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Mapping of Clusters in Cultural and Creative Industries in the Southern Mediterranean

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EXECUTIVE SUMMARY

The following document summarizes the results of the mapping of clusters and cluster initiatives in Cultural and Creative Industries in the Southern Mediterranean that have the potential to develop into promising pilot cluster initiatives for the project. The mapping was undertaken between May and October 2014, and would not have been possible without the support of national public and private partner institutions, including public authorities. It is the result of both qualitative and quantitative analysis, with over 500 people interviewed. There is no pretention of exhaustiveness as only selected characteristics were considered for this mapping exercise. The mapping was prepared by UNIDO experts Alessandra Chevallard, Luis Ramis, Maria Pedrals, Jordi Reventos and Julien Schmitt, under the overall guidance of Gerardo Patacconi, UNIDO Project Manager.

1. Background

The overall objective of the EU-funded project is to foster entrepreneurial cooperation in the Cultural and Creative Industries through the promotion of pilot cluster initiatives that will contribute to inclusive growth. The project also aims at demonstrating, through adequate replication and larger scale support, the national and regional employment potential of Cultural and Creative Industries in the Southern Mediterranean.

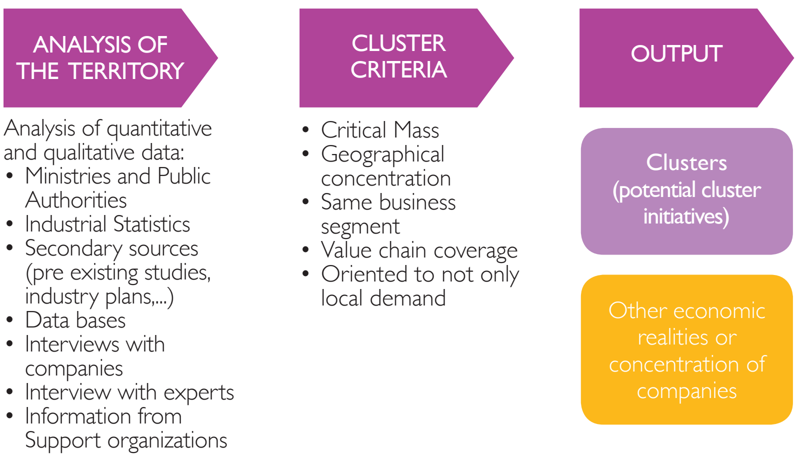
2. Cluster methodology

Clusters are economic realities, whereby companies tend to concentrate in certain areas or locations to benefit from a competitive advantage such as the proximity to a raw material, the existence of a skill or know how, etc. Companies do belong to clusters, regardless of the fact whether they participate or not in the cluster project or to collaborative actions. Clusters are composed by all the agents related to the cluster business within the territory. The 5 criteria that any cluster has to accomplish are:

- Same business: the companies have to belong to the same business and face the same threats so that they can share common strategic challenges
- Critical mass: a sufficient number of companies and agents must exist within the cluster; the dimension can be relative to the area density and has to show a critical concentration of skills and competences
- Value chain coverage: there should be a sufficient coverage of all value chain steps; including support agents (e.g. service companies/suppliers, financial institutions, specialized infrastructure, etc.)
- Geographical concentration: no interaction will happen among companies if the distance is too big
- Not only local demand: the products/services should also serve a market that is not only local (have the potential to export).

3. Mapping methodology

Through the assessment of qualitative and quantitative sources, a first broad-spectrum scrutiny of the Cultural and Creative Industries in target countries of the Southern Mediterranean allowed for an initial analysis of cluster-related economic realities (whether there is a clusterisation of agents, and where). Thereafter, the 5 cluster criteria were applied; this allowed differentiating between clusters and other economic realities, or concentrations of skills that do not accomplish the whole set of requirements but that can be considered distinctive for a territory. It is important to note that the lack of clusterisation doesn't mean that there is a lack of competencies or agents in the territory; it only signifies that the current economic reality doesn't fit with the afore-mentioned cluster requisites.



