in the southern region around Kortrijk

Kortrijk, is recognized as a UNESCO Creative City of Design. The city has a strong legacy in textile manufacturing and has successfully transitioned towards creative and design-driven innovation. The

region supports a dynamic ecosystem of SMEs, design studios, and start-ups, supported by institutions like Designregio Kortrijk and Howest University of Applied Sciences.

The region has a thriving creative sector in Flanders, contributing significantly to employment (6.17% FTEs in 2021, 14.35% of self-employed), gross added value (5.24%), and total turnover (11.4%) of the Flemish Region.

Key strengths include:

- A vibrant network of designers, makers, and digital creatives - strong design ecosystem.
- Access to living labs, coworking spaces, and incubators.
- Strong integration of design in traditional industries, enhancing innovation and competitiveness.
- international recognition (UNESCO City of Design)

Challenges:

- Need for stronger internationalization support.
- Bridging the gap between education and creative business scaling.
- Ensuring sustainable career paths for young creatives.

KOPRIVNICA



Population: 101,661 (2021), app. 2.6% of Croatia's total population

Key Industries: food processing, pharmaceuticals, manufacturing, brewing

Koprivnica is a small but dynamic city in northern Croatia, with growing engagement in cultural and creative initiatives. While not traditionally seen as a creative industry hub, the region has shown increasing commitment to nurturing creative entrepreneurship through local initiatives, events, and EU-funded projects.

The local CCSI ecosystem includes 42 cultural associations and 108 companies in Koprivnica, with 239 companies and 255 cultural associations at the county level. Key stakeholders include public authorities, creative professionals (especially in video/film), cultural institutions, the business sector (marketing/digital agencies), educational institutions, and NGOs.

Key features:

- An emerging creative scene based around community-driven culture and youth engagement.
- Utilization of EU programs for capacity building and infrastructure development.
- Local government support through strategies focused on cultural tourism and innovation.

Challenges:

- Limited access to professional training in creative industries.
- Small market size and lack of established creative economy clusters.
- Need for policy alignment at regional and national levels to support growth.

SOUTHERN DENMARK

Population: 1,239,234 (2023) app. 20.9% of Denmark's total population

Key Industries: Manufacturing, public administration, education, health services, trade, and transport

Key Creative Sectors: design, architecture, fashion, digital media, crafts, and cultural heritage

Southern Denmark is home to a well-developed creative economy, especially in design, gaming, and animation. Features a strong creative ecosystem with key players like LEGO, ECCO, and Design School Kolding. The region benefits from Denmark's overall supportive framework for creative industries and entrepreneurship. Stakeholders encompass educational institutions, business sector, public authorities, funders, and creative hubs/networks.

Highlights:

- High level of digitalization and creative tech application.
- Cross-sector collaboration between creative, health, and manufacturing sectors - cross-sector innovation.
- Strong public and private investment in R&D and creative innovation.
- Advanced digital creative industries (gaming, animation);
- Strong infrastructure

Challenges:

- Talent retention outside major urban centers.
- Bridging urban-rural disparities in access to creative industry infrastructure.
- Enhancing international collaboration opportunities.

CENTRAL MACEDONIA



Population: 1,795,669 (2021), app. 17.2% of Greece's total population

Key Industries: Tourism, agriculture, manufacturing, services

Key Creative Sectors: Thessaloniki, the region's capital, is a cultural hub with numerous festivals, museums, and a vibrant arts scene.

Central Macedonia, with Thessaloniki as its capital and cultural hub, is one of the most populous regions in Greece and a key cultural and economic center. The creative industries here are closely linked to cultural heritage, performing arts, audiovisual production, and more recently, digital content creation.

Strengths:

- **Rich cultural heritage.**
- **Academic support** - presence of universities and cultural institutions fostering creative talent.
- Active creative communities, particularly in film, music, and visual arts.
- Initiatives like Thessaloniki International Film Festival enhance global visibility.

Challenges:

- Fragmented support ecosystem and limited coordination between stakeholders.
- Underdeveloped funding structures for creative start-ups.
- Lack of awareness and metrics to monitor the sector's impact on the regional economy.

MAŁOPOLSKA



Population: 3.4 million (2023), app. 8.9% of Poland's total population

Key Industries: Life sciences, renewable energy, ICT, chemistry, metal production, electrical engineering, machinery,

Key Creative Sectors: gaming, digital design, and multimedia arts.

Małopolska, with Kraków as its capital, is one of Poland's leading regions in the field of creative and cultural industries. Kraków is a leading center for modern business services in Poland, with over 101,000 people employed in 288 service centers, accounting for 22% of national employment in this sector. The region combines a rich historical and cultural heritage with dynamic growth in digital and creative sectors. Kraków, a UNESCO City of Literature, serves as a major hub for film, design, publishing, architecture, IT, and gaming industries.

Key strengths:

- Strong academic base with universities offering creative disciplines and fostering talent (e.g. Jagiellonian University, Academy of Fine Arts).
- A thriving digital economy, especially in game development, animation, and multimedia.
- Active participation in European cultural and creative projects.
- Kraków's position as an international cultural and tourism destination enhances opportunities for creative enterprises.

Challenges:

- Concentration of activity in Kraków – need to decentralize and support rural and smaller urban creative ecosystems.
- Limited coordination between public, private, and educational sectors on a regional strategy for creative industries.
- Gaps in access to funding and business support services for early-stage creative entrepreneurs outside the capital.

2.2.Strategic Documents

WEST FLANDERS PROVINCE

- Policy 1: Policy note 2024-2029, Culture (Flanders)
- Policy 2: Policy note 2024-2029. Economy, science, innovation and industry (Flanders)
- Policy 3: Flemish Arts Decree (2020); culture
- Policy 4: "Kortrijk Relaunches; 4 strategic choices"

Culture and creative sectors are not a federal competence in, it is the responsibility of the Flemish government. There is a lack of supportive policies in terms of funding, market access and access to creative spaces. Collaboration and networking are crucial for the sector, but are also under-supported in current policies. This is also related to the current needs of the sector.

SJEVERNA HRVATSKA – KOPRIVNICA

- Policy 1: City of Koprivnica Development Strategy until 2030
- Policy 2: National development strategy until 2030
- Policy 3: The Strategy of Digital Croatia for the Period Until 2032
- Policy 4: Smart specialization strategy until 2029

According to the responses given in the Focus Groups, policies are insufficient in these areas: public calls are short-term - for one year, there are few employment opportunities, the amounts of funds are insufficient, the construction of infrastructure is not financed, and the adaptation to technological development is too slow.

CENTRAL MACEDONIA

- Policy 1: National Smart Specialisation Strategy (RIS3) 2021–2027
- Policy 2: National Recovery and Resilience Plan
- Policy 3: The Operational Program “Competitiveness”
- Policy 4: The Regional Operational Programs (ROPs) 2021–2027

The cultural and creative industry is an evolving and multifaceted sector of the economy, combining cultural heritage with innovation and contributing to economic development, employment, and social cohesion. In Greece, this sector has been developing dynamically, despite challenges such as limited access to funding and the need to adapt to technological advancements

SOUTHERN DENMARK

- Policy 1: Denmark’s National Cultural Policy – Focuses on access to culture, support for innovation, and digital inclusion in the arts.
- Policy 2: Smart Specialisation Strategy (S3) for Southern Denmark – Integrates CCSI with green growth, tourism, and digital transformation.
- Policy 3: EU Interreg and Regional Development Programs – Provides funding mechanisms for cross-border and regional CCSI development.

Current policies broadly support the development of the sector, especially in terms of access to funding and internationalization. However, operational gaps exist in digital skills support, physical infrastructure, and cross-sector integration, which limit their effectiveness.

MAŁOPOLSKA

- Policy 1: Development Strategy of the Małopolska Region 2030 - supports the development of the culture and creativity sector as a tool for strengthening regional identity and economic competitiveness.
- Policy 2: Regional Innovation Strategy of the Małopolska Region 2030 (RIS 2030) - outlines the region's approach to fostering innovation, including the development of the cultural and creative industries.
- Policy 3: Regional Operational Programme of the Małopolska Region 2014–2020 / European Funds for Małopolska 2021–2027 - Finances projects related to the development of the creative sector, particularly in the context of innovation and entrepreneurship.

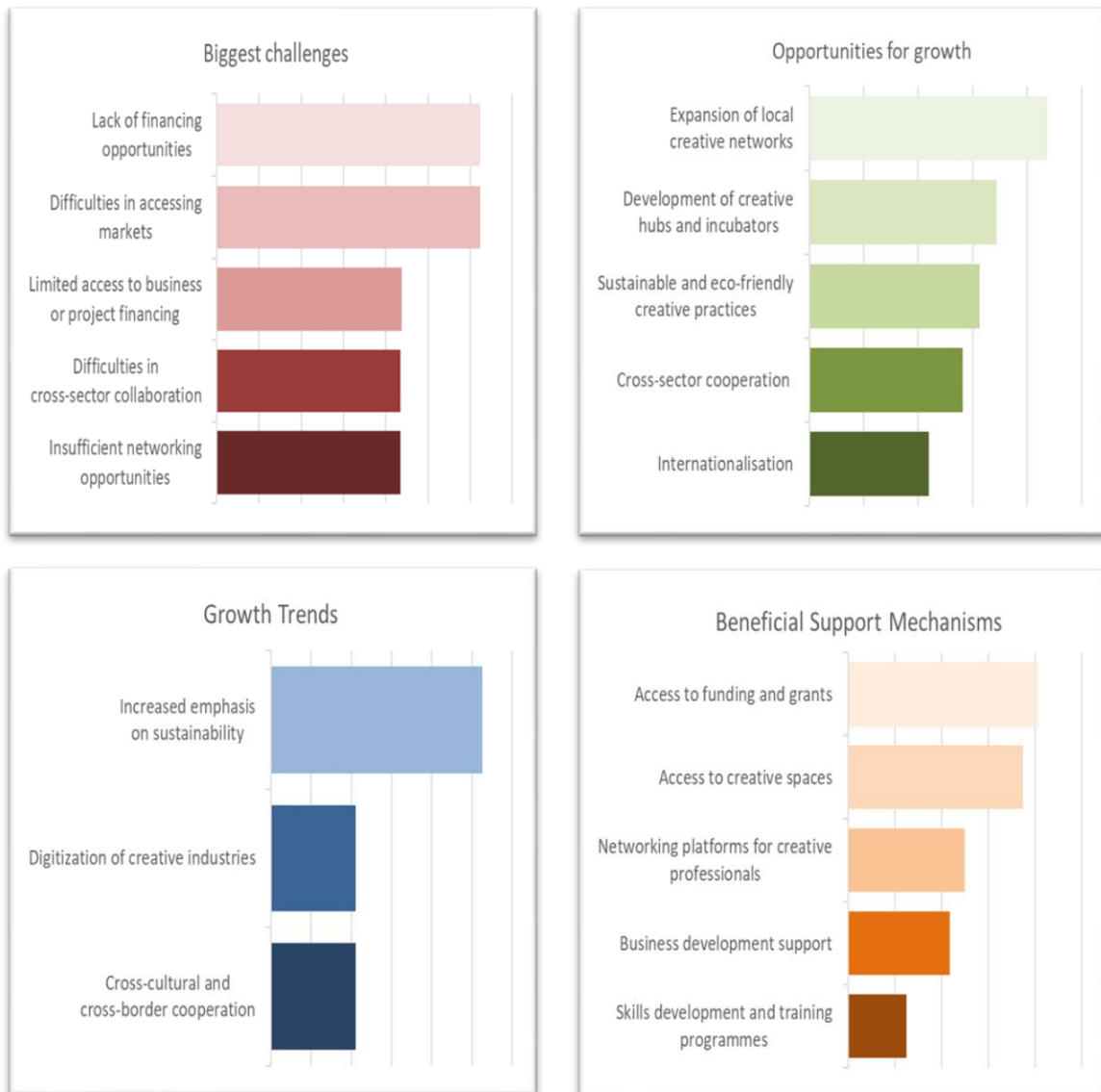
The national policies provide a foundational framework for cultural and creative sectors in Poland. However, their broad scope may not fully address the specific needs and priorities of the Małopolska region's CCSI. The existing regional policies demonstrate a commitment to supporting the cultural and creative sectors in Małopolska. However, there is room for improvement in aligning these policies more closely with the specific needs of the sector.

