



# Leveraging cultural and creative sectors for development in the European Union outermost regions



AZORES  
CANARY ISLANDS  
FRENCH GUIANA  
GUADELOUPE  
MADEIRA  
MARTINIQUE  
MAYOTTE  
RÉUNION  
SAINT MARTIN

# Leveraging cultural and creative sectors for development in the EU outermost regions

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This report assesses the current state and future potential of cultural and creative sectors (CCS) in the nine outermost regions of the European Union: Guadeloupe, French Guiana, Martinique, Mayotte, Réunion, and Saint Martin (France); the Azores and Madeira (Portugal); and the Canary Islands (Spain). Global trends, such as increases in cultural tourism, trade in creative goods and services, and FDI in CCS offer significant opportunities for EU ORs to expand their cultural and creative sectors, promote synergies with tourism and help drive job creation. In addition, CCS policies can also boost well-being outcomes and social cohesion through preserving and promoting local cultural heritage and encouraging cultural participation. CCS policy which capitalises on these global trends, whilst recognising the specific context of EU ORs, could help promote these areas and contribute to local development.

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# Executive summary

## Cultural and creative sectors represent a development opportunity for European outermost regions

**Around five million European citizens (approximately 1.1%) live in Europe’s “outermost regions” located in Macaronesia (North Atlantic Ocean), the Caribbean, and the Indian Ocean.** There are nine EU outermost regions (ORs): Guadeloupe, French Guiana, Martinique, Mayotte, Réunion, and Saint Martin (France); the Azores and Madeira (Portugal); and the Canary Islands (Spain). While the ORs are quite different from one another in many aspects, they share some characteristics such as remoteness, small size, vulnerability to climate change, economies dependent on a few sectors and large amounts of informal economic activity. They also generally have lower GDP per capita than national averages, as well as higher unemployment and youth unemployment rates.

**There is potential for cultural and creative sectors (CCS) to contribute to local development in the EU outermost regions.** Global trends, such as increases in cultural tourism, trade in creative goods and services, and FDI in CCS offer significant opportunities for EU ORs to expand their cultural and creative sectors, and help drive job creation. In addition, CCS policies can also boost well-being outcomes and social cohesion through preserving and promoting local cultural heritage and encouraging cultural participation. CCS policy which capitalises on these global trends, whilst recognising the specific context of EU ORs, could help promote these areas and contribute to local development.

**The outermost regions can leverage their comparative advantages in tourism to support growth in cultural and creative sectors and, in turn, support tourism.** Tourism is the leading sector for the majority of EU ORs. Capitalising on tourism assets can help support a strong CCS and, at the same time, strengthening the cultural and creative ecosystem can help boost tourism revenues. Moreover, EU ORs are in a unique position to tap into different markets. As European regions, ORs are able to benefit from national as well as EU support for CCS, while at the same time, their geographic location enables access to other major markets through strong local ties. Additionally, the specific culture of EU ORs, influenced both by their national identity and that of their geographic region, is itself an important cultural asset.

## In general, CCS are currently less developed in the outermost regions than in the mainland, but recent policy developments aim to address this gap

**International data shows most outermost regions lagging national averages in cultural and creative employment.** Eurostat data for 2020 shows cultural and creative employment (including those working in cultural and creative sectors, plus those working in creative occupations in other sectors of the economy) accounted for 2.4% of employment in the Canary Islands (compared to 3.5% on average for Spain) and 2.3% in the French ORs collectively (compared to 3.6% on average for France). While shares of cultural and creative employment for the Azores and Madeira specifically are not available, shares of cultural and creative employment in mainland Portugal (3.7%) are higher than the national average (3.6%), suggesting that Portuguese ORs have a lower share than the mainland. In addition, growth in cultural and creative



employment is also generally lower in ORs compared to national averages (with the exception of the Canary Islands where the number of people working in cultural and creative employment increased by 16.7% between 2014 and 2020, compared to 12.9% in Spain). Evidence also shows low female employment in CCS for some EU ORs, compared to national averages and to female employment in other sectors.

**There is however strong growth in creative businesses in some EU ORs.** For example, between 2009 and 2020 the number of CCS enterprises in the Azores increased by 26.6%, far higher than the increase in CCS businesses in mainland Portugal (7.5%) and higher than the increase of all enterprises in the business economy (5.6%). Similarly, the number of CCS enterprises in the Canary Islands has increased by around 27% between 2008 and 2018, making up around 4.1% of all Spanish CCS enterprises in 2018 (up from 3.5% in 2008).

**Some French ORs have dedicated programmes to support CCS development, while others have integrated CCS into their tourism strategies.**

- **French Guiana** has a dedicated cultural development plan that aims to promote French Guiana's culture, encourage culture as a lever for economic development, democratise access to culture and support innovation.
- **Guadeloupe** identifies CCS along with the green, social and silver economy as emerging sectors for the archipelago in its Regional Economic Development Plan.
- In **Martinique**, CCS are considered as complements to other policy areas. For example, culture, cinema and music feature as strategic clusters to promote tourism in the island's development plan. CCS also feature in the island's health agenda, through a partnership between the Department of Cultural Affairs and the Regional Health Agency of Martinique.
- The preservation and promotion of culture also form part of **Saint Martin's** tourism strategy, for example, by reinvesting in heritage sites for renewed uses and seeking to diversify cultural activities offered on the island. Saint Martin has also engaged in new ways to develop cultural participation and cultural education, through digital museums.
- As part of its regional development plan, **Mayotte** is also investing in cultural education and the promotion of cultural participation for young people, as well as investing in actions to promote and preserve its traditional crafts sector.
- In **Réunion**, policies are evolving towards greater consideration of culture's socio-economic potential. For example, as part of wider efforts to support investment in cultural enterprises, the region is supporting research and innovation centres, SMEs, young innovative firms, and culture and artistic centres to collaborate on joint projects funded by the region.

**In the Portuguese ORs (the Azores and Madeira), longstanding cultural policies support CCS and deliver cultural services to citizens.** In both Portuguese ORs, Regional Cultural Affairs Directorates leverage their autonomy to run distinct cultural policies. Both regions administer grant programmes for CCS production, heritage protection programmes and a broad set of cultural services for citizens. In the Azores, a bid to be the European Capital of Culture 2027 prompted renewed policy interest in CCS, including mappings of CCS across the islands and a new cultural strategy. In Madeira attention is also growing in culture's role in development. For example, in 2022, the Regional Secretary for Tourism and Culture of Madeira recognised the role of culture in generating employment and wellbeing and in 2021, the city of Funchal, the island's capital and largest city, launched the "Strategic Plan for Culture 2021-2031"; notable for being the first cultural strategy elaborated by a public institution in Madeira.

**The Canary Islands (Spain) have been particularly active in public policy for CCS and have seen impressive growth rates in the sector.** The Department for Education, Universities, Culture and Sport spearheads the government's cultural policy, while a dedicated public company, the Canaries Institute of Cultural Development (ICDC), executes a large part of the regional government's policies, including grants

for cultural production and direct delivery of cultural services. Recent reforms of the ICDC resulted in a wider mandate to maximise culture's role in development, for example through greater integration in employment, innovation and internationalisation policies. The Canary Islands offer one of Europe's highest tax incentives for audio-visual production, as well as tax reliefs for videogames production.

## The EU offers a range of instruments to support CCS in the outermost regions

**The European Commission is committed to supporting these regions' socio-economic development** and has adopted a Communication titled 'Putting people first, securing sustainable and inclusive growth, unlocking potential' in May 2022. The Communication sets out a new strategy for the outermost regions, including commitments and actions to improve living conditions.

**The EU offers tailored support to the outermost regions in their main funding streams.** For example, the European Regional Development Fund (ERDF), the Recovery Assistance for Cohesion and the Territories of Europe (REACT-EU) which provides funding for recovery from the COVID-19 pandemic, and the European Territorial Cooperation funds (Interreg) all make specific funding available for ORs. For example, strand D of Interreg was established specifically for the outermost regions, to allow them to cooperate with their neighbouring countries and territories in the most efficient and simple way. These funds have been accessed by some ORs for cultural and creative projects. For example, in Mayotte, Interreg financed the *Au Fil des Îles* – Regional School for the Fashion Industry to support the archipelago's fashion sector.

**The outermost regions can also take advantage of specific EU funding streams to support CCS.** For example, CCS actors in the outermost regions can apply for funding from the European Commission's Creative Europe programme, and can benefit from the Culture Moves Europe initiative which supports artist mobility in the ORs. In addition, a new EU co-funded programme also specifically finances cultural activities exclusively in EU ORs. The programme, Archipel.eu, provides financial support to cultural projects and initiatives through a series of thematic calls for projects which support intangible cultural heritage, improve cultural dialogue across the EU and disseminate cultural and creative works.

## Other multilateral and bilateral platforms also offer opportunity for greater collaboration between the outermost regions and their geographic neighbours

**In Macaronesia, various cooperation platforms exist which could be utilised for CCS policy.** The Interreg MAC (Madeira-Azores-Canary Islands) Territorial Cooperation Programme offers an avenue to promote cooperation between the Macaronesian ORs and their neighbouring countries, and could be utilised to develop further collaboration on CCS issues. The Atlantic Parliamentary Days, a regular meeting between members of the legislative assemblies of the Azores, the Canary Islands, Cabo Verde and Madeira, is another avenue for strategic cooperation. Meetings occur on an ad-hoc basis and include CCS topics.

**The Caribbean Community (CARICOM) has identified CCS as a strategic area** and various CARICOM bodies, such as the CARICOM Development Fund (CDF), are working with other regional organisations, such as Caribbean Export, the region's export and investment promotion agency, to identify resources and donors to finance CCS development. The Caribbean Development Bank (CDB), a partner of CARICOM, is also working on support for CCS, for example through its Cultural and Creative Industries Innovation Fund available to CCS actors in the region. The Organisation for Eastern Caribbean States (OECS) also funds CCS initiatives, through its Enterprise Competitiveness Unit, which runs a programme dedicated specifically to the creatives sectors, crafts, fashion, cinema and music.

**The Indian Ocean Commission (IOC) is targeting CCS as a lever of socio-economic development, both at the local and regional level.** With support from the French Development Agency, they have launched a five-year project to support the post-COVID economic and social recovery of IOC members (and Mozambique), through a focus on CCS. The Association of the Vanilla Islands (*Association des Îles Vanilles*) is another multilateral organisation in the region which works to promote a common brand for marketing and combined tourism offers for the region. Whilst this organisation is not targeted at CCS, the sector could benefit from the opportunities such cooperation provides.

### Recommendations to enhance CCS in the outermost regions call for a place-based approach in the respective global regions

**In Macaronesia, there is opportunity to deepen policy dialogue between the Azores, the Canary Islands and Madeira as well as strengthening cultural and economic partnerships with Africa and Latin America.** Building on the success of the MAC European Territorial Cooperation Programme, for example, areas such as joint cultural production, policy exchange, pooling of resources and cooperation within EU initiatives could form the basis of future partnerships targeted specifically towards CCS. There is also opportunity for ORs to deepen economic ties with African and Latin American countries, potentially through bilateral or multilateral programmes. For example, initiatives such as *Casa África* have been fruitful in establishing economic ties in CCS across countries.

**In the Caribbean ORs (French Guiana, Guadeloupe, Martinique and Saint Martin) policy could promote access to a range of existing funding mechanisms, and could develop specific support to address gender inequality in the sector.** Both EU and French support measures are open to CCS in the Caribbean ORs. Developing advice and information resources for OR CCS actors to better understand the potential funding streams and business support mechanisms available to them could improve take-up. Moreover, specific measures could be developed to address the low levels of female employment in CCS in the ORs. Policy could look to promote female employment in CCS through targeted support for female artists and entrepreneurs, training and skills development programmes, and the establishment of networking and promotion groups.

**ORs in the Indian Ocean (Réunion and Mayotte) are well placed to draw on various international organisations to support CCS development.** For example, leveraging the Indian Ocean Commission (IOC) mandate in culture could be used to help grow cooperation and provide a common offering for international investors and visitors. Closer association of Mayotte in IOC activities could help the archipelago also benefit from the possible growth in CCS exchange. Similarly, the Association of the Vanilla Islands' tourism work could be harnessed to further promote synergies between tourism and CCS.

**Additionally, strengthening linkages between tourism and CCS could be of benefit for all EU ORs.** Cultural tourism is one of the largest and fastest growing global tourism markets and EU ORs are in a strong position to capitalise on their unique cultural heritage to promote tourism in both European and non-European markets. Developing coordinated cultural tourism policies could help to strengthen both the tourism sector and CCS, creating a magnet affect for both tourists and CCS professionals. For example, supporting the use of local creative content in place branding and promoting supply chain linkages between tourism and CCS SMEs could help support mutually reinforcing synergies between the sectors.

## Addressing data gaps could help to better identify policy priorities for CCS in the outermost regions

**A lack of data is an issue for some of the smaller EU ORs, but a lack of comparable data is an issue for all ORs.** For some ORs, such as Mayotte and Saint Martin, data is not available at a granular enough level to be able to fully assess the size and shape of CCS on the islands. For some of the larger ORs, for example the Azores and Madeira, national level data has been disaggregated to make it possible to compare the islands with their mainland counterparts, however, there remain issues of international comparability.

**More granular level reporting at the national level as well as local mapping studies could help build the evidence base to support further policy making.** A first step towards greater comparability of CCS data would be to encourage more granular reporting at the national level, so that trends in the ORs can be observed. Further mapping studies and local observation centres could also aid in data collection. Close attention to the definition used in such studies is important, and efforts would benefit from using the same statistical definition of CCS as Eurostat to aid international comparison.

**Additionally, work could look to better document the wider economic and social impact of CCS in the EU ORs.** For example, case study or qualitative evidence could be sought to assess the impact of CCS on fostering social cohesion, supporting health and wellbeing, and preserving and promoting cultural heritage. Work could also look to capture some of the additional economic impact of CCS, such as the sectors' role in driving innovation, promoting tourism and attracting skilled workers.





# 1 Introduction





## Characteristics of the EU outermost regions

**Around five million EU citizens (approximately 1.1%) live in the EU “outermost regions” (ORs), located in Macaronesia,<sup>1</sup> the Caribbean, and the Indian Ocean** (Figure 1.1). There are nine EU ORs: Guadeloupe, French Guiana, Martinique, Mayotte, Réunion, and Saint Martin (France); the Azores and Madeira (Portugal); and the Canary Islands (Spain). Unlike EU overseas countries and territories (OCTs), the EU ORs are territories which form part of an EU member state and are an integral part of the European Union. Therefore, EU law applies to these regions. However, due to their remoteness and specific challenges, they benefit from a special status under Article 349 of the Treaty on the Functioning of the European Union, whereby the EU adopts specific targeted measures to help them address structural economic constraints. The European Commission is committed to supporting these regions’ socio-economic development and has set out strategic orientations in favour of the outermost regions in five Communications (2004, 2008, 2012, 2017 and 2022) to encourage economic development and to improve living conditions.

**Figure 1.1. Map of the EU outermost regions**



Source: (European Commission, 2022<sub>[1]</sub>)

**EU ORs tend to have lower GDP per capita and higher unemployment rates than EU averages.** While EU ORs are quite different from one another in many aspects, they share some characteristics such as remoteness, small size, vulnerability to climate change, and economies dependent on a few sectors (European Commission, 2022<sup>[2]</sup>). They also have higher youth unemployment rates (Table 1.1). The informal economy is also estimated to be high in EU ORs, creating challenges in understanding and supporting employment and business activity (European Commission, 2021<sup>[3]</sup>).