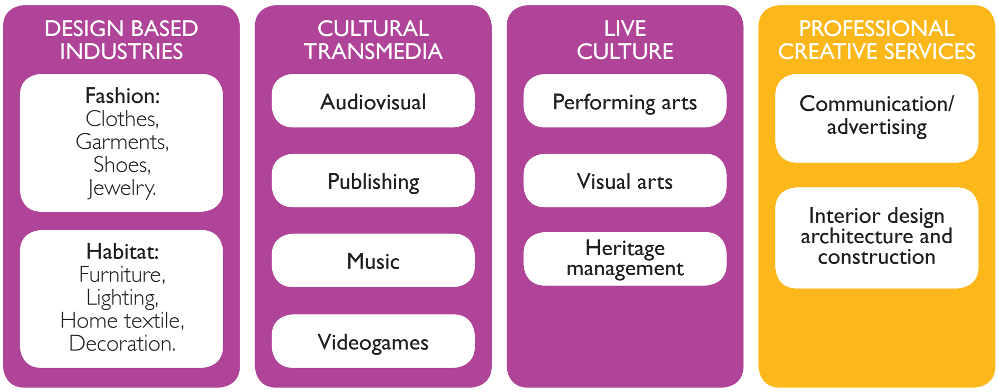
4. Mapping of the Cultural and Creative Industries in the Southern Mediterranean

Cultural and Creative Industries (CCI) are important because their outputs shape the identity of their countries and their people; they also contribute to their countries' prosperity: on average, they account for 3.4% of total world trade, with exports reaching US$424.4 billion (2005) and an average annual growth rate of 8.7% (2000-2005). Moreover, Cultural and Creative Industries grow faster than most sectors and also generate new jobs twice as fast; they have become an important component of many countries' competitiveness and offer opportunities to emerging economies to participate in high-growth areas -- both at national and international level. Nevertheless, the large majority of developing countries are not yet able to harness their creative capacities for development gains; for example, Africa's share in global trade of creative products remains marginal at less than 1% of world exports.

Cultural and Creative industries refer to a range of economic activities, which transform Cultural and Creative inputs into goods and services embodying both cultural and economic values. These sectors are largely dominated by SMEs that bring creativity, skills and talent into production, distribution and promotion of Cultural and Creative produce. The mapping uses the EU definition that includes Advertising, Architecture, Archives and libraries, Artistic crafts, Audio-visual (including film, radio, television, video games and multimedia), Heritage, Design, Festivals, Music, Performing arts, Publishing, Visual arts, Textiles/clothing, ICT[1] and Tourism.

What makes Cultural and Creative Industries so special is that they are based on an inexhaustible resource: creativity. CCI sectors are largely dominated by free lances, micro entreprises and SMEs bringing creativity, skills and talent into production, distribution and promotion of cultural and creative contents. Yet, the existence of individual creativity is not enough: innovation tends to appear where the value of creativity is positively perceived and sustained, where the creative talents can find the necessary support to turn their ideas into products and services. It is through the valorisation of creativity into value chains that some regions succeed, while others lag behind despite copious creativity and a rich culture.

The CCI sectors or segments can be classified into 4 main business typologies according to their strategic challenges:



Cultural and Creative Industries are in a strategic position to promote smart, sustainable and inclusive growth. Still, despite their considerable potential, CCI remain sometimes undervalued and unrecognized. Some of the challenges that CCI are facing at the regional level are:

- Lack of information on CCI industries
- Lack of valorization of the local strengths and unique specifities of the more "traditional" sectors - such as the design-based industries - in comparison with more industrialized, technological or "appealing" sectors, either inside or outside CCI
- Lack of support policies and other regulatory and legislative hurdles, such as intellectual property rights, tax regime, export procedures, mobility issues, etc.
- Limitations in terms of the companies' capability to access start-up capital and financing also because of a limited understanding of the CCI potential
- Necessity to adopt digital technologies at company level and expand distribution channels
- Professionalization of SMEs: support to enable companies to properly represent their interests (at various levels, from technicity to management and comercialisation).