3. The assessment of the needs of CCSI in regions

3.1. Survey Results in the Regions

This section explores the specific needs, challenges, and growth opportunities of the CCSI in each participating region. Drawing on survey results and focus group discussions, it provides insights into the current state of the sector from the perspective of key stakeholders. The analysis helps identify priority areas for support and reveals both shared concerns and regionally distinct issues shaping the development of the creative and cultural industries.

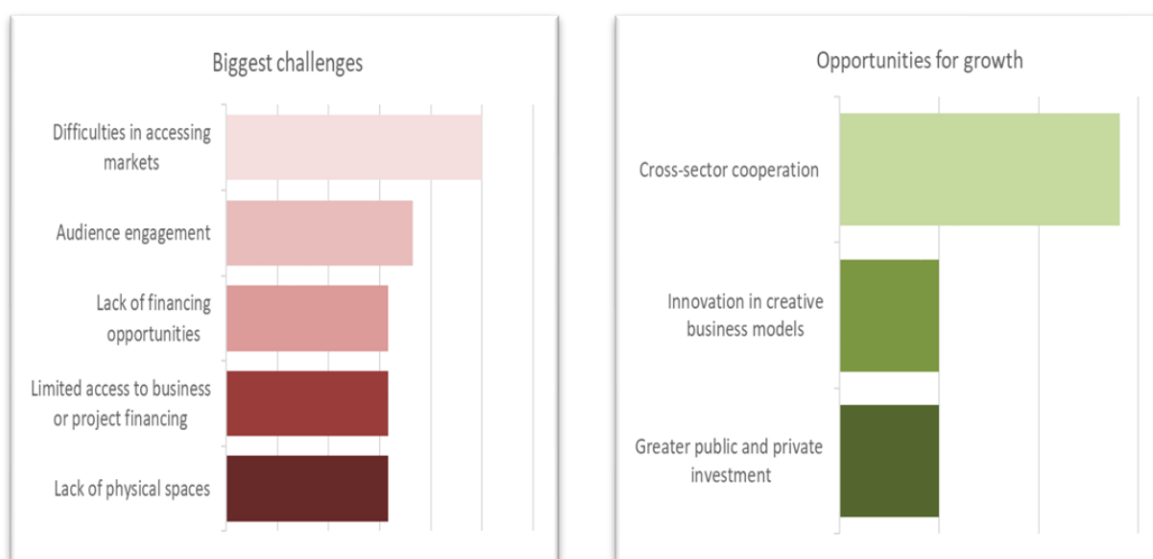
Analysis for Belgium

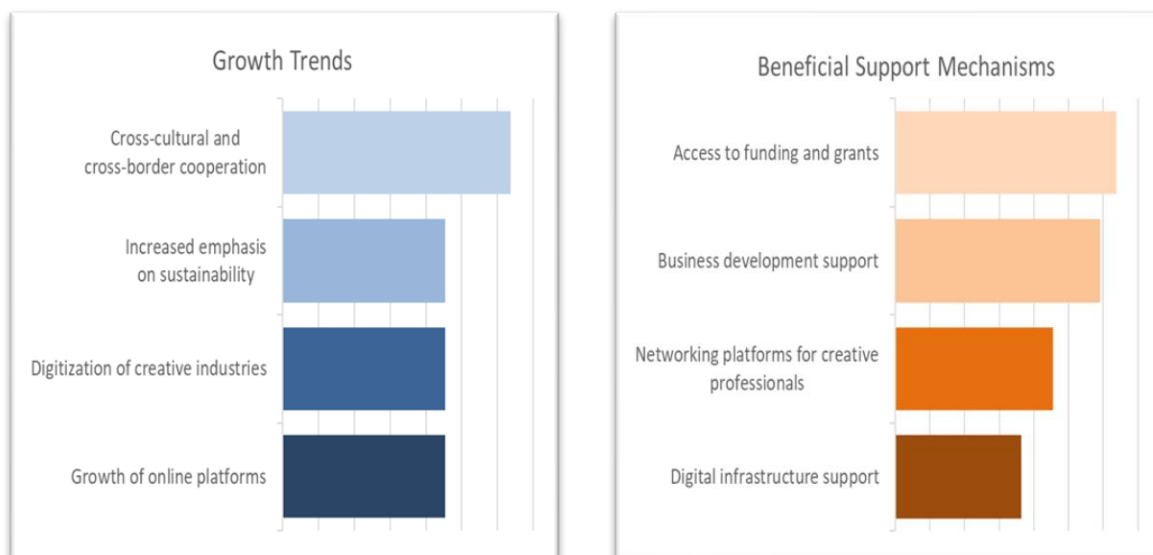


- **Role in CCSI:** The **overwhelming majority** of respondents identify as **Creative Professionals** (70.50%). Businesses are the second largest group, though significantly smaller (5.90%).
- **Primary Sub-sector:** The primary sub-sector of work is most frequently **Design and Fashion** (35.50%), followed by Visual Arts (17.60%) and Literature and Publishing (11.80%).
- **Biggest Challenges:** The most significant challenges are **Difficulties in accessing markets** (62.50%) and **Lack of financing opportunities** (62.50%). Insufficient networking opportunities and Difficulties in cross-sector collaboration are also major concerns (both 43.50%).
- **Opportunities for Growth:** The **Expansion of local creative networks** is seen as a massive opportunity (87.50%). Development of creative hubs and incubators (69%), Sustainable and eco-friendly creative practices (62.50%), and Cross-sector cooperation (56.20%) are also highly rated.

- **Growth Trends:** Expected growth drivers in the next 5-10 years include Cross-cultural and cross-border cooperation (56.20%) and Digitization of creative industries (56.20%). Increased emphasis on sustainability is also noted (62.50%).
- **Most Beneficial Support Mechanisms:** **Access to funding and grants** is identified as the most beneficial support mechanism (81.2%). Access to creative spaces (e.g., co-working spaces, studios) is also highly beneficial (75%). Business development support (44%) and Networking platforms for creative professionals (50%) are also important.
- **Prioritized Support Mechanisms:** The prioritized support mechanisms for immediate action align with the most beneficial ones: **Access to funding and grants** (81.2%) and **Access to creative spaces** (75%).
- **Most Effective Delivery Methods:** **Regional creative centers and incubators** are seen as the most effective way to deliver support (75%). International cooperation and networking (50%) and Public-private partnerships (43.80%) are also considered effective.

Analysis for Croatia

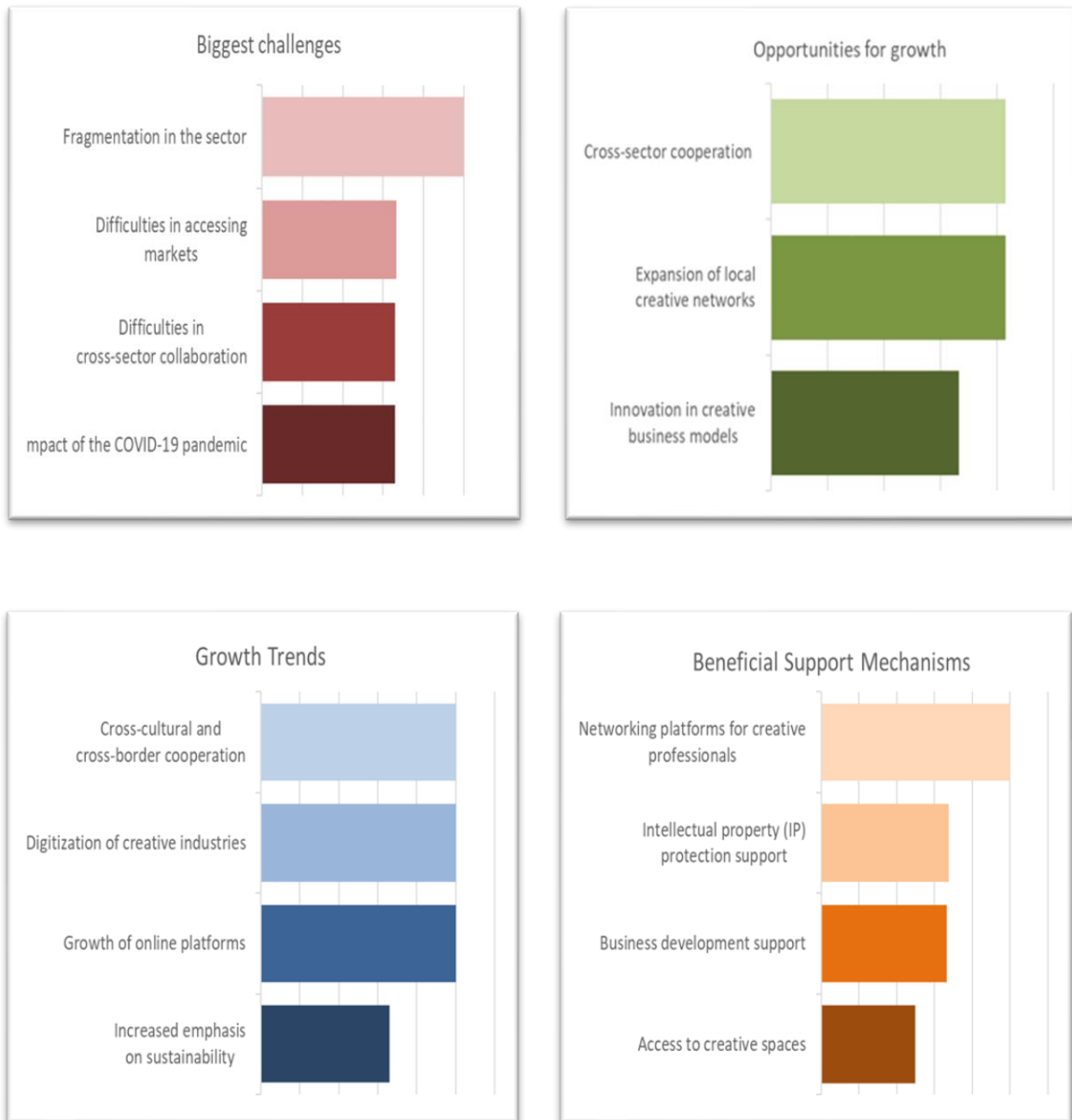




- **Role in CCSI:** The largest group identifying their role is **Businesses** (40.90%). Creative Professionals make up the second largest group (18.20%), followed by NGOs (13.60%).
- **Primary Sub-sector:** Croatia's responses are more distributed across sectors. The most frequent primary sub-sectors are Visual Arts (22%), Other (20%), Digital Media (18%), and Performing Arts (14%).
- **Biggest Challenges:** The most significant challenges are **Difficulties in accessing markets** (50%) and **Audience engagement** (36%). Lack of physical spaces (32%), Lack of financing opportunities (31.70%), and Limited access to business or project financing (31.70%) are also prominent.
- **Opportunities for Growth:** **Cross-sector cooperation** is the top perceived opportunity for growth (59%). Innovation in creative business models (50%), Greater public and private investment in CCSI (50%), and Digital transformation (40%) are also highly rated opportunities.
- **Growth Trends:** The top trends expected to drive growth are Cross-cultural and cross-border cooperation (32%) and Growth of online platforms for the distribution of cultural and creative products/services (24%).
- **Most Beneficial Support Mechanisms:** **Business development support** is identified as the most beneficial support (59%). Access to funding and grants (63.7%) is also highly beneficial. Skills development and training programmes (27.3%) and Policy advocacy and regulatory reform (27%) are also noted.
- **Prioritized Support Mechanisms:** The prioritized support mechanisms for immediate action align closely with the most beneficial: **Business development support** (59%) and **Access to funding and grants** (63.2%).

