



ekip White Paper

CCI Policy Landscape Analysis

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**Funded by
the European Union**

This project has received funding from the European Union's Horizon (2021-2027) Research and Innovation programme under grant agreement No. 101112111.

About ekip

ekip is a collaborative platform designed to boost the development of innovation capacity in ecosystems to include the Cultural and Creative Industries (CCI).

Creatives are not just “nice to have” they are essential for driving progress on major challenges like the green and digital transformation and social inclusion. Their competences and skills are crucial for tackling complex innovation processes involving diverse stakeholders.

Rooted in open innovation, *ekip* brings together broad stakeholder groups to co-create and deliver evidence-based policy recommendations. Together, we’re shaping smarter innovation policies for ecosystems where collaborative processes and cross and open innovation are standard practice. We believe this will empower the CCIs to become drivers of innovation, creating a better and brighter future.

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Executive Summary

Cultural and Creative Industries (CCI) have become an established and increasingly important area of policy development across Europe. Their role has expanded significantly – from being primarily associated with cultural production and heritage to being recognised as key contributors to innovation, economic development, and broader societal transformation. This evolution reflects a growing acknowledgement that creativity, cultural knowledge, and artistic practices are essential resources for addressing complex challenges, including the sustainability and digital transitions.

Over time, European-level policies, programmes, and initiatives have played a central role in shaping the development of the CCI field. These efforts have strengthened the visibility of CCI and supported their positioning within discussions on innovation, competitiveness, and sustainable development. At the same time, they have encouraged corresponding developments at national and regional levels, where policies and support structures have gradually emerged to reflect both European priorities and local contexts.

Despite this progress, the current European CCI policy landscape remains fragmented, as CCI continue to be addressed across policy domains – most notably in cultural policy, economic or industrial policy, and innovation policy – each with their own objectives, instruments, and institutional logics. This hampers the recognition and inclusion of CCI in cross-sectoral development initiatives and innovation programmes. While ecosystem thinking and open innovation approaches offer promising frameworks for overcoming these challenges, their practical application is uneven and still evolving in most parts of Europe.

This White Paper provides an overview of how CCI policies have developed across European, national, and subnational levels. It explores how CCI are conceptualised within different policy frameworks, how they relate to adjacent domains, and how their role in innovation is being shaped by emerging priorities such as digitalisation, sustainability, and collaborative governance. Particular attention is given to the dynamic interplay between policy design and implementation across governance levels, highlighting both opportunities and persistent structural constraints.

A key finding is that, although the importance of CCI is widely recognised, their potential remains only partially realised. Differences in national approaches, variations in regional capacity, and the persistence of policy silos all contribute to an uneven landscape in which CCI are not yet fully embedded in mainstream innovation systems. At the same time, emerging policy agendas at the European level – focusing on competitiveness, resilience, and the twin green and digital transitions – create new opportunities for repositioning CCI as integral in future-oriented innovation ecosystems.

In this context, further attention is needed to how these evolving priorities are reflected and operationalised in national and regional CCI strategies. It calls for more nuanced, comparative policy analyses and – both in European and closer settings – strengthening coherence across policy domains and governance levels. All in all, better understanding about how policies translate into practice, will be essential for enabling CCI to fulfil their transformative potential.

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1 Introduction

Cultural and Creative Industries (CCI) have become an increasingly prominent policy focus in Europe over the past two decades. Their role has evolved from being primarily associated with culture and art-based product and service production to being recognised as a driver of economic development, innovation, and societal transformation. Today, CCI are widely acknowledged not only for their economic contributions – such as employment, growth, and entrepreneurship – but also for their capacity to shape social cohesion, support sustainability transitions, and contribute to more inclusive and resilient societies. CCI are understood in this paper as a hybrid domain combining cultural, economic, and innovation functions, whose roles vary depending on policy context.

The growing recognition has been accompanied by a proliferation of policy initiatives at European, national, and regional levels, as CCI have gradually been positioned at the intersection of multiple policy domains. They now can be viewed in a complex space between cultural policy, innovation policy, economic development, and broader societal agendas such as the green and digital transitions. This positioning reflects both opportunity and challenge: while it highlights the potential of CCI to contribute across domains, it also exposes tensions, inconsistencies, and fragmentation within existing policy frameworks.

A key issue emerging from this complexity is the difficulty of effectively integrating CCI into innovation systems. Innovation policies have traditionally focused on technological development, scalability, and measurable economic impact. Trade policies typically emphasise entrepreneurship and business fluency with growing international competitiveness and product development. Cultural policies often prioritise the support of cultural service structures, cultural heritage safeguarding, and art ecosystems. CCI actors operate between these logics, combining artistic, cultural and creative competencies with entrepreneurial and innovation-oriented practices. Strikingly, policy frameworks struggle to accommodate this hybridity, and as a result, CCI actors are frequently positioned as peripheral – recognised in principle but insufficiently embedded in the structures that are supposed to drive innovative thinking and positive transformation for future society.

The broader shift towards ecosystem thinking and open innovation introduces new perspectives to understand the possible roles of CCI. Innovation is increasingly seen as a collaborative, cross-sectoral process involving diverse actors, knowledge bases, and forms of expertise. In this context, various CCI actors can be understood as active contributors to innovation processes bringing creative methods, design approaches, and new ways of thinking into complex problem-solving environments. This shift challenges traditional policy boundaries and calls for more integrated and flexible governance approaches.

Indeed, despite these conceptual advances, significant gaps remain between policy ambition and practical implementation. Differences in institutional structures, between governance levels, and policy priorities create inconsistencies across countries and regions. Furthermore, the translation of high-level policy objectives into local contexts often encounters barriers related to capacity, coordination, and resources. Understanding these dynamics requires not only a mapping of policies and strategies, but also a deeper examination of how different policy domains and spheres of policy-making intersect and interact in practice.

This White Paper aims to provide a structured overview of the evolving policy landscape for CCI in Europe, with particular attention to the relationships between European, national, and subnational levels. It explores how CCI are framed within different policy domains, how their role in innovation is

conceptualised, and how emerging priorities – such as digitalisation, sustainability, and new forms of collaboration – are shaping future policy directions. By examining both the opportunities and the persistent challenges, the analysis contributes to a more nuanced understanding of how CCI can be more effectively supported as integral components of innovation ecosystems.

The metaphor of a “landscape analysis” is used to evoke an understanding of simultaneous, connected, and even overlapping policies that involve several different and even opposite interests that nevertheless can be viewed concurrently. For example, the analysis acknowledges and accepts that various actors that would identify either with cultural policies or with innovation policies (or indeed, with both) can have discrepant or disparate viewpoints about CCI, respective definitions, development goals, and policies. Also, it is seen as needed, as part of *ekip*, to recognise potential hot spots for connecting bridges between CCI policies, innovation policies, and cultural policies.

The analysis work conducted was principally built on desk research with emphasis on recognising, collecting, and studying policy documents that explicitly concern CCI but also other relevant policy documents. As the interest to develop expressly CCI policies is a relevantly young phenomenon, it was found important to maintain porous borders of definition while sketching the view upon the CCI policy landscape.

While mapping the landscape of CCI policies in Europe, this paper also highlights a policy–practice gap, referring to the divergence between formal policy ambitions and their implementation in practice. The author discusses this elsewhere (Kraatari 2026) highlighting performative dynamics and implementation gaps that help explain the structural fragmentation identified here. Ultimately, the development of coherent and impactful CCI policies will depend on the ability to move beyond fragmented approaches towards more coordinated, cross-sectoral, and adaptive frameworks. This requires not only profound understanding about the CCI, its potentials and values, but also rethinking how policies are designed, connected, and implemented across different levels and domains.

2 CCI Policy Development in the EU

This overview of CCI policy development in the European Union is divided into three parts. The first starts with cultural programmes such as Culture 2000 and Work Plans for Culture that introduced the CCI, the second brings in a more explicit and coherent EU policy for cultural and creative industries, and finally, the third part focuses on some of the key projects that have advanced CCI-relevant EU policies, namely the InduCCI, CICERONE and Creative FLIP that each contribute to the CCI policy landscape with, among other things, different mappings and typologies. They also provide further valuable insights into current CCI related policy debates and key recommendations for both innovation and cultural policies.

Despite the increased interest in the matter and the numerous publications about cultural and creative industries respectively, there are not too many volumes that expressly address the development of CCI policies. In this regard the recent volume by Katja Lindqvist (2024), *Cultural and Creative Industries Policymaking*, has been helpful by offering a longitudinal look to CCI policy development in Europe and is thus recommendable to anyone working in the field especially in the European context. The study is particularly valuable in juxtaposing EU and national level CCI policy making, to which Lindqvist pays special attention from the Swedish perspective. This evokes the increasing need for comparative studies, not only of CCI policies but including also cultural and innovation policies at different levels of governance and policy making.

2.1 From Culture 2000 to Work Plans for culture

The first EU framework programme for culture was *Culture 2000* (2000–2006) that opened the path to introduce the terms 'cultural industries' and 'creative industries' to EU policy documents. However, the programme had several objectives that the promotion of culture and creativity would yield, acknowledging, on the one hand, cultural diversity and the need for cultural dialogue and mutual knowledge of the culture and history of European peoples and, on the other hand, the role of culture in socioeconomic development and culture as an economic factor.

Culture 2000 was followed by *Culture Programme 2007–13* with ca. 70 % increase in the budget (€400 million), while, also in 2007, the European Commission (EC) launched the first *European Agenda for Culture*. The programme period 2014–20 witnessed the *Creative Europe* programme that is currently followed under the same title for the duration of 2021–27. Whereas the budget of the *Culture 2000* was €236,5 million, the *Creative Europe* programme, bringing together the separate programmes for culture and media, first held a budget of €1,47 billion, to which sum the new programme budget brought an additional 66 % meaning a budget of €2,44 billion. In 2018, the *New European Agenda for Culture* was launched, and it applies as the current framework for cooperation on culture at the EU level (to be followed by the *Culture Compass for Europe* that will function as the strategic anchor for culture within the 2028–34 Multiannual Financial Framework (MFF). (On the side of the *Agendas for Culture* and since 2008, *Work Plans for Culture* have provided the planning tool for a four-year time span at a time (the first work plan covered only three years, 2008–10). The current *Work Plan for Culture* is for years 2023–26.)