**Table 1.1. Selected statistics on the outermost regions compared to national and EU averages**

Region	Population 2020	GDP PPS per inhabitant % EU average 2020	Growth rate 2000-2019: Real GDP per head (in million EUR) yearly average	Unemployment rate % labour force aged 15-74 2020	Youth unemployment rate % labour force aged 15-24 2020	% households with access to broadband 2021	Exports In million EUR	Imports In million EUR	Median age of total population 2020 versus 2100 projections
<b>EU-27</b>	<b>447.3 million</b>	<b>100</b>	<b>1.2</b>	<b>7.1</b>	<b>16.8</b>	<b>88</b>	<b>6 248 664.2</b>	<b>5 742 247.2</b>	<b>2020: 43.9 2100: 48.8</b>
<i>France</i>	<i>67.3 million</i>	<i>104</i>	<i>0.8</i>	<i>8.1</i>	<i>20.2</i>	<i>88</i>	<i>641 891</i>	<i>688 412</i>	<i>2020: 42.0 2100: 47.5</i>
Guadeloupe	412 682	69	2.2	17.5	41.5	75	68.1	741.6	2020: 45.6 2100: 46.2
French Guiana	288 086	46	0.3	16.1	-	79	29.4	410.7	2020: 26.2 2100: 35.1
Martinique	359 821	76	1.4	12.4	38.3	86	67.6	641.6	2020: 48.6 2100: 47.1
Mayotte	278 926	30	3.0	27.8	55.4	-	1.3	203.6	2020: 17.9 2100: 28.0
Réunion	856 858	68	1.7	17.4	42.3	87	73.4	1 478.5	2020: 37.1 2100: 44.3
Saint Martin	32 489	-	-	-	-	-	-	-	-
<i>Portugal</i>	<i>10.3 million</i>	<i>76</i>	<i>0.8</i>	<i>6.9</i>	<i>22.6</i>	<i>84</i>	<i>74 096.9</i>	<i>78 323.2</i>	<i>2020: 45.5 2100: 49.5</i>
The Azores	242 796	67	1.3	6.1	-	88	27.5	25.7	2020: 40.2 2100: 52.3
Madeira	254 254	69	0.9	8.1	-	87	268.3	250.2	2020: 43.2 2100: 52.8
<i>Spain</i>	<i>47.3 million</i>	<i>84</i>	<i>0.9</i>	<i>15.5</i>	<i>38.3</i>	<i>96</i>	<i>343 551</i>	<i>327 023</i>	<i>2020: 44.3 2100: 50.2</i>
Canary Islands	2 236 992	62	-0.2	22.6	51.6	97	217.9	1 206.8	2020: 44.0 2100: 54.4

Notes: PPS is the technical term used by Eurostat for the common currency in which national accounts aggregates are expressed when adjusted for price level differences using PPPs (see [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Glossary:Purchasing\\_power\\_standard\\_\(PPS\)](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Glossary:Purchasing_power_standard_(PPS))). Growth rate of real GDP per head for Mayotte is the 2014-2019 yearly average. Median age of total population figures for the Canary Islands relate to Gran Canaria. Exports includes both intra-EU + extra-EU exports. Does not include "exports" to the OR's Member State. Data from June 2021: Canary Islands. Q1 2021 Quarterly data: Réunion, Mayotte, Guadeloupe, Martinique, French Guiana, the Azores. 2020 (p) Yearly data: France, Portugal and Spain. Imports includes both intra-EU + extra-EU imports. Does not include "imports" from the OR's Member State. Data from June 2021: Canary Islands. Q1 2021 Quarterly data: Réunion, Mayotte, Guadeloupe, Martinique, French Guiana, the Azores. 2020 (p) Yearly data: France, Portugal and Spain.  
Source: (European Commission, 2022<sup>[1]</sup>)

## Why cultural and creative sectors matter for the outermost regions

### Box 1.1. What are cultural and creative sectors (CCS)?

**Cultural and creative sectors (CCS)** is a term used to capture a range of activities which have cultural value and/or require significant amounts of creativity. Though there are different definitions of CCS at national and international levels, the definition used by Creative Europe, which is broadly applicable to this report, states that CCS are:

*Sectors whose activities are based on cultural values or artistic and other individual or collective creative expressions. The activities may include the development, the creation, the production, the dissemination and the preservation of goods and services which embody cultural, artistic or other creative expressions, as well as related functions such as education or management. They will have a potential to generate innovation and jobs in particular from intellectual property. The sectors include architecture, archives, libraries and museums, artistic crafts, audiovisual (including film, television, video games and multimedia), tangible and intangible cultural heritage, design (including fashion design), festivals, music, literature, performing arts, books and publishing, radio, and visual arts.*

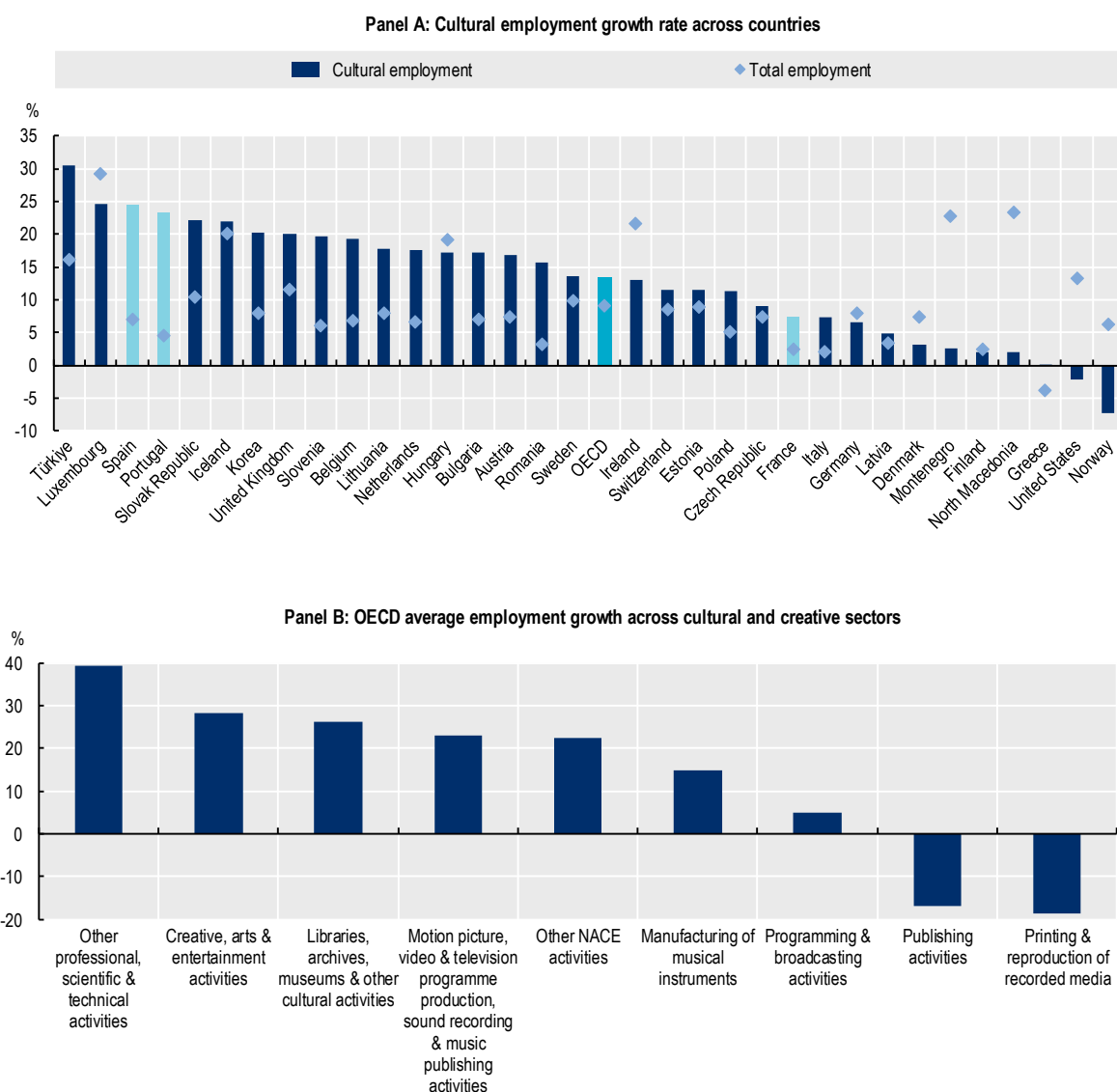
**Different CCS subsectors, and different businesses and organisations within these subsectors, can be more or less commercially oriented.** The cost structures and business models of organisations in CCS vary significantly, from not-for-profit and public institutions to for-profit companies. For some CCS actors, promoting and protecting cultural heritage will be a driving force, for others it may be to express creativity, whereas for others it may be to make a profit. These ambitions are not necessarily mutually exclusive, and policy can look to support actors in harnessing CCS for both economic and social returns.

Source: (OECD, 2022<sup>[4]</sup>; EU, 2021<sup>[5]</sup>)

**Cultural and creative sectors (CCS) are increasingly recognised as contributing to local development.** Beyond generating economic wealth and creating jobs, CCS also support innovation and promote happier, healthier and more inclusive societies (OECD, 2022<sup>[4]</sup>). Moreover, CCS can make places more attractive to live, work and invest in. These attributes mean that CCS can be leveraged by EU ORs to support wider economic and social development goals.

**Cultural and creative sectors are an increasing source of job creation.** Across EU27 countries, cultural employment makes up a significant share of the labour force. In 2021, 3.7% of all employment in the EU27 was in cultural employment which includes both those working in cultural and creative sectors (CCS) and those working in cultural and creative jobs in other sectors of the economy (e.g. a designer working for a car manufacturer) (Eurostat, 2022<sup>[6]</sup>). Moreover, growth in cultural and creative employment outpaced growth in overall employment in the majority of EU countries before the COVID-19 pandemic (Figure 1.2). Between 2011 and 2019, cultural and creative employment grew by 13.4%, compared to 9.1% for overall employment across OECD and EU countries. While growth in cultural and creative employment was generally lower for EU ORs compared to national averages (see section 334695728), the upward trend in cultural and creative employment across the OECD suggests CCS could be leveraged by the EU ORs to support job creation.

Figure 1.2. Cultural employment growth, 2011-2019



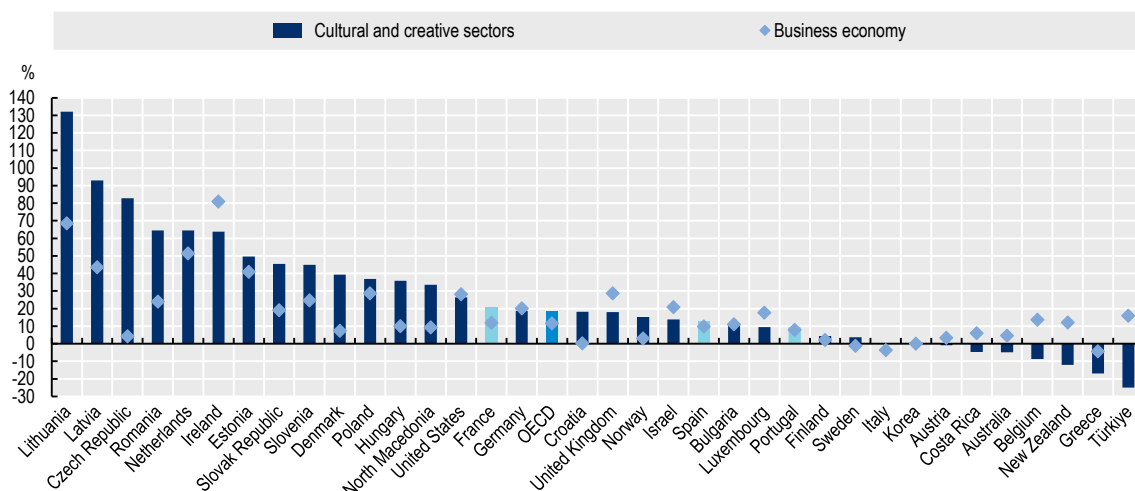
Note: Growth rate in Panel A for Korea refers to the period, 2013 to 2019. Considering sectoral data available across years, the OECD average in Panel B includes Austria, Belgium, the Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, the Netherlands, Norway, Poland, Portugal, the Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Republic of Türkiye, the United Kingdom, and the United States. Other professional, scientific and technical activities include specialised design activities, photographic activities and translation and interpretation activities.

Source: OECD calculations on Eurostat (2021<sup>[7]</sup>), *Cultural Employment*, <https://ec.europa.eu/eurostat/web/culture/data/database>, American Community Survey, 2019; and Statistics Korea, 2019.

**CCS businesses are an increasing contributor to the economic landscape.** The number of CCS enterprises in the OECD has grown in the decade before the pandemic, outstripping enterprise growth in the total business economy. Between 2011 and 2018, the number of enterprises in CCS grew by 18% across OECD countries, outpacing the total business economy, which grew at about 12% (Figure 1.3).



Figure 1.3. Growth rate of the number of CCS enterprises, 2011 to 2018



Note: Business economy here includes all economic activities in NACE Rev. 2 B to J, L to N, R90, R91, and S95. Cultural and creative sectors include C18, C3212, C322, G4761, G4762, G4763, J5811, J5813, J5814, J5821, J59, J60, J6391, M7111, M741, M742, M743, N7722, R90, and R91. Latest data for Australia and Costa Rica are from 2017.

Source: OECD calculations on OECD (2021<sup>[8]</sup>), *OECD Regional Statistics (database)*, <https://doi.org/10.1787/6ef7b296-en> (ad-hoc data collection); Eurostat (2021<sup>[9]</sup>), *Regional Structural Business Statistics (table sbs\_r\_nuts06\_r2)*.

**CCS generate an increasing amount of wealth through international exports.** Between 2002 and 2020, global exports of cultural and creative goods more than doubled in value, increasing from USD 208 billion in 2002 to USD 524 billion in 2020 (UNCTAD, 2022<sup>[10]</sup>). Moreover, creative goods exports grew by 3.5% a year, on average, between 2006 and 2020, outpacing annual growth (2.4%) of total exports (UNCTAD, 2022<sup>[10]</sup>). World exports of creative services are an even larger value generator. In 2020, global creative services exports were estimated at USD 1.1 trillion, a sizeable increase from the USD 487 billion value in 2010 (UNCTAD, 2022<sup>[10]</sup>). However, while least developed countries have seen the highest growth in creative goods exports, small island developing states have seen a decline in the past 15 years (Table 1.2)<sup>2</sup>. This indicates that there may be potential to boost CCS exports in small island economies, such as the EU ORs.

Table 1.2. Average annual export growth rates of creative goods, 2006–2020

(%)

Region	2006-2010	2011-2015	2016-2020	2006-2020	2020
Developing economies	9.8	4.9	2	5.9	-10.6
Developed economies	1.5	0.2	0.3	1.3	-14.9
Least developed countries	19.5	4.2	38.3	10.1	-2.2
Small island developing States	12.8	-0.6	-29.8	-3.9	-48.5
World – creative goods	5.1	2.7	1.2	3.5	-12.5
World – all goods	3.6	-1.8	2.6	2.4	-7.2

Source: UNCTAD based on UN COMTRADE Database, UNCTAD (2022<sup>[10]</sup>)

**Increasing globalisation and digitalisation have expanded the international market for CCS goods and services.** Increased digitisation has presented challenges for CCS, such as issues of data and copyright protection, and ethical issues in relation to the use of artificial intelligence in creative production. However, it has also produced greater opportunity to disseminate CCS goods and services. Video on

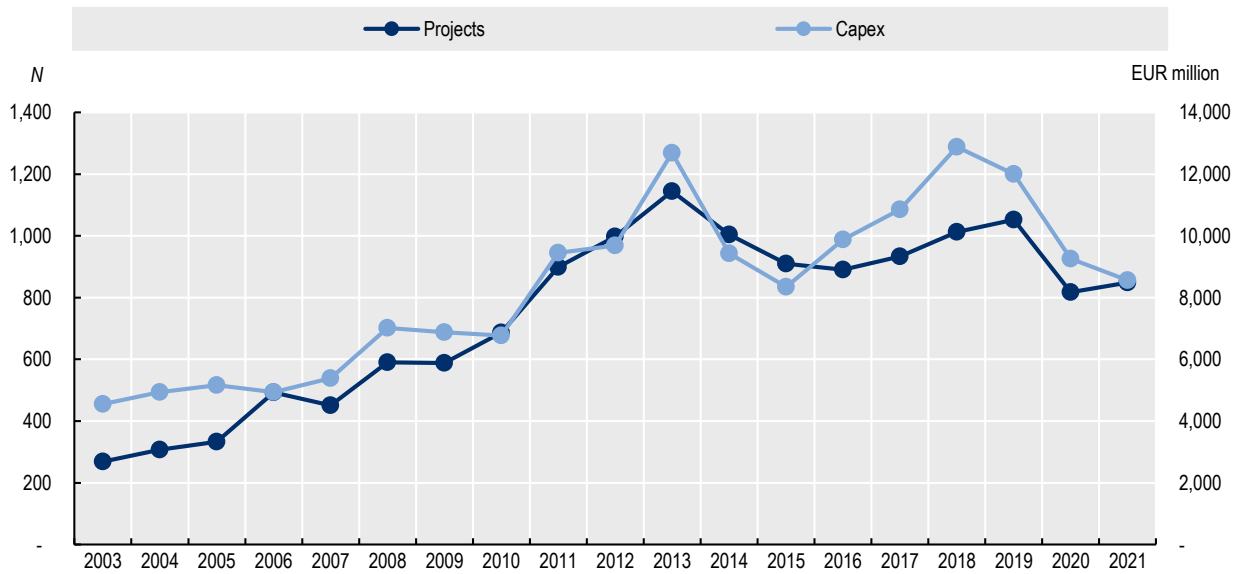
demand services (such as Netflix, Disney+, etc.) have enabled greater international licencing of television content. E-commerce has enabled craft workers and artisans to expand to global markets. Greater normalisation of remote working has opened opportunities for cultural services to be more easily exported. While CCS are increasingly accessing global markets, the inputs to CCS (such as talent, ideas, materials, etc.) remain largely localised (European Commission, 2017<sup>[11]</sup>). This means there is an increased opportunity for CCS actors in the EU ORs to access international markets, without the need for physical presence in those locations.

**CCS can also contribute to a country or region's competitive advantage.** In addition to the direct revenue generated by international exports in creative goods and services, there are wider reputational spillovers associated with cultural and creative trade. Many types of cultural and creative goods are deeply associated with certain places (for example Paris and the fashion industry) and these reputational associations further enhance exporting potential. Policy initiatives have been shown to help promote the competitiveness of CCS on the global scene (OECD, 2022<sup>[4]</sup>). This is particularly the case in the film industry for example, where governments offer tax incentives for international companies to film and complete post-production work in their country (see Box 3.1 and Box 3.3). These types of incentives can increase the attractiveness of the country for foreign film production, which can then, in turn, stimulate local competencies due to increased demand. Moreover, producing creative content, such as film and television, which showcase a particular locality has been shown to boost tourism and contribute to positive place branding (OECD, 2022<sup>[12]</sup>), which may be particularly relevant for the EU ORs.

**Foreign direct investment (FDI) in CCS has been growing over the past two decades.** Global FDI in CCS has more than doubled over the past 20 years, growing by 118% from 2003 to 2021 (Figure 1.4). The number of projects has also increased during this time by around 166%. Between 2018 and 2021, CCS accounted for an average 1.4% of all FDI. Moreover, FDI in CCS is estimated to have created almost 673 000 jobs globally since 2003. The largest proportion of CCS FDI is in the motion picture and sound recording sector, followed by video games, applications and digital content (Figure 1.5). FDI flows show the United States and the United Kingdom dominating investment, with FDI recipients more broadly distributed across countries. There is also a significant amount of FDI going to South American countries (e.g. Mexico, Brazil, Colombia), perhaps reflecting a growing policy interest in CCS in the region (for example see (OECD, 2022<sup>[13]</sup>)). This growth in global CCS FDI illustrates the growing global market for creative projects. While attracting large scale FDI in CCS projects may be challenging for some EU ORs, given their remote location and small size, there is evidence of successful CCS FDI in some places. For example, the Canary Islands have seen at least three major FDI projects in the motion picture sector between 2018 and 2021, with the projects totalling over EUR 33 million in capital investment and creating over 200 new jobs<sup>3</sup>.