1 ICT has not been considered a business per se, but a part of the value chain of the rest of the businesses (as ICT is a necessary step or a tool for the right functioning of a number of value chains). Tourism has been considered as a final market.

5. Overview of identified clusters

The mapping of Cultural and Creative Industries' clusters and economic realities has been based both on the analysis of qualitative information as well as on quantitative and qualitative reports, statistics and documents published or made available by the countries' institutions and public authorities.

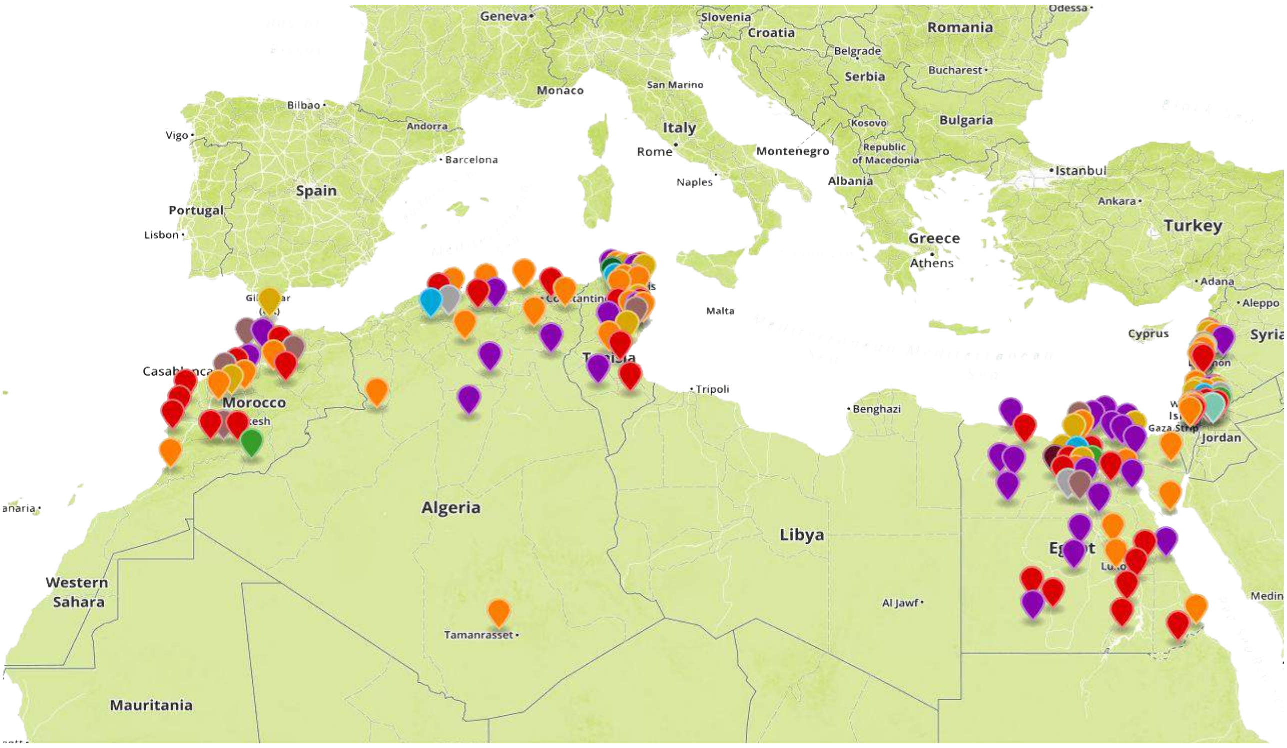
The mapping has identified a total of 144 clusters in 7 countries: Morocco (21), Algeria (17), Tunisia (25), Egypt (47), Palestine (9), Lebanon (14) and Jordan (11), with a majority identified within design-based industries (e.g. clothing, jewelry, shoes, furniture, decoration and crafts, home textile, etc.).