2.2 Coherent EU policy for CGI

In addition to the cultural programmes and respective work plans, the importance and relevance of the CCI was confirmed through the 2016 European Parliament (EP) resolution on a coherent EU policy for cultural and creative industries. Due to the format, the resolution offers a practical listing of various policy documents that have contributed to the building of CCI as a policy domain in the EU (see Table 1). Through those numerous documents the European Parliament have reiterated, among the many other things, that "CCI are a driving force for innovation and development of ICT in Europe" and that "creative industries are amongst the most entrepreneurial sectors, developing transferable skills such as creative thinking, problem-solving, teamwork and resourcefulness".

With the resolution, the EP listed more than 60 calls for action and needs for attention. Regarding actions on innovation, the resolution called the European Commission "to introduce an umbrella scheme that bridges the gap between R&D, European creative content production and technological innovation in the media field and beyond". (*A coherent EU policy*, 2016.)

Title / topic	Date	Author
cultural industries in Europe	10 April 2008	Parliament resolution
culture as a catalyst for creativity and innovation	12 May 2009	Council conclusions
'The impact of culture on creativity'	June 2009	Commission study
'Unlocking the potential of cultural and creative industries'	27 April 2010	Commission Green Paper

Title / topic	Date	Author
unlocking the potential of cultural and creative industries	12 May 2011	Parliament resolution
Promoting cultural and creative sectors for growth and jobs in the EU	26 September 2012	Commission communication
on promoting cultural and creative sectors	30 May 2013	Committee of the Regions communication
promoting the European cultural and creative sectors as sources of economic growth and jobs	12 September 2013	Parliament resolution
cultural and creative crossovers to stimulate innovation, economic sustainability and social inclusion	27 May 2015	Council conclusions
Boosting the competitiveness of cultural and creative industries for growth and jobs'	June 2015	Commission study
Creative and cultural industries – a European asset to be used in global competition	16 September 2015	Opinion of the European Economic and Social Committee
Towards more efficient financial ecosystems: innovative instruments to facilitate access to finance for the cultural and creative sectors	November 2015	Working Group of EU Member States Experts report

Table 1. Arranged to chronological order, a sample of documents (12 out of total 41) referred to in the European Parliament resolution on a coherent EU policy for cultural and creative industries (13 December 2016) (A coherent EU policy, 2016.).

As is well known, the pandemic covid-19 posed severe challenges for the cultural and creative sector and the consequences reflected in many ways, especially in 2020 but with effects also in the following year(s) – some fields of activity were almost paralyzed while for others the exceptional circumstances brought unforeseen leverage. The critical times craved for swift response in various policy domains. While space for criticism was left, also the cultural and creative sector was addressed with different measures. The amplification of policy documents with relevance for the CCI and respective policy development work is apparent when conducting a review of document sources.

While the various projects have raised awareness about the role of CCI at different levels from the local to interregional contexts, the whole serves as a process that has strengthened CCI as a policy domain. Through her analysis of policy documents Lindqvist (2024, 91) pointed out the complexity of policymaking as a political process “where CCI as a policy domain has to be inscribed into existing policy domains and is subject to varying political priorities of various bodies within the EU decision-making structure as a system”. Such a claim could in part carry an undertone of EU policies swallowing the integrity of arts and culture, while in part the process illustrates the achieved coherence in CCI policymaking at the EU level. According to Lindqvist’s analyses, EU CCI policy (domain) has proved to have grown across several programme periods and become more nuanced in its approaches.

Indeed, with the rather strong regional and local level policy implementation structures, the EU CCI policy may have had more impact than respective national level policies. While there have emerged many lines of criticism towards CCI policies or even CCI as a policy domain, not least due to the highly instrumentalizing approaches to culture and creativity, the same approach may have been appreciated for having leverage potential especially at sub-national levels of development work and policymaking.

The *New European Agenda for Culture* (2018, 1) reiterated the functionality claiming the agenda would “harness the full potential of culture to help build a more inclusive and fairer Union, supporting innovation, creativity and sustainable jobs and growth.” Argumentation hailing from the agenda, especially in the second strategic objective covering the economic dimension chimes with the goals of the *ekip*:

“Culture, the arts, creativity and creative industries are interdependent. Combining knowledge and skills specific to cultural and creative sectors with those of other sectors helps generate innovative solutions, including in information and communication technology, tourism, manufacturing, services, and the public sector. To tap into this transformative power, the Commission proposes to focus on three specific ecosystems: education and training, cities and regions, and cultural and creative industries themselves, in order to create supportive environments for culture-led innovation.” (New European Agenda for Culture, 2018, 4.)

In short, it can be said that the more or less two decades of continuous EU policymaking on the CCI has delivered certain policy objectives that reflect nationally and in regions. The efforts carried out through the *ekip* will reciprocally advance these goals.

2.3 Building the CCI Policies through Projects

Most concretely the advent of the “new” CCI policy domain has been seen as the establishing of the Creative Europe funding schemes and in the emergence of numerous development projects as part of larger programmes, such as the Interreg, that focuses on policy development in the numerous regions of Europe. The need to better understand the field, the status, state and needs of the sector, and its interrelations with other policy areas reflect as amplification of studies, mappings, foresight analyses and research on the CCS in general and more specifically on CCI development policies.

2.3.1 InduCCI – Mapping the Promoters of CCI in EU Policy-making

The project [InduCCI](#), part of Interreg Central Europe programme, delivered in 2020 a valuable analysis of CCI policy landscape on European level (Weber & Duarte 2020). The project itself is an example of applying CCIs as development measure as the key goal was to link “CCI with traditional industry to benefit from innovation and creative input”. Also, the project aimed to strengthen understanding and communication between spheres of public administration and the CCI actors’ needs. Based on these objectives, the project embarked to map and describe relevant actors in European policy making and list seminal programmes and projects that concentrate on the CCI’s development needs.

Referring to statements originating from the Commission documents, the Weber & Duarte describe CCI as “well equipped to adapt to new forms of entrepreneurship”, to “play a key role in the structural change in Europe” and that the field is “one of the largest employment sectors in the EU”. The authors nevertheless point out the need to study whether the potential seen in CCI corresponds as practical actions:

“An ensuing question after investigating the CCI policy landscape on EU level is for us if the European Union is redeeming what it expects from the cultural and creative industries. Is there really enough financial support for CCI, a sector emphasized in so many EU strategies, papers and policy recommendations as a highly innovative sector that has to be promoted and supported on cultural and social and economic level?” (Weber & Duarte 2020, 8).

The InduCCI project mapped also regional level policies on the CCIs and discovered remarkable diversity between regions' readiness to support their CCI fields. In the framework of the InduCCI project, the authors remarked, in spring 2020, that "the field of cultural and creative industries is not sufficiently identified and seen as a partner and driver of economic structural change" concluding that this also marked as the key challenge the project aimed to answer (Weber & Duarte 2020, 14).

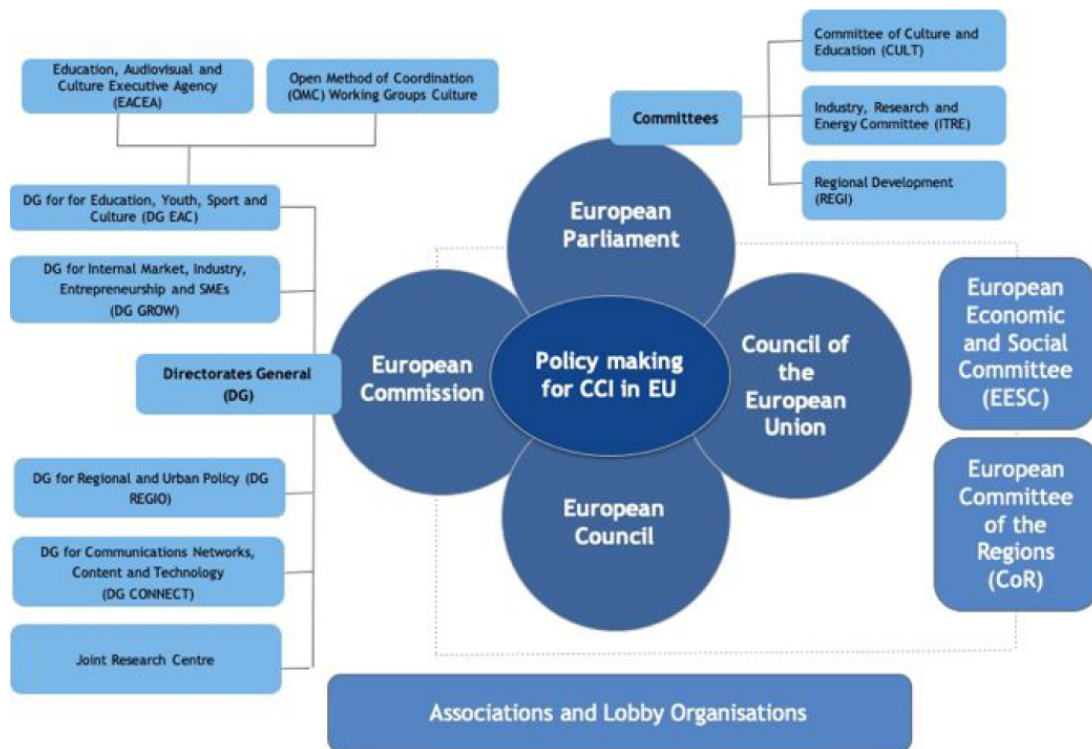


Figure 1. The European CCI policy-making bodies as identified in the InduCCI project (Weber & Duarte 2020, 16).

In sum, there are several bodies that involve and promote CCI policy development in the EU level and, as Weber & Duarte noted (2020, 14) a horizontal approach to CCI governance translates as strategies, programmes and initiatives that are distributed among several institutions. They also noted the increased awareness about the CCI and the need for interdepartmental coordination. "However," the authors point, "no efficient horizontal steering mechanism between EU actors is apparent." This apparent need the *ekip* project proceeds to answer.