**Figure 1.4. FDI in global CCS, 2003-2021**

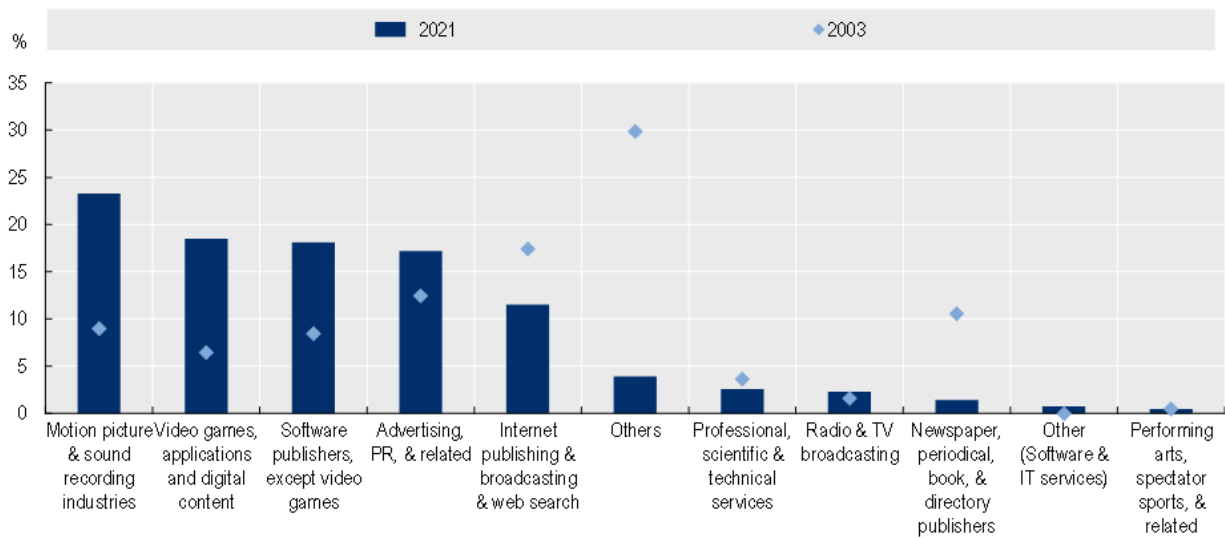
Number of projects (left axis) and capital expenditure (right axis)



Note: Data for companies investing in the creative industries cluster between January 2003 and December 2021.

Source: Financial Times FDI Market database <https://www.fdimarkets.com/>

**Figure 1.5. Share of CCS FDI capital expenditure by subsector, 2003 and 2021**



Source: Financial Times FDI Market database <https://www.fdimarkets.com/>

**Cultural and creative sectors are often deeply intertwined with the tourism sector, offering opportunities to develop cross-sector initiatives.** Cultural tourism is one of the largest and fastest growing global tourism markets (World Tourism Organization, 2018<sup>[14]</sup>). CCS can act as a magnet for tourism and often rely on revenue from tourism to sustain their practices. However, the complementarities between culture and tourism go beyond these traditional links (OECD, 2022<sup>[12]</sup>). Increasingly, policy makers are recognising the role of cultural and creative sectors in supporting innovation in tourism (e.g. through

new digital technologies), promoting places internationally (e.g. through creative content such as film) and supporting more sustainable tourism (e.g. through contributing to the diversification of tourist destinations).

**EU ORs are in a favourable position to capitalise on their tourism assets and are well placed to tap into multiple markets for creative exporting.** Tourism is the leading sector for the majority of EU ORs. Evidence suggests that capitalising on tourism assets can help support a strong CCS and at the same time, strengthening the cultural and creative ecosystem can help boost tourism revenues (OECD, 2022<sup>[12]</sup>). Moreover, EU ORs are in a unique position to tap into different markets. As European regions, ORs are able to benefit from national and EU support for CCS while at the same time, their geographic location enables access to other major markets through strong local ties. Additionally, the specific culture of EU ORs, influenced both by their national identity and that of their geographic region is itself an important cultural asset. Consequently, strengthening and supporting cultural and creative sectors represents a strong development opportunity for EU ORs.

## Notes

<sup>1</sup> Macaronesia refers to the collection of islands in the eastern area of the North Atlantic Ocean.

<sup>2</sup> This could potentially be explained by low growth rates in overall exports from small island developing states in recent years, firstly as a result of the global economic crisis in 2008, then following a slump in commodity prices in 2016, where small island developing states were slower to recover than other countries (UNCTAD, 2023<sup>[97]</sup>)

<sup>3</sup> OECD calculations on data from the Financial Times FDI Market database, <https://www.fdimarkets.com/>





## 2 Overview of cultural and creative sectors in the outermost regions





### Box 2.1. Data on CCS in the EU outermost regions

**Assessing cultural and creative sectors in ORs is challenging, due to differences in definitions and availability of regional data**

**Defining cultural and creative sectors (CCS) in statistical terms is not straightforward and many countries use slightly different definitions.** Both UNESCO and Eurostat provide definitions of CCS to be used for statistical purposes. However, many national definitions of CCS include or exclude slightly different sectors meaning comparing between different national level definitions is problematic. Moreover, even when countries use a definition of CCS consistent with UNESCO or Eurostat, statistics are often not available at the subnational level. This is particularly the case for ORs, where their small size makes it difficult to disaggregate from national level data.

**The data drawn upon in this section of the report is taken primarily from country-level studies and statistical databases, with incorporation of specific OR studies where possible.** The main sources of data are from:

- *L'Atlas Culture des territoires* – lead by the French Ministry of culture, this data source maps CCS statistics across 18 French regions, including 5 French ORs
- *Mayotte, un territoire riche de ses langues et de ses traditions* – a report conducted by the French Ministry of Culture on cultural practices in Mayotte
- *Instituto Nacional de Estatística (INE)* – the Portuguese national statistics agency makes available detailed enterprise and employment statistics which can be used to compile indicators of CCS
- *Estatísticas da Cultura* – a collection of CCS specific statistics produced yearly by INE
- *Análisis sectorial y territorial de las actividades de los sectores culturales y creativos en Canarias* – a mapping study carried out by the consultancy firm CULTURALINK

**The final section of this chapter offers some limited international comparisons, but further comparison between statistics presented in this chapter should be made with caution.** As each data source uses slightly different definitions and methodologies, comparisons between ORs of different countries should be taken with caution. For example, while it is possible to directly compare French ORs with one another, it is not advised to compare the statistics presented for French ORs with the statistics presented for Portuguese or Spanish ORs, in the first part of this chapter. Moreover, due to differences in methodologies, statistics presented in the international comparison section may not match statistics presented in the first part of the chapter. Additionally, all the statistics presented in this chapter may differ from national level reporting of CCS, using slightly different definitions and methods.

## Guadeloupe

**Like most ORs, Guadeloupe has a lower proportion of people working in cultural and creative occupations than the national average, but it has higher than average proportion of visual arts and crafts professionals.** According to research by the French Ministry of Culture (Ministry of Culture of France, 2023<sup>[15]</sup>), in 2017, 1.5% of workers in Guadeloupe worked in cultural and creative professions, lower than the French national average (2.3%), but slightly higher than the French overseas region average (1.4%). An estimated 38% of cultural and creative professionals worked in visual arts and crafts, a higher proportion than the French national average (30%). Consistent with international trends, a far higher proportion of those in cultural and creative occupations in Guadeloupe were self-employed (45%) compared to the general working population (17%).

**Employment in cultural and creative sectors is dominated by the media sector.** Around 1.7% of the active population in Guadeloupe worked in CCS (including non-cultural and creative occupations within CCS) (Ministry of Culture of France, 2023<sup>[15]</sup>). Of these workers, just under a quarter (22%) worked in the audio-visual and multimedia sector, a higher proportion than the French national average (16%). The audio-visual and multimedia sector is, however, highly concentrated in the Pointe-à-Pitre employment area, which hosts 90% of employment in this sector.

**A large share (around 3%) of commercial and non-commercial establishments in Guadeloupe were in CCS in 2018** (Ministry of Culture of France, 2023<sup>[15]</sup>). CCS establishments account for around 1 500 full time equivalent jobs and represent 1.5% of all salaried employment in 2018, the same proportion as the French average (outside of the capital region Île -de-France). The largest CCS companies in terms of employment were in the media sector: France Télévision, the newspaper France Antilles Guadeloupe then Multi TV Antilles.

## French Guiana

**French Guiana had the lowest share of those working in a cultural occupation amongst the French ORs in 2017** (Ministry of Culture of France, 2023<sup>[16]</sup>). In French Guiana, 1.1% of the working population were employed in a cultural occupation in 2017, slightly below the French OR average of 1.4%. Around 1.2% of the working population was employed in cultural and creative sectors in any profession, also the lowest of the French ORs, and 1.4 percentage points below the French average (2.6%). Of those employed in CCS, around a third (32%) worked in the audio-visual and multimedia sectors - double the national average share and 10 percentage points higher than the average for all French ORs.

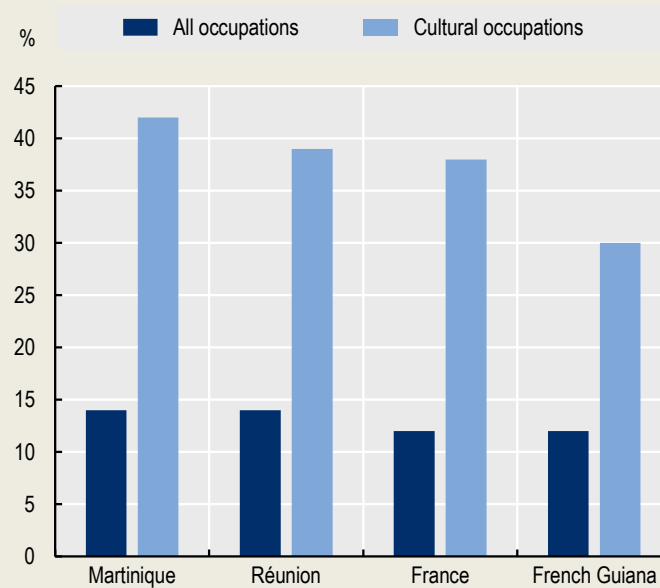
**CCS workers are highly concentrated in the Cayenne employment zone (around four out of five workers).** Workers in the audio-visual and multimedia sector are similarly concentrated there (79%) (Ministry of Culture of France, 2023<sup>[16]</sup>). Around a third of all CCS workers are self-employed.

**In terms of enterprise counts, French Guiana has strengths in the books and press sector and in architecture.** Around 2.9% of enterprises in French Guiana in 2018 were in CCS, a proportion lower than the national average outside Île-de-France (3.3 %), but around average for the French ORs (Ministry of Culture of France, 2023<sup>[16]</sup>). Around a quarter of CCS enterprises are in books and press, with a further 23% of CCS enterprises coming from the architecture subsector.

### Box 2.2. Self-employment is far higher in cultural professions in French Guiana, Réunion and Martinique than in other types of work

**Cultural and creative sectors are characterised by high levels of self-employment, compared with other sectors of the economy, even more so for French ORs.** Indeed, across the OECD around a third of those in cultural employment (including both those in cultural occupations and those working in other occupations within the cultural sector) are self-employed (OECD, 2022<sup>[4]</sup>). In France, an average of 38% of those working in cultural occupations are in non-salaried work, compared to only 12% of the general working population. In both Martinique and Réunion these shares are even higher, with 42% and 39% respectively, of cultural professionals being in non-salaried work.

Figure 2.1. Share of non-salaried work, 2017



Source: Insee, Recensement de la population, 2017 / Deps-doc, ministère de la Culture, 2021, <https://atlasculture.fr/>

## Martinique

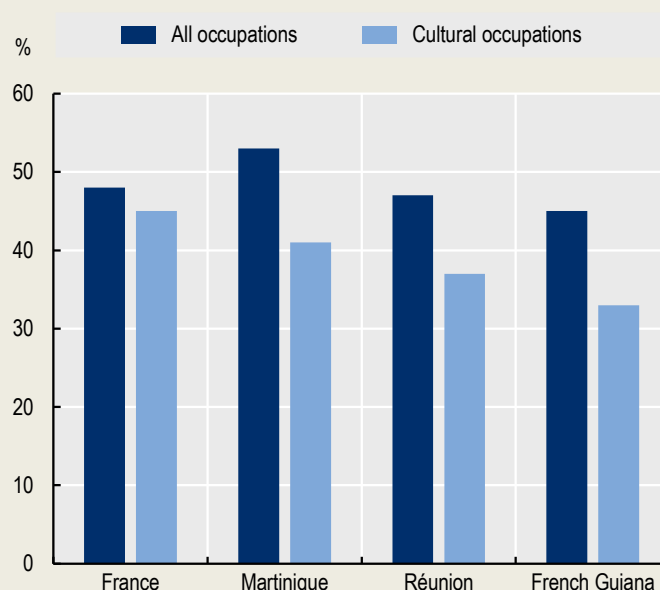
**Martinique has one of the largest shares of cultural employment of the French ORs.** The proportion of the working population employed in a cultural occupation in Martinique in 2017 was 1.5%, higher than the French OR average (1.4%), though still below the French national average (2.3%) (Ministry of Culture of France, 2023<sub>[17]</sub>). Slightly under half of all cultural professionals (42%) worked in the visual arts and crafts, a far higher proportion than the French national (31%) and French overseas (32%) averages. Martinique also has a relatively high proportion of workers in CCS (including both cultural and non-cultural occupations). Around 1.8% of the population worked in CCS in 2017, with just under a quarter (23%) working in the audio-visual and media sector.

**Martinique has a similar proportion of CCS enterprises to the other French ORs, but these enterprises provide above average employment.** Around 2.9% of enterprises in Martinique in 2018 were in CCS (Ministry of Culture of France, 2023<sub>[17]</sub>). The largest number of enterprises were in the books and press sector, which makes up around a third of all enterprises. CCS enterprises in Martinique employ 1 600 full-time equivalent employees, representing 1.6% of total salaried employment, a proportion higher than the average for French regions outside Île-de-France (1.5%).

### Box 2.3. Women are underrepresented in cultural occupations in French Guiana, Réunion and Martinique

**The share of women in cultural occupations is lower than average across the French ORs for which data is available.** While on average across France, women make up 45% of those in cultural occupations (compared to 48% of all occupations), in French Guiana, Réunion and Martinique, the share of women in cultural occupations is substantively lower. In Martinique, women represent 41% of cultural professionals (vs 53% representation in all professions), In Réunion they represent 37% of cultural professionals (vs 47% representation in all professions), and in French Guiana they represent 33% of cultural professionals (vs 45% representation in all professions).

Figure 2.2. Female employment as a share of total employment, 2017



Source: Insee, Recensement de la population, 2017 / Deps-doc, ministère de la Culture, 2021, <https://atlasculture.fr/>

## Réunion

**A large number of professionals work in entertainment occupations in Réunion.** As the largest of the French ORs, Réunion has the most cultural professionals in absolute terms, but a slightly lower proportion of the population compared with other French ORs (Ministry of Culture of France, 2023<sup>[18]</sup>). Those working in cultural and creative occupations in 2017 represented 1.3% of the working population, slightly lower than the 1.4% average for French ORs. The largest group of cultural professionals worked in entertainment occupations (36%) with just over 1 240 people working in this category. Of this group, slightly over a quarter (27%) were self-employed.

**Réunion has one of the highest proportion of workers in CCS (including all professions) of the French ORs.** Around 1.8% of workers in Réunion worked in CCS in 2017, the same proportion as in Martinique, and higher than all other French ORs (Ministry of Culture of France, 2023<sup>[18]</sup>). Employment in

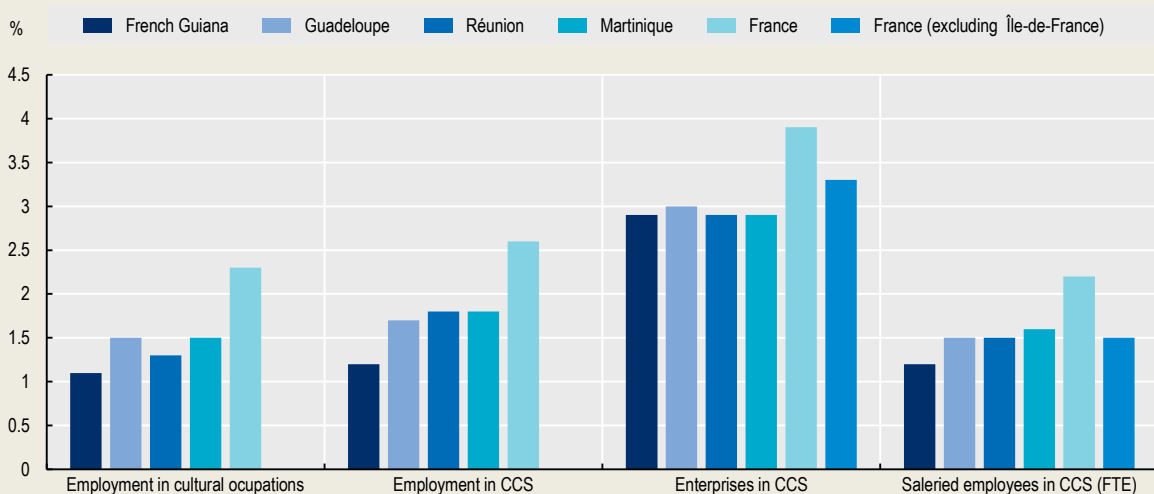
CCS is relatively evenly distributed across subsectors, though the largest subsector, similar to other ORs, is in the audio-visual and multimedia subsector.

**Around 1% of CCS enterprises in France are located in Réunion.** In 2018, 2.9% of enterprises in Réunion were in CCS (Ministry of Culture of France, 2023<sup>[18]</sup>). Similar to the other French ORs, the books and press subsector has the highest share of CCS enterprises (25%), Réunion has a markedly high proportion of enterprises in the entertainment subsector, with 22% of CCS enterprises falling into this category.