- **Most Effective Delivery Methods:** **Public-private partnerships** (50%) and **Regional creative centers and incubators** (45.50%) are seen as the most effective ways to deliver support.

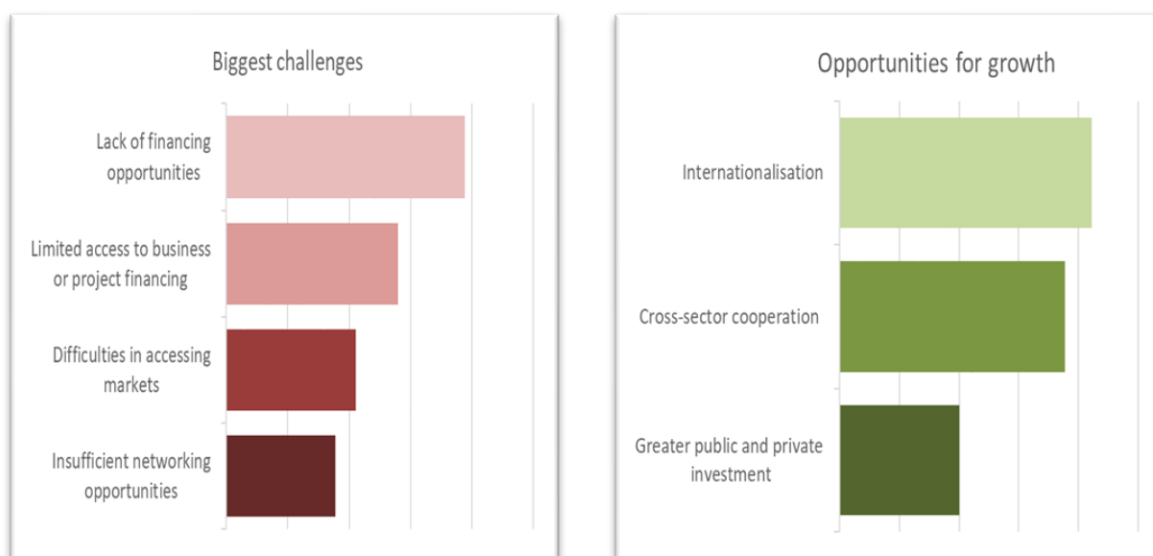
Analysis for Denmark

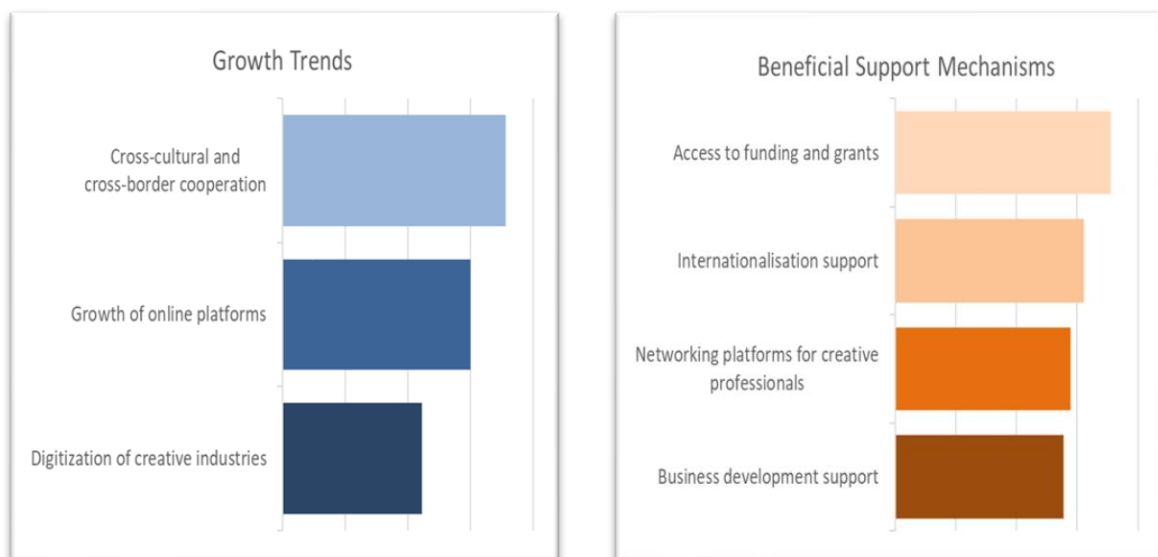


- **Role in CCSI:** There is a significant presence of **Creative Professionals** (73%), with Businesses also playing a substantial role (33%).
- **Primary Sub-sector:** The most frequent primary sub-sectors are **Design and Fashion** (40.00%) and **Digital Media** (40.00%). Visual Arts is the third most common (20%).

- **Biggest Challenges: Fragmentation in the sector** (50%), Difficulties in accessing markets (33.33%), Difficulties in cross-sector collaboration (33.33%), Impact of the COVID-19 pandemic (33.33%) are all challenges.
- **Opportunities for Growth: Expansion of local creative networks** and **Cross-sector cooperation** are a major opportunities (83% each%). Innovation in creative business models (67%) is the second biggest opportunity. Development of creative hubs and incubators (50.00%), Digital transformation (50.00%), and Sustainable and eco-friendly creative practices (50.00%) are also seen as key.
- **Growth Trends: Growth of online platforms for the distribution of cultural and creative products/services**, Cross-cultural and cross-border cooperation (50%) and Digitization of creative industries (50%) are equally significant trends.
- **Most Beneficial Support Mechanisms: Networking platforms for creative professionals** is identified as the most beneficial support (100.00%). Business development support (66,67%) and Intellectual property (IP) protection support are also highly beneficial. Access to creative spaces (50%) is also important.
- **Prioritized Support Mechanisms:** No data provided.
- **Most Effective Delivery Methods: Regional creative centers and incubators** are seen as the most effective way to deliver support (66,67%). Public-private partnerships (50%) is also considered effective.

Analysis for Greece

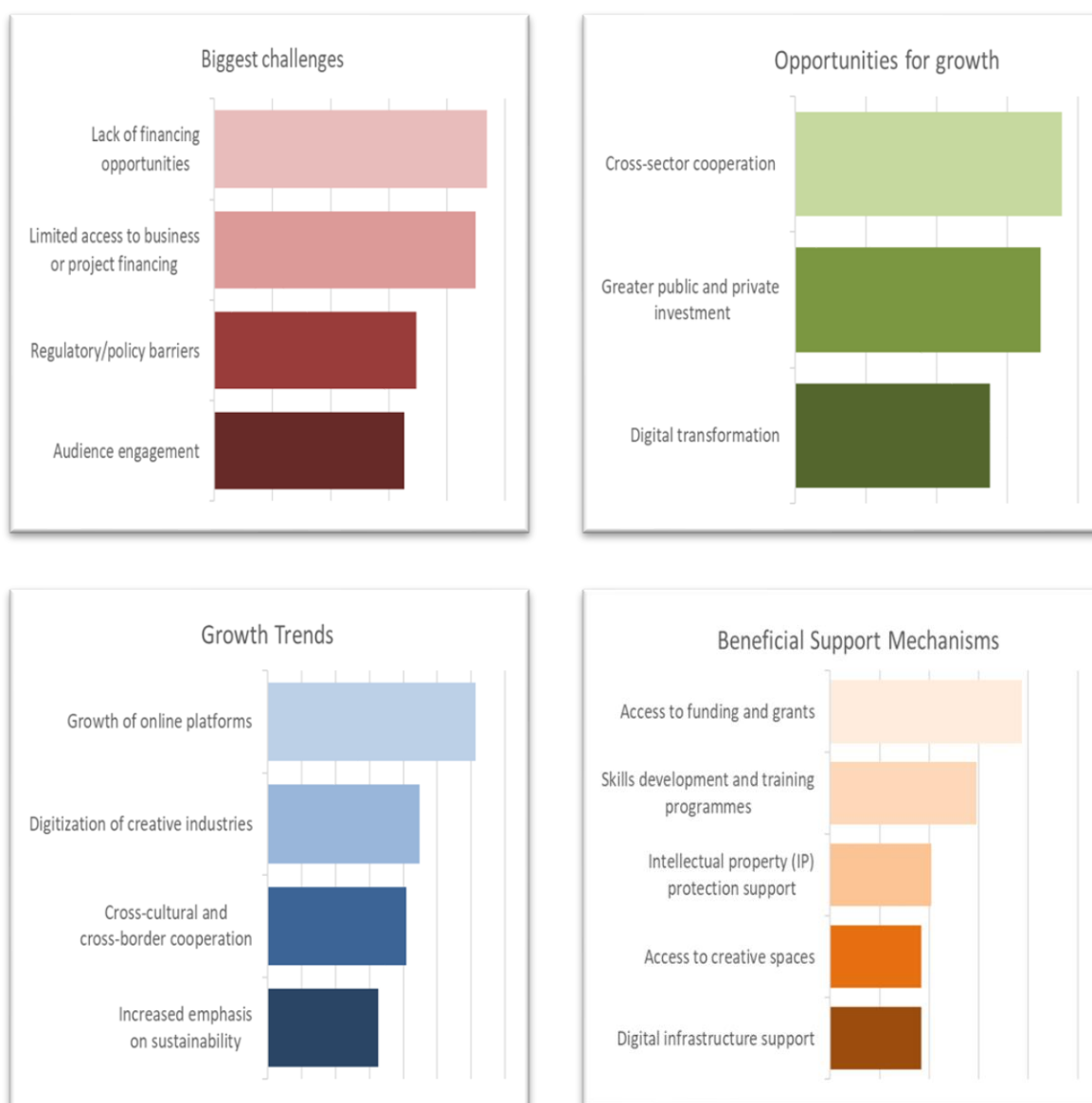




- **Role in CCSI:** The largest group identifying their role is **Businesses** (35.60%), followed by Creative Professionals (31.10%) and NGOs (13.30%).
- **Primary Sub-sector:** The most frequent primary sub-sector is . Digital media (24.4%), music (20%), visual arts (15.6%), cultural heritage (15.6%), and performing arts (11.1%) are also present. Other represented sectors include design, fashion, architecture, social innovation, photography, gastronomy, and education.
- **Biggest Challenges:** The most significant challenge is **Lack of financing opportunities** (77.80%), Difficulties in accessing markets (42.20%), Limited access to business or project financing (56%), Insufficient networking opportunities (35.60%), and Regulatory/policy barriers (35%) are also major concerns.
- **Opportunities for Growth: Internationalisation** (export of creative products/services) is seen as a huge opportunity (71.10%). Cross-sector cooperation (68.90%) and Greater public and private investment in CCSI (60.00%) are also highly rated. Innovation in creative business models (53.30%) and Expansion of local creative networks (53.30%) are notable as well.
- **Growth Trends: Cross-cultural and cross-border cooperation** is the dominant expected growth trend (71.10%). Growth of online platforms for the distribution of cultural and creative products/services (60.00%) and Digitization of creative industries (44.40%) are also important.
- **Most Beneficial Support Mechanisms: Access to funding and grants** is identified as the most beneficial support mechanism (71.1%). Internationalisation support (62.2%) and Networking platforms for creative professionals (57.80%) are also highly beneficial. Business development support (55.60%) is also important.

- **Prioritized Support Mechanisms:** The prioritized support mechanisms for immediate action align closely with the most beneficial: **Access to funding and grants** (71.1%) and **Internationalisation support** (62.2%).
- **Most Effective Delivery Methods:** **Government programs and initiatives** (64.40%) and **International cooperation and networking** (53.30%) are seen as the most effective ways to deliver support. Public-private partnerships (71.10%) are also highlighted as highly effective.