2.3.2 The Leverage of Regional and Local Projects

Whereas the InduCCI project is here singled out due to its landscape analysis of the CCI in Europe, it must be emphasised that numerous Interreg projects have focussed on CCI policy development, and those projects have been implemented in different parts of Europe through the Interreg geographical schemes. Lessons from these regional and local CCI policy development project have recently been summed up by Luc Schmerber (2024) with a detailed yet concise policy brief. Listing several needs and challenges along with policy recommendations already yielding from Interreg projects, Schmerber emphasises the transformative potential of CCI in modern societies and economies:

"[The] experiences from the Interreg Europe community have made clear that CCI are at the heart of modern economies and societies. Knowledge-intensive and based on individual creativity and talent, they generate considerable economic wealth. In economic terms, they show above-average growth and create jobs – particularly for young people – while strengthening social cohesion. The global trend is clearly showing increasing demand of CCI and their increasing cross-sectoral contributions to almost any sector of the economy and policymaking." (Schmerber, 2024, 20.)

It is possible that CCI-related prioritisations in EU project funding programmes have helped to maintain CCI-oriented development initiatives at the regional level at times when nation-level interest into CCIs has swagged. Validation from higher tiers of political hierarchy is important for CCI policy support, because without such attention "it has been difficult to argue for the development of CCI policy at the local and regional levels" (Lindqvist 2024, 103). A 2023 report on the role of creative economy in regional development in Finland reiterated the need for national level policy attention that would draw response from regional and local levels (Siltanen & Perttunen, [2023]).

The need for increased cross-sectoral cooperative methodologies to support and enable the CCI to prosper and contribute to innovations and transformative developments in society, a want that the *ekip* is planned to address and solve, has been noticed and discussed also elsewhere, most recently in the projects CICERONE and Cultural FLIP.

2.3.3 CICERONE – Typologies of CCI Production Networks

Through applying a customised application of the 'Global Production Network' (GPN) approach and respective analyses, the goal of the [CICERONE](#) project (2020–23) was to create and experiment an innovative way of understanding how cultural and creative industries function and thus provide a new basis for CCI policies at the EU, national, and local levels. With its focus on networked systems the CICERONE project is close, or at least parallel, to the objectives of *ekip*. It is relevant to be informed of the project's results and, where possible, to utilize them.

Even CICERONE started from discerning the general state-of-art of CCI policies (CICERONE principally applied the abbreviation CCS, cultural and creative sectors) in Europe noting that the relevance of CCI has been reiterated in several policy documents: "for the last 30 years or so, policy and measurement has mainly focused on trying to identify the cultural and creative core and through supporting the core supposing that the sector as a whole will thrive" (Power & Kloosterman 2023, 6.) To help policies to proceed from repeating generalised suppositions about the impacts of the CCI (CCS), the CICERONE project aimed to dive deeper and to analyse the networked systems of various fields that are counted under the umbrella of the sector. This led to the constellation of a typology that further helps to understand how actual CCI actors are distributed and constituted: where they are located and how they are organised.

Results of the CICERONE project can be helpful for several future CCI development projects, including *ekip*. CICERONE managed to shift the focus, first, from general descriptions to the processes that are typical to the CCI fields, underscoring that 'creation' (an act of artistic or cultural creativity and/or result of such creativity) only stands as one part of the process where the phase of creation is followed by production; distribution; exchange; and archiving. Secondly, with special focus on the phase of production, the project studied the CCI networks' geographical position and the governance structures they are bound to. This approach details why "one-size-fits-all" policies hardly are effective and instead emphasises "the importance of coupling strategies and how matches and mismatches between regional assets can be better understood, and what sorts of governance structures need to be understood to do this. (Power & Kloosterman 2023, 24.)

2.3.4 Creative FLIP – Finance, Learning, Innovation and Intellectual Property Rights for the Cultural and Creative Sectors and Industries (CCSI)

The [Creative FLIP](#) project, co-funded by the EU, aimed at strengthening the CCSI (cultural and creative sectors and industries) by addressing key challenges in finance, education, innovation, and intellectual property. During the initiative's Pilot Phase, in 2019–21, the main objective was to develop ways to support sustainable ecosystems for Cultural and Creative Industries (CCI) with special attention to the four key areas of finance, learning, innovation, and patenting (at later phases 'intellectual property'). In the second, Preparatory Phase of the project, during 2021–24, the project emphasised the need for cross-sectoral cooperation and connecting different sectors or policy areas. Bringing to the forefront the need to access up-to-date knowledge and data about the field, the project has resulted, among other things, with guidance to improve the compatibility and visibility of CCSI-related terminology with ESCO and previous results of the ESSNet-Culture (Bina et al., 2012), that is, general taxonomy of occupations and the European Statistical System Network's initiative to advance statistics and data collection about cultural sectors in Europe.

How can we build a collaborative eco-system?

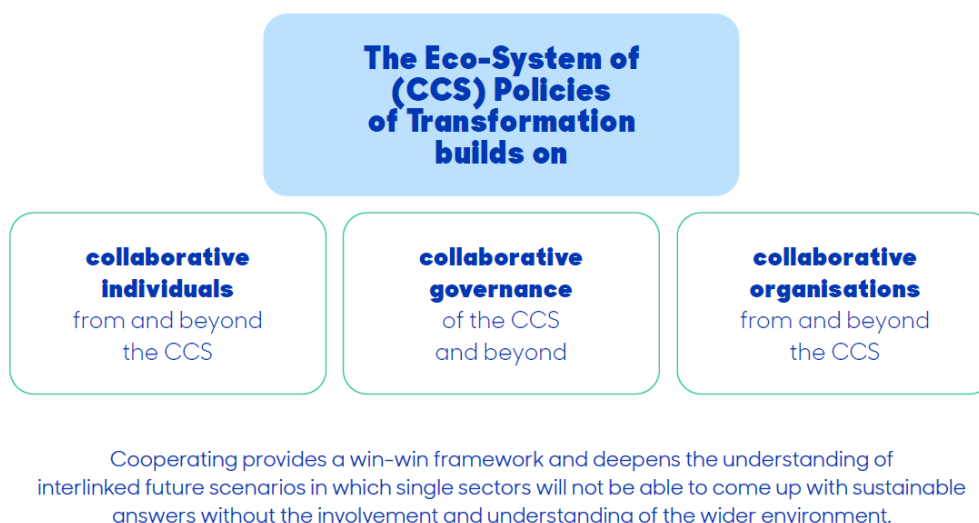


Figure 2. The Creative FLIP suggestion to perceive aspects of collaborative action in order to achieve transformative (CCS) policies applies the notion of ecosystem thinking. Amann 2023.

In the latest, third phase (2024–26), the project continued supporting the CCSI actors with focus on their long-term resilience and preparedness to face future challenges and participate in transformation processes. In this way, also cross-sectorial cooperation and learning remain in the core interests of the initiative. In addition, the project continued to develop the online platform [Creatives Unite](#), operated by the European Creative Hubs Network and the Goethe-Institut, representing Creative FLIP project and consortium. FLIP continued reaping its results and outcomes culminating in the project's Final Conference in June 2026.

In addition to the more short-termed, yet project-based work for developing the CCI throughout the 2010s and the current decade worth attention would also be the structured dialogue with CCSI called *Voices of Culture*. This was implemented by the Goethe-Institut on behalf of the Commission (following a call for

tender) from 2015 until 2023, as part of the New European Agenda for Culture. The initiative provided a framework for discussions between civil society stakeholders and the European Commission. (*Dialogue with*, s.a.).

3 CCI Policies and Policy Frames

A review of CCI policy development at the European level, together with insights from recent projects, highlights a growing need to reconsider how CCI policies are understood and positioned within the wider policy landscape. As the field has matured, it has become increasingly clear that CCI policies do not exist in isolation but are deeply interconnected with a range of adjacent policy domains, including innovation and economic development but also education, regional, and social policies. This interconnectedness calls for a more nuanced perspective that goes beyond treating CCI as a distinct sector and instead recognises their role within broader policy contexts.

At the same time, the conceptualisation of CCI – as an administrative, political, and analytical category – remains complex and often contested. Efforts to define and govern the field must take into account its inherent diversity, spanning artistic, cultural, and commercial activities, as well as its dual positioning within both cultural and economic policy logics. This complexity is further reflected in the variety of ways in which CCI are framed across different contexts and policy agendas.

Understanding the broader horizon in which CCI policies operate therefore requires attention to the range of policy areas that intersect with or influence the development of the sector. These adjacent domains shape both the expectations placed upon CCI and the opportunities available to them, particularly in relation to innovation, sustainability, and cross-sector collaboration. As these connections deepen, the need for coordination and alignment across policy domains becomes more pronounced.

Against this backdrop, CCI policies can be understood as situated at the intersection of cultural and innovation policy. This positioning captures both their potential and their limitations: while it opens up opportunities for CCIs to contribute to wider innovation processes and societal transformation, it also exposes tensions between differing policy objectives, institutional structures, and value systems. Recognising and navigating this in-between position is therefore essential for developing more coherent and effective policy approaches that fully leverage the role of CCI within contemporary innovation ecosystems.

3.1 CCI (CCS) as an Administrative and Political Concept

The internal diversity and incompatibility that the notions of 'cultural and creative industries' or 'cultural and creative sectors' hold are understandable against the politico-administrative evolution of these conceptions. As such, CCS and CCI are artificial attempts to neatly amass various activities with cultural and creative motivations or backgrounds under one administrative sector and/or political concept. This reflects clearly in the sometimes (or often) polarised views upon this sector where, on the one hand, the aesthetic, educational, and cognitive aspects of the field are underlined, especially in cultural political takes on the matter and, on the other hand, the instrumental, fiscal and economic aspects are emphasised, especially in industry, business, development, and innovation policies.

The variegated compose of the concepts, and specifically that of CCS, led Power and Kloosterman of the CICERONE project to give the dual characterisation, according to which, on the one hand, "*the CCS is about markets, products, workers and firms, and the CCS production system is an important employer and a vibrant part of the European economy and economic development*", while on the other hand, and with intended identical opening to the sentence, "*the CCS is about markets, products, workers and firms that are central to giving form and expression for many of the cultural, social and political development processes at the*

heart of Europe” (Power and Kloosterman 2023, 13). This articulation allows to be interpreted in various ways, but for one it might illustrate what culture in the EU is about: one can approach culture and creativity instrumentally or intrinsically, or as both simultaneously, but whichever way motivated, in the end it would be “*about markets, products, workers and firms*”.