In parallel, a list of "other" realities has been underlined, which describe economic concentrations that lack at least 1 of the 5 pre-defined criteria to be considered as a cluster. In general, the criteria lacking for most of the "other" realities identified is the critical mass (the concentrations were too small), and in some cases the export capability (the products faced too big constraints in terms of exports). The number of "other" realities has no pretension of exhaustiveness as they were identified during the mapping without actually searching for them. Some of the concentrations labelised today as "other" realities might become clusters in the very near future, as the growth rate for some realities is very strong.

Most of the clusters identified are in the design-based industries: clothing, jewelry, shoes, furniture, carpets, home textiles, and decoration and crafts. Actually, the countries of the Southern Mediterranean are particularly rich in terms of habitat and fashion industries, and the analysis has brought to light both already well-known concentrations as well as more discrete, less-known economic realities that constitute an important economic tissue at national and sometimes international level. It is worth mentioning that, in general, all the clusters identified convey very strong elements of heritage (for example local know-how, local specific designs, local elements of culture and heritage factors, etc.) that, in addition to their cultural significance, can become one of the cluster's main economic strengths at economic level, as this differentiates the cluster's products from other production.

There are also some relevant clusters that have lost the link to their heritage as they work more and more as subcontractors for western companies. Nevertheless, even in that case, these clusters have an economic role to play as they usually master the technical specifities of manufacturing and production and, with time, can develop more sustainable business options; for instance, exit the subcontracting market and create their own brands.

Other segments of Cultural and Creative Industries, such as Cultural Transmedia, Live Culture, and Professional Creative Services, are often very strong sectors in the countries of the Southern Mediterranean, yet the industry is not concentrated in a single city or placement but spread all over the country. They also often lack a complete, comprehensive value chain (there is a strong presence of some steps but a full absence of the rest of the value chain) or, more often, they do not have the necessary critical mass to be considered a cluster. Some representative economic concrentrations identified outside the design-based industries include advertising in Algiers, architecture in Amman, publishing in Cairo, cinema in Ouarzazate and scenic arts in Tunisia.



Textile / Garments Shoes / Jewelry

Stone & marble / Building materials

Audiovisual

Advertising

Furniture / Lighting

Architecture

Film

Performing Arts

Home textiles / Carpets

Decoration / Art de table

Publishing

Music

This map is available at:
https://a.tiles.mapbox.com/v4/clusterdevelopment.j1e2jmdl/page.html?access_token=pk.eyJ1IjoiY2x1c3RlcmRldmVsb3BtZW50Iiwi YSI6IklDbmQyRFkifQgCZpvW9wNTBRZigwJwzrYw#13/30.0718/31.2173

ALGERIA

1. Cultural and Creative Industries in Algeria

In Algeria, there is a long and very rich tradition of handicrafts, albeit very fragmented and highly informal. Design-based industry is characterized by a weak industrial production; at the same time, professional creative services and cultural transmedia are relatively young, and are still dominated by state actors. For all three sectors, a strong international concurrence has led to low production level and limited private sector participation. Few formal collaborative actions exist and cluster initiatives have so far not been formalized even though there is a limited network of support and auxiliary agents, albeit with limited personnel capacities, and limited outreach.

2. Existing cluster framework and cluster programmes in Algeria

Algeria has yet to develop a national cluster policy, but it has been gathering some experiences in cluster development: in 2007-2008, the former Ministry of SME and Handicrafts (now Ministry of Tourism and Handicrafts) has initiated and animated a total of 21 Systèmes de Production Locale or SPL (Local Productive Systems) to promote the local development of strategic economic segments. Currently, most have a more administrative character while only few have remained active. Since 2010-2011, and based on this experience, the Ministry of Industry and Mines and the German agency for international cooperation (GIZ) have promoted pilot clusters in ship building/reparation, food industries and transport/logistics. The Ministry, together with the French car manufacturer Renault, has also encouraged other potential automotive clusters in Constantine, Rouiba and Ouled Tlélat. DIVECO, the Programme d'Appui à la Diversification de l'Economie en Algérie (programme for economic diversification in Algeria), funded by the European Union also provides support to agro-processing clusters. There are few "spontaneous" clusters that have not yet been formalized, such as the food industry cluster in Taharacht and the white goods cluster in Bordj Bou Arredj.