#### Box 2.4. French ORs have lower shares of CCS employment and enterprises than French national average, but similar levels to other non-capital regions

Of those with available data, French ORs have lower shares of employment and enterprises in CCS compared to the French national average (Figure 2.3). French Guiana has the lowest shares of the French ORs, with around 1% of workers working cultural occupations (compared to a French average of slightly over 2%) and just under 3% of enterprises being in CCS (compared to a French average of slightly under 4%). However, the French national average is boosted by high shares of cultural workers and enterprises in Île-de-France. This because, as is common across the OECD, cultural workers and businesses tend to concentrate in capital cities. Indeed, when looking at CCS enterprises and salaried employees in CCS, we find that the French ORs have similar shares to the average for French regions outside Île-de-France.

Figure 2.3. Comparing French ORs to National benchmarks



Note: Employment in cultural occupations as a share of all occupations 2017, employment in cultural sectors as a share of employment in all sectors 2017, CCS enterprises as a share of all enterprises 2018, fulltime equivalent salaried employees in CCS as a share of all fulltime equivalent salaried employment 2018.

Source: *L'Atlas Culture des territoires*

## Mayotte

**There is likely to be a far lower share of CCS businesses in Mayotte than in mainland France.** While detailed data on businesses in Mayotte is not available, there are indications that CCS business make up a lower share of businesses than in mainland France. The category 'other services' includes the majority of cultural and creative sectors. Data for 2020 shows that in Mayotte, 2.9% of businesses are categorised as 'other services', compared with 8.9% in mainland France (INSEE, 2022<sup>[19]</sup>).

**Mayotte has some notable cultural amenities.** Mayotte has around twenty places, sites and cultural facilities, among which ten are registered and classified historical monuments, and two buildings are classified as Remarkable Contemporary Architecture (Ministry of Culture of France, 2023<sup>[20]</sup>). The island also houses five public reading establishments, including a departmental library which serves relay points, an archive service and three museums. The Muma, *Musée de France de Mayotte* located in Dzaoudzi, attracted 6,000 visitors in 2018, and nearly 8,000 users visited the archive services in 2019 (Ministry of Culture of France, 2023<sup>[20]</sup>).

**With substantially lower GDP per capita and less access to broadband than its peers, residents of Mayotte generally engage less with passive forms of cultural participation.** Mayotte has the lowest GDP per capita of the EU ORs, with GDP per capita at 30% of the EU average (see Table 1.1). Fewer households in Mayotte own televisions, radios, computers, smartphones and games consoles than mainland France (Dehon and Louguet, 2022<sup>[21]</sup>). For example, a television is present in eight out of ten households in Mayotte, compared to more than nine out of ten in mainland France. Internet access is also limited: 41% of Mahorais have an internet connection (compared to 86% in mainland France) and the types of connection most commonly used are less efficient (Dehon and Louguet, 2022<sup>[21]</sup>). This perhaps helps to explain why there are lower rates of passive cultural participation (including watching television, listening to music, listening to the radio, playing computer games etc.) in Mayotte than in mainland France (Table 2.1).

**Table 2.1. Passive cultural participation in Mayotte and mainland France**

Share of persons aged 15 years and over, 2018 (France) and 2019 (Mayotte)

	Mayotte	Metropolitan France
	%	%
Listen to music	73	92
of which: every day or so	33	65
Watch television	85	94
of which: every day or so	54	78
Play video games	34	44
of which: every day or so	9	15
Listen to the radio	60	82
of which: every day or so	28	60
Read books	54	70
Used a library during the year	21	27
Went to the cinema during the year	9	62
Went to the museum during the year	4	29
Went to the theatre during the year	2	21
Went to a dance performance in the year	9	13
Went to a concert during the year	35	34

Source: (Dehon and Louguet, 2022<sup>[21]</sup>)



**However, active cultural participation rates in Mayotte are higher than in mainland France.** Active cultural participation, such as dancing, singing, playing music and performing in theatre is widespread in Mayotte (Dehon and Louguet, 2022<sup>[21]</sup>). For example, 11% of Mayotte inhabitants practise dance, compared to 7% in mainland France. Around 11% of Mayotte inhabitants play music or sing, and, unlike in mainland France where music and singing are practised predominantly by young people, in Mayotte the practice remains important after the age of 60. Moreover, a large proportion of the population engage in culturally specific local practices which combine song, dance and music. For example, 35% of native Mayotte women and 15% of foreign-born women report having practised ‘debaa’ (a practice recognised by the French Ministry of Culture as part of Mayotte’s intangible cultural heritage) in their lifetime. Similarly, 12% of men report having practised ‘shigoma’ in their lifetime.

## Saint Martin

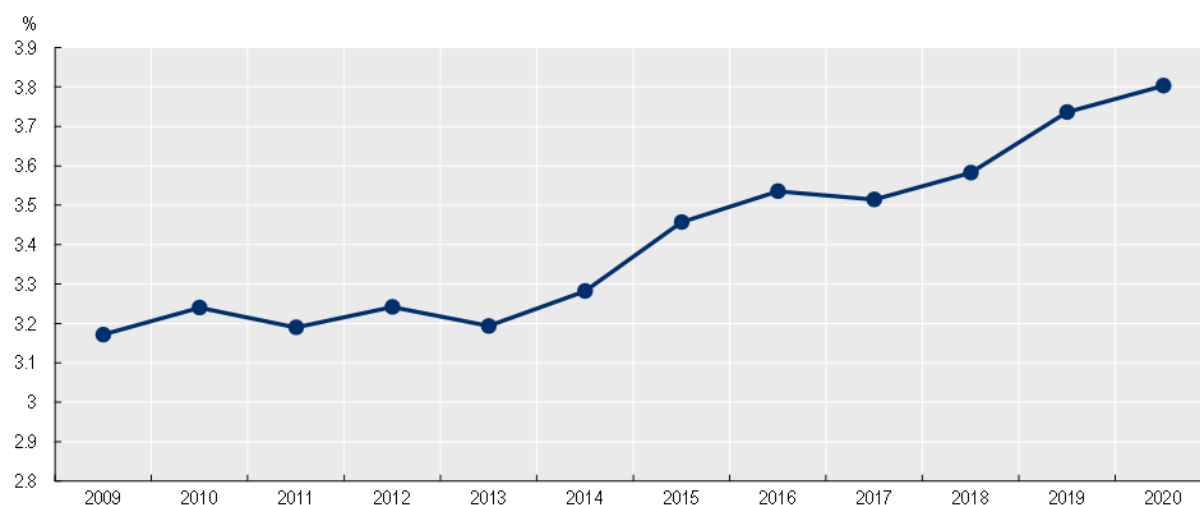
**Saint Martin is the smallest of the EU ORs, and little data are available on the size and shape of CCS in this region.** The island of Saint Martin/Sint Maarten is divided into two regions: the French Collectivity of Saint Martin to the North and Sint Maarten, a constituent country within the Kingdom of the Netherlands, to the south. In 2017, the island was hit by Hurricane Irma which caused widespread damage to buildings and infrastructure. Prior to 2007, the French part of Saint Martin was a commune of Guadeloupe, and despite work to give the Collectivity of Saint Martin its own geographic statistical status in the EUs NUTS framework (Collectivity of Saint-Martin, 2018<sup>[22]</sup>), the OR continues to be included in the same NUTS region as Guadeloupe at all levels. This means that many statistics specifically for Saint Martin are not obtainable.

**However, it is well documented that the region boasts many cultural amenities and hosts regular festivals.** For example, the SXM Festival, first held in 2016, is an electronic music festival which attracts between 5 000 and 6 000 visitors a year to the island and is recognised as contributing significantly to the island’s growth (St. Martin Tourist Office, 2023<sup>[23]</sup>). Grand Case, an old fishing village, has hosted the biggest craft market on Saint-Martin (known as *Les mardis de grand case*) on Tuesday evenings in February, March, and April for nearly twenty years. This initiative originally aimed to promote the area’s tradespeople; however it has now grown into a significant tourist attraction and major artistic event (St. Martin Tourist Office, 2023<sup>[23]</sup>). *Les mardis de grand case* encompass music and dance, food stalls and craft stalls showcasing local artists and craft workers.

## The Azores

**The number of CCS businesses in the Azores has increased significantly over the past decade.** OECD calculations on Portuguese business statistics (INE, 2022<sup>[24]</sup>), show that in 2020, CCS businesses represented around 3.8% of all enterprises in the business economy (Figure 2.4). Between 2009 and 2020 the number of CCS enterprises in the Azores increased 26.6%, far higher than the increase in CCS businesses on mainland Portugal (7.5%) and higher than the increase of all enterprises in the business economy (5.6%). The impact on COVID-19, which was felt heavily in CCS across the world, appears to have been minimal in terms of enterprise loss, with only four fewer CCS enterprises in 2020 compared to 2019. The largest growth was in the design sector, which more than doubled over the past decade, from 27 enterprises in 2009 to 98 enterprises in 2020.

**Figure 2.4. Share of CCS enterprises in the business economy in the Azores, 2009-2020**



Source: OECD calculations on data from Statistics Portugal (INE), “Empresas (N.º) por Localização geográfica (NUTS – 2013) e Atividade económica (Subclasse – CAE Rev. 3)”

**A large share of GVA is generated from cultural retail in the Azores.** While GVA data for CCS is patchy across years and subsectors, the cultural retail sector shows to be a consistently large contributor of GVA in the island (INE, 2022<sup>[25]</sup>). There is also indication that the motion picture, video, television programme production, sound recording and music publishing activities is particularly strong in the Azores, with this area generating over EUR 1 960 000 turnover in 2019.

## Madeira

**Madeira has a high proportion of CCS enterprises, though it has not seen much growth in enterprise numbers in the past decade.** OECD calculations on official business survey data from the Portuguese statistics agency (INE, 2022<sup>[24]</sup>), show around 4% of enterprises in Madeira were CCS enterprises in 2020, a higher proportion than in the Azores (3.8%) and but smaller than mainland Portugal (4.4%). The number of CCS enterprises has not grown much over the past decade, with only 2.7% growth in enterprise counts. This is set against larger growth in the rest of the business economy, meaning that CCS enterprises as a proportion of all enterprises in the business economy has actually declined, from close to 5% in 2009.

**While Madeira has a similar number of CCS enterprises to the Azores, it has a far higher turnover from CCS.** In 2019, ICE reports show 1 215 CCS enterprises in Madeira, only around 50 more than in the Azores (INE, 2022<sup>[25]</sup>). However, CCS enterprises in Madeira generated almost twice as much in turnover. This could perhaps be due to large disparity in turnover from the advertising subsector and the design sector, where Madeira has particularly high turnover.

## The Canary Islands

**Cultural employment in the Canary Islands has grown dramatically over the past few years, more than doubling since 2013.** In 2019, cultural employment accounted for around 3.5% of all employment in the Canary Islands, only marginally lower than cultural employment rates in mainland Spain (3.6%) (Culturalink, 2020<sup>[26]</sup>). Moreover, the number of people in creative employment in the islands has more

than doubled since 2013, when the proportion of total employment was only 2.5%. The Canary Islands also have a growing share of Spanish CCS employment, rising from 2.2% in 2013 to 5.2% in 2019.

**The number of CCS enterprises in the Canary Islands has increased over the past decade and the islands are taking a larger share of the Spanish CCS total** (Culturalink, 2020<sup>[26]</sup>). The number of CCS enterprises in the Canary Islands has risen by around 27% between 2008 and 2018, making up around 4.1% of all Spanish CCS enterprises in 2018 (up from 3.5% in 2008). The largest subsectors, in terms of enterprise counts are in the design, creative and performing arts sector as well as in cultural retail. The introduction of tax incentives for audio-visual production over the past decade has also influenced the establishment of companies and professionals, especially in the animation and videogames sectors (see Box 3.1). The proportion of CCS enterprises in the total economy varies between islands. In 2018, around 3% of enterprises in Tenerife were in CCS, compared to around 1% in El Hierro.

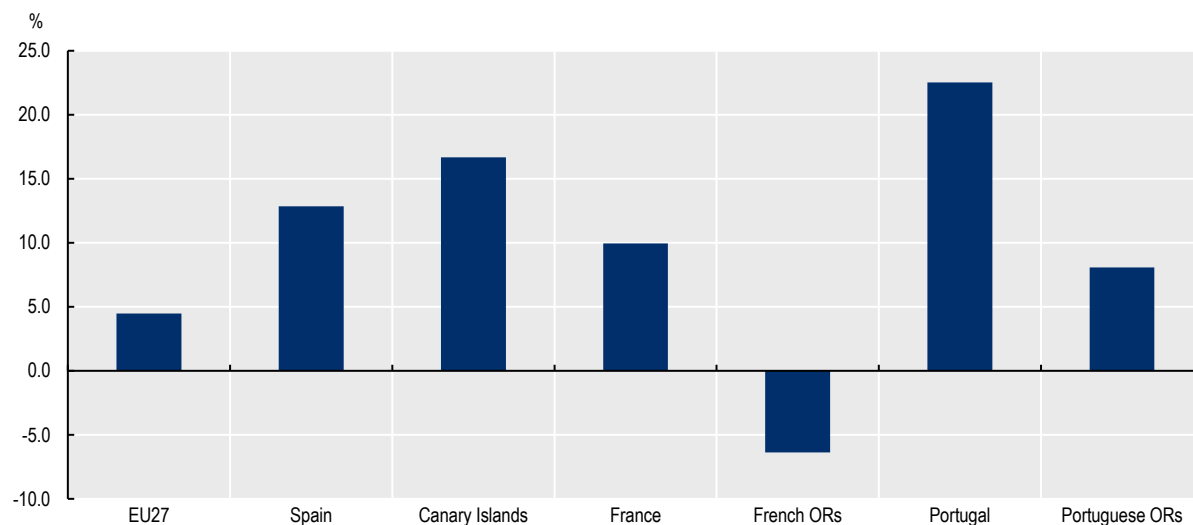
## International comparisons

**Data from Eurostat allows for some, limited, analysis of cultural and creative employment in EU ORs.** Cultural and creative employment includes all those working in CCS as well as those working in cultural and creative occupations in other sectors of the economy (e.g. an designer working in the automotive industry). Data on cultural and creative employment is available at the national and sub-national level for France, Portugal, and Spain,

**EU ORs have a lower proportion of cultural and creative employment compared with national and international averages.** In 2020, 3.7% of those working in the EU27 were working in cultural and creative employment – which includes both those working in CCS and those working in cultural and creative occupations in other sectors of the economy. Available data (Eurostat, 2022<sup>[27]</sup>) shows that cultural and creative employment accounted for 2.4% of employment in the Canary Islands (compared to 3.5% average for Spain) and 2.3% in the French ORs collectively (compared to 3.6% average for France). While shares of cultural and creative employment for the Azores and Madeira specifically are not available, shares of cultural and creative employment in mainland Portugal (3.7%) are higher than the national average (3.6%), suggesting that the Portuguese ORs have a lower share than the mainland.

**Growth in cultural and creative employment is also generally lower in ORs compared to national averages, though this is not the case for the Canary Islands.** Looking at growth in the number of people working in cultural and creative employment between 2014 and 2020 (Figure 2.5) shows a mixed picture for EU ORs. In the Canary Islands, the number of people working in cultural and creative employment has increased by 16.7% between 2014 and 2020, higher than the average growth for Spain of 12.9%. Cultural and creative employment in the French ORs however has declined during this period by 6.4% against a national average increase of 10%. By looking at the difference in the number of people in CCS employment between mainland Portugal and the Portuguese total, we can also estimate growth in the Portuguese ORs. While cultural and creative employment in the Portuguese ORs has increased by a smaller amount than the national average (8.1% compared to 22.5% respectively), this increase is still higher than the EU27 average (4.5%).

Figure 2.5. Growth in cultural and creative employment 2014-20

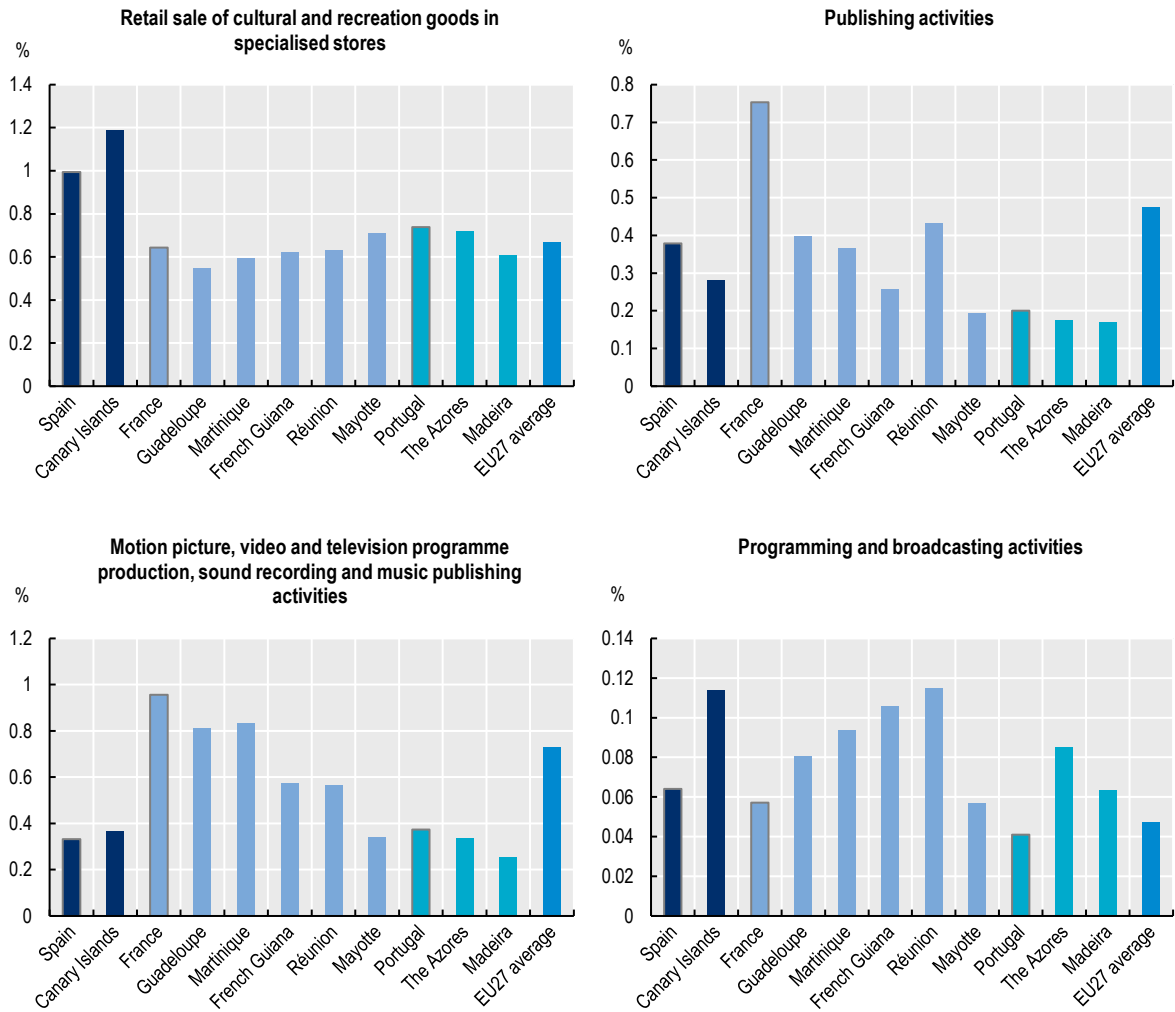


Source: OECD calculations on (Eurostat, 2022<sup>[27]</sup>)

**A limited amount of data on businesses in a few CCS subsectors are also available in a form that allows for international comparison.** While it is important to note that CCS comprise a range of subsectors which are only identifiable using granular data, internationally comparable data on a few of these subsectors are available for some of the EU ORs. This means that we can compare shares of CCS businesses between ORs and national and European averages for a few subsectors.