Analysis for Poland



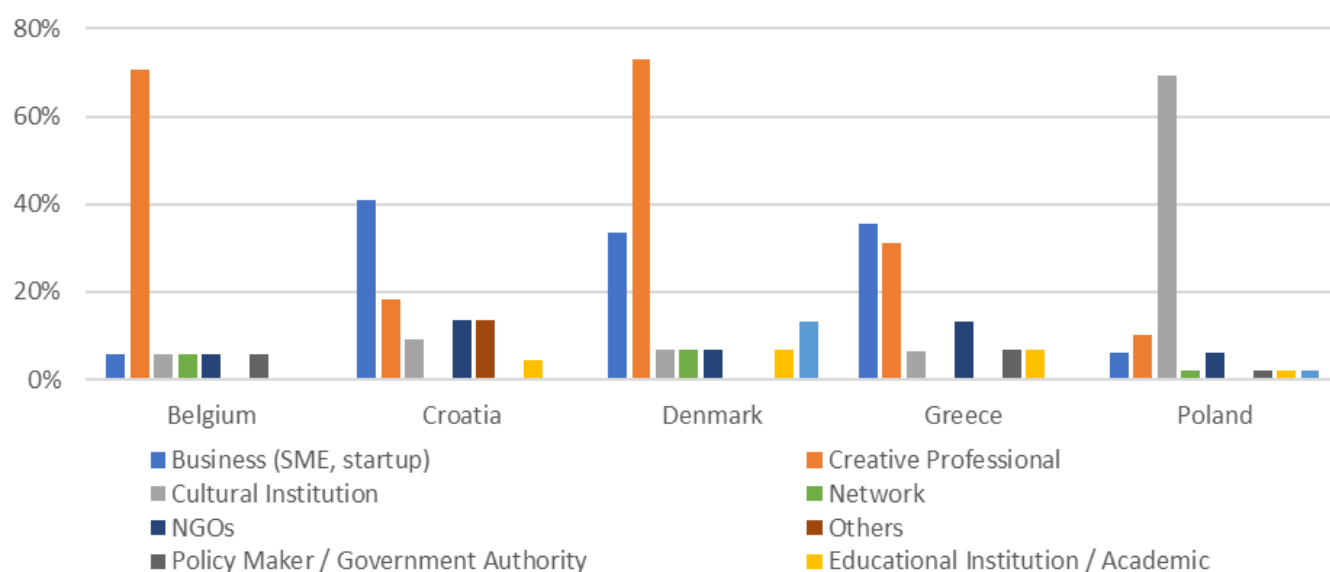
- **Role in CCSI:** **Cultural Institutions** represent the overwhelming majority (69%). Businesses, Creative Professionals, and NGOs constitute smaller, equal shares (6% each).

- **Primary Sub-sector:** The primary sub-sector of work is strongly focused on **Cultural Heritage** (43%). Performing Arts (18%) and Visual Arts (6%), Digital Media (6%), Literature and Publishing (6%), and Architecture (2%) are also present.
- **Biggest Challenges:** The most significant challenges are **Lack of financing opportunities** (47%) and **Limited access to business or project financing** (45%). Audience engagement (33%), Lack of physical spaces (29%), Difficulties in cross-sector collaboration (24%), and Lack of skills development programmes (20%) are also major concerns.
- **Opportunities for Growth:** **Cross-sector cooperation** (76%) and **Greater public and private investment in CCSI** (69%) are seen as the most significant opportunities. Digital transformation (55%) and Sustainable and eco-friendly creative practices (39%), along with Development of creative hubs and incubators (39%), are also notable.
- **Growth Trends:** Growth of online platforms for the distribution of cultural and creative products/services (31%), Digitization of creative industries (22%), and Cross-cultural and cross-border cooperation (20%) are the main expected growth trends.
- **Most Beneficial Support Mechanisms:** **Access to funding and grants** is identified as the most beneficial and prioritized support mechanism (78%). Skills development and training programmes (59%) and Intellectual property (IP) protection support (41%) are also seen as highly beneficial.
- **Prioritized Support Mechanisms:** The prioritized support mechanisms for immediate action are **Access to funding and grants** (78%) and **Skills development and training programmes** (59%).
- **Most Effective Delivery Methods:** **Government programs and initiatives** (42.85%) are seen as the most effective way to deliver support. Public-private partnerships (24.48%) and Regional creative centers and incubators (14.28%) are less frequently cited as effective compared to other countries.

3.2. Survey participants

Understanding the profile of survey participants is essential for contextualizing the findings presented in the report. This section details the types of stakeholders who contributed to the survey across regions—ranging from creative professionals and businesses to NGOs and public institutions—and highlights the diversity of sub-sectors represented. These distinctions help explain regional variations in perceived challenges and priorities.

1 Role of survey participants in the CCSI sector

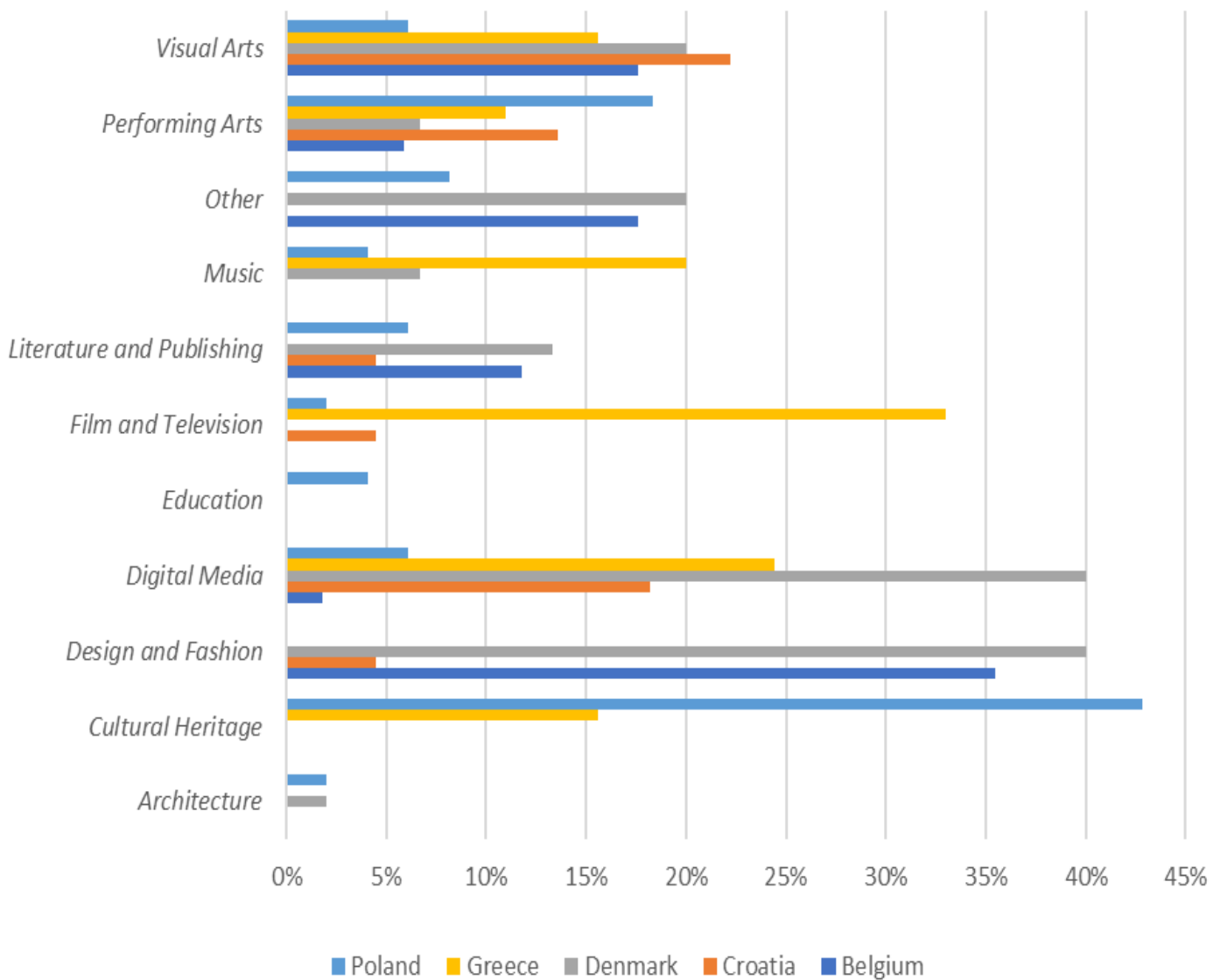


The profiles of respondents differ significantly across regions, which is crucial for understanding the perspectives presented later in the analysis.

- In **Belgium**, the **dominant group was Creative Professionals** (70.50%). Businesses (5.90%), cultural institutions (5.90%), networks (5.90%), NGOs (5.90%), and public authorities representatives (5.90%) were significantly less numerous.
- In **Croatia**, the largest share was held by **Businesses** (40.90%), followed by Creative Professionals (18.20%) and NGOs (13.60%). Cultural institutions constituted 9.10% of respondents.
- In **Denmark**, similar to Belgium, the largest group was **Creative Professionals** (73%), although the share of Businesses was also high (33%).
- In **Greece**, Businesses (35.60%) and Creative Professionals (31.10%) constituted the two largest groups, with comparable shares. NGOs also had a significant share (13.30%).
- In **Poland**, the structure of respondents was unique among partners, with a huge predominance of **Cultural Institutions** (69%). Businesses (6%), Creative Professionals (10%), and NGOs (6%) constituted much smaller percentages.

Conclusion: The analysis of challenges, opportunities, and support needs should take into account the specific structure of respondents in each region. Particularly in Poland, where cultural institutions dominate, the results may reflect their specific perspectives and needs, differing from regions with a predominance of businesses or individual professionals.

2 CCSI Sub-sectors represented by survey participants



Similar to roles, the diversity of represented sub-sectors is significant.

- In **Belgium**, the dominant sub-sectors were **Design and Fashion** (35.50%) and **Visual Arts** (17.60%), as well as the "Other" category (17.60%).
- In **Croatia**, the largest shares were held by **Visual Arts** (22%), the "Other" category (20%), and **Digital Media** (18%) and Performing Arts (14%).
- In **Denmark**, there was a clear dominance in **Design and Fashion** (40.00%) and **Digital Media** (40.00%).
- In **Greece**, the highest share was recorded in the category of **Performing Arts** (18%). The sub-sectors of Design and Fashion, Digital Media, Literature and Publishing, and Visual Arts each had a 5-6% share.