Inevitably, the multifaceted and differential conceptualisation of cultural and creative activities yields, not least due to its inherent artificiality, various challenges. In return, the different policy responses, be those financial, regulative, or other measures, or suggestions and recommendations, can be mutually contradictory or even hamper each other’s potential impact. As the CICERONE project emphasised, it is therefore crucial to perceive cultural and creative networks in their spatial contexts and with attention to their organisational links, administrative and power dependences. This multiconnectedness can in part be a challenge but, with growing understanding and supportive actions, it can also open gates to new perceptions of cultural and creative work and of their possible roles and applications in future society. As Power & Kloosterman (2023, 19) conclude:

“Connections and linkages are not simply neutral pipelines. Networks and connections are also moments of mobilisation of unique collections of resources and competencies. As such, they are the potential sites of innovation and creativity. [Production networks] are much more than ‘simply connect’ the chain [sic!], they are also about pivoting new ideas. This is why networks and rich ecosystems are particularly critical in high innovation and knowledge intensive industries like the CCS.”

Ekip steers attention especially to ecosystems and promotes the CCI’s role in open innovation ecosystems. This may entail a new or at least an alternative perspective to how the cultural and creative sector – and specifically the cultural and creative industries – would be viewed. In *ekip*, the CCI are not viewed so much as sources of cultural products and productions, but as active parties and actors in innovation ecosystems, indeed as people and “unique collections” of creative resources and competencies that are vital for truly innovative processes.

3.2 Horizon of adjacent policy domains (to CCI)

The viewpoint of *ekip* on CCI and innovation emphasises the role of different CCI actors as active parties in innovation processes and thus envisions future network actions to support CCI-led processes, in which innovation is perceived more broadly, exceeding the traditional technology-bound perimeter. However, the value of innovating action easily weakens without substantial contents and goals, as would be reflected by the growing attention to mission-oriented innovation policies (MOIP) (Jessen & Giacometti, 2024) that often connect with addressing large and complex, transnational if not global, challenges.

Therefore, while the CCI allow to be conceived of as an established policy domain with various, dedicated development measures, it would also appear that the CCI readily connect with several other domains of interest, topics, or activities. Based on its innovation-led orientation, *ekip* is purposefully focussed to identify coinciding points of interest across CCI and other policy domains.

The collecting, filtering, and screening of texts and documents conducted as part of the work done in *ekip* illuminates the spectrum of topics that would allow to be considered as innovation areas with potential for CCI-led innovation processes. The semi-final list of the prioritisation included the following:

- Collaboration between CCIs; agglomeration and clustering of CCIs
- Cross-sectorial cooperation
- Intellectual property
- Infrastructure, connections, amenities, industrial structures
- Challenges for CCIs in rural and remote areas, opportunities for CCIs at the outskirts of EU (and concentration of CCIs)
- Soft infrastructure (soft power of the place and culture), competitiveness of a region
- Economic prosperity and growth (including regional development)
- Spill-over effect of CCIs on the economy
- Education and skills, learning new skills
- New types of jobs, skills transformation
- Employment growth and creation
- Entrepreneurship
- Financing, financial support and grants, incentives
- Crowdfunding
- Profitability, financial sustainability, investments, business growth, management, business models
- Technology (developments), ICT, AI
- Digitalisation, digital transformation, digital content creation
- Open distribution of cultural products, digital marketing strategy
- Resilience
- Sustainability (programmes)
- Inclusive and sustainable value creation and development (social inclusion)
- Social capital and community cohesion, community building
- Regeneration (social and local)

The lengthy list of topics refers to several policy areas, from e.g. financial and employment policies to education and social policies. This evokes the need to be better informed about other domains or sectors that are likely to step out as potential partners in joint innovation processes and perceive convergent points of development needs and policy learning. The open innovation approach would allow positioning CCI and actors from other policy domains to joint development and innovation processes. This parallelism and proximity call for dedicated consideration on the convergence of CCI policies and innovation policies.

3.3 CCI, Cultural Policies and Innovation Policies

Bearing in mind the evolutionary history of CCI, the field can be viewed as an expression of attempts to interconnect or at least create synergies between culture and art-based activities, entrepreneurship, and innovation. To an extent, it might even be claimed that, in the course of the 21st century, innovation has been discovered within the CCI realm as parallel to the more technology-oriented innovation approach.

The envisioned hybridity and proximity to innovation, then, illustrate that CCI stands with one leg on cultural policy and the other on innovation policy. In this way, the politico-administrative concept of cultural and creative industries allows cultural policy and innovation policy to meet and even overlap. Bridging the gaps between the two can help create policies that support art, cultural professionals and

cultural participation and at the same time endorse diverse innovation for a future society invoking all aspects of sustainability (economic, ecological, social, and cultural sustainability).¹

Following general recent development in the field, innovation policies rather typically focus on technology-led products and services that allow flexible scalability, impact, growth, and lead to successful iterative innovation cycles. You (possibly) enter an innovation support system, innovate, preferably secure intellectual property (IP), evolve innovation into a business venture, scale up, grow, exit the innovation support system, perhaps until entering for a new round. In short, the objective of innovation policy is in 'what' referring to different products, services, and solutions.

Cultural policy, on the other hand, is largely about sustaining infrastructures that support access to cultural services and the cultural and artistic productions – the ecosystem of cultural and artistic practices and, at large, the cultural, symbolic and value basis and structure of the society. Aside the objective of 'what', focus of cultural policy is, in short, more often on 'how' and 'for whom'. Whereas innovation policies tend to lean on rather short temporal cycles, aiming for practical solutions, technological advancement and economic growth, cultural policies balance between contemporary phenomena and long durations, typically charged with questions about values and aesthetics, identity and access, and more.

Yet, despite the differences between innovation and cultural policies, their inherent logics and rationalities, they nevertheless can also have a lot in common when it comes to shaping the course of development in society. At the bottom line, cultural policies steer and influence perceptions, values, ideas, styles and behaviours in society. Innovation policies can well have similar effects, even if unconsciously or bypassed by the business-led scaling-up and growth intentions. Still, both innovation and cultural policies contribute to societal development and progress, even if they often do so with different emphasis.

The *ekip* process underlines the societally positive opportunities that the combining of the two policy rationalities could bring. In the future, we may see policies that head to unified support across policy sectors, moving away from the traditional, repressive silos of cultural and economic departments. Instead, we can bridge this divide, as *ekip* illustrates, through the possibilities that open innovation and ecosystem thinking can bring connecting the 'what', the 'how' and the 'who'. Open innovation process addresses the 'how' and ecosystem thinking emphasises including the many instead of the selected few.

Open innovation can deliver a balanced system where various parties – government, administration, businesses, and communities – work together to find solutions. By involving different stakeholders as active participants, open innovation process helps accelerate breakthroughs and leads to more creative, well-thought and solid outcomes with balanced impact.

The *ekip* discussions and workshops have enabled opportunities to probe and imagine alternative and even revolutionary ways that allow cultural and innovation policies work together and how that could be achieved at the concrete, everyday level, including, for example, political frameworks, structures for cooperation, support systems, development monitoring instruments, etc. An essential key element is to create spaces, both virtual and real, where innovation partners and creators can meet in an atmosphere of trust and openly exchange ideas, bridge the gaps between different worlds, find common languages, collaborate effectively and with impact that contributes to public good.

¹ The author would like to acknowledge and thank for the previous work done on this topic by Dr. Marcin Poprawski especially in the *ekip* project deliverable D4.2. Policy Landscape Analysis (Kraatari & Poprawski, 2025), as it has created the foundation for this chapter.

4 Interrelation between EU and national CCI policies

The interrelations between European and national CCI policies opens a complex and evolving governance landscape shaped by multiple levels of policy-making and development. Across Europe, national approaches to CCI vary significantly, reflecting differences in institutional structures, cultural traditions, economic priorities, and degrees of policy maturity. By examining a range of nation-level policy documents, a diverse and rich picture emerges in which CCI are addressed to varying extents and with different approaches.

The national perspective gains further depth when considered alongside developments at subnational and local levels. Regions and cities play a crucial role in translating policy ambitions into action, often acting as testing grounds for new approaches to policy implementation. This translation process is not uniform: local contexts, capacities, and priorities shape how policies are interpreted and put to action, leading to considerable variation in how CCIs are supported and mobilised in different countries and national regions.

These multi-level dynamics are closely linked to ongoing shifts in how CCI policy itself is framed. As CCI have emerged more clearly as a distinct policy domain, a growing range of priorities and thematic areas has come into focus. Recent policy developments highlight particular attention to areas such as digital transformation, sustainability, resilience and security, and cross-sector collaboration – fields in which CCI are increasingly expected to play an active and transformative role. This evolution reflects a broader rethinking of the sector, not only in terms of its economic contribution, but also its capacity to address complex societal challenges.

The impetus for strengthening CCI policies at national and subnational levels stems from multiple sources. International frameworks and initiatives have contributed to shaping the discourse, including UNESCO programmes that emphasise cultural development and creative economy, as well as global analyses highlighting the economic significance of the sector. Within the European context, however, the European Union has played a particularly influential role. Through its policy frameworks, funding programmes, and strategic priorities, the EU has both encouraged and enabled the development of CCI policies across Member States.

As a result, the establishment of development structures and support mechanisms at the European level has been followed by corresponding initiatives at national and regional levels. This interplay has reinforced the position of CCI within policy agendas while also contributing to the diversification of approaches across Europe. Growing understanding about these layered relationships is essential for grasping how CCI policies develop in practice, how they interact across governance levels, and how they shape the conditions for CCI-led innovation.

4.1 A Look into National Level CCI Policies

As discussed above, while the conceptualisations of CCI (and CCS) offer governmental and administrative tools to address cultural and creativity-based activities, cultures and creative expressions are, as was illuminated by the CICERONE project among others, bound to places and networked ecosystems that are prone to change and reshuffle, and, of course, bound to their cultural and historical contexts. Respectively, national interpretations of CCI policy development needs, cultural policies, and further framings in regard to innovation policies are likely to differ and fluctuate.