**Some EU ORs have a higher share of local businesses in some CCS subsectors than the national average** (Figure 2.6). For example, the Canary Islands have a higher share of businesses in the motion picture, video and television programme production, sound recording and music publishing subsector, the programming and broadcasting subsector, and the retail sale of cultural and recreation goods in specialised stores, compared to the Spanish average (possibly due to the provision of tax incentives discussed in Box 3.1). All of the ORs for which data was available, with the exception of Mayotte, also have higher shares of businesses in the programming and broadcasting sector than their national averages.

Figure 2.6. Share of CCS businesses in the business economy, 2020



Note: These statistics relate to local units as opposed to enterprises. The business economy here includes sectors B-J, and L-N.  
 Source: OECD calculations on Eurostat (2022<sup>[28]</sup>) SBS data by NUTS 2 regions and NACE Rev. 2.



The background of the slide is a vibrant, multi-colored plaid fabric. The colors include shades of red, yellow, orange, and green, with thin lines of blue and purple. The fabric is draped and folded, creating a textured, three-dimensional effect. A blue rectangular border frames the text in the upper left quadrant.

# **3 Overview of policies to support CCS in the outermost regions**



## EU instruments to support CCS in the outermost regions

### *The EU outermost regions benefit from a tailored position in the EU funding framework*

#### **The EU outermost regions are given specific consideration in EU laws and funding mechanisms.**

The EU recognises that ORs face specific challenges, such as their geographic insularity and remoteness, as well as showing strong potential levers for development, such as a young population and renewable energy resources (European Commission, 2022<sup>[2]</sup>). To address these challenges and harness these opportunities, Article 349 of the Treaty on the Functioning of the European Union (TFEU) tailors the application of EU law and funding instruments to EU ORs (TFEU, 2012<sup>[29]</sup>).

**Following COVID-19, the European Commission has set out a new agenda to foster sustainable recovery and growth in the EU ORs.** The European Commission published a study on the impact of the COVID-19 pandemic on the outermost regions (European Commission, 2021<sup>[3]</sup>). The study provides a preliminary picture of the health and socio-economic effects of COVID-19 in the ORs and puts forward recommendations for recovery and resilience-building measures.

**The objective of fostering sustainable recovery, resilience and growth in these regions has guided the design of the Outermost Regions Communication** (European Commission, 2022<sup>[2]</sup>). This communication focuses on four pillars:

- Putting people first - improving living conditions for people in the outermost regions, ensuring people's quality of life, tackling poverty, and developing opportunities for the youth.
- Building on each regions' unique assets such as biodiversity, blue economy or research potential.
- Supporting a sustainable, environmentally friendly and climate-neutral economic transformation grounded on the green and digital transition.
- Strengthening outermost regions' regional cooperation with neighbouring countries and territories.

**In the 2021-2027 EU Multiannual Financial Framework, the EU considered the ORs specifically in different funding instruments.** Funding under the Cohesion policy is a primary source of funding for projects in EU ORs, some of which may also be dedicated to CCS. In addition to this funding, made possible through national shares of Cohesion Funding, EU ORs also benefit from reserved shares or additional flexibility within certain funds. For example, within the Cohesion envelope 2021-2027, over EUR 9 billion was reserved specifically for ORs in addition to national funding shares (European Commission, 2021<sup>[30]</sup>). Concretely, the European Regional Development Fund (ERDF) regulation includes a specific article on EU ORs and outlines how investment in otherwise excluded categories of expenditure may be made in the case of EU ORs (e.g. investment in airport infrastructure). EU ORs also benefit from over EUR 2 billion in Recovery Assistance for Cohesion and the Territories of Europe (REACT-EU) funding for recovery from the COVID-19 pandemic, independent of shares granted to France, Portugal and Spain.

**European territorial cooperation funds (Interreg) also make specific funding available for ORs.** The European Commission makes specific Interreg funding available to integrate ORs into the geographic areas in which they are located. In the new regulation 2021-2027, the specificities of the outermost regions are recognised through a specific strand (strand D). The objective of strand D, established for the outermost regions, is to allow them to cooperate with their neighbouring countries and territories in the most efficient and simple way. To this end, the Interreg Regulation offers the possibility to manage both external funds and the ERDF under the same set of rules.

**Between 2014 and 2020, multiple Interreg projects explored the artistic, social and economic integration of CCS in ORs within their geographic context.** For example, between 2016 and 2022, the Amazonian – Caribbean Dance and Circus Passport (PACAM) initiative created new training programmes for artists to learn entrepreneurial skills and build their innovative abilities, with a budget of over EUR 1.7 million, of which nearly EUR 1.3 million was from EU funds (INTERact, 2022<sup>[31]</sup>). PACAM sought to



expand Caribbean OR's tourism offer with culture through the promotion of festivals and events in the Caribbean.

**Interreg funding also supports commercial and export-oriented CCS in the outermost regions.** For example, starting in 2019 in Mayotte, Interreg financed the *Au Fil des Îles* – Regional School for the Fashion Industry (AFI) to support the archipelago's fashion sector (INTERact, 2022<sup>[31]</sup>). AFI aimed to capitalise on the islands' fashion and textile production as an opportunity to reinforce a high value added fashion industry. AFI financed the Regional School of Fashion Professions (EMMR), which brought together Mayotte's crafts professionals with the dress, tailor and cosmetics industry. Students, trainers and/or businesses from Madagascar, Comoros, Kenya and mainland France could also participate. Around EUR 1 million in EU funding was dedicated to this project.

### ***Outermost regions can also benefit from dedicated CCS funding streams within wider European Union programmes***

**CCS in outermost regions benefit from the EU's capstone programme for CCS funding, Creative Europe.** From 2021 to 2027, the Commission allocated EUR 2.4 billion to the Creative Europe programme (European Commission, 2022<sup>[32]</sup>). The programme is based on financing projects that safeguard, develop or promote Europe's cultural-linguistic heritage, as well as those that strengthen the economic dimension of CCS. CCS in ORs can benefit from the three financing pillars: (1) a culture strand, financing artistic and cultural projects, (2) a media strand, supporting competitiveness, innovation and sustainability of the audio-visual sector and (3) a cross-sectoral stream, which encourages collaboration between the audio-visual sector and other parts of CCS. In its first funding cycle, from 2014 to 2020, Creative Europe supported two programmes in ORs; a project supporting young opera singers and a debut film production, both in the Canary Islands.

**As part of Creative Europe, the Culture Moves Europe initiative supports artist mobility in the ORs.** Culture Moves Europe, the new mobility scheme for artists and cultural professionals under the Creative Europe programme, specifically tackles the needs of the ORs, by offering a top-up to the mobility grant targeting artists travelling from and to ORs and Overseas Countries and Territories (OCTs). From 2022 to 2025, the scheme has a total budget of EUR 21 million, aiming to support around 7 000 artists, creators, and cultural professionals to go abroad for professional development or international collaborations, co-produce, co-create and present their works to new audiences.

**An EU co-funded programme also specifically finances cultural activities exclusively in EU ORs and OCTs.** In 2020, the European Commission's Directorate General for Regional and Urban Policy (DG REGIO) launched a call for projects to safeguard and promote culture in the outermost regions and overseas countries and territories (European Commission, 2020<sup>[33]</sup>). In response to this call, in 2021 the Archipel.eu pilot project was launched, co-funded by the EU the Institut Français, the Association of Overseas Countries and Territories (OCTA) and the Atlantic Culture Promotion Agency (APCA). Archipel.eu aims to test, over a 24 month period, a direct financial support scheme for cultural professionals, artists, groups of artists, cultural organisations and institutions residing in the EU ORs and OCTs (OCTA, 2022<sup>[34]</sup>). Archipel.eu provides financial support to cultural projects and initiatives through a series of thematic calls for projects in order to contribute to safeguarding, promoting and supporting intangible cultural heritage, local knowledge, popular arts and practices as well as ancestral and indigenous cultures; improve cultural dialogue and exchanges amongst ORs and OCTs and across the EU; and disseminate cultural and creative works from overseas cultures, through mobility including virtual projects. Each of these priorities is supported by a distinct funding instrument.

**A host of other EU programmes are also open to CCS in ORs.** Programmes from across the EU include dedicated financing or support for CCS, as well as more broad support for actors across economic sectors (European Commission, 2021<sup>[35]</sup>). Programmes such as Erasmus+, for example, can finance the mobility of students and educators in culture. Erasmus+ can also finance partnerships in the field of CCS, and

scholarships for specific students to pursue intra-EU education. EU funding streams tied to the objectives of New European Bauhaus also finance projects associated with the European Green Deal, such as financing for creative projects related to sustainable living and quality of life. Other major EU funding streams, such as the Horizon Europe programme for knowledge and innovation, can also be utilised by CCS actors, as well as funding streams from the European Institute of Innovation and Technology (EIT).

**To help CCS actors navigate the various funding streams available, the EU has recently launched a new on-line funding guide.** CulturEU is a new user-friendly guide showcasing the funding opportunities for culture in all relevant EU programmes 2021-2027. It has been designed specifically for cultural and creative professionals and is now available in all EU languages (European Commission, 2022<sup>[36]</sup>). In addition, the EU has co-funded the development of a broader on-line funding and financing tool, Creatives Unite, which provides information on regional and national project calls, as well as funding and finance providers for the creative and cultural sectors, including different financing mechanisms such as crowd-funding, micro credits and venture capital (Creatives Unite, 2022<sup>[37]</sup>).

## Macaronesian CCS policies and coordination instruments

### ***Policies for CCS in Macaronesia are using culture for both economic and social development***

**Macaronesia houses three EU outermost regions in the North Atlantic, the Azores (Portugal), the Canary Islands (Spain) and Madeira (Portugal).** Geographic and cultural links with Africa and Latin America reinforces the engagement opportunities of ORs in Macaronesia with continents outside Europe. Both the Canary Islands and the Portuguese islands share common languages with Brazil and Spanish-speaking countries in the Americas, facilitating the circulation of cultural goods, services and ideas between the islands and the American continent. Africa is also an area of strategic engagement for the islands, both for historic, geographic and linguistic reasons.

**Macaronesian ORs are all autonomous regions granted greater levels of policy discretion in culture.** In the Canary Islands, artistic and cultural activities are an exclusive power of the autonomous government (Government of the Canary Islands, 2018<sup>[38]</sup>). Spanish law also grants the Canary Island's autonomous government responsibility for the protection and promotion of heritage and to diffuse its culture internationally. The statutes of autonomy of the Azores and Madeira also grant the regions autonomous legislative powers in the fields of culture and protection of cultural heritage (Republic of Portugal, 1980<sup>[39]</sup>) (Republic of Portugal, 1991<sup>[40]</sup>).

**Taking stock of the opportunity brought by culture and the creative industries, the Canary Islands have been particularly active in public policy for culture and the creative economy.** The Canary Islands government has been particularly active in strategic policy planning around CCS. The Department for Education, Universities, Culture and Sport spearheads the government's cultural policy, while a dedicated public company, the Canaries Institute of Cultural Development (ICDC), executes a large part of the regional government's policies, including through grants for cultural production and direct delivery of cultural services. The Canary Islands founded the earliest predecessor of the ICDC in 1984, highlighting the islands' early commitment to publicly support cultural development.

**Recent reforms in the Canary Islands highlight growing attention to the creative economy and culture's role in socio-economic development.** In 2021, the mandate of the ICDC was extended to six programming areas, including music, film, visual and plastic arts, performing arts, books and reading promotion and cultural heritage<sup>1</sup>. According to the ICDC, the 2021 reform seeks to support the institute's ability to provide equal and democratic access to culture, including increasing active participation in culture among the population, and providing greater visibility to the islands' vulnerable groups in cultural production (ICDC, 2022<sup>[41]</sup>). The ICDC reform also seeks to maximise culture's role in development, for

example through greater integration in employment, innovation and internationalisation policies. For example, the Canary Islands offer one of Europe's highest tax incentives for audio-visual production, as well as tax reliefs for videogames production (see Box 3.1)

**The Canary Islands are also using culture to help address the Sustainable Development Goals.** As part of its Recovery, Transformation and Resilience Plan (RTRP), the Canary Islands launched a cultural accelerator focusing on the performing arts<sup>2</sup>. The accelerator is one of the initiatives that make up *Canarias en Escena*, a project of the Government of the Canary Islands that was born with the purpose of promoting an ecosystem for the performing arts that contributes to advancing the Sustainable Development Goals (SDGs), while at the same time facilitating equitable access to cultural resources.

### Box 3.1. The Canary Islands offer one of Europe's highest tax incentives for audio-visual production

#### The Canary Islands offer a range of tax incentives to promote the audio-visual sector

The Canary Islands offer a set of attractive tax advantages for the audio-visual sector as a result of the Canary Islands Economic and Tax Regime (REF), within the legal framework of the EU and Spain. Tax reliefs for film and television include:

- **50%-45% deduction for foreign productions.** International productions with a qualified local expenditure of at least EUR 1 million benefit from a 50% tax rebate on eligible expenditure in the Canary Islands on the first million euros, and 45% from then on, capped at a total of EUR 18 million.
- **50%-45% deduction for Spanish or co-productions.** In the case of national productions shot in the Canary Islands and granted with a Canarian Certificate of Audio-visual Production, the deduction also amounts to 50% on the first million euros, and 45% from then on; though it may reach 54% for certain film productions. To be granted a Canarian Certificate of Audio-visual Production, the company must be registered in the Registry of Canary Islands Audio-visual Companies. The production must be Spanish and must fulfil certain requirements in regards to shooting time in the Canary Islands and hiring of local staff.

#### R&D tax reliefs are also being marketed targeted towards videogame development

Videogame development is eligible for R&D tax relief, under terms which are more favourable than those in mainland Spain. Expenditure on Technological Innovation in the Canary Islands is eligible for a 45% deduction, compared with a deduction of 12% in mainland Spain. To benefit from the 45% deduction, the expenditure has to be made by a Canary Islands studio.

#### Alongside these incentives, both audio-visual and videogames companies can benefit from special corporation tax reliefs within the Canary Islands Special Zone (ZEC)

The Canary Islands Special Zone (ZEC) is a low tax zone created within the framework of the Canary Islands Economic and Tax Regime (REF) for the promotion of the economic and social development of the Islands and to diversify their production structure. ZEC was authorized by the European Commission in January 2000 and it is regulated in the Law number 19/94 of the 6th of July, 1994. Those qualifying for the ZEC receive a reduced rate of 4% on Corporate Income Tax.

To qualify as a ZEC entity, businesses must:

- Be a newly-created entity or branch located within the geographical area of the ZEC.
- Have at least one member of the administration reside in the Canary Islands.

- Make a minimum investment of EUR 100 000 (in Gran Canaria or Tenerife) or EUR 50 000 (in the case of La Gomera, El Hierro, La Palma, Fuerteventura or Lanzarote) within the first two years following its registration.
- Create at least five jobs (in Gran Canaria or Tenerife) or three (in the other islands) during the first six months following its registration and this average must be maintained during the time that the benefits are enjoyed.

ZEC entities can also work in a wide range of activities related to audio-visual and video games production, such as: Film, video, radio and television production, postproduction activities, film distribution, videogame publishing, other computer software publishing, sound recording and music publishing, computer programming activities, and data processing, hosting and related activities.

Source: Canary Islands Film (2021<sup>[42]</sup>), Tax Incentives For Film Production In The Canary Islands, available at: <https://canaryislandsfilm.com/wp-content/uploads/2021/11/TAXENG-17-11-2021-min.pdf>; Canary Islands Film (2022<sup>[43]</sup>) Tax guide for the industry of the video games in the Canary Islands, available at: [https://canaryislandsfilm.com/wp-content/uploads/2022/03/Canary\\_Islands\\_Videogame\\_taxguide\\_ENG\\_V5-min.pdf](https://canaryislandsfilm.com/wp-content/uploads/2022/03/Canary_Islands_Videogame_taxguide_ENG_V5-min.pdf); Canarias ZEC (2022<sup>[44]</sup>), <https://canariaszec.com>

**In the Azores and Madeira, longstanding cultural policies support CCS and deliver cultural services to citizens.** In both Portuguese ORs, Regional Cultural Affairs Directorates leverage their autonomy to run distinct cultural policies. Both regions administer grant programmes for CCS production, heritage protection programmes and a broad set of cultural services for citizens.