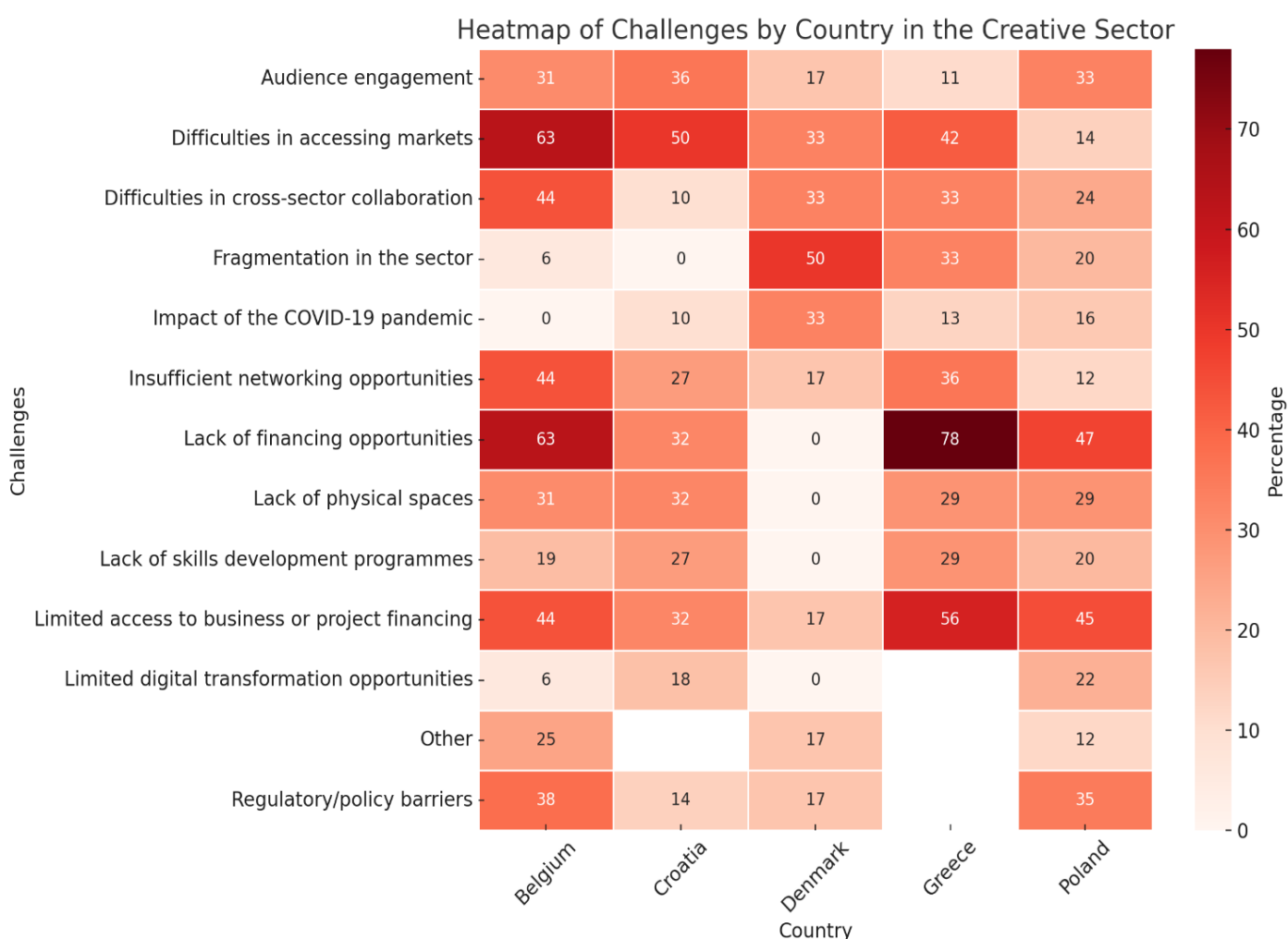
- In **Poland**, **Cultural Heritage** (43%) clearly dominated. Other significant sub-sectors included Performing Arts (18%), Literature and Publishing (6%), and Visual Arts (6%). Design and Fashion and Digital Media sub-sectors had a 0% share.

Conclusion: The diversity of represented sub-sectors (e.g., the dominance of Cultural Heritage in Poland, Design/Fashion and Digital Media in Denmark, or Visual Arts in Croatia) influences the specific challenges and needs.

3.3.Common Needs and Challenges

Despite regional diversity, several challenges consistently emerged across countries. This section synthesizes the most frequently reported barriers facing the CCSI revealing shared structural constraints. The identification of these cross-cutting issues helps to inform targeted, transnational support strategies.

3 Biggest challenges facing the CCSI sector in the regions



Despite differences, some challenges are common to most surveyed regions.

- **Lack of financing opportunities / Limited access to business or project financing:** This is a key challenge indicated by respondents in **Greece** (77.80%, 56%), **Belgium** (62.50%, 43.80), **Poland** (47%, 45%), and **Croatia** (31.70%). These indicators are lower in Denmark (0% and 17%).
- **Difficulties in accessing markets:** This challenge is particularly significant in **Belgium** (62.50%), **Croatia** (50%), and **Greece** (42.20%). It is less significant in Poland and Denmark (14%, 33% respectively).
- **Insufficient networking opportunities:** This issue is frequently indicated in **Belgium** (43.50%), **Croatia** (27%), and **Greece** (35.60%). In **Denmark** and **Poland**, it was noted at a level of 17% and 12% respectively.
- **Lack of physical spaces:** This constitutes a significant challenge in **Croatia** (32%), and **Greece** (28.90%), as well as in Belgium (**31.20%**). In Poland, 29% of respondents indicated it. In **Denmark** no one indicated it as a challenge.
- **Regulatory/policy barriers:** These are particularly important in **Belgium** (37.50%), and Poland (35%). This problem is less common in **Denmark** (17%) and Croatia (14%) and not a problem in Greece (0%)
- **Audience engagement:** This is a key challenge in **Croatia** (36%) and **Poland** (33%), as well as in Belgium (31.20%).
- **Difficulties in cross-sector collaboration:** These were indicated by 43.50% of respondents in **Belgium**, 33.30% in **Greece**, 33% in **Denmark** and 24% in **Poland**. In Croatia and Denmark, this issue is marginal (10% and 0% respectively).
- **Lack of skills development programmes:** Indicated by approximately 27-29% of respondents in Croatia and Greece. In Belgium at 18.80%, in Poland 20%. In Denmark this problem hasn't been noticed at all (0%)
- **Sector fragmentation:** This is the biggest challenge in Denmark (50%), and Greece (33.30%), , and Poland (20%).

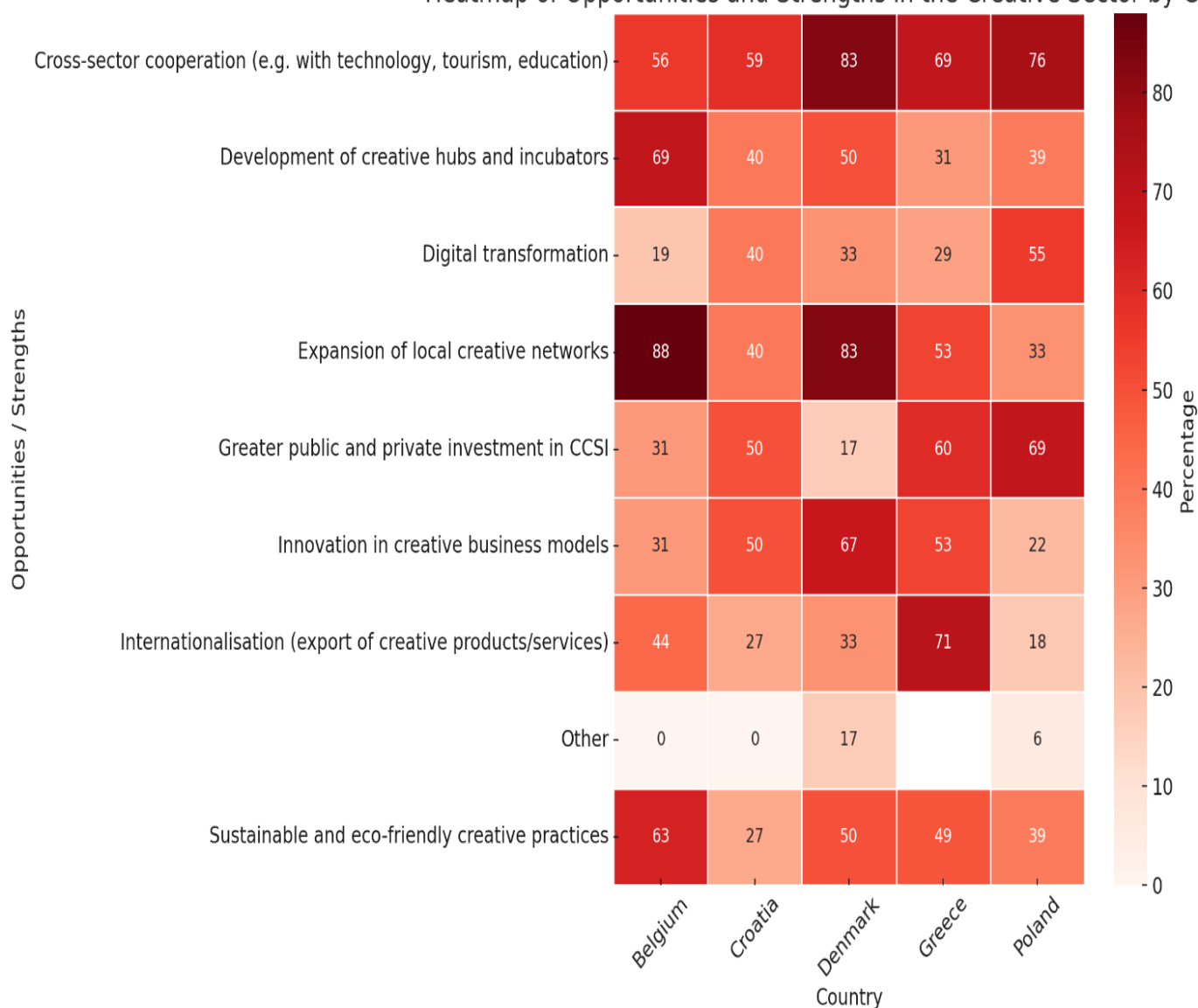
Conclusion: Lack of financing is a universal and often dominant challenge. Market difficulties and insufficient networking are common, especially in Belgium, Croatia, and Greece. Poland, with its specific sector structure, puts more emphasis on audience engagement. Regulatory barriers are significant in Belgium, Fragmentation in the sector is a serious challenge in Denmark.

3.4. Opportunities for growth

While challenges are widespread, so too are opportunities for sustainable growth within the CCSI. This chapter outlines the most promising areas for development identified by stakeholders. These opportunities reflect both global trends and region-specific potential for innovation.

4 Opportunities for growth in the CCSI sector

Heatmap of Opportunities and Strengths in the Creative Sector by Country

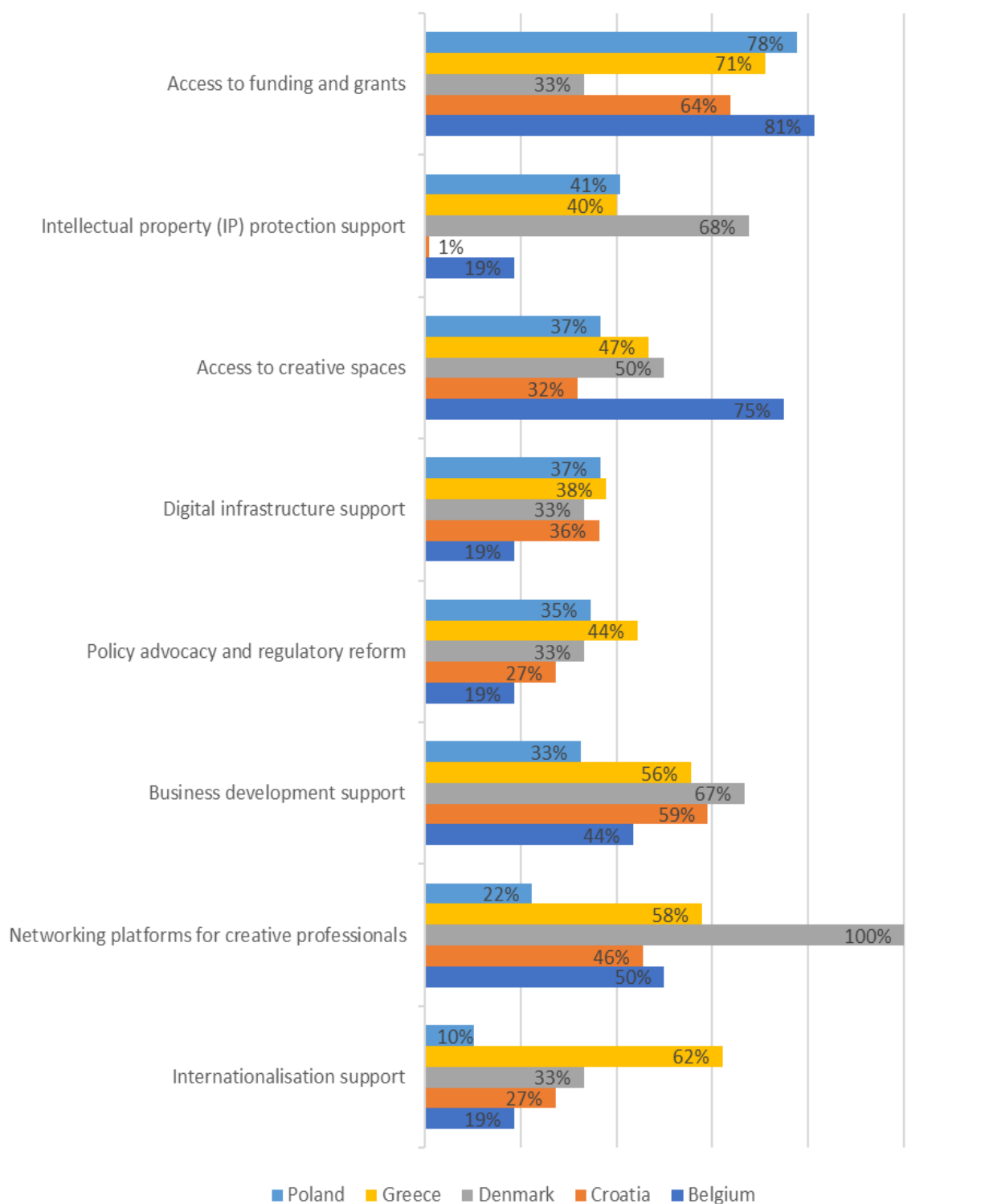


Respondents indicated various development opportunities, often converging across regions.