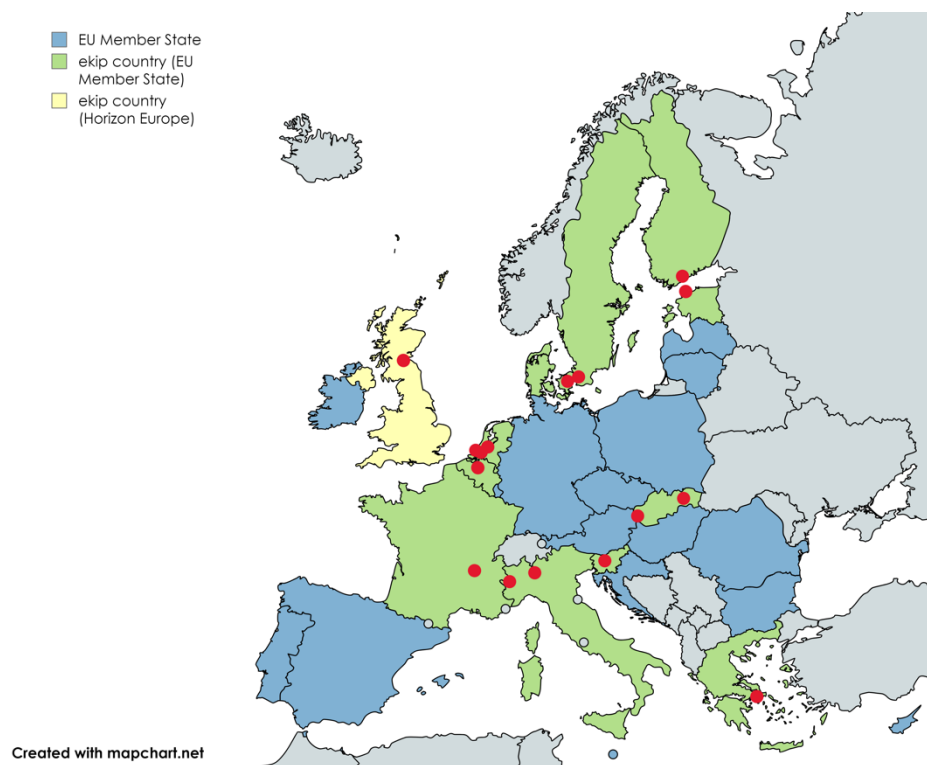


Figure 4. Partnering countries and cities in the ekip: Belgium (Brussels), Denmark (Copenhagen), Estonia (Tallinn), Finland (Helsinki; Turku; Tampere), France (Saint-Etienne), Greece (Athens; Thessaloniki), Italy (Milan; Turin), the Netherlands (Rotterdam, Delft, Hilversum), Slovakia (Košice; Bratislava), Slovenia (Ljubljana), Sweden (Lund), Scotland (UK) (Edinburgh). (Source: author (EK))

While EU-level policies provide an increasingly coherent strategic framework, their translation into national contexts varies significantly. The CCI have been incorporated in national policy frameworks to different extents. The Cultural FLIP project analysed the national level covering a few of the countries that are involved also in *ekip* i.e, Finland, France, Slovenia, and the UK (VVA et al., 2021). Country analyses have also been conducted elsewhere and before (Heliste et al., 2015; [Compendium of Cultural Policies and Trends in Europe](#)) and the need for cumulating knowledge and data with heed to contextual differences remains.

The CCI policy landscape in Europe is in constant change. Therefore, the short country profiles below quickly and unavoidably turn more or less obsolete despite the recent updates included into this White Paper version. The concise format of the document constrains the scope and depth of analysis, and, due to cursory examination, limited interpretations and conclusions are possible. The examination of CCI policies in various European countries can nevertheless open a vista for a preliminary comprehension of similarities and differences and pave the way for further and more nuanced analyses. Even through the concise look into CCI policies it appears that countries have approached CCI policy-making in different ways. Some countries have opted for a consolidated, single-strategy approach with explicit objectives and implementation indicators, rather than the instrument-stacking, legislative or innovation-agenda models seen elsewhere. The short profiles below offer indicative overviews and hopefully invokes further CCI policy investigation into transnational differences, convergences, and policy impact.

Belgium

Belgium's cultural policy landscape has a distinctively subnational emphasis, due to its federal structure, which includes the Flemish, French, and German-speaking communities, each with their own policies for culture domain. The two larger areas, Flanders and Wallonia, have both actively emphasised development in the CCI.

Although cultural and creative employment has somewhat concentrated to the capital, Brussels, the value of CCI is well recognised widely as a strategic priority within its broader economic and social development framework, as reflected in the recent OECD analysis commissioned by the Department of Culture, Youth and Media (*Culture and the creative economy in Flanders*, 2023). With specific attention to cross-sectoral innovation activities (De Voldere et al., 2023) Flanders holds a relatively large cultural and creative sector. A central source of support for CCI actors is the [Cultuurloket](#) knowledge bank, which provides transversal assistance to all cultural workers and organisations across profit and non-profit sectors. The importance and potential of cross-sectoral cooperation and connections between culture, innovation, and science are well recognised through projects and studies. (For a collection of studies and reports, see the dedicated [webpages](#) of the Flemish department for culture, the young, and media.)

In Wallonia CCI has evolved from a dedicated sectoral programme into an embedded cross-cutting dimension. The Creative Wallonia programme, launched in 2010, positioned creativity as an innovation driver through targeted actions (creative hubs, living labs, training initiatives). Later, Wallonia undertook a strategic integration: the renewed Smart Specialisation Strategy (S3) 2021–2027 formally incorporated creative economy as a transversal priority across all five Strategic Innovation Domains, rather than treating CCI as a standalone sector. This reflects a promising shift from policy compartmentalization toward ecosystem-wide innovation logic. The close interaction between CCI and digitalisation is apparent, for example, in the Digital Wallonia strategy and the emergence of the *wake!* label (2022 onwards) that view digital creativity as a strategic economic asset. Overall, Wallonian policy treats CCI rather as a methodological and economic lens for innovation that cuts across regional development priorities.

Regarding the Wallonia and Brussels regions worth noting is the 2009 founded ST'ART, a public investment fund whose core purpose is "to serve the general interest, by facilitating the emergence and development of the creative industries of Wallonia and Brussels in every way possible." (*Investment Fund [ST'ART], s.a.*)

Denmark

Denmark's 2019 *Vækstplan for de kreative erhverv – Et kreativt Danmark i front* (Growth Plan for the Creative Industries – A Creative Denmark in Front) represented a comprehensive policy initiative under the Ministry of Business, comprising 28 initiatives designed to increase growth in the creative industries. As of the period following 2022, instead of a new comprehensive national strategy, Danish CCI policy development has shifted toward thematic sector-specific publications and initiatives coordinated through Creative Denmark's white papers on sustainability, circular design, digital games, and interior design, alongside continued support through broader economic and entrepreneurship frameworks.

Creative Denmark is a partnership involving the Ministry of Industry, Business and Financial Affairs, the Ministry of Foreign Affairs of Denmark, the Ministry of Culture, the Confederation of Danish Industry, the Danish Chamber of Commerce, and the philanthropic association Realdania, and it has emerged as a key institutional platform for CCI development.

A parallel operation emerged as the first ministerial cultural policy statement in more than 25 years was published in May 2023. The report-form statement quantifies how Danes engage with culture, how culture contributes to Denmark's economy and employment, and how digital developments are affecting Danes'

consumption of media, news, and culture. In preparation for the report, the Ministry of Culture asked Statistics Denmark to assess the significance of cultural industries for the Danish economy: the overall proportion of CCI was counted to cover 4,2 % of the total Danish production (in 2021). For comparison, the report notes that respective share of 'agriculture, forestry, and food' corresponding to 1.9 percent of the total Danish production. However, the report sees that there is a need for greater knowledge about the cultural industries, including the barriers these industries face in developing their activities. (Kulturpolitisk redegørelse, 2023.)

Estonia

The Cultural Development Plan 2021–2030 Culture 2030 sets the long-term goals for Estonia's cultural sector. Key goals include broadening access to culture, enhancing cultural heritage preservation, and fostering a creative economy aligned with Estonia's national strategy, *Estonia 2035*. The plan integrates inclusivity, digital transformation, and sustainability noticing the global Sustainable Development Goals (SDGs) and highlights digital heritage as a priority (see the webpages of the Estonian Ministry of Culture, [Kultuur 2030](#)). The operative framework takes form as the *Kultuuriprogramm* (Culture Programme) 2026–2029, where CCI policy is a distinct activity.

Estonia's commitment to innovation, inclusivity, and sustainability in cultural development, with a robust integration of European-level priorities is clear and the role of culture and creativity in the development of society is valued. Estonia actively aligns with European cultural policies, leveraging programs like Creative Europe for funding and cross-border collaboration. It prioritizes European media, fostering digital cultural heritage preservation, and advancing CCI competitiveness on a global scale. Initiatives like the European Capital of Culture, hosted in Tartu for 2024, are also key platforms for promoting Estonian culture internationally. (Jauram & Jõe, 2024; see also *Survey and Mapping*, 2022)

Culture and creativity are closely integrated with various fields, supporting the comprehensive and sustainable development of society and thereby contributing to Estonia's competitiveness, growth of social and economic well-being and international image. Estonia's monitoring of the creative economy rests on recurring national sector mappings that have been repeated at roughly four-year intervals since the mid-2000s, giving the country one of the longer continuous CCI evidence series in the region. The 2025 *Eesti loomemajanduse olukorra uuring ja kaardistus. Lõpparuanne* (Varblane et al. 2025), monitoring report produced by Kantar Emor for the Enterprise and Innovation Foundation (EIS), is framed as a baseline for future, comparable monitoring.

Finland

According to Cultural FLIP country analysis, Finland's policy support for creative industries, innovation and creativity goes back to the late 1990s, as CCSI, or a respective notion, was first included in policy documents (VVA et al., 2021). Most recently, the Growth Strategy for the Creative Economy 2025–2030 (*Luovan talouden kasvustrategia*) was published jointly by the Ministry of Education and Culture and the Ministry of Economic Affairs and Employment in June 2025 illustrating that links between the two ministries in regard to CCI policies have grown closer. The earlier 2020 "Roadmap to Creative Economy" (Tarjanne, 2020) hailed from the latter ministry, and the 2018 study *In search of Finnish creative economy ecosystems and their development needs – study based on international benchmarking* was published by the Prime Minister's Office, giving several policy recommendations for supporting CCI ecosystem development in a cross-sectoral context (Oksala et al., 2018).