In terms of Cultural and Creative industries, none of the identified potential clusters has been formalized; 15 out of 17 are handicraft clusters formed mostly by artisans and a limited number of SMEs. The 2 exceptions are the advertising and the publishing sectors, both in Algiers. GIZ is developing a cluster initiative for the production of carpets in Ghardaïa but it has not yet led to the formalization of the cluster.

3. Potential clusters in Cultural and Creative Industries in Algeria

Potential CCI clusters are to be found in the handicraft sector, which has been suffering from a discontinuation of state engagement especially related to raw material sourcing and commercialization. Despite this loss of support and despite growing concurrence by more competitive, imported products, several poles of handicraft have been able to persist in carpet, jewellery, ceramics/ pottery and traditional clothing. Geographically, a high density of artisans can be found in the central regions of Algiers and Kabylia as well as in the region of Ghardaïa. The identified clusters are:

- Advertising in Algiers
- Berber jewellery in Tizi Ouzou
- Brassworks in Constantine
- Carpets and other home textiles in Laghouat
- Carpets in Ghardaïa
- Carpets in Khenchela
- Carpets in Tizi Ouzou
- Gold and silver Jewelry in Batna
- High-end ceramics in Algiers
- Leather accessories in Jijel
- Pottery in Kabylia
- Publishing in Algiers
- Traditional clothing (camel hair) in Djelfa
- Traditional textile in Algiers
- Traditional textile in Constantine
- Traditional textile in Tlemcen/Oran
- Tuareg jewellery in the "Grand Sud".

4. Other economic realities in Cultural and Creative Industries in Algeria

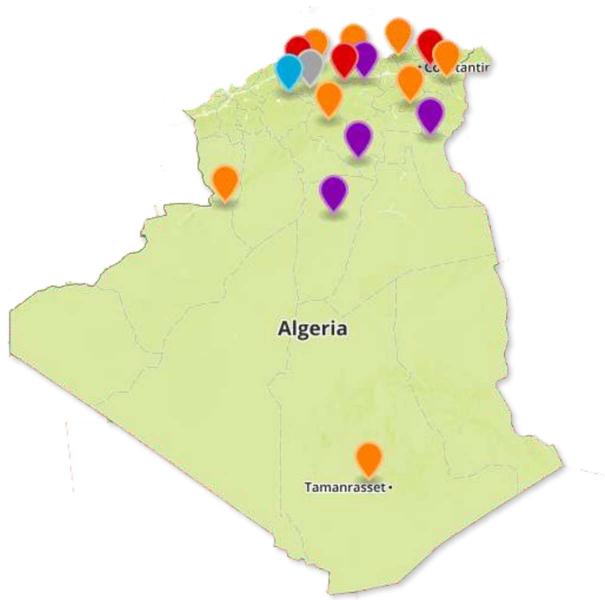
Other economic realities have also been identified:

- Fine arts in Algiers: a concentration of fine arts exists in Algiers but it lacks important parts of the value chain as, for example, very few art galleries and agents exist
- Heritage management in Algiers: associations that are preserving the heritage exist, especially around the old city centre of the "Casbah", but the concentration of enterprises is too low
- Heritage management in Oran: the historic neighbourhood of Sidi El Houari is also trying to develop with the help of AECID (Spanish bilateral development cooperation) but lacks the volume of enterprises
- Music in Algiers: there is a concentration of artists but a lack of studios, private agents and event agencies. Activities are generally organized by state actors with little private sector participation
- Architecture in Algiers: Algiers is home to many architects but there is no cluster as many steps in the value chain are missing, including training and support institutions
- Concentration of traditional handicrafts in the Kabylia region: the areas around Tizi Ouzou, Bejaia, and Jijel are home to concentrations in the jewellery, pottery, carpets and leather sectors; however, a lack of critical mass and limited coverage of the value chain have prevented wood works and basketry from qualifying as clusters.