**In the Azores, cultural policy looks to integrate with Europe whilst leveraging CCS for development.**

The Regional Cultural Affairs Office of Azores has an agenda not only to preserve, defend and enhance the islands' cultural offerings, but also to disseminate it so that despite being far from mainland Europe the islands can be a presence in European cultural heritage. In this vein, Ponta Delgada, one of the Azores' main cities, bid to be the European Capital of Culture 2027. While the bid was not ultimately successful, the process of preparing the bid prompted renewed policy interest in CCS, including mappings of CCS across the islands and a new cultural strategy. Policy focus in the Azores is also growing regarding the potential of culture in attracting international tourism flows (Government of the Azores, 2020<sup>[45]</sup>), as well as utilising culture to address social and health issues. For instance, the government of the archipelago has entered agreements with health organisations to deliver cultural activities as a form of therapy to those in nursing homes.<sup>3</sup> This type of policy highlights the important role that CCS can play in supporting social, as well as economic, benefits.

**In Madeira, there is also growing attention paid to the role of culture in economic development.** In 2022, the Regional Secretary for Tourism and Culture of Madeira recognised the role of culture in generating employment and wellbeing through culture's positive social impact (Cultura Madeira, 2020<sup>[46]</sup>). The autonomous government has co-funded many projects supporting culture and heritage, and new grants are also being deployed to help artists in Madeira finance the internationalisation of their projects. In 2021, the city of Funchal, the island's capital and largest city, launched the "Strategic Plan for Culture 2021-2031", notable for being the first cultural strategy elaborated by a public institution in Madeira (Câmara Municipal do Funchal, 2021<sup>[47]</sup>). The plan sets out how culture is viewed as an essential factor in promoting development of the city of Funchal and will be one of the municipality's major commitments over the proceeding decade.

***Multiple partnerships and international platforms support inter-regional policy and exchange on CCS in Macaronesia***

**International platforms can facilitate the subnational exchange of goods, services, capital, people and ideas within a wider geographic region.** These organisations can convene actors regularly through meetings or conferences, create spaces for ongoing digital communication or develop into spaces for strategic reflection on common challenges and opportunities. In the ORs in Macaronesia, national and

subnational governments are active in forging links for local CCS with the broad Latin American and African space they share cultural, economic and human ties with.

**An Interreg funded programme supports collaboration between the Azores, the Canary Islands, and Madeira, and other countries in the region.** The Interreg MAC (Madeira-Azores-Canary Islands) Territorial Cooperation Programme has been consolidated in recent decades as a core instrument to promote cooperation between the Macaronesian ORs and their neighbouring countries, in order to foster sustainable economic development and strengthen political stability (Interreg MAC, 2021<sup>[48]</sup>). The Interreg MAC 2014-2020 Program supported 123 projects promoting collaboration between the Spanish and Portuguese ORs and neighbouring Cabo Verde, Senegal and Mauritania. The 2021-2027 programme expands the geographic reach of the initiative to include the Ivory Coast, Gambia, Ghana, and São Tomé and Príncipe. While CCS is not a main feature of the 2021-2027 programme, it is mentioned as a potential action area in relation to strengthening university-industry linkages in strategic areas.

**In the Canary Islands, CCS commercial and human links with countries in Africa and Latin America take shape through channels dedicated specifically to culture.** For example, the Canary Islands ICDC runs the isLABentura Canarias programme, a support programme for filmmakers. The programme specifically encourages Canary Island-based filmmakers to leverage the migratory and historical ties between the islands and Latin America in their creative production (Government of the Canary Islands, 2022<sup>[49]</sup>). Supported by all levels of government in the Canary Islands, *Mapas* is an annual event for the performing arts and music for both Spanish and Portuguese actors, with those from Latin America and Africa, held in Tenerife, Canary Islands. The event includes different channels for CCS actors to attend workshops, network, present productions, meet with potential investors and join a community of practice, with the aim of developing a “professional market” for music and the performing arts in the south Atlantic (MAPAS, 2018<sup>[50]</sup>).

**Platforms engaging more broadly across sectors or policy areas also play a role in both the Canary Islands and the Portuguese ORs.** Casa África is a partnership between the Ministry of External Affairs of Spain, the government of the Canary Islands and the City Hall of Las Palmas of Gran Canaria. This initiative may reflect broad agreement between levels of government in the Canary Islands, including local, regional and national government, yielding joint efforts to raise the attractiveness of and internationalise CCS on the islands. Casa África brings together leaders from African countries and Spain from across sectors to dialogue, forge common projects and generate business opportunities. Casa África includes programming in CCS, for example through its *Vis a Vis* programme, which supports the internationalisation of musicians from African countries in the Spanish market (Casa África, n.d.<sup>[51]</sup>).

**In the Portuguese ORs, similar institutions exist addressing a host of issues through regular dialogue and joint initiatives.** The Atlantic Parliamentary Days (*jornadas parlamentares atlânticas*) are a regular meeting between members of the legislative assemblies of the Azores, the Canary Islands, Cabo Verde and Madeira. Meetings occur on an ad-hoc basis and include CCS topics. In 2016, for example, the parliamentary days included a session led by Cabo Verde on Macaronesia as a common cultural space (Jornadas Parlamentares Atlânticas, n.d.<sup>[52]</sup>). The Azores and Madeira can also benefit from CCS international cooperation initiatives through Portugal’s membership in the Community of Portuguese Language Countries (CPLP).

**Like the Canary Islands, the Azores and Madeira leverage historical links to forge strategic CCS partnerships.** In Madeira, for example, CCS have organised through a business group, the Association of Creative Industries of the Atlantic (AICA) to organise the Atlantic Culture and Creative Economy Summit with support from the Madeira regional government, Cabo Verde and the Chamber of Commerce of Ponta so Sol, Madeira. The summit brings together CCS actors from Madeira with those from Cabo Verde to reinforce social, cultural and economic links between CCS from the African country and the island of Madeira. Some of the summit’s objectives include improving the pooling of cultural infrastructure, new policies for cultural participation and the creation of a network of Portuguese-speaking artists and authors in the region (Perregil, 2021<sup>[53]</sup>).

**The international engagement of CCS in Macaronesia benefits from multiple platforms, particularly for those sectors most turned towards artistic production.** Public leadership reflects the priority placed by all levels of government for developing CCS on the islands. The platforms are yielding new commercial partnerships and human connections between ORs and those parts of Latin America and Africa, effectively leveraging Macaronesia's unique geographic and cultural position. In the policy space, initiatives identify and seek to exploit the islands' unique position as a force for economic differentiation for CCS.

**Deepening common strategic thinking between Portuguese and Spanish ORs may help further identify areas of strategic cooperation such as joint cultural production, policy exchange, pooling of resources and cooperation within EU initiatives.** Naturally, the groups of islands have primarily developed CCS partnerships based on the linguistic and cultural links they share with different geographies, shaped by centuries of political, economic and human interaction. However, there is scope to build on existing cooperation arrangements within the region, such as the relationships forged through the MAC European Territorial Cooperation Programme to build a shared CCS ecosystem. An institutional means of this type of collaboration could potentially involve a Euroregion, such as the Pyrenees Mediterranean European Grouping for Territorial Cooperation (EGTC), in which French and Spanish utilise EU and regional government funds to support joint economic and cultural initiatives, particularly in CCS (Box 3.2).

### Box 3.2. Euro-regions may be promising organisations to consider for CCS cooperation in OR

#### The Pyrenees–Mediterranean Euro-region promotes a common inter-regional approach to CCS development between two Spanish and one French regions in the western Mediterranean

The Pyrenees Mediterranean European Grouping for Territorial Cooperation (EGTC), or Euro-region, is across border administration entity for trans-border cooperation between Occitanie, France, as well as Catalonia and the Balearic Islands in Spain. Euro-regions are a legal instrument made available by the Council of Europe and supported by European Commission financing. Regional governments form cross-border cooperation structures through the Madrid Outline Convention and corresponding protocols.

In the Pyrenees border regions and Balearic Islands, the Euro-region positions culture at the forefront of its strategic thinking on sustainable development. The institutions have supported CCS projects since 2010. In 2019, the EGTC supported seven CCS projects for a total of EUR 140 000. This included projects such as Art et Territoire, which supported research and artistic production in all three regions through a system of residences for collaboration. In 2019, the EGTC strengthened dialogue between museums in the three regions, including through initiatives such as sharing good practices and developing joint projects. In 2020, during the COVID-19 pandemic, the Euro-region deployed a specific fund to young cultural creators to help them digitalise and thus diffuse their work during periods of lockdown and/or social distancing.

In its 2021-2030 strategic roadmap, the EGTC sees joint development of CCS between Occitanie, Catalonia and the Balearic Islands as a vector for resilience. This engagement for culture includes support for the artistic production and sectoral digitalisation. In 2022, for example, the Euro-region renewed a call for CCS projects, allocating EUR 125 000 for CCS in the three regions. As part of its 2030 agenda, the EGTC also commits to support exchange between young people over languages and culture of the Euro-region. Beyond its support for CCS in the three regions, the trans-border organisation also supports CCS internationalisation in the greater Mediterranean basin.

Source: (Pyrenees Mediterranean Euroregion, 2021<sup>[54]</sup>), L'Eurorégion, construire un futur résilient d'ici à 2030, [https://www.euroregio.eu/wp-content/uploads/Feuille-de-route-2021-30\\_EPM\\_FR.pdf](https://www.euroregio.eu/wp-content/uploads/Feuille-de-route-2021-30_EPM_FR.pdf); (Pyrenees Mediterranean Euroregion, 2022<sup>[55]</sup>), Culture, <https://www.euroregio.eu/fr/appels-a-projets-euroregionaux/culture-2>.

## Caribbean CCS policies and coordination instruments

### *Attention is growing around culture as a driver of development in certain Caribbean ORs*

**France is the home country of four EU outermost regions in the Caribbean, French Guiana, Guadeloupe, Martinique and Saint Martin.** All are islands in the Antilles except for French Guiana, which is part of mainland South America. Policy focus is growing around culture and the creative economy in the region, though opportunities may exist to develop more cross-cutting strategies.

**As French regions, ORs in the Caribbean share the same competencies over culture and the creative economy.** As overseas regions and departments of France, French Guiana, Guadeloupe, Martinique and Saint Martin exercise a degree of competence and funding authority over some cultural services, such as libraries, museums and artistic education, and share powers in culture policy with the French State and other levels of government, such as departments and communes (Republic of France, 2022<sup>[56]</sup>). Creative economy support undertaken in the other non-sovereign islands in the Caribbean may offer relevant complementary policy options for EU ORs due to similar administrative situations. For example, Box 3.3 details how Puerto Rico, an overseas territory of the United States (US) is using a range of tax incentives to support the development of CCS domestically, as well as encouraging inward investment.



### Box 3.3. FDI attraction and tax incentives in CCS in the overseas US territory of Puerto Rico

#### In 2014, Puerto Rico passed a creative industries law, reflecting growing policy attention for CCS

CCS in Puerto Rico are a significant part of the island's economy. According to the island's investment attraction agency, nearly 1 600 companies in Puerto Rico are engaged in the creative industries. The island's investment attraction agency estimates CCS have contributed USD 2.37 billion to GDP in 2019. In localities in and around the San Juan metropolitan area, up to 298 people are employed in CCS per 10 000 inhabitants. Puerto Rican CCS has yielded major international economic attention, such as the island's salsa and Reggaeton. A public Puerto Rico Institute of Culture administers cultural policies, such as subsidies for cultural production, and runs a share of the island's cultural institutions, such as museums and archives.

CCS policy in Puerto Rico has brought specific attention to investment attraction in these sectors. In 2014, Puerto Rico passed a law granting specific support to CCS. 2014 legislation recognises CCS potential to strengthen social cohesion, innovation and urban renovation, as the island continues to confront economic and environmental hardships. The law opened eligibility to a host of tax incentives to those who chose to certify themselves under the creative industries label. The law also gave responsibility for creative economy policy specifically to the Puerto Rican government Trade and Export Company. The law created an Advisory Council for the Creative Industries composed of nine members from creative industries on the island. The law also strengthened statistical work around CCS in Puerto Rico by enshrining dialogue with the Puerto Rico Institute of Statistics.

The law contributed to an encompassing set of tax incentives existing in Puerto Rico, specifically for CCS internationalisation. Among a group of incentives, CCS benefit from a 4% fixed income tax rate on eligible income and a conditional 100% exemption on capital gains tax. The industries can also benefit from a 75% exemption on municipal construction taxes, and a 50% exemption regarding municipal license tax.

To promote the audio-visual sector, the government has developed a refined set of policies for this sector. The Puerto Rico Department of Economic Development and Commerce, for example, administers a Film Industry Development Programme. According to the Department, the sector is of particular interest due to its coherence with the island's large tourism sector, which it can support mutually. Policies include a specific additional set of tax incentives for the sector, such as a tax credit on film production, including up to 40% deduction in production expenses paid to residents of Puerto Rico. Policies also seek to promote local film production, through an objective of eight to ten new productions through grants.

Source: (Government of Puerto Rico, 2014<sup>[57]</sup>), "Ley para Fomentar las Industrias Creativas", *Ley Núm. 173 de 13 de octubre de 2014*, <https://bvirtualogp.pr.gov/ogp/Bvirtual/leyesreferencia/PDF/Empleos/173-2014/173-2014.pdf>; (Invest in Puerto Rico, 2021<sup>[58]</sup>); *Creative Industries*, <https://www.investpr.org/wp-content/uploads/2021/11/Creative-Industries.pdf>; (Puerto Rico Department of Economic Development and Commerce, 2022<sup>[59]</sup>), *Film Industry Development Program*, <https://www.ddec.pr.gov/en/film-industry-development-program/>

**French Guiana has a dedicated cultural development plan.** The French Guiana 2020 Territorial Cultural Development Plan (STDC) aims to promote French Guiana culture, encourage culture as a lever for economic development, democratise access to culture and support innovation.<sup>4</sup> The plan prepares actions to promote local identity, increase artistic education among youth, support creative production and circulation, connect culture with other policies areas, train CCS actors, further development of cultural infrastructure and develop partnerships. For example, the Guiana Territorial Community (CTG), the

regional government, operates a fund for film and audio-visual production, disbursing nearly EUR 814 000 for this group in 2021<sup>5</sup>. In 2022, the CTG has a budget of EUR 7 750 thousand for culture.

**Guadeloupe identifies CCS along with the green, social and silver economy as emerging sectors for the archipelago.** The Guadeloupe Regional Council (*Conseil Régional*) considers the cultural and creative industries as an opportunity for development in its Regional Economic Development Plan (SRDEII), a legally-mandated policy roadmap for French regions (Guadeloupe Region, 2016<sup>[60]</sup>). In its most recent SRDEII, Guadeloupe envisioned CCS activities such as festivals and film production as particular areas to lever in the region's public communications. As other ORs, Guadeloupe also recognises the potential of CCS for the attractiveness of the islands for tourists.

**In Martinique, CCS are considered as complements to other policy areas.** For example, culture, cinema and music figure as strategic clusters to promote tourism in Martinique's SRDEII (CTM, 2017<sup>[61]</sup>). The SRDEII also outlines the island's ambitions around promoting more sustainable tourism, through the protection and promotion of the island's tangible and intangible heritage, including arts, crafts, and other creative activities. CCS also features in the island's health agenda, through a partnership between the Department of Cultural Affairs and the Regional Health Agency of Martinique (DAC Martinique, 2023<sup>[62]</sup>). This partnership agreement centres around an annual call for projects which enable cultural participation of those residing, or working in healthcare settings (e.g. hospitals, care homes, etc). Projects are led by cultural professionals, and are open to all audiences (patients, relatives, healthcare teams, visitors). The projects cover all fields of arts and culture.

**The preservation and promotion of culture forms part of Saint Martin's tourism strategy.** The Saint Martin tourism strategy 2017-2027 highlights the ambition to create a more sustainable tourism industry through balancing economic ambitions with environmental and socio-cultural protection, including through the preservation of culture. For example, the plan sets out ambitions to protect and preserve the built heritage of Saint Martin by reinvesting heritage sites for renewed uses and seeking to diversify cultural activities offered on the island (Collectivity of Saint-Martin, 2017<sup>[63]</sup>). Saint Martin has also engaged in new ways to develop cultural participation and cultural education, through digital museums (see Box 3.4).

### Box 3.4. Micro-Folies: bringing digital museums to the French outermost regions

**The Micro-Folie system is presented in the form of a kit and gives access to digital museums and cultural content.** The Micro-Folie project revolves around a digital museum that can be set up anywhere and which brings together several thousand masterpieces from numerous national and international institutions and museums. It has been supported by the French Ministry of Culture in collaboration with 12 founding national cultural establishments: the Center Pompidou, the Château de Versailles, the Cité de la Musique – Philharmonie de Paris, the Festival d'Avignon, the Institut du monde arabe, the Louvre, the Musée national Picasso-Paris, the Musée d'Orsay, the Musée du Quai Branly-Jacques Chirac, the Paris National Opera, the Réunion des Musées Nationaux – Grand Palais, Universcience and La Villette. Depending on the place chosen to host the Micro-Folie, several additional modules can complete the Digital Museum: a FabLab, a virtual reality space, a stage, a library / toy library or even a space of friendliness.

**The Micro-Folie project is being deployed in Saint Martin to give young people better access to culture.** Jointly supported by the Collectivité and the prefecture, the project is carried out with the support of the Ministry of Culture, the Parc de la Villette, the National Education and the Academic Region of Guadeloupe, as well as the Caisse Territoriale des Œuvres Scolaires (CTOS) within the framework of extracurricular time. In 2022, it was decided to deploy the Micro-Folie network on the territory of Saint Martin for a period of 3 years. The Collectivité has thus chosen to join the network for an amount of EUR 1 000 a year. The cultural kits are lent by the Parc de la Villette and can be installed in spaces of 30 to 60m<sup>2</sup>. They will be made available to all schoolchildren in Saint Martin. Seven schools are in charge of receiving the kits, which will benefit the whole territory. Micro-Folies have also been set up in Guadeloupe, French Guiana and Réunion.