The 2025 growth strategy now more clearly links cultural policy to economic and employment policy, and its implementation is monitored by a standing Advisory Board on the Creative Economy whose mandate runs to 2030, charged with sustaining long-term cooperation between the public sector and business. Regarding the CCI policy form, Finland has opted for a consolidated, single-strategy approach with

explicit objectives and implementation indicators. Still, despite the longitudinal line of development, the 2025 strategy diagnoses Finland as underexploiting immaterial value creation and targets three sub-sectors — scalable content (games, literature, music, audiovisual), creative services (architecture, design, fashion, marketing) and the event sector.

Ongoing evaluative and statistical work about CCI continues through the Centre for Cultural Policy Research (Cupore) (see Sokka, Karttunen & Luonila, 2025), and parallel academic cultural policy literature. Other advocates of the CCI include the state-funded organisations Business Finland that has recently paid special attention to the regional level and their needs in CCI policy development. The strategy tool for developing sustainable creative economy in regions, from 2023, is a practical guide that specifically supports regional development efforts (Gävert et al., 2023). In addition, although the public culture sector has recently faced severe budget cuts, there on the other hand have been allocated funds for revitalising cultural and creative industries through Finland's Sustainable Growth Programme (deriving from the NextGeneration EU fund) since 2021 for nearly €29 millions. The objective of the funds has been to encourage the CCI to create innovative services and devise novel production and operating procedures.

France

The main institutional actors related to the CCI policies would be the Ministry of Culture and at the local level the DRACs, regional offices of cultural affairs (*Direction Générale des Affaires Culturelles*) and the FRACs, regional funds for contemporary art (*Fonds Régional d'Art Contemporain*). The government aims to support the cultural and creative industries (CCIs) through a cross-cutting approach that fosters innovation.

France's CCI policy is best understood not through a single governing strategy but through successive and parallel initiatives. A recent significant operation to advance the CCI was, as part of the acceleration strategy *France Relance* (2020–22) and the 4th Future Investment Programme (PIA 4, *Programme d'investissements d'avenir*), the launch of the national acceleration strategy for CCI in 2021 (*Stratégie d'accélération*, 2021). The innovation, experimentation, and early-stage funding component of this strategy included a budget of €400 million over the years 2021–2025. The goal of the strategy was to enable the CCI sector to strengthen and profoundly transform itself, so that they adapt to the challenges of digital transformation and the increasingly intense competition among global-scale companies.

Remarkably, the CCI acceleration strategy resulted from inter-ministerial efforts, led by the Ministry of Culture in coordination with the Ministry of Economy involving four other ministries (Ministry of Europe and Foreign Affairs, Ministry of Higher Education, Ministry of Ecological Transition, and Ministry for Gender Equality, Diversity, and Equal Opportunities). It focused resources on six priority areas aligned with the PIA 4 objectives of innovation, growth, and transformation, and aims to transform the CCI into a hub of innovation, a source of jobs and value, an instrument of international influence, and a driver of regional revitalization. (*Stratégie d'accélération*, 2021; *Consultation publique*, 2020).

The large investment and innovation strategy France 2030, launched in 2021, supports culture and arts and the CCI, among others, also deploying and scaling-up the 2021 acceleration strategy for the CCI. Coordination runs through the *Secrétariat général pour l'investissement (SGPI)*, with Bpifrance as the principal operator and the Ministry of Culture supplying the “volet culture” that dedicates roughly € 1 billion to culture across numerous schemes involving also launch of territorial hubs, export accelerators, and green/digital transition accelerators.

Two recent additions are significant for the evidence base and the regulatory dimension. On the research side, the PEPR ICCARE (*Industries culturelles et créatives: action, recherche, expérimentation*), launched in June 2024 and piloted by the CNRS, constitutes the research arm of the acceleration strategy, with €25

million over six years. On the evidence side, the *Panorama des ICC 2025*, published in December 2025, covering ten sectors, reported the French CCI sector as the third-largest sector of the French economy.

Greece

Cultural policies in Greece demonstrate the dual focus of preserving Greece's rich cultural heritage and fostering innovation through CCI. The cultural sector in general was hit hard first by the recession in 2009 and again due to the covid-19 pandemic in the early 2020s. Recent cultural policy initiatives in Greece have been aimed at enhancing the resilience of the CCI, particularly in response to the pandemic. The study *Mapping the Cultural and Creative Industries in Greece* was published in 2017, the first comprehensive study on the topic in Greece that delivered an overview of the CCI and their contribution to the economy, employment, and society as a whole (*Mapping the Cultural*, 2017).

The National Recovery and Resilience Plan [Greece 2.0](#) funded by the NextGenerationEU programme, integrated cultural initiatives to promote heritage and innovation. The programme holds several actions on culture with specific measures on CCI such as the "Culture as a driver of growth" and "Skill building for creative and cultural professionals". Under the component "Modernise and improve resilience of key economic sectors" these two measures' expected investment value is ca. €173 millions (*Greece 2.0*, 2021).

Notable recent development took form through legislation, the "Creative Greece" (Δημιουργική Ελλάδα), in force from 29 April 2024 (ΦΕΚ Α 61/2024), whose full title (Creative Greece: support for the film, audiovisual and creative sector, establishment of a body for books and other provisions for modern culture) signals a wider ambition than its operative content delivers. It established a rebate programme for CCI projects and productions (with emphasis on audiovisual contents) that nevertheless faced instability in the implementation (due to discontinuity in payouts).

Italy

In Italy, recent national-level cultural policy documents and policy initiatives highlight a dual focus on safeguarding cultural heritage while fostering the sector in general and the CCI to contribute to economic growth, innovation, and sustainability. Based on the NextGenerationEU plans in Italy, the National Recovery and Resilience Plan [Italia Domani](#), the Mission 1 on Digitization, Innovation, Competitiveness, Culture and Tourism included component 3, Tourism and Culture 4.0 that focussed on relaunching these sectors, heavily hit by the covid-19 crisis. With the allocation of €155 million and as part of the Component 3 the "Cultural and Creative Industry 4.0" pertains to the recovery of the CCI as digitally stronger and environmentally sensitive (Annex to Council decision, 2023; for more, see the webpages [Cultura 4.0](#)). The goals were detailed to support the recovery of cultural activities by promoting innovation and the use of digital technology along the entire value chain, guiding cultural and creative operators in the implementation of digital strategies and in increasing their management capabilities, and secondly, to promote a green approach throughout the cultural and creative supply chain, aiming to reduce the ecological footprint and promoting innovative and inclusive eco-design in order to orientate the public towards more responsible and environmentally aware behaviour.

In legislative terms, a remarkable development was achieved in December 2023 in Italy, as the law for *Made in Italy* (Law no. 206 of 27 Dec. 2023) came into effect (*GU 300*, 2023). The new law gave a definition of "cultural and creative enterprise" (*impresa culturale e creativa*), also creating a legal status and a register (*Albo delle imprese culturali e creative*) spanning the whole sector, thus defining the perimeter of goods and services hailing from CCI activities. The definition builds on the one used in the programme *Creative Europe* (Barge 2024) but the emphasis is perhaps more on the industrial rather than the cultural political side, although under joint ministerial governance, serving an example of legal-recognition-and-registry approach to CCI policy-making.

In 2020, established in the budget forecast of the Ministry of Economic Development, a fund for small and medium-sized creative enterprises was opened with an endowment of 40 million euros for the years 2021 and 2022 (Law No. 178 of 30 Dec. 2020) (*Fondo per le piccole e medie imprese creative, 2022; GU 322, 2020*). The aim was to promote the creation, development and consolidation of companies operating in the creative sector, through the granting of contributions, facilitation of access to credit and the promotion of innovative financing tools, as well as other initiatives for the development of the sector.

The Netherlands

Recent CCI policy developments in the Netherlands reflect a sustained emphasis on innovation, interdisciplinarity, and international collaboration. The CCI held earlier a position as one of the country's nine Top Sectors, valued not only for its economic contribution but for the transformative potential of design and creative method across environmental and social challenges. The current mission-driven innovation policy (*Missiegedreven Innovatiebeleid*), under which the CCI operate, is now anchored in the new industrial and innovation policy, combining mission-driven innovation with an industrial-policy focus on promising markets and technologies for economic earning capacity and strategic autonomy (see [CLICKNL site](#) for mission-driven innovation).

The Creative Industries Fund NL ([Stimuleringsfonds Creatieve Industrie](#)) supports projects in architecture, design, and digital culture with a focus on interdisciplinary approaches. It aims to foster innovation, societal impact, and internationalization within the creative sector. The fund largely channels allocation from the Ministry of Education, Culture, and Science. According to the recent plan, the ministry allocates over €90 millions to the fund for the years 2025–28. (*Beleidsplan 2025–2028, [2024]*.) By financing initiatives both domestically and internationally, the fund plays a central role in promoting Dutch CCI as driver of sustainable design and solutions.

The [CLICKNL](#) (Creativity, Learning, Innovation, Co-creation, Knowledge) serves as the knowledge and innovation network for the CCI. Within the current mission-driven framework, CLICKNL acts as the connecting role between research, practice and policy, and coordinates the Knowledge and Innovation Agenda for Societal Earning Capacity. CLICKNL and the creative-industry top sector are responsible for three coherent agendas: the Knowledge and Innovation Agenda Societal Earning Capacity (*KIA Maatschappelijk Verdienvormogen*), the Key Enabling Methodologies research agenda (the KEM agenda), and the Power of Design Agenda (*Agenda Ontwerpkracht*). The KIA MV forms the foundation, while the other two agendas give it more specific substance — KEM directing the research base of "key enabling methodologies", and the Power of Design Agenda setting out the knowledge needed to strengthen and apply design capacity to societal challenges. The KEM concept itself was originally launched in the *KIA Creatieve Industrie 2018–2021* and was subsequently embraced across the top sectors and incorporated into the KIA Societal Earning Capacity (2024–2027) — a clear marker of the creative industry's repositioning from a vertical sector with its own agenda to a horizontal supplier of method into the mission themes. (*KIA, 2023; KEM 2024–2027, 2024; Power of Design, 2024*.)