- **Cross-sector cooperation** (e.g., with technology, tourism, education): This is perceived as the biggest opportunity for development in every country: Denmark (83%), **Poland** (76%), **Greece** (68.90%), **Croatia** (59%), and **Belgium** (56.20%).
- **Greater public and private investment in CCSI**: This is a key opportunity in **Poland** (69%) and **Greece** (60.00%), as well as in Croatia (50%). In Belgium, it was indicated at 31.30%, in Denmark 16.67%.
- **Expansion of local creative networks**: The biggest opportunity according to respondents in **Belgium** (87.50%), and Denmark (83%, it is) also important in Greece (53.30%).
- **Digital transformation**: Particularly significant in **Poland** (55%), Croatia (40.00%). In and Denmark at (33%), Greece at 28.90%, in Belgium 18.80%.
- **Development of creative centres and incubators**: Perceived as a significant opportunity in **Belgium** (69%) and **Denmark** (50.00%). Around 40% in Poland and Croatia.
- **Internationalisation** (export of creative products/services): This is a key opportunity in **Greece** (71.10%). Also important in Belgium (43.80%).
- **Innovation in creative business models**: This is perceived as the biggest opportunity for development in Denmark (67%). Indicated by approximately 50-53% of respondents in Croatia, and Greece.
- **Sustainable and eco-friendly creative practices**: Indicated by 62.50% of respondents in Belgium and 50.00% in Denmark and 48.90% in Greece. Around 30% in Poland and Croatia.

Conclusion: Cross-sector cooperation and greater investment are universal opportunities. Expansion of local networks is particularly important in Belgium and Denmark, and internationalisation in Greece. Digital transformation is key in Poland, and Croatia,

5 Most beneficial support mechanisms to the CCSI

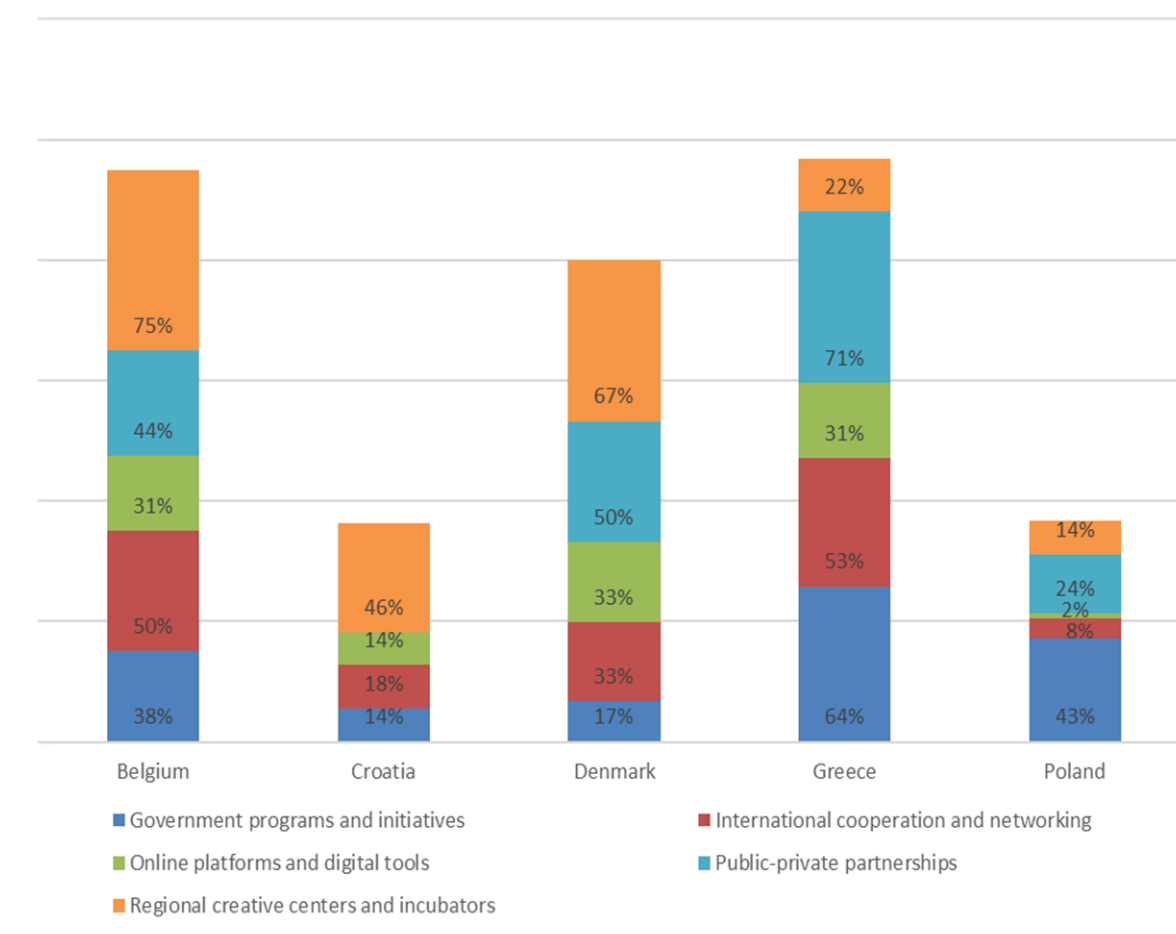


- **Access to funding and grants:** This is the **highest priority** in **Poland** (78%) and **Belgium** (81.2%). Very high priority also in Greece (71.1%). At around 6% in Croatia, significantly less in Denmark (33%).

- **Business development support** (e.g., training, mentoring): **Highest priority in Denmark** (67%) and **Croatia** (59%). Also important in Greece (55.6%) and Belgium (44%). 33% in Poland.
- **Access to creative spaces** (e.g., co-working spaces, studios): **Highest priority in Belgium** (75%), and in Denmark (50%). At around 37-46% in Greece and Poland. 32% in Croatia.
- **Networking platforms for creative professionals**: Priority in **Denmark** (100%), **Greece** (57.8%), **Belgium** (50%), At 46% in Croatia. 22% in Poland.
- **Skills development and training programmes**: Priority in **Poland** (59%) and **Greece** (40%). At around 25-33% in the remaining regions.
- **Intellectual Property (IP) protection support**: Highest priority in Denmark (62%), then **Poland** (41%) and **Greece** (40%). Lower in Belgium and Croatia.
- **Digital infrastructure support**: Priority in Poland (37%), Greece (37.8%), Croatia (35.4%). Lower in Belgium and Denmark.
- **Policy advocacy and regulatory reform**: Important in Greece (44.4%), Denmark (33.33%), Poland (35%), and Croatia (27%). 19% in Belgium.
- **Internationalisation support**: Particularly important in Greece (62.2%). Significantly lower in the remaining regions (from 10% in Poland to 33.33% in Denmark and Croatia).

Conclusion: Access to financing is a universal and often the most important priority. Business development support is key in Denmark, Greece and Croatia. Access to creative spaces is a priority in Belgium. Poland places great emphasis on skills development and IP protection. Greece on networking, skills development, IP protection, and internationalization. Denmark on networking platforms for creative professionals.

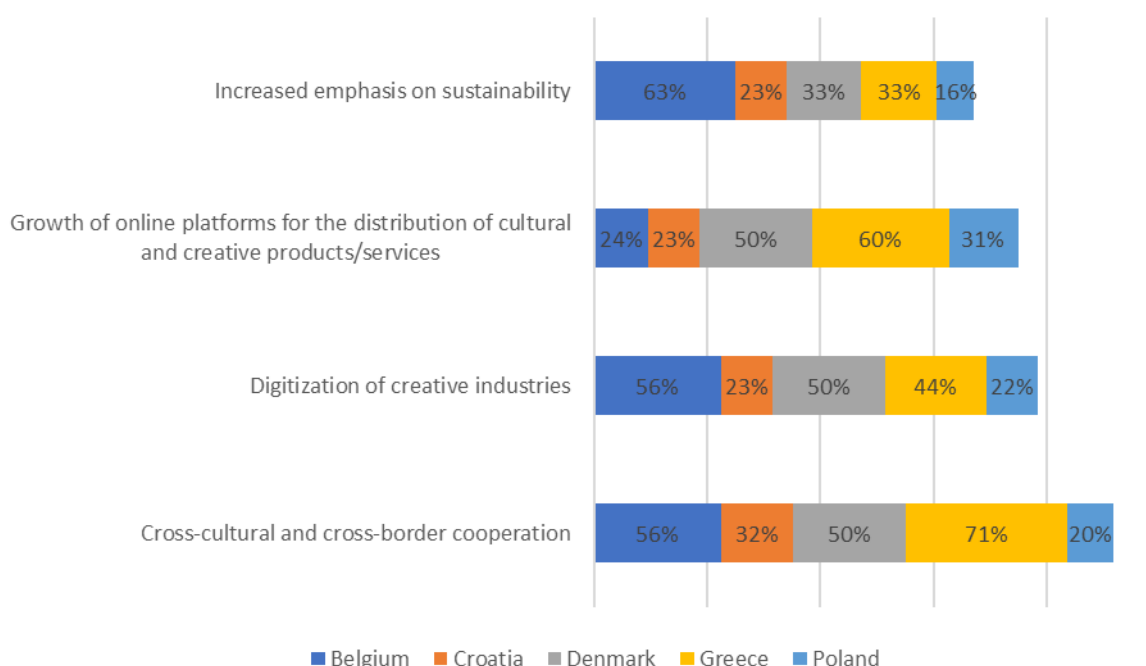
6 Most effective support methods



- **Regional creative centres and incubators:** Perceived as the most effective method in **Denmark** (67%) and **Belgium** (75%). Also important in Croatia (45.50%). Significantly less so in Greece (22.20%) and Poland (14.28%).
- **Government programmes and initiatives:** An effective method in **Greece** (64.40%). In Poland 42.85%. Lower in Belgium, and significantly less in **Denmark** (17%) and Croatia (14%).
- **Public-private partnerships:** A key method in **Greece** (71.10%) and **Croatia** (50%). Also important in Belgium (43.80%). Significantly less so in Poland (24.48%).
- **International cooperation and networking:** Indicated by and 53.30% in Greece, 50% of respondents in Belgium. Lower in 33% in Denmark (33%), Croatia (18.20%) and Poland (8.16%).
- **Online platforms and digital tools:** Perceived as effective in Belgium (31.20%), Denmark (33.33%), and Greece (31.10%). Significantly lower share in Croatia (13.60%) and Poland (2.04%).

Conclusion: The effectiveness of support delivery is perceived differently. Regional centres/incubators are key in Belgium and Denmark. Government programmes in Denmark and Greece. Public-private partnerships in Greece and Croatia.