**The expansion of Micro-Folies across all French ORs is ongoing, with nine Micro-Folies now open across the ORs.** In addition, regional digital collections have been developed, with content from all over France and overseas. For example, the “Caribbean-Guyana-Amazonia collection” will soon be launched, which includes works from around thirty territorial museums including the Museum of History and Ethnography of Martinique, the departmental archives of Guadeloupe, the Museum of Guyanese cultures, and the eco-museum of Marie-Galante.

Source: (Collectivity of Saint-Martin, 2022<sup>[64]</sup>), *Adhésion au dispositif culturel micro-folies!*, available at: [http://www.com-saint-martin.fr/Adh%C3%A9sion-au-dispositif-culturel-micro-folies!-Saint-Martin-Antilles\\_2655.html](http://www.com-saint-martin.fr/Adh%C3%A9sion-au-dispositif-culturel-micro-folies!-Saint-Martin-Antilles_2655.html); (La Villette, 2022<sup>[65]</sup>), *Micro-Madness: Cultural platform at the service of the territories*, available at [https://lavillette.com/page/micro-folie\\_a405/1](https://lavillette.com/page/micro-folie_a405/1)

**The French State is a major policy actor for CCS in its overseas regions and departments**, including both the French outermost regions - Guadeloupe, French Guiana, Martinique, Réunion, Mayotte and Saint Martin – and its overseas countries and territories (OCTs) - Saint-Barthélemy, Saint-Pierre- et-Miquelon, the Wallis and Futuna Islands and French Polynesia. Regional offices of the Ministry of Culture (DAC) implement the French government’s policies for culture (Republic of France, 2010<sup>[66]</sup>). DAC also provide policy advice and administrative guidance to subnational government and local CCS. French regions in the Antilles and South America also benefit from the funding, training and public services of CCS actors of French regions in Europe.

**France also tailors CCS policy tools to its overseas regions, including the ORs, in the Caribbean.** France has created specific instruments for overseas CCS actors for the production and diffusion of creative production, such as the Support Fund for Artistic and Cultural Exchange for the Overseas (FEAC). This fund supports artistic production in French overseas regions by providing funding towards travel and

transportation relating to the movement of artists and creators, the creation and dissemination of works, the holding of cultural events, and research and training of artists and creative professionals. The fund also finances bilateral cultural exchanges between the Overseas Territories on the one hand and the countries of their geographical area, mainland France and the rest of the world on the other (Ministry of Culture of France, 2023<sup>[67]</sup>). CCS has also been a major area of France's pandemic recovery plan, *France Relance*, in its overseas regions in the Caribbean. In 2021, *France Relance* devoted a share of funding to CCS projects in its Caribbean regions. For instance, EUR 435 000 was earmarked for CCS in Martinique in 2021 (Ministry of Culture of France, 2021<sup>[68]</sup>). In addition, the Ministry of Culture, in conjunction with the Ministry of Ecological Transition and Territorial Cohesion have been working to reduce the energy consumption of CCS across the whole of France, where the culture sector accounts for around 2% of national energy consumption (Ministry of Culture of France, 2023<sup>[69]</sup>).

**High levels of informality are an issue for ORs in general and this is also the case for ORs in the Caribbean.** As noted by the European Commission, the high prevalence of informal economic activity in the ORs is a barrier to implementing policy support (European Commission, 2021<sup>[3]</sup>). This may be especially relevant for ORs in the Caribbean, a region with particularly high levels of informality (ILO, 2022<sup>[70]</sup>). While informality is also high in cultural and creative sectors across the OECD, some countries are using CCS support measures to help prompt formalisation of the sector. For example, during the COVID-19 pandemic, Colombia launched SoyCultura, a national registry for cultural workers to help distribute support measures and work towards more formalisation of the sector (see Box 3.5). Similar measures could be enacted by EU ORs to help identify and support informal CCS workers.

### Box 3.5. SoyCultura - a national registry for creative economy workers

**Through SoyCultura, Colombia identifies cultural workers, contributing to formalisation efforts.**

In response to the crisis generated by COVID-19 for cultural workers, Colombia launched SoyCultura, a national registry for cultural workers. SoyCultura responded to a need to gather information on the number and profile of Colombia's cultural workers at a time when COVID-19 measures placed unprecedented hardship on artists and creative producers.

**Soy Cultura incentivises cultural workers to register as the process has become a requirement to participate in national and local government applications for competitive culture grants.** The Ministry of Culture created a web portal which accompanies cultural workers through a step by step process to register. Those registered receive specific information on creative economy opportunities. Taking stock of the high level of informality in Colombia, this programme enabled the government to gather territorial, sectoral and other information on artists and producers and to introduce tailored formalisation efforts. In doing so, the programme was able to gather crucial information on informal workers to support the formulation of public policies. Beyond its role to help formalise workers, SoyCultura is also a broader tool to connect cultural agents in a network and help gather data for a range of cultural policies. Information is linked directly to subnational governments.

**Similar initiatives could be used by EU ORs to help identify and support those working informally in CCS.**

Source: OECD (2022<sup>[13]</sup>) Culture and the Creative Economy in Colombia: Leveraging the Orange Economy; <https://doi.org/10.1787/184f1e07-en>

### ***ORs in the Caribbean can leverage existing multilateral organisations for exchange, trade and political dialogue in CCS***

**A group of organisations in the Caribbean can act as a channel for CCS in ORs to engage internationally.** The Caribbean region is composed of 13 sovereign States and nearly 24 non-sovereign territories, multiplying opportunities for OR CCS to exchange ideas, develop joint projects and leverage a regional market for CCS exports. The Caribbean region also presents opportunity to promote the attractiveness of ORs to artists, investment and tourists from neighbouring countries and territories.

**The Caribbean Community (CARICOM) is one of the principle multilateral organisations in the region for CCS development.** In 2012, as non-sovereign entities, French Guiana, Guadeloupe and Martinique requested associate member status within CARICOM (Guadeloupe Prefecture, 2018<sup>[71]</sup>). In 2013, French became CARICOM's second official language, offering an opportunity to tighten links with the ORs. As an organisation working towards both economic integration and cultural promotion, the involvement of EU ORs in CARICOM offers prospects for greater development of CCS markets. Indeed, CARICOM has identified the creative industries as a strategic area and the CARICOM administration includes a regional culture committee, as well as staff dedicated to working on culture and community development (CARICOM, 2018<sup>[72]</sup>).

**CARICOM and its partners deploy financial means to support CCS in the region.** The CARICOM bodies, such as the CARICOM Development Fund (CDF) are working with other regional organisations, such as Caribbean Export, the region's export and investment promotion agency, to identify resources and donors to finance CCS development. The Caribbean Development Bank (CDB), a partner of CARICOM, is also converging on CCS promotion objectives. The CDB runs the Creative Industries Innovation Fund (CIIF), with a capital of USD 2.9 million in 2018, available to CCS entrepreneurs in the region (CARICOM, 2018<sup>[72]</sup>). Opportunities may exist to tighten cooperation between EU ORs in the Caribbean and CARICOM organisations to leverage synergies.

**Other international organisations also offer opportunities for CCS in EU outermost regions in the Caribbean.** Martinique and Guadeloupe are associate members of the Organisation for Eastern Caribbean States (OECS). Through its Enterprise Competitiveness Unit, the OECS Commission runs a programme dedicated specifically to the creatives sectors, crafts, fashion, cinema and music. In collaboration with the Ministries of OECS Member States, as well as regional and international agencies, the OECS works with sectoral experts and governments to supports CCS firms and CCS ecosystem development, largely using funds from the European Development Fund (EDF) (OECS, 2020<sup>[73]</sup>). Associate membership provides avenues for OR engagement in this area of work.

**Outermost regions also engage internationally through events, programmes or initiatives that draw Caribbean artists, visitors and potential investors to their territory.** For example, Martinique hosts a yearly salon (*Foire Expo de Martinique*) one of the largest expo/trade fairs in the region. The fair is open to all industry sectors, including CCS and offers opportunity to promote Martinique's CCS to foreign actors and establish potential sources of FDI (Foire Expo, 2020<sup>[74]</sup>). Beyond its commercial aspect, the expo fair aims to be a cultural event, offering a platform to share and promote regional local cultural traditions. Film and music festivals are also a source of international attractiveness for ORs across the Caribbean. For example, in French Guiana, the Festival of Mestizo Dances (*Festival des danses Métisses*) or the international documentary film festival of Caribbean America (FIFAC) are examples of festivals that can draw international audiences.

**Caribbean ORs can also access export, internationalisation and tourism attraction opportunities open to CCS across France.** For example, Bpi France, France's public investment bank, runs the La French Touch programme for CCS exports, a resource for CCS in Caribbean ORs. With a dedicated work stream for CCS internationalisation, the Bpi France programme links with the French export support agency, Team France Export, to support market prospection abroad. La French Touch also provides export



financing tools, such as loans, export credits, guarantees, as well as export insurance instruments to culture and creative sector actors. In 2018, the French Ministry of Culture and ministries responsible for tourism signed a cooperation agreement to further drive synergies between CCS and tourism (Ministry of Culture of France, 2018<sup>[75]</sup>). For example, as part of this cooperation, a cultural tourism representative has been appointed in the Ministry of Culture's local offices, including in ORs.

## Indian Ocean CCS policies and coordination instruments

### *The Indian Ocean is a vast space for CCS engagement for Réunion and Mayotte*

**Two EU ORs exist in the Indian Ocean, which connects Africa's south eastern coast with the Indian subcontinent.** The Indian Ocean is home to two EU ORs, the most populated French OR, Réunion, as well as the French region of Mayotte, the EU OR with the lowest GDP per capita. In 2019, GDP per capita in Mayotte sat at EUR 10 000 compared to the French average of EUR 31 200 (European Commission, 2021<sup>[3]</sup>). In previous OECD analysis on Réunion, the OECD identified the island's very high broadband coverage compared to other EU regions, as a potential source of international attractiveness through digital means, as well as the island's potential to leverage its cultural diversity to link with an international diaspora of talent (OECD, 2022<sup>[76]</sup>).

**Both EU ORs in the Indian Ocean consider the cultural and creative sectors as opportunities for development.** In Réunion's latest economic development strategy, the SRDEII, CCS figure as the third orientation of the region's economic development strategy (La Réunion Regional Council, 2016<sup>[77]</sup>). The region notes the cultural and creative industries represent over 28 000 establishment and 60 000 jobs in the territory. The region planned to develop action plans in CCS in tandem with the island's cultural actors. In particular, the island's strategy hinges on valorising Réunion's heritage for tourism and well-being, and supporting investment in cultural enterprises. In Mayotte, CCS also figures among the archipelago's prioritised sectors for economic differentiation (Department of Mayotte, 2019<sup>[78]</sup>).

**In Réunion, investment is being made towards supporting the next generation of CCS professionals.** In its 2021-2028 mandate, the Réunion Regional council envisages new school-to-work linkages in the field of culture, and a host of initiatives to support access to culture among secondary school students, such as through art competitions (La Réunion Regional Council, 2021<sup>[79]</sup>). Regional excellence conservatories (CRR) will open, and the island will decentralise certain cultural events to territories with limited access. The Regional council also sets out to reinforce policies that support artists and creative workers, in coordination with support already provided by the State.

**Réunion will also take steps to further valorise the island's cultural heritage.** According to the Regional council mandate for 2021-2028, for example, Réunion will create regional cultural "labels", such as one for artistic or historical territories. A local cinema centre will also open to showcase the island's cinematographic production.

**Réunion policies are evolving towards greater consideration of culture's socio-economic potential.** In particular, the region will launch a call for applications to incentivise research and innovation centres, SME, young innovative firms and culture and artistic centres to collaborate on joint projects funded by the region (La Réunion Regional Council, 2021<sup>[79]</sup>). According to the Regional council's mandate document, the region would also like to leverage the island's cultural heritage as a lever to attract tourists to heritage sites, potentially alleviating nature-based tourism in parts of the island's fragile natural environment.

**CCS enterprise groups are also taking the initiative to promote their sector in Réunion.** In 2022, Digital Reunion, a regional association of technology companies, launched the videogame and creative industry commission to raise awareness about the sector (Digital Réunion, 2022<sup>[80]</sup>). Among multifaceted

activities, the association supports the sector's internationalisation and the attractiveness of digital creative industries on the island.

**In Mayotte, projects have been initiated to translate the archipelago's cultural and creative traditions into socio-economic opportunity.** For example, Mayotte's 2019 SRDEII sees culture as a vector for social development, defining actions to strengthen associations active in culture and the traditional crafts involved in extracurricular education (Department of Mayotte, 2019<sup>[78]</sup>). A pilot project was established which involved crafts workers in extracurricular activities in order to support the sector's development, and transmit knowledge to children related to the archipelago's cultural practices. Protecting and promoting traditional craft practices has also been established through the Museum of Mayotte (MuMA), which received technical and financial support from the Ministry of Culture (DAC Mayotte) and the prefecture of Mayotte to develop workshops on the transmission of know-how related to traditional crafts, such as calligraphy, basketry, the manufacture of clay utensils, etc (Ministry of Culture of France, 2023<sup>[81]</sup>).

**Mayotte is also investing in cultural education and the promotion of cultural participation to young people.** Raising awareness among young audiences of the diversity of artistic practices and aesthetics is a priority of both the Department of Cultural Affairs of Mayotte (DAC Mayotte) and the Mayotte rectorate, established through the DAC-rectorate framework agreement 2020-2025. This framework agreement aims to promote artistic and cultural education for all young people, from kindergarten to university. For example, in the 2022/2023 school year, the DAC Mayotte and the rectorate are supporting more than 330 projects throughout the territory, for an amount of approximately EUR 850 000 (Ministry of Culture of France, 2023<sup>[82]</sup>).

**As in the Caribbean, the French State is a principal actor for CCS policies in Indian Ocean ORs.** As in the Caribbean, both Indian Ocean ORs have access to the State's repertoire of culture financing and services, particularly through the Ministry of Culture's Regional offices for cultural affairs (DRAC/DAC). In 2019, France had among the highest relative public budgets for culture in the OECD, dedicating over 1.19% of total government spending on culture compared to an OECD average of less than 1.11% (OECD, 2022<sup>[76]</sup>).

**France's CCS policies for territories, CCS actors and citizens is wide ranging.** They include CCS lending and financing measures through public banks, such as opportunities provided by Bpi, France's public investment bank, mentioned above. France's COVID-19 recovery plan, France Relance, also funded a group of projects in French regions in the Indian Ocean. For example, the plan financed heritage restoration projects throughout Réunion (Magnien, 2021<sup>[83]</sup>) and earmarked EUR 840 000 in funds in 2021 towards renovating the Tsingoni Mosque, the oldest mosque in France (Ministry of Culture of France, 2021<sup>[68]</sup>).

**France has brought policy attention to unequal access to culture in its ORs.** For instance, in Réunion, the Ministry of Culture has included the island in its Action plan for priority cultural territories (Plan d'action en faveur des territoires culturels prioritaires) (Ministry of Culture of France, 2018<sup>[84]</sup>). The plan works through the Ministry's DRAC to provide cultural services to those territories with the least access. Launched in 2018, the plan set out to reach a budget of EUR 10 million in 2022.

### Box 3.6. CCS skill and investment attraction in Mauritius

#### Policies in Mauritius offer prospects for integration with EU ORs in the Indian Ocean

In Mauritius, the attraction of foreign talent in the arts and culture has been a growing objective of CCS policies. Mauritius has identified a lack of technical expertise as a challenge to the further development of CCS on the islands. In a landmark white paper on its CCS policies, the Mauritian Ministry of Arts and Culture highlighted the opportunity presented by the attraction of international entrepreneurs in CCS to develop local talent.

Since 2019, the Mauritius International Art Fair (MIAF) attracts local and international artists to showcase their work. The fair is held as a collaboration between the Ministry of Arts and Cultural Heritage, the country's Economic Development Board and a host of private and international actors. The fair seeks to help build the position of Mauritius as a unique destination for art and culture, showcasing the island's culture. The MIAF serves as a platform for dialogue for artists from around the Indian Ocean region, include Réunion. The MIAF emphasizes connecting Mauritian and international artists with the local business community, making links with tourism and other sectors. In 2022, MIAF is also set to hold a session specifically on investment in the arts with the objective of stimulating capital flows into CCS from the business community in Mauritius.

Artist residencies have also grown across Mauritius to build the island's artistic visibility and stimulate joint projects with local creators. The pARTage artist residency programme, for example, attracts international and local artists to its residence in Mauritius to encourage creation and provide a place of exchange for local artists and internationals. The residency programme operates as a non-profit with a specific focus on bringing together emerging artist from the Indian Ocean region, including Réunion. The programme is part of the international artist network, Triangle Network. When international artists arrive at pARTage, they participate in workshops, talks, conferences and an art exhibition at the end of their stay.

The Economic Development Board of Mauritius also operates a Film Rebate Scheme as a financial incentive to attract the film industry to the island. Those meeting certain criteria, such as minimum expenditure requirements, can be eligible for up to 40% reimbursement of expended on audio-visual production such as film, music video and documentaries on qualifying production expenditure made in Mauritius.

Source: Economic Development Board of Mauritius (2022), *Creative industry*, <https://www.edbmauritius.org/creative-industry>; Ministry of Arts and Culture (2013), *Creative Mauritius Vision 2025*, [https://culture.govmu.org/Lists/DocumentsLinks/Attachments/17/CREATIVE\\_MAUITIUS\\_VISION\\_2025\\_WEB\\_VERSION.pdf](https://culture.govmu.org/Lists/DocumentsLinks/Attachments/17/CREATIVE_MAUITIUS_VISION_2025_WEB_VERSION.pdf); Ministry of Arts and Culture (2018), *Annual Report 2017-2018*, <https://culture.govmu.org/AnnualReports/ANNUAL%20REPORT%202017-2018.pdf>; pARTage (n.d.), *About us*, <https://partagemauritius.wordpress.com/about-us/>; UNESCO (2022), "Reshaping policies for creativity", *Addressing culture as a global public good*, <https://cultureactioneurope.org/files/2022/02/380474eng.pdf>.