Other realities were detected but they lack the critical mass to be considered as clusters:

- Traditional pottery production in Tlemcen
- Traditional pottery production in Adrar (black pottery)
- Leather production in the Medea region
- Pottery production in the Jijel region
- Basketry production in the oasis region of Biskra/Ouargla/El Oued/Touggourt.

5. Map of the clusters in Algeria



Carpets and home textiles clusters
- Carpets in Ghardaïa region
- Carpets and other home textiles in Eastern Region (Khenchela and Oum El Bouaghi)
- Carpets in Tizi Ouzou Region
- Carpets and other home textiles in Laghouat Region

Decoration clusters
- High-end ceramics in Algiers
- Brassworks in Constantine
- Pottery in Tizi Ouzou Region

Jewellery clusters
- Berber jewellery in Tizi Ouzou region
- Gold and silver Jewelry in Batna region
- Tuareg jewellery in the Grand Sud Region (Tamanrasset)

Textile and clothing clusters
- Leather accessories in Jijel region
- Traditional clothing in Algiers
- Traditional clothing in Constantine
- Traditional clothing in Tlemcen/Oran region
- Traditional clothing of camel hair in Djelfa region

Advertising clusters
- Advertising in Algiers

Publishing clusters
- Publishing in Algiers

EGYPT

1. Cultural and Creative Industries in Egypt

Many civilizations have contributed to Egypt's cultural wealth; the country is often cited as a cultural and creative reference. This has contributed to a strong expertise on the creation and production of a certain type of goods as well as to the development of other cultural expressions, such as music, books, movies or performing arts. In Egypt, there are no formalized CCI clusters but there are support and auxiliary agents that foster the development of those companies. Most Cultural and Creative Industries are fully consolidated, especially in the design-based Industries and in Cultural Transmedia, which are mainly located in Alexandria and Cairo. Also, the most advanced CCI segments are industrialized, and generally more internationalized with leading companies that have world-wide recognition. Still, informal companies represent a high percentage of many CCI clusters, especially for handicraft, which makes it more difficult to structure and support these concentrations all over the territory. In addition, there are many smaller economic realities that have a long history and that are spread in villages around the country, including carpets, pottery or embroidery. "Young" sectors (such as videogames) are emerging but they have yet to attain a critical mass to be considered as clusters.

2. Existing cluster framework and cluster programmes in Egypt

Egypt doesn't currently have a national cluster policy for CCI. There are however organizations, such as the Industrial Modernisation Center (IMC), which actively support the development of CCI in Egypt. IMC has provided assistance to develop industrial clusters with the Chambers of Commerce and the Export Councils. IMC also provided support to the development of business opportunities in the handicrafts. The Egyptian Export Council of Handicrafts is a recently-founded entity that supports artisans. National stakeholders are working together to counter the declining participation in the handicraft sector, and to develop products that compete on quality and not just on price. Another trend is the linkage by support organizations of designers with producers to foster innovation and the development of new products.

3. Potential clusters in Cultural and Creative Industries in Egypt

Among the 47 CCI clusters identified, almost half (21 clusters) are based on an industrial or service approach, i.e. there is a manufacturing process, characterized by a significant or intensive use of machinery and equipment, identical products and large series of production. The rest (26 clusters) are based on a more artisanal approach, i.e. hand-made products that are never identical as traditional techniques are used to produce short series. The clusters are:

- Advertising in Cairo
- Arts de la table and pottery in Tunis (Faiyum)
- Artistic Glassware in Cairo
- Basketry decoration and arts de table in Al Wahat
- Basketry decoration and arts de table in Fayoum
- Basketry decoration and arts de table in Shalateen
- Carpets (flat-woven carpet "Kilim") in Al Wahat
- Carpets (Flat-woven carpet "Kilim") in Fowa
- Carpets (Flat-woven carpet "Kilim") in Siwa
- Carpets (Traditional Carpets) in Giza
- Carpets (Traditional Carpets) in Minya
- Carpets (Traditional Carpets) in Saqiet Abou Shaara
- Carpets in 10th Ramadan City
- Decorative "Noubian Art" in Nouba
- Decorative Alabaster in Cairo Region
- Decorative Marble and Alabaster in Gorna
- Decorative Pottery in Al Wahat
- Decorative Pottery in Garagos
- Film in Cairo
- Furniture in Alexandria
- Furniture in Cairo
- Furniture in Damietta
- Garments and Home Textile in Bourj Al Arab
- Garments and Home Textile in El Obour City
- Garments and Home Textile in El Sadate City

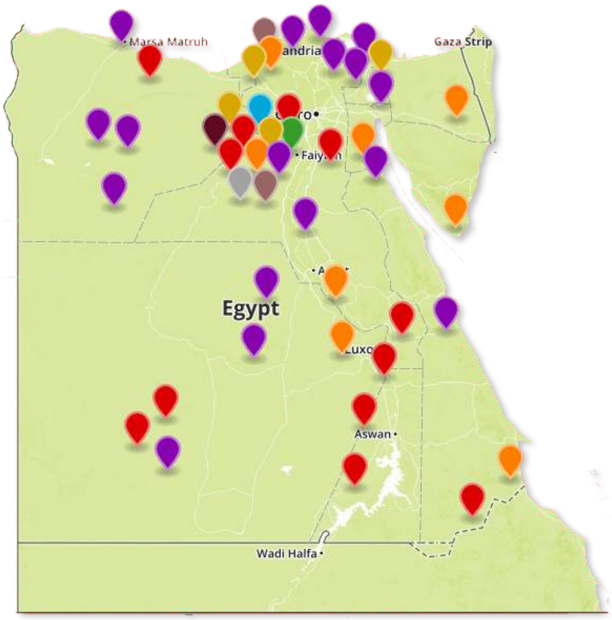
- Garments and Home Textile in Shubra Al Khaymah
- Garments and Home Textile in 6th October City
- Garments and Home Textile in El-Mahalla El-Kubra
- Garments Decorative Embroidery designs in North Sinai
- Garments Decorative Embroidery designs in South Sinai
- Garments Decorative Tally and Embroidery designs in Shandawil
- Garments Traditional Scarves in Naqada
- Habitat Design in Cairo
- Hand-made Leather goods in Shalateen
- Home Textiles Applique Embroidery Designs "khayameya" in Cairo
- Home Textiles Bed Trows in Akhmim
- Home textiles blankets and Embroidery Designs in Siwa
- Home Textiles crochet goods in Quseir
- Jewelry in Cairo
- Leather shoes and fashion accessories in 10th Ramadan City (Cairo Region)
- Leather shoes and fashion accessories in Alexandria
- Lighting in Cairo
- Marble and Granite in Cairo (Sha'a El Te'Aban)
- Marble, Granite and mosaics in Alexandria
- Music in Cairo
- Publishing in Cairo
- Traditional Wood hand-carving products for home in Hegaza.