7 Trends driving CCSI development in a 5-10 year perspective



- **Transnational and cross-border cooperation:** Perceived as a key trend in **Greece** (71.10%) and **Denmark** (50%), as well as in Belgium (56.20%). 32% in Croatia, 20% in Poland.
- **Digitisation of creative industries:** Significant trend in Denmark (50%) and Belgium (56.20%). At 44.40% in Greece. 23% in Croatia, and 22% in Poland.
- **Growth of online platforms** for the distribution of cultural and creative products/services: Particularly important in Greece (60%), and **Denmark** (50%). Less significant in Poland (31,2%) Belgium (24), Croatia (23%), and Greece (60.00%).
- **Increased emphasis on sustainability:** Indicated by 62.50% of respondents in Belgium. At 33% in Denmark and Greece. 23% in Croatia, and 16% in Poland.

Conclusion: Transnational cooperation, digitisation, and online platforms are widely recognised as major trends, although with varying intensity in specific regions. Sustainability is very important in Belgium.

3.5. Regional Specificities and Unique Findings

Each region participating in the study presents a unique configuration of strengths, needs, and development pathways. This section explores those regional specificities in greater depth, highlighting what differentiates one area from another—whether in stakeholder profiles, sub-sector focus, or preferred support mechanisms. These insights support the design of context-sensitive interventions.

Biggest Similarities Across Countries

- **Lack of Financing:** A **significant similarity** is the challenge of **lack of financing opportunities** and **limited access to business or project financing**. This is perceived as a major challenge across most countries, including Belgium (62.50% and 43.80% respectively), Greece (77.80% and 56%), and Poland (47% and 45%). Correspondingly, **access to funding and grants** is consistently ranked as one of the **most beneficial** and often the **highest priority** support mechanism needed across four countries (ranging from 63.2% in Croatia to 81.2% in Belgium, Denmark is an exception 33%).
- **Cross-sector Cooperation as Opportunity:** Another **major similarity** is the view that **cross-sector cooperation** (e.g., with technology, tourism, education) presents a significant **opportunity for growth** in the CCSI. This opportunity is highly rated across all countries, with percentages ranging from 56% in Belgium to 76% in Poland.
- **Importance of Creative Professionals and Businesses:** While the dominant type of organization varies, **Creative Professionals** and **Businesses** (including creative SMEs and startups) represent **significant roles** within the CCSI in several countries. For example, Creative Professionals account for 70.50% in Belgium and 73% in Denmark, while Businesses are 40.90% in Croatia and 35.60% in Greece.

Biggest Differences Across Countries

- **Dominant Organizational Role:** There is a **significant difference** in the **primary role** played by different types of organizations within the CCSI. Poland stands out with a dominant percentage of **Cultural Institutions** (69%), whereas in Belgium and Denmark, **Creative Professionals** are overwhelmingly the largest group (70.50%, 73% respectively). In Croatia, **Businesses** hold the largest share (40.90%). Greece has a more even split, with Creative Professionals (31%) and Businesses (36%) being significant roles.
- **Perceived Effectiveness of Support Delivery Mechanisms:** The countries show **large differences** in what they consider the **most effective ways to deliver support**. For example, **Regional creative centers and incubators** are perceived as extremely effective in Denmark (67%) and Belgium (75%), but much less so in Greece (22.20%) and Poland (14.28%). Similarly, **International cooperation and networking** are highly valued in Belgium, and Greece (50% to 53.30%), but significantly less in Poland (8.16%).
- **Primary Sub-sector Focus:** The **primary sub-sector** of work within the CCSI varies **considerably**. Poland shows a strong focus on **Cultural Heritage** (43%). Belgium is strongest in **Design and Fashion** (35.50%) while Denmark has an equally high percentage in Design and Fashion (40%) and

Digital Media (40.00% each),. Croatia's responses are more distributed across various sectors, like Visual Arts (22%), Digital Media (18%), and Performing Arts (14%).

- **Severity of Specific Challenges:** The perceived severity of certain challenges differs notably. While lack of financing is common, other challenges like **Difficulties in accessing markets** are very high in Belgium (62.50%) and Croatia (50%) but much lower in Denmark (33%) and Poland (14%). **Regulatory/policy barriers** are a major concern in Belgium (37.50%) and Poland (35%), compared to Croatia (13.60%), Denmark (16.67%) and Greece (11.10%).
- **Opportunities for Growth Prioritization:** While cross-sector cooperation is a shared opportunity, others vary in importance. **Expansion of local creative networks** is seen as a huge opportunity in Belgium (87.50%) and Denmark (83%), but less so in Poland (33%). **Greater public and private investment** is a major opportunity in Poland (69%), Greece (60%), and Croatia (50%), but less emphasized in Denmark (16.67%) and Belgium (31.30%). **Digital transformation** as an opportunity is highest in Poland (55%) and Croatia (33%), while lower in Belgium (18.80%).

These points highlight both **shared concerns** (like financing) and **unique contexts** (like dominant roles, sub-sector focus, and preferred support delivery) within the CCSI across these European countries, based directly on the survey data provided.

3.6. Findings from Focus Groups

To complement the survey data, focus groups were conducted in each region to gain qualitative insights directly from stakeholders. This section presents key outcomes from these discussions. The findings enrich the quantitative analysis and validate regional reports with lived experiences.

Belgium (Kortrijk, West Flanders): The focus group confirmed survey insights, especially emphasizing the importance of daring to do business and working together, and the need to lower barriers to cooperation and funding.

Croatia (Koprivnica): Focus group participants identified funding challenges, market access and audience engagement as key obstacles, skills development gaps, and opportunities related to tourism, technology, global demand, funding, and infrastructure.

Denmark (Southern Denmark): Focus group consultations contributed to the identification of challenges and opportunities, but specific, separate findings are not explicitly detailed.

Greece (Central Macedonia): The focus group identified a range of multi-level challenges related to the institutional and legal framework (e.g., NGO exclusion from funding, project-based instability, lack of specialized roles, restrictive funding calls, lack of collaboration framework for artists, AI copyright issues), the financial and banking environment (difficulties in accessing loans and working capital, need for specialized financial tools), and education and skills development (need for structured training, lack of technical and administrative support for accessing funding).

Poland (Małopolska): Focus group discussions contributed to the overall understanding of challenges and opportunities, but explicit, detailed findings from these discussions are not presented separately.

3.7.Synthesis

The analysis of survey data indicates significant differences between the CCSI4CCSI partner regions, largely resulting from the diverse profile of respondents and represented sub-sectors.

- **Respondent profile:** Poland stands out with its concentration on cultural institutions, while other regions have a larger share of businesses and individual professionals. Croatia has the highest share of businesses. This is a fundamental difference that shapes perspectives and needs.
- **Sub-sectors:** The dominance of cultural heritage in Poland, design/fashion and digital media in Denmark, or visual arts in Croatia shows that the "CCSI sector" in each region has a different specific character.
- **Challenges:** Although **lack of financing** is a universal problem, market challenges dominate in Belgium, Croatia, and Greece, while audience engagement is key in Poland and Croatia. Regulatory barriers are significant in Denmark and Belgium.
- **Opportunities:** **Cross-sector cooperation** is universally perceived as a major opportunity. Public/private investments are key in Poland and Greece. The development of networks and hubs is important in Belgium and Denmark. Digital transformation has varying levels of significance, from very high in Poland, Croatia, and Denmark to lower in Belgium. Internationalisation is crucial for Greece.
- **Trends:** Digitisation, online platforms, and transnational cooperation are major trends, but sustainability is strongly emphasised in Belgium and Croatia.
- **Support (priorities):** **Access to financing** is the highest priority in Poland, Belgium, and Greece. Business development support is key in Denmark and Croatia. Access to spaces in Belgium and

Denmark. Poland has specific needs regarding skills development and IP protection. Greece regarding networking, skills development, IP protection, and internationalisation.

- **Support delivery:** The effectiveness of regional centres/incubators is highly rated in Belgium and Denmark, government programmes in Denmark and Greece, and public-private partnerships in Greece and Croatia.

Table 1: Key Challenges, Opportunities, and Support Needs in CCSI by Region

Region	Challenges / Needs	Opportunities	Support Mechanisms Needed
Kortrijk, West Flanders	<ul style="list-style-type: none"> - Poor access to markets and funding - Weak cross-sector collaboration and networking - Limited creative spaces 	<ul style="list-style-type: none"> - Strong local creative networks - Growth of hubs and incubators - Eco-friendly practices - Cross-sector work 	<ul style="list-style-type: none"> - Grants and funding (with better outreach) - Creative spaces (co-working, studios) - Support for networking platforms
Koprivnica	<ul style="list-style-type: none"> - Market access barriers (50%) - Limited funding and financing options - Inadequate spaces and audience reach - Skills development gaps 	<ul style="list-style-type: none"> - Growth in tourism and tech - Rising global demand for cultural products - Cross-sector collaboration and digitalisation 	<ul style="list-style-type: none"> - Investment in digital, education, and infrastructure - Business training and workshops - Support for networking and cooperation
Southern Denmark	<ul style="list-style-type: none"> - Fragmented ecosystem - Market access issues - Weak collaboration across sectors - post pandemic consequences 	<ul style="list-style-type: none"> - Digital transformation - Export growth - Sustainability innovation - Strong hub potential 	<ul style="list-style-type: none"> - Support for networks and regional collaboration - Intellectual property - Skills in business,
Central Macedonia	<ul style="list-style-type: none"> - Funding issues (78%) - Lack of business/project financing (56%) - Market access and networking barriers - Legal, financial, and skills gaps 	<ul style="list-style-type: none"> - Strong potential for internationalisation - Innovation and new business models - Sustainable practices and digital growth 	<ul style="list-style-type: none"> - Grants and internationalisation support - Training, mentoring, and IP protection - Legal reforms and digital infrastructure
Małopolska	<ul style="list-style-type: none"> - Limited and hard-to-access funding - Few skill development opportunities - Regulatory obstacles 	<ul style="list-style-type: none"> - Digital transformation - Cross-sector collaboration (tech, tourism) - Hubs and sustainability focus 	<ul style="list-style-type: none"> - Tailored grants and funding - Training in digital and project skills - Infrastructure and internationalisation support - IP and SME aid