#### ***International cooperation around CCS in the Indian Ocean is primarily led by The Indian Ocean Commission, though there are other avenues which CCS actors can tap into***

**The Indian Ocean Commission (IOC) is a driving force for international cooperation around culture among islands in southeast Africa.** Founded in 1984, the IOC is composed of Comoros, Mauritius, the Seychelles and France through Réunion. Culture is one of the targeted projects areas of the IOC. The IOC collaborates with organisations involved in development cooperation to implement projects in its Member States and east Africa. Unlike multilateral organisations present in Macaronesia and the Caribbean, EU ORs benefits from direct membership in IOC. Observer members China, the EU, the International

Organisation of the Francophonie (OIF), Malta, India, Japan and the United Nations offers the possibility to multiply opportunities for CCS in Réunion to benefit from projects or engage internationally.

**Although support to CCS from IOC has historically been limited compared to other areas, recent initiatives suggest CCS is of growing interest to the Commission.** In 2013, the IOC adopted a specific strategy for cooperation in the field of culture (IOC, 2020<sup>[85]</sup>). This cooperation strategy focused mainly on promoting local culture and cultural exchange. The Indian Océanie prize, for example, offers prizes to unpublished writings in French from writers in IOC Member States (UNESCO, 2020<sup>[86]</sup>). Prizes are awarded to writers who are inspired by the region's shared linguistic and cultural heritage. However, more recently CCS is being recognised as a potential pathway for economic growth in the Indian Ocean region.

**In 2020, the IOC and the French Development Agency (AFD) conducted a study into the socio-economic potential of CCS cooperation in IOC Member States.** The study found that promoting CCS can support job creation, income generation and skills development, both in the creative sectors and in the technical sectors of support, promotion, dissemination or supervision. The study also revealed that connections between IOC islands are a unique method to build a critical market size. Connections with Africa may constitute a way to leverage this market size and renew economic exchange, both through drawing investment and identifying export markets.

**Following this study, a new IOC/AFD funded project is targeting CCS as a lever of socio-economic development, both at the local and regional level.** The five year project, supported by EUR 5.1 million from the AFD, aims to support the post-Covid economic and social recovery of IOC members (and Mozambique), through a focus on CCS (Indian Ocean Commission, 2023<sup>[87]</sup>). This includes a focus on skills development (including both technical, and business and entrepreneurship skills), as well as supporting artist mobility, co-creation, the promotion of cultural goods and services and better governance and communication of the sector. Alongside actions to enhance the CCS ecosystem, the initiative also sees CCS as a promising sector for promoting social inclusion and gender equality, with many of the actions having a strong gender focus.

**Although relatively limited in the field of CCS, EU ORs in the Indian Ocean leverage internationalisation efforts outside culture.** A host of domestically led efforts draw tourists to and support exports from the island (OECD, 2022<sup>[76]</sup>). The Export House (Maison de l'Export), for example, assembles export support entities, such as Business France, the regional government's Directorate for Export and Internationalisation of Enterprises, the international section of the Chamber of Commerce of Réunion, and the island's export club (La Maison de l'Export, 2018<sup>[88]</sup>). The Export House is targeted at the island's SMEs. Sectoral organisations, such as the region's Chamber for Artisans (Les Chambres de Métiers et de l'Artisanat), which represents craft workers, also contribute to internationalisation and exchange activities. The Chamber is organised into six commissions, including one dedicated to international cooperation.

**To attract international tourism, Réunion and Mayotte are members of single organisation representing the tourism industry across Indian Ocean islands.** The Association of the Vanilla Islands (Association des Îles Vanilles) develops a tourism offer at the level of Indian Ocean islands. The organisation develops a common brand for marketing and combined tourism offers for international visitors. The islands' heritage and cultural attractions are part of the association's common marketed offer (Association of Vanilla Islands, 2022<sup>[89]</sup>). Both initiatives are not targeted at CCS, though the sector can benefit from their opportunities.



## Notes

<sup>1</sup> Information provided in 2022 OECD survey to Canary Islands government.

<sup>2</sup> The cultural accelerator (CA) project is part of the PRTR component 24, which aims at the revaluation of the cultural industry. Action 2 of C24.I12.P1 provides support for cultural accelerators. Information provided in 2022 OECD survey to Canary Islands government.


<sup>3</sup> Information provided in 2022 OECD survey to the Azores government.

<sup>4</sup> Information provided in 2022 OECD survey to French Guiana government.

<sup>5</sup> Information provided in 2022 OECD survey to French Guiana government.







# 4 Recommendations to develop CCS in the EU outermost regions





## Disparities in CCS ecosystems across outermost regions' geographies call for a place-based approach

**Cultural and creative sector policy offers opportunity for all EU ORs.** Supporting and enhancing the CCS ecosystem in EU ORs offers opportunity to promote job creation, FDI, exports and tourism. Moreover, CCS policy can help to preserve and promote local cultural heritage and encourage cultural participation. Global trends, such as an increase in cultural tourism (World Tourism Organization, 2018<sup>[14]</sup>), increasing trade in creative goods and services (UNCTAD, 2022<sup>[10]</sup>) and increasing FDI in CCS offers significant opportunities for EU ORs to expand their cultural and creative sectors.

**However, EU ORs each have their own specific context, which needs to be recognised in policy making.** Each of the EU ORs is shaped by both their national and local identity. The size, resources, governance structures and geographic region in which they are situated will heavily influence the form and direction that CCS policy takes. Therefore a place based approach, which recognises the specific assets and challenges of each location is best placed to promote CCS.

## In Macaronesia, a high level of CCS development offers an opportunity to coordinate strategies among outermost regions to identify complementarities

**While strong international partnerships exist at the national level, there is opportunity to deepen policy dialogue between the Azores, Canary Islands and Madeira.** The Azores, Canary Islands and Madeira have developed CCS partnerships with other countries mainly based on the linguistic and cultural links they share with different geographies. However, deepening common strategic thinking between the Portuguese and Spanish ORs could help in identifying areas of strategic cooperation. Building on the success of the MAC European Territorial Cooperation Programme, for example, areas such as joint cultural production, policy exchange, pooling of resources and cooperation within EU initiatives could form the basis of future partnerships targeted specifically towards CCS. A Euroregion for the islands could potentially be an avenue to explore in helping to formalise such arrangements and provide further support for the development of joint CCS initiatives.

**The greater levels of autonomy given to ORs in Macaronesia offer opportunity to strengthen cultural and economic partnerships with Africa and Latin America.** A number of initiatives exist to promote dialogue and creative exchange between artists and cultural workers in Macaronesian ORs and those in some African and Latin American countries. Initiatives such as Casa África have also been fruitful in establishing economic ties in CCS across countries. However, there is opportunity for ORs to deepen economic ties with African and Latin American countries, potentially through bilateral or multilateral programmes.

**Tourism is a major sector for the Azores, Canary Islands and Madeira, and CCS policy can do much to help support linkages with this sector.** CCS can act as a magnet for tourism and often rely on revenue from tourism to sustain their practices. CCS can help support the tourism sector by prompting innovation in tourism (e.g. through new digital technologies), promoting places internationally (e.g. through creative content such as film) and aid in efforts towards more sustainable tourism (e.g. through contributing to the diversification of tourist destinations). Developing common policy agendas to strengthen linkages between tourism and CCS could help to develop both sectors and to capitalise on existing strengths.

## In the Caribbean, efforts could focus on building CCS use of French and EU funding instruments to grow cultural production

**Promoting access to French and EU funding mechanisms could help to further develop CCS in Caribbean ORs.** Although funding and governance structures vary between the Caribbean ORs, capitalising on the financial and policy support offered by the French government could focus efforts on building the financial capacity of local actors through access to grant instruments and other business development schemes. Similarly, promoting access to EU funding mechanisms offers opportunity to develop local CCS ecosystems. Developing advice and information resources for OR CCS actors to better understand the potential funding streams and business support mechanisms available to them could be useful in promoting engagement with these instruments. For example, a dedicated website and information campaign could seek to consolidate funding guidance offered through the EU creative funding platform with available funding from the French government and any other local funding available to ORs in the Caribbean.

**Policy could look to address low levels of female employment in CCS through targeted supports.** Female employment in CCS is low for ORs in the Caribbean compared to both female employment in the rest of the economy and to the French national average. Policy could look to promote female employment in CCS through targeted support for female artists and entrepreneurs, training and skills development programmes and the establishment of networking and promotion groups.

**French Guiana, Guadeloupe and Martinique's involvement in CARICOM presents opportunity to strengthen broader ties between the organisation and the EU to support CCS.** Opportunities may exist to tighten cooperation between EU ORs in the Caribbean and CARICOM organisations to leverage synergies. Moreover, at an institutional level, there is opportunity for CARICOM and the EU to collaborate in strengthening CCS for French ORs in the Caribbean and building broader networks between EU and Caribbean states.

## In the Indian Ocean, conditions may exist for strategic partnership between EU outermost regions and third countries

**ORs in the Indian Ocean are well placed to draw on various international organisations to support CCS development.** For example, leveraging the Indian Ocean Commission mandate in culture could be used to help grow cooperation and provide common offering for international investors and visitors. The closer association of Mayotte in IOC activities can help the archipelago also benefit from the possible growth in CCS exchange. Similarly, the Association of the Vanilla Islands' tourism work could be harnessed to further promote synergies between tourism and CCS.

**There is also opportunity to further CCS networks within the region and beyond.** For example, developing an artist network for the Indian Ocean islands could help to pool resources, build capacity and contribute to promotion efforts. Similarly, supporting international artist exchange programmes could help in local capacity building as well as helping to promote the islands in an international context.

## Strengthening linkages between tourism and CCS could be of benefit for all EU ORs

**Cultural tourism is one of the largest and fastest growing global tourism markets.** Promoting synergies between the tourism sector and CCS can generate higher value added tourism, support the preservation of local heritage, stimulate innovation and support skills and knowledge development (OECD, 2022<sup>[12]</sup>). Moreover, promoting linkages between these sectors can help to drive exports, through products



that link creative content, places and culture in order to increase general levels of interest in local creativity and stimulate tourist visitation.

**EU ORs are in a strong position to capitalise on their unique cultural heritage to promote tourism in both European and non-European markets.** Developing coordinated cultural tourism policies could help to strengthen both the tourism sector and CCS, creating a magnet affect for both tourists and CCS professionals. For example, supporting the use of local creative content in place branding and promoting supply chain linkages between tourism and CCS SMEs could help support mutually reinforcing synergies between the sectors.

### **A lack of comparable data remains a barrier to fully understanding the size and shape of CCS in the EU outermost regions, respective to their geographic region**

**A lack of data is an issue for some of the smaller EU ORs, but a lack of comparable data is an issue for all ORs.** For some ORs, such as Mayotte and Saint Martin, data is not available at a granular enough level to be able to fully assess the size and shape of CCS on the islands. For some of the larger ORs, for example the Azores and Madeira, national level data has been disaggregated such that it is possible to compare the islands with their mainland counterparts. However, while specific mapping studies have been conducted in many of the EU ORs, there remain gaps in reporting and issues of comparability. Indeed, across all EU ORs, it is challenging to find statistics that are internationally comparable.

**This issue is not unique to EU ORs.** Across the world, various definitions of CCS and different methodologies for assessing their size and shape exist. This means that while comparing between EU ORs is at present a challenge, a further challenge is to compare these places with other countries in the same geographical region.

**More granular level reporting at the national level as well as local mapping studies could help build the evidence base to support further policy making.** A first step towards greater comparability of CCS data would be to encourage more granular reporting at the national level. Further mapping studies and local observation centres could also aid in data collection. Close attention to the definition used in such studies is important and such efforts would benefit from using the same statistical definition of CCS as Eurostat (Eurostat, 2018<sup>[90]</sup>). As the European Commission continues to evaluate and update its frameworks for CCS definitions and measurement methodologies (for example, the recently published study on Measuring the Cultural and Creative Sectors in the EU (Measuring CCS Consortium, 2022<sup>[91]</sup>)) there is opportunity for EU ORs and for national statistics agencies to develop CCS statistics in line with these standards. There is scope too for Eurostat and national statistics agencies to work together to improve disaggregation of national level statistics to better capture activity in EU ORs.

**Additionally, work could look to better document the wider economic and social impact of CCS in the EU ORs.** For example, case study or qualitative evidence could be sought to assess the impact of CCS on fostering social cohesion, supporting health and wellbeing, and preserving and promoting cultural heritage. Work could also look to capture some of the additional economic impact of CCS, such as the sectors role in driving innovation, promoting tourism and attracting skilled workers.

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## Annex A. Workshop participants

The Peer Learning Group (PLG) Meeting on “Creative Futures” was organised in the framework of EU/OECD project on Transforming economies in EU outermost regions: fostering learning and making the most of global interconnectedness. It counted with the participation of high-level delegations from six countries (Colombia, France, Germany, Indonesia, Portugal, Romania and Spain), including representatives from all EU Outermost Regions (ORs) from multiple departments (the Azores (Portugal), Canary Islands (Spain), French Guiana, Guadeloupe, Madeira, Martinique, Mayotte, Réunion and Saint Martin (France), and representatives from the European Commission (DG-EAC, DG-REGIO), and representatives from Afreximbank, OACPS, BID, UNIDO, and the OECD (Development Centre and CFE).

The meeting was structured in two sessions. The first one focused on global trends on creative industries with presentations by OECD Centre for Entrepreneurship, SMEs, Regions and Cities, and the European Commission. The second session focused on unlocking the potential of cultural and creative industries with presentations by Colombia, Guadeloupe - France and IDB.

### Creative Futures

#### PEER LEARNING GROUP MEETING

#### LIST OF PARTICIPANTS

31 March 2022  
Paris, France

#### Countries

##### Colombia

<b>Brayan Moreno</b>	<i>Advisor to the Vice Minister for Creativity and Orange Economy Ministry of Culture</i>
<b>Natalia Sefair</b>	<i>Head of International Affairs and Cooperation Ministry of Culture</i>
<b>Yully Ramirez</b>	<i>International cooperation advisor Ministry of Culture</i>
<b>Carlos Hernández</b>	<i>International cooperation advisor Ministry of Culture</i>

##### France

<b>Alain Maurin</b>	<b>Guadeloupe Regional Government</b>
	<i>Professor University of Economy</i>
	<b>Martinique Regional Government</b>

<b>Matilde dos Santos Ferreira</b>	<i>Cultural cooperation officer</i>
	<b>Germany</b> <b>German National Institute of Metrology (PTB)</b>
<b>Karl-Christian Göthner</b>	<i>Senior Consultant</i> <i>German National Institute of Metrology (PTB)</i>
	<b>Indonesia</b>
<b>Rifky Akbar</b>	<i>Third Secretary</i> <i>Embassy of Indonesia to France</i>
	<b>Portugal</b> <b>Azores Regional Government</b>
<b>Pedro Correia</b>	<i>Director of Services</i> <i>Institute for Food and Agricultural Markets</i>
<b>Alda Correia</b>	<i>Head of Division</i> <i>Regional Directorate for Rural Development</i>
	<b>Madeira Regional Government</b>
<b>Sara Relvas</b>	<i>President</i> <i>Institute for Qualification</i>
<b>Sérgio Mendonça</b>	<i>Director of Services</i> <i>Regional Directorate for European Affairs</i>
<b>Marisa Santos</b>	<i>Head of Division</i> <i>Regional Directorate for Culture</i>
<b>Lucio Quintal</b>	<i>Projects Manager &amp; Coordinator</i> <i>Regional Agency for the Development of Research, Technology and Innovation</i>
<b>Fábio Ferro</b>	<i>Senior Technician</i> <i>Regional Secretariat of Tourism and Transport</i>
	<b>Spain</b> <b>Canary Islands Regional Government</b>
<b>Christian Perazzone</b>	<i>Project coordinator for policies cultural and actions</i> <i>Vice Ministry of Culture and Cultural Heritage</i>
<b>Victoria Nakoura González</b>	<i>Advisor</i> <i>Government of the Canary Islands-DG European Affairs</i>
<b>Padilla Luis</b>	<i>Economist</i> <i>Government of the Canary Islands</i>
<b>Michelle Perello</b>	



CEO  
*Consulta Europa Projects and Innovation*

#### **Academia**

**Mina Fanea-Ivanovici** *Bucharest University of Economic Studies*  
*PhD Professor*

**Keith Nurse** *Sir Arthur Lewis Community College, Barbados*  
*President*  
*Sir Arthur Lewis Community College*

#### **International Organisations and Partners**

##### *African Export-Import Bank*

**Temwa Gondwe** *Senior Manager*

*European Commission (EC)*

**Barbara Gessler** *Head of Creative Unit*  
*Directorate-General for Education, Youth, Sport and Culture*

**Germán Esteban** *Deputy Head of Unit*  
*Outermost Regions Unit*

**Jitka Vocaskova** *Policy analyst*  
*DG Regional and Urban Policy*

**Delia Bonsignore** *Trainee*

##### *Organisation of Economic Cooperation and Development (OECD)*

#### **Development Centre**

**Ayumi Yuasa** *Deputy Director*

**Annalisa Primi** *Head of Division*  
*Economic Transformation and Development Division*

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*Economic Transformation and Development Division*

**Elisabeth Lambrecht** *Policy Analyst*  
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**Manuel Toselli** *Economist*  
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Local Employment, Skills and Social Innovation Division*

**Ekaterina Travkina** *Coordinator, Culture, Creative Sectors & Global Events  
Local Employment, Skills and Social Innovation Division*

**Escipion Oliveira** *Assistant Secretary General / Structural Economic Transformation and Trade*

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*Inter-American Development Bank*

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**Luis Mesias** *United Nations Industrial Development Organization, UNIDO  
Consultant*

**Private sector & Associations**

**Eloísa Dutari** *Eloísa Dutari, Panama  
Consultant*

For more information: [www.oecd.org/cfe/leed/culture-and-creative-sectors.htm](http://www.oecd.org/cfe/leed/culture-and-creative-sectors.htm)

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