Slovakia

In March 2020, there was completed an analysis of Slovakia's policy measures to support the development of CCI (*Cultural Industries in Slovakia, 2020*). Delivered by the KEA European Affairs research centre, the report included a market analysis (value added, employment, cultural participation) of the CCI in the period 2013–17 and an impact assessment of policy measures of the period 2016–17 along with policy recommendations for future operations.

According to the analysis the Slovakian Ministry of Culture has a holistic approach to the development of CCIs linking it to other policy areas such as entrepreneurship, market access, territorial development and

attractiveness, education and skills development, internationalisation and export, and innovation. Also, the EU Structural Funds have been successfully deployed, as more than €270 millions via the Integrated Regional Operational Programme (IROP) 2014-2020 was channelled to "Mobilising creative potential in the regions". This operation helped fund CCI supportive units, primarily the regional creative centres. Until the covid-19, the CCI sector proved to be a quickly growing economic sector especially in the audiovisual, media and multimedia macro-area.

In June 2023, The Culture and Creative Industries Strategy of the Slovak Republic 2030 (*Stratégia kultúry a kreatívneho priemyslu Slovenskej republiky 2030*) was approved by the Slovak government. It is a long-term policy document that aims to shape Slovakia's cultural and creative sectors through a set of strategic goals and initiatives up until 2030. The strategy focuses on creating a sustainable, innovative, and inclusive cultural ecosystem that is integrated with other sectors like economy and education. Most of the Strategic Priorities frequently refer to the development needs in the CCI regarding e.g. funding, fair working conditions, and international networks and cooperation. The priority 6 calls support for cross-sectoral collaboration and emphasizes fostering cooperation and synergy between different stakeholders within the CCI and beyond including businesses and educational entities. (*Stratégia kultúry, 2023*)

Following the approval of the strategy, the Ministry of Culture was tasked with preparing and submitting the Action Plan to implement the strategy during years 2024–2026. The financial aspect of this was significant: of the strategy's 130 measures, 93 carried no budgetary impact, while the remaining 37 implied an increase of €653 million over the whole 2024–2030 period, a 30% rise on the ministry's spending in the preceding seven years. However, the implementation mechanism was later removed, as, in July 2025, the new government cancelled the obligation. The strategy therefore remains formally approved as a long-term framework, but it has been de-operationalised — left without the action-plan instrument that was supposed to deliver it. (*Stratégia kultúry, 2023; Uznesenie vlády 355/2025.*)

Slovenia

The [Centre for Creativity](#) (Center za kreativnost, CzK), established in 2017 and run by the Museum of Architecture and Design (MAO), is the national platform supporting Slovenia's cultural and creative sector. It is currently supported through Slovenia's Cohesion Policy Programme 2021–2027, within the "Innovative knowledge-based society" priority. CzK presents itself as the first national business-development accelerator for creative and cultural professionals, operating together with the Ministry of Culture's open calls and forming the support framework for the sector's development with offices in Ljubljana and Maribor. (*Center za kreativnost, s.d.; EU funding for the national platform, 2024*)

In 2020, there was published the "Statistical Analysis of the Cultural and Creative Sector in Slovenia 2008–2017" conducted by the CzK and the Slovenian Institute for Economic Research (IER) providing a detailed overview of the sector, including employment figures and the economic impact of creative industries (Murovec et al., 2020). The relevance of culture and creativity was acknowledged before, in the Slovenian development strategy 2030 (2017) especially as part of development goal 4, "Culture and language as main factors of national identity". While it was noted that the CCI would be an underappreciated and substantially unexploited source of opportunities in Slovenia, the strategy suggests strengthening cooperation between the business and cultural spheres and promoting synergies between science and art. (*Slovenian development strategy 2030, 2017.*)

Key national level documents of interest are, however, the two successively approved resolutions on culture, in 2022 and in 2024. The 2022–2029 resolution (*Resolucija o nacionalnem programu za kulturo 2022–2029*) was framed around national cultural substance and identity, and within that frame the CCI appeared as a developmental bridge: digitalisation strengthening culture's everyday presence, technological development encouraging links with science, and the creative industries connecting

culture with the economy. The resolution was not paired with an action plan before the new, 2024 resolution was approved.

The 2024–2031 resolution (*Resolucija o nacionalnem programu za kulturo 2024–2031*) brought along a different framing that aims to link culture with other sectorial policies. The essential difference is that CCI was moved from the discourse of bridge-to-the-economy to a constellation of governance-and-delivery issue: CCI is seen as an integrative, cross-sectoral topic steered through structured inter-ministerial interfaces that would span digitalisation, capacity-building and the support environment, the green transition, international cooperation and infrastructure. The document takes largely note of EU frameworks, for example, the EU Work Plan for Culture 2023–2026, the New European Agenda for Culture, the European Green Deal and the New European Bauhaus. The respective Action Plan up to year 2027 was approved in April 2025 (*Vlada sprejela akcijski*, 2025).

Sweden

Sweden has increasingly focused on CCI as a driver of innovation and economic development and emphasizes the need to modernize and adapt cultural strategies to evolving societal and technological contexts and support initiatives to strengthen the CCI, fostering international collaborations and integrating creative sectors into broader innovation strategies. In 2018, the first statistical analysis of cultural and creative industries in Sweden (*Kreativmetern*, 2018) was published by the Swedish Agency for Economic and Regional Growth (*Tillväxtverket*) in cooperation with key public actors to advance, study, and fund the CCI in Sweden, the Swedish Arts Council (*Kulturrådet*), the Swedish Agency for Cultural Policy Analysis (*Myndigheten för kulturanalys*), and Statistics Sweden. Along with the analysis, there was also published an introduction to the methodology applied during the study process (*Kreativmetern metodrapport*, 2018). In 2026, the Swedish Agency for Cultural Policy Analysis is expected to study and give a memorandum on how reliable and relevant national statistics on the economic values of cultural and creative industries can be produced and published on an ongoing basis (*Regeringsbeslut 1:6*, 2025).

In 2022, the report “Creative Sweden” (*Kreativa Sverige!*, SOU 2022:44) was completed to propose a national strategy specifically to promote sustainable development in cultural and creative industries. While the proposal for strategy offers an example for reviewing how sustainable development may better be incorporated in plans and recommendations for future, it also offers a review of the CCI in Sweden. However, the emphasis is rather on business and CCI policy development than on how CCI could have stronger impact on achieving sustainability impelling innovations and social transformation.

Two years after, in April 2024, “The strategy for businesses in the cultural and creative industries” was published covering a decennial plan for period 2024–33 (*Strategi för företag*, Skr. 2023/24:111, 2023). The concise English summary lists the six key objectives, those being: 1. reliable statistics at national level; 2. good knowledge of the conditions for and developments in the copyright-based market; 3. accurate guidance, support and funding and lower regulation costs; 4. good skills supply, lifelong learning and good conditions in social security systems; 5. attractive, sustainable living environments and a diversified and competitive national business sector; 6. major and growing international traction for cultural and creative businesses. (*Strategy for businesses*, 2024). On the occasion of launching the strategy, Minister of Culture Parisa Liljestränd asserted that CCI should be considered a new type of basic industry for Sweden and that promoting the conditions for CCI enterprises benefits the free culture, because most professional practitioners and creators in the sector would be organised as businesses. An interim evaluation of the strategy’s implementation shall be carried out in 2026. (*Ny strategi*, 2024.)

Scotland (United Kingdom)

CCI policy directions in Scotland reflect commitment to fostering a vibrant cultural ecosystem that is inclusive, sustainable, and globally connected. Brexit and immigration policies have posed challenges for

workforce development and international collaboration. Additionally, funding gaps from the cessation of EU structural funds have impacted the financial landscape for CCI. One of the motivations of the recent Scotland's International Culture Strategy (*Inspiring Connections*, 2024) is cultural innovation and learning.

Originally published in 2020, the *Culture Strategy for Scotland* underscores the intrinsic value of culture and its role in societal and economic development (*Culture Strategy*, 2020). The 2023 action plan updates its implementation, focusing on three key themes: strengthening culture's role in communities, supporting creative professionals, and enhancing international cultural connections. Climate action and digital transformation are also highlighted as priorities. (*Culture Strategy Action Plan*, 2023.)

The key public actor for the Scottish CCI is the [Creative Scotland](#). The organisation's plans are accessible through their annual plans, most recent one thus from 2026. (*Creative Scotland*, 2026). The current topics address equality, diversity, inclusion, and fair work; sustainable development; and international collaboration. The annual plans set out the priority areas, funding and budgets. The major funders for Creative Scotland are the Scottish Government and the UK National Lottery.

The [Creative Industries Council](#) (CIC) promotes CCI development in the United Kingdom with various advancement programmes and resources of data and research. The most recent, *Creative Industries Sector Plan* was published in June 2025 as part of the UK's Modern Industrial Strategy. It follows the previous *Creative Industries Sector Vision* (2023), that outlined a roadmap for growth in the CCI, emphasizing innovation, job creation, and regional development, and the *Creative Industries Clusters Programme* (2021).

The *Convergent Screen Technologies and Performance in Realtime* ([CoSTAR](#)) programme makes an UK wide infrastructure for CCI SME's to access the newest technologies and research expertise that enable their entry to R&D for emergent technologies especially in gaming, TV, film, performance, and digital entertainment. CoSTAR is funded through UK Research and Innovation's Infrastructure Fund and delivered by the UKRI Arts and Humanities Research Council.

4.2 CCI and open innovation at policy subnational and local levels

As was noticed earlier, CCI policies at the EU level have grown across several programme periods and become more nuanced in their approaches. This already reflects on several occasion in the CCI plans and strategies at the national level. Through a more detailed, comparative analysis, it would be possible to assess, on the one hand, to which extent the political and administrative will to CCI policy development appear as consistent across EU Member States, and on the other hand, how the different national approaches to CCI policy-making could be understood and, moreover, meaningfully compared.

Based on the short profiles, we already can loosely discern typologies: a single-strategy or a consolidated approach (Finland; Estonia; Flanders; Sweden); legislative and codifying approaches (Italy; Greece); instrument-stacking with layered and incremental schemes based on a larger investment architecture (France; Scotland; also Italy); cross-sectoral enabling method (The Netherlands; Wallonia; also Slovenia). Alternative typologies and further categorisation are of course possible to draw to continue European CCI policy landscape analysis.