3.8.Regional Heatmap of CCSI Challenges and Opportunities

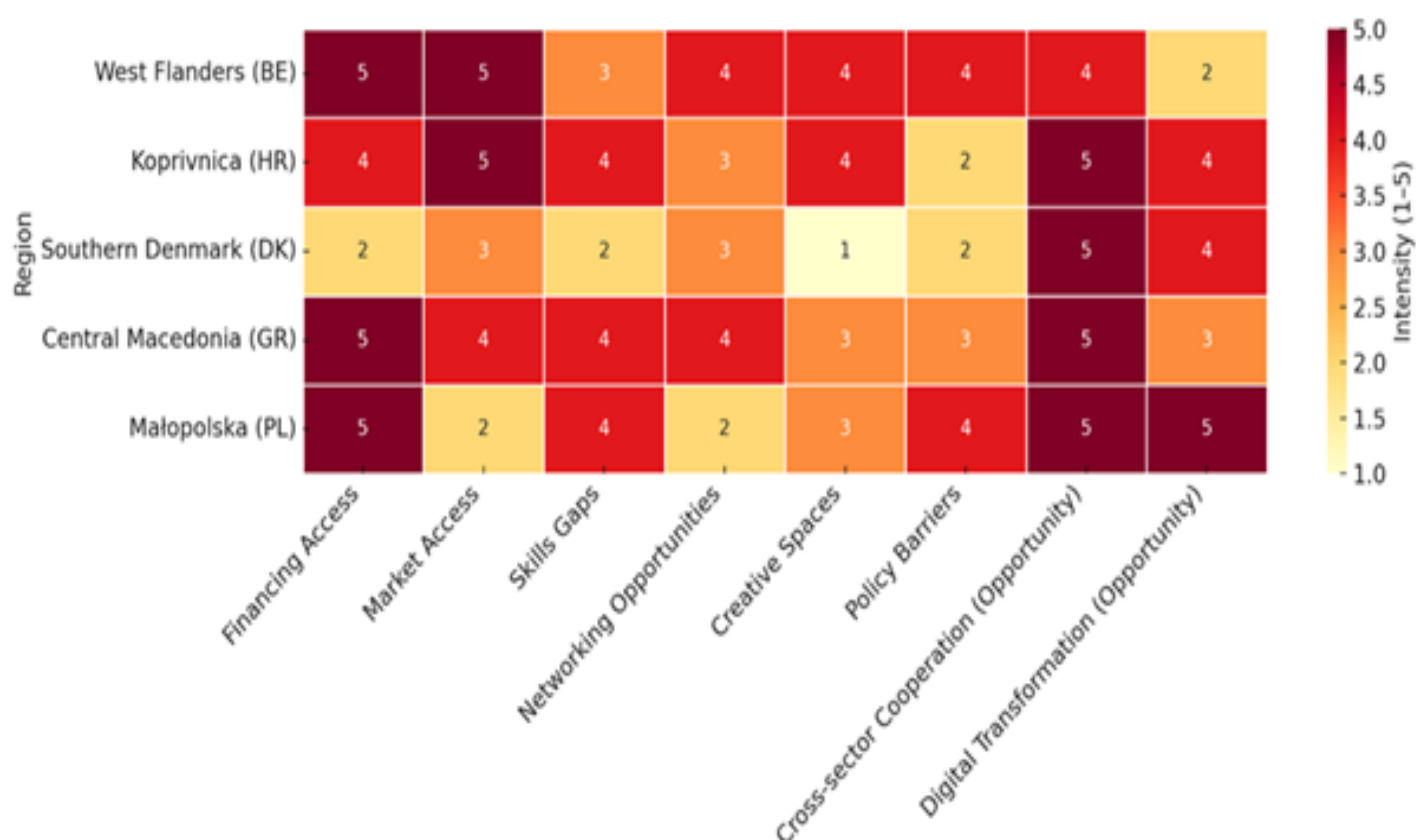
To visualize the intensity of key challenges and opportunities across the participating regions in the CCSI4CCSI project, a **heatmap** was developed using a comparative scoring approach. This visualization serves as a synthetic and comparative tool to highlight both **shared issues** and **unique regional dynamics**.

The heatmap is based on the qualitative and quantitative findings presented in the Joint Study, particularly: Section 4: "Assessment of the Needs of CCSI in Regions"; Survey response data per region; Focus group summaries; Comparative conclusions on challenges and opportunities.

This visualization:

- Offers a quick, intuitive overview of CCSI landscape variation across regions
- Helps identify where support efforts should be prioritized
- Supports data-driven policy design and transnational knowledge sharing

8 Regional Heatmap of CCSI Challenges and Opportunities



Each challenge or opportunity was assigned an intensity score on a scale from 1 to 5, where:

1 = very low intensity or relevance in that region

5 = very high intensity or top priority according to survey or focus group data

This was done based on:

- Percentage of respondents identifying a challenge/opportunity as critical (e.g., >60% = score 5)
- Explicit mentions and emphasis in qualitative feedback
- Cross-comparison between regions based on shared metrics (e.g., access to funding, digital transformation)

Eight key indicators were selected, representing both structural challenges and strategic opportunities: Financing Access, Market Access, Skills Gaps, Networking Opportunities, Creative Spaces, Policy Barriers, Cross-sector Cooperation (as an opportunity), Digital Transformation (as an opportunity).

4. Opportunities for mutual learning

The collection of regional needs reports provides a valuable comparative framework. By analyzing the similarities and differences across regions, partners can gain a more comprehensive understanding of the challenges, opportunities, and effective support strategies for the cultural and creative industries in Europe, ultimately enriching their own regional development efforts.

The most important key areas of potential mutual learning are:

- **Understanding Common Challenges and Diverse Perspectives:** Partners can gain insights into the shared challenges faced by the Cultural and Creative Sectors and Industries (CCSI) across different European regions, such as **access to funding, market access, and skills development**. However, they can also learn about how the severity and specific manifestations of these challenges differ regionally. For example, while difficulty accessing markets is a primary challenge in Koprivnica, Croatia, and Kortrijk, Belgium, a lack of sufficient and easily accessible funding is highlighted as the most significant challenge in Małopolska, Poland.
- **Exploring Varied Opportunities:** By comparing the reports, partners can discover the diverse opportunities identified in different regional contexts. Małopolska emphasizes **digital transformation and cross-sector collaboration**, while Southern Denmark sees strong potential in **internationalization and sustainable creative practices**. Koprivnica highlights opportunities in **growing tourism and technological advancements**. Learning about these different areas of potential growth can inspire partners to consider new avenues for development in their own regions.
- **Learning About Different Support Mechanisms:** The reports detail various support mechanisms deemed beneficial in each region. Małopolska stresses the need for **non-refundable grants and business development support**, while Kortrijk emphasizes the importance of **communication about existing funding and spaces**. Southern Denmark suggests establishing **regionally coordinated funding programs and skills development partnerships with universities**. Partners can learn which support mechanisms are prioritized and considered most effective in different settings.

- **Understanding Different Policy Recommendations:** Each regional report proposes policy interventions tailored to its specific needs. Małopolska recommends **policy reform for funding, enhancing digital infrastructure, and fostering cross-sectoral collaboration**. Koprivnica suggests **greater governmental support and co-financing of events**. Southern Denmark proposes **expanding regional grant schemes and investing in digital training hubs**. Comparing these recommendations can offer valuable insights into different policy approaches to support the CCSI.
- **Insights into Stakeholder Engagement and Methodologies:** The reports implicitly demonstrate different approaches to stakeholder engagement (surveys, focus groups) and data collection. Partners can learn about the effectiveness of different methodologies in identifying regional needs and gathering stakeholder feedback.
- **Specific Examples and Initiatives:** While not always explicitly detailed for inter-regional learning, the reports mention local initiatives and the involvement of specific organizations. By further communication, partners could learn about concrete examples of successful projects, creative hubs, or networking platforms in other regions and potentially adapt or replicate these models. For instance, the mention of creative hubs in Małopolska, Kortrijk, and Southern Denmark suggests a common interest in this type of support structure, and partners could share best practices in their development and management.

5. Executive summary

The joint study confirms that while the Cultural and Creative Sectors and Industries (CCSI) vary significantly across regions, they face many shared structural and developmental issues. At the same time, there is clear recognition of the sector's growing economic, social, and cultural value. The findings highlight the need for more coordinated support strategies that reflect both regional specificities and transnational trends. The study provides a solid foundation for future collaboration, policy development, and investment planning aimed at unlocking the full potential of the CCSI across Europe.

5.1. Common challenges across regions

Across all participating regions, the lack of adequate funding and grants emerged as the most pressing issue. Many creative professionals and businesses face difficulties accessing markets and engaging audiences. Skills gaps—especially in digital competencies—along with insufficient networking opportunities and limited access to creative workspaces, further constrain growth. Regulatory and

policy inefficiencies also hinder sector development. While these challenges are present in different intensities, their recurring nature across countries underlines the need for coordinated, transnational solutions.

- **Access to funding and grants.** All regions report this issue as one of the most critical.
- **Access to markets and audience engagement.** Difficulties in reaching audiences and commercializing creative products/services are widespread.
- **Skills development.** The lack of appropriate skills development programmes, especially in digital competencies and project management, is identified as a significant problem.
- **Cross-sectoral collaboration and networking.** Challenges in establishing cooperation between different sectors and limited networking opportunities are a constraint to the development of the CCSI.
- **Access to creative spaces.** The insufficient availability of spaces for creative work is a challenge in many regions.
- **Regulatory and policy barriers.** Inefficient legal frameworks and a lack of understanding of the specific nature of the CCSI by public authorities are indicated as obstacles.

Table 2: Key Structural Gaps and Development Needs

Area	Observations
Talent Development	Regions show strong educational infrastructure, but gaps remain in translating creative education into jobs and startups.
Access to Finance	Limited funding opportunities for creative start-ups, especially outside major urban centers.
Infrastructure & Hubs	Uneven distribution of creative spaces; smaller towns and rural areas often lack adequate infrastructure.
Ecosystem Coordination	Need for better policy alignment and stakeholder cooperation (public–private–academic) in regional strategies.
Internationalization	Desire to scale creative products and services beyond local/national markets, especially in less developed regions.
Data & Visibility	Lack of comprehensive data on the creative industries' economic impact; need for better monitoring and evaluation tools.

5.2.Shared opportunities and priorities for CCSI

The joint study identifies digital transformation as a universally recognised growth driver. Cross-sectoral collaboration, particularly with technology, tourism, and education, offers significant potential. Internationalisation—especially the export of creative goods and services—is seen as a strategic priority, notably in Greece and Denmark. The development of creative hubs and incubators is another common goal, serving as engines for innovation and business growth. Additionally, the importance of sustainability and green practices is growing across regions, aligning the CCSI with broader EU climate and social goals.

- **Digital transformation.** The potential of using digital tools and platforms is widely recognised.
- **Cross-sectoral collaboration.** There are significant opportunities in combining the potential of the CCSI with other sectors (e.g. technology, tourism).
- **Internationalisation.** Expansion into foreign markets is seen as an opportunity for growth.
- **Development of creative hubs and incubators.** Establishing support and incubation centres is considered an important growth factor.
- **Sustainability and green practices.** The growing importance of sustainable practices within the CCSI is widely acknowledged.

6. Recommendation

The joint study identifies necessary support mechanisms for CCSI, now it is crucial to develop how those support mechanisms might be implemented in each region:

- **Financial support and grants.** What forms of financial support are most needed?
- **Business development support and training.** What training and mentoring programmes are most in demand?
- **Networking platforms and collaboration support.** How can networking and collaboration be effectively facilitated?
- **Support for digital infrastructure.** What investments in digital infrastructure are essential?
- **Access to creative spaces.** How can better access to such spaces be ensured?
- **Policy and regulatory support.** What policy and regulatory changes are necessary?

Belgium (Kortrijk, Flanders)

Recommendations focus on putting more effort into creative hubs/incubators with enhanced (international) networking opportunities and partnerships to facilitate access to funding, creative spaces, collaborations, and business support.

Croatia (Koprivnica)

Key recommendations include policy reform for funding (greater governmental support and co-financing) and enhancing digital infrastructure.

Denmark (Southern Denmark)

Policy reforms are recommended for funding (expanding regional grants and easing access to national/EU funds), enhancing digital infrastructure (investment in tools, broadband, training hubs), and fostering cross-sector partnerships (developing a regional CCSI collaboration strategy).

Greece (Central Macedonia)

Proposals for improvement include the development of artistic expression opportunities, attracting international collaborations and creating creative spaces, establishing an institutional employment framework and mapping of the sector, providing work incentives, recruiting leading executives, developing a representative entity for CCSI, promoting educational seminars, establishing a regional strategy and legal framework, emphasizing creation, culture, and activism, and cultivating empathy. Focus group findings also implicitly suggest policy changes related to funding access for NGOs, longer-term funding models, clear organizational roles, updated activity codes and platforms, inclusive funding calls, collaboration frameworks for artists, AI regulation, and improved banking access.

Poland (Małopolska)

Comprehensive policy recommendations include policy reform for funding (increasing availability, simplifying procedures, diverse schemes), enhancing digital infrastructure, fostering cross-sectoral collaboration and networking, investing in skills development and business support, and simplifying regulatory frameworks and enhancing institutional support.

7. Conclusion

The CCSI sector in Europe remains dynamic and diverse, with significant contributions to employment, regional identity, and innovation. However, its development is uneven, with urban

centres often better equipped than rural areas. Many regions face structural challenges in funding, infrastructure, and policy coherence. Nevertheless, there is an increasing awareness of the strategic value of CCSI, with many regions actively working to build more resilient and interconnected creative ecosystems.

Moving ahead, key priorities include improving access to finance, investing in skills and digital infrastructure, and enhancing collaboration across sectors and regions. Regions should focus on decentralising support to include smaller towns and rural areas, developing creative hubs, and fostering innovation through digital and green transitions. Regional policies must be better aligned with the specific needs of CCSI, and monitoring systems should be improved to track impact and guide investment.