Shifting attention from the short profiles of national level to subnational and local levels, as part of the Policy Landscape Analysis task, it is noteworthy that the at times rather unison objectives and plans may face critical challenges at local levels, when the envisioned goals of the thriving and transformative CCI meet the heterogenous regional and local contexts and the complexity of policymaking as a political process. As a rather new policy domain, CCI has to be matched with existing policy domains and it often falls subject to varying other political priorities and programmes.

The question thus arises, how could ecosystem-thinking help as it highlights the importance of understanding the bigger picture and interdependencies among actors. In regional work, challenges include the fragmented nature of cultural and creative industries and differences in scale and goals between sectors. Each sector should be seen as one among many, requiring comparable data and sector-specific skill assessments.

Relating to this, three seminal observations were made during the first part of *ekip* work and exchange about incongruences between cultural, CCI, and innovation policies at the level of cities. First, cities often are more used to develop cultural policies instead of innovation policies for the CCI. Second, cities are more used to develop innovation policies in or relation to technology-driven innovation ecosystems and, thirdly, cities are not that accustomed to operating with or develop open innovation policies. However, not least because of the steering power of the EU and national level prioritisations, local-level actors are rapidly adopting the mind set of open innovation and taking on ecosystem thinking.

A question that arises from this sequence of observations is, then, whether and how cities and local policymakers and public actors can benefit from the knowledge they would have about developing cultural policies and traditional innovation policies on their way to implementing open innovation policies driven by CCI. This is crucial as innovation ecosystems in cities seem to be the most promising locations, particularly important, practical and effective as laboratories for CCI-led open innovation policies. This is the key element of the *ekip* engine and has been tested in the cities involved in the *ekip* partnership, including Lund, Rotterdam, Kosice, Bratislava, Saint-Etienne, Tallinn, and Tampere through their multi-stakeholder work on *ekip* policy assessment and innovation inventories in city ecosystems.

5. Conclusions

This White Paper aimed to provide an overview of the evolving policy landscape for Cultural and Creative Industries (CCI) across Europe (*ekip* partner countries). The analysis highlights that, while CCI policy has matured significantly over the past two decades and gained recognition as a distinct domain, it remains characterised by structural fragmentation, conceptual ambiguity, and uneven implementation across governance levels.

At the European level, CCI policies have developed into a comparatively coherent framework supported by funding programmes, strategic agendas, and a growing body of research and pilot initiatives. These efforts have contributed to strengthening the visibility and legitimacy of CCI as contributors to economic development, innovation, and societal transformation. At the same time, they have reinforced expectations for CCI to play a more active role in addressing complex challenges, including the green and digital transitions and broader socio-economic resilience.

However, this growing ambition is not yet fully reflected in national and regional policy systems. The analysis of different country contexts demonstrates that the integration of CCI into innovation and economic development frameworks varies considerably. While some countries have taken steps towards embedding CCI within mission-oriented and innovation-driven strategies, others continue to approach them primarily through cultural or sectoral lenses. This unevenness is further amplified at subnational and local levels, where the translation of policy priorities into practice depends strongly on institutional capacity, governance structures, and local policy traditions.

A recurring finding throughout the analysis is the persistent separation between cultural policy, innovation policy, and economic or industrial policy. Despite increasing recognition of the cross-cutting nature of CCI, policy silos remain a significant barrier to their effective mobilisation within innovation ecosystems. Ecosystem thinking and open innovation approaches offer promising frameworks for addressing this

challenge, but their practical implementation is still at an early stage and often constrained by existing institutional logics and funding structures.

At the same time, emerging policy areas such as artificial intelligence and the New European Bauhaus highlight both opportunities and gaps in current policy frameworks. While these areas emphasise creativity, design, and cultural perspectives as essential components of innovation and sustainability transitions, the role of CCI is not always explicitly recognised or operationalised. This indicates a need for more systematic integration of CCI perspectives into broader policy agendas, particularly in areas where cultural and creative competencies can contribute to shaping technological development and societal change.

Looking ahead, recent European priorities for the 2024–2029 period further reinforce the importance of competitiveness, innovation, and the twin green and digital transitions, alongside social cohesion and resilience. These priorities emphasise strengthening Europe’s innovation capacity, supporting sustainable economic growth, and fostering a more resilient and inclusive society. Within this context, CCI have significant potential to act as enablers of cross-sector innovation, contributors to sustainable transformation, and facilitators of cultural and social value creation.

Nevertheless, there remains a notable gap in understanding how national CCI strategies align with or reflect these evolving European priorities. Further research is needed to examine the extent to which national and regional policies incorporate themes such as digital innovation, sustainability, competitiveness, and social inclusion, and how effectively these priorities are translated into operational vehicles. Comparative analyses across countries could provide valuable insights into convergences and divergences in policy approaches, as well as into the mechanisms that enable – or hinder – the integration of CCI into broader innovation systems.

In conclusion, while the policy foundations for CCI development in Europe are increasingly well established, their full potential remains underutilised. Addressing this challenge requires not only continued investment and policy attention but also a shift towards more coordinated, cross-sectoral, and adaptive governance frameworks. Strengthening the role of CCI within innovation ecosystems will depend on the ability to bridge policy domains, align strategic priorities across levels of governance, and develop more effective mechanisms for implementation and learning.

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Annex 1

A collection of EU policy documents from years 2016–2024 (in chronological order) relevant for cultural and creative sectors and industries (CCSI) perspectives in general and the *ekip* especially.

Title / topic	Date	Author
Towards an integrated approach to cultural heritage for Europe	8 September 2015	European Parliament resolution
The role of intercultural dialogue, cultural diversity and education in promoting EU fundamental values	19 January 2016	European Parliament resolution
A coherent EU policy for cultural and creative industries	13 December 2016	European Parliament resolution
European Year of Cultural Heritage (2018)	17 May 2017	Decision (EU) 2017/864 of the European Parliament and of the Council
promoting access to culture through digital means with a focus on audience development	12 December 2017	Council Conclusions
Cultural Heritage as a strategic resource for more cohesive and sustainable regions in the EU	17 May 2018	Opinion of the European Committee of the Regions
A New European Agenda for Culture	22 May 2018	Commission communication
The New European Agenda for Culture	11 December 2018	European Parliament resolution
Culture in a Union that strives for more: the role of regions and cities	12 February 2020	Opinion of the European Committee of the Regions
Europe's Media in the Digital Decade: An Action Plan to Support Recovery and Transformation	2020	Commission communication
Cultural recovery of Europe	17 September 2020	European Parliament resolution
Framework of ethical aspects of artificial intelligence, robotics and related technologies	20 October 2020	European Parliament resolution with recommendations to the Commission
intellectual property rights for the development of artificial intelligence technologies	20 October 2020	European Parliament resolution
New Industrial Strategy for Europe	25 November 2020	European Parliament resolution

Title / topic	Date	Author
achieving an effective policy legacy for the European Year of Cultural Heritage	20 January 2021	European Parliament resolution
Restart of cultural and creative sectors	5 February 2021	Opinion of the European Committee of the Regions
the recovery, resilience and sustainability of the cultural and creative sectors	18 May 2021	Council conclusions
Artificial intelligence in education, culture and the audiovisual sector	19 May 2021	European Parliament resolution
shaping the digital future of Europe: removing barriers to the functioning of the digital single market and improving the use of AI for European consumers	20 May 2021	European Parliament resolution
establishing the Creative Europe Programme (2021 to 2027)	20 May 2021	Regulation (EU) 2021/818 of the European Parliament and of the Council
'Europe's Media in the Digital Decade: An Action Plan to Support Recovery and Transformation'	3 June 2021	Council conclusions
EU guidelines for the safe resumption of activities in the cultural and creative sectors - COVID-19	5 June 2021	Commission communication
'New European Bauhaus: Beautiful, Sustainable, Together'	15 September 2021	Commission communication
the situation of artists and the cultural recovery in the EU	20 October 2021	European Parliament resolution
Europe's Media in the Digital Decade: an Action Plan to Support Recovery and Transformation	20 October 2021	European Parliament resolution
an intellectual property action plan to support the EU's recovery and resilience	11 November 2021	European Parliament resolution
culture, high-quality architecture and built environment as key elements of the New European Bauhaus initiative	30 November 2021	Council conclusion
The role of culture, education, media and sport in the fight against racism	8 March 2022	European Parliament resolution
Building a European strategy for the cultural and creative industries ecosystem	4 April 2022	Council conclusions

Title / topic	Date	Author
reinforcing intercultural exchanges through the mobility of artists and cultural and creative professionals, and through multilingualism in the digital era	13 April 2022	Council conclusions
The new European Bauhaus	14 September 2022	European Parliament resolution
Esports and video games	10 November 2022	European Parliament resolution
The EU work plan for culture 2023–2026	7 December 2022	Council resolution
The implementation the New European Agenda for Culture and the EU Strategy for International Cultural Relations	14 December 2022	European Parliament resolution
Consumer protection in online video games: a European single market approach	18 January 2023	European Parliament resolution
Implementation of the Audiovisual Media Services Directive	9 May 2023	European Parliament resolution
An EU initiative on Web 4.0 and virtual worlds: a head start in the next technological transition	11 July 2023	Commission communication
COVID-19 pandemic: lessons learned and recommendations for the future	12 July 2023	European Parliament resolution
The future of the European book sector	14 September 2023	European Parliament resolution
EU framework for the social and professional situation of artists and workers in the cultural and creative sectors	21 November 2023	European Parliament resolution
enhancing the cultural and creative dimension of the European video games sector	24 November 2023	Council conclusions
Increasing innovation, industrial and technological competitiveness through a favourable environment for start-ups and scale-ups	14 December 2023	European Parliament resolution
"Stimulate the green transition of the cultural and creative sectors, with a specific focus on the energy crisis"	15 January 2024	mandate of the Open Method of Coordination (OMC) Group of Member States' experts

Title / topic	Date	Author
Implementation of the Creative Europe programme 2021-2027	16 January 2024	European Parliament resolution
Cultural diversity and the conditions for authors in the European music streaming market	17 January 2024	European Parliament resolution
boosting startups and innovation in trustworthy artificial intelligence	24 January 2024	Commission communication
State of the Digital Decade 2024	2 July 2024	Commission communication
empowering the cultural and creative sectors through data-driven audience development	31 May 2024	Council conclusions