4. Other economic realities in Cultural and Creative Industries in Egypt

There are a number of other economic concentrations that do not fulfil all required criteria to be considered as clusters; they are:

- Architects: more than 100,000 architects currently work in Egypt, with 50 universities and 6,000 new graduates every year. However, they are not geographically concentrated
- Heritage Management: In spite of the existence of many heritage sites in Egypt, there are only few companies in the value chain offering related services; they are also spread around the country
- Videogames in Cairo: the videogames industry is an emerging sector but there is not enough critical mass to form a cluster.
- Ceramic manufacturing: 38 companies produce ceramic tiles with 3,000 workers; they are however spread over the territory. Thus, there is neither geographical concentration nor a critical mass of companies
- Candles: There are 15 candle and wax accessories manufacturers in Egypt but there is a lack of critical mass and concentration in a specific location
- Performing Arts in Cairo and in Alexandria: Several companies of dance and theatre have been identified but there is a low critical mass to consider them as a cluster
- Visual Arts in Giza: in Haram, a district of Giza, there is a concentration of visual artists and professionals but currently it is still a very local reality
- Hand-made leather products in Cairo and in Fayoum: despite the relocation of many companies to Badr City (for tanneries) or 10th Ramadan City (for leather products), there are still some tanneries and leather workshops in Old Cairo but they are mainly oriented to a local demand
- Furniture industry in different locations: there are three main clusters in Alexandria, Cairo and Damietta with other concentrations (for example in El Menya, Gharbeya and Sohag) spread around the country; these do not have enough critical mass to be considered a cluster. Others agglomerations such as Assuit, Daqahleya or Sharkeya could be potential clusters but focus on the local market
- Garments and home textiles in Alexandria and Cairo: in Cairo, there is a concentration of companies but not enough critical mass to be considered as a cluster. In Alexandria, there is also a concentration of the textile industry but there is not enough critical mass
- Marble in Suez and Ismailia: as quarries are spread all over the country, there are small agglomerations of companies focused on marble processing, for example in Suez and Ismailia, but in both cases there is not enough critical mass to consider them as clusters
- Cotton-ginning in Tanta: In Tanta, there is an agglomeration of companies specialized in cotton ginning (separation of cotton fibres from their seeds) that is part of a value chain but does not qualify as a cluster.

5. Map of the clusters in Egypt



Leather and shoes clusters
- Leather shoes and fashion accessories in 10th RamadanCity
- Leather shoes and fashion accessories in Alexandria
- Hand-made Leather goods in Shalateen

Jewelry clusters
- Jewelry in Cairo

Textile and clothing clusters
- Garments Decorative Embroidery designs in North Sinai
- Garments Decorative Embroidery designs in South Sinai
- Garments Decorative Tally and Embroidery designs in Shandawil
- Garments Traditional Scarves in Naqada

Furniture clusters
- Furniture in Damietta
- Furniture in Cairo
- Furniture in Alexandria

Lighting clusters
- Lighting in Cairo

Home Textile clusters
- Garments and Home Textile in El-Mahalla El-Kubra
- Garments and Home Textile in 6th October City
- Garments and Home Textile in El Sadate City
- Garments and Home Textile in El Obour City
- Garments and Home Textile in Shubra Al Khaymah
- Garments and Home Textile in Bourj Al Arab
- Home Textiles Applique Embroidery Designs "khayameya" in Cairo
- Home Textiles Bed Trows in Akhmim
- Home textiles blankets and Embroidery Designs in Siwa
- Home Textiles crochet goods in Quseir

Carpets clusters
- Carpets (Flat-woven carpet "Kilim") in Siwa
- Carpets (flat-woven carpet "Kilim") in Al Wahat
- Carpets (Flat-woven carpet "Kilim") in Fowa
- Carpets (Traditional Carpets) in Saqiet Abou Shaara
- Carpets (Traditional Carpets) in Giza
- Carpets (Traditional Carpets) in Minya
- Carpets in 10th Ramadan City

Building materials (& decoration) clusters
- Marble and Granite in Cairo (Sha'a El Te'Aban)
- Marble, Granite, and mosaics in Alexandria

Decoration clusters
- Art Table & Pottery in Tunis (Faiyum)
- Artistic Glassware in Cairo
- Basketry decoration and art de table in Al Wahat
- Basketry decoration and art de table in Shalateen
- Basketry decoration and art de table in Fayoum
- Decorative Alabaster in Cairo Region
- Decorative Marble and Alabaster in Gorna
- Decorative "Noubian Art" in Nouba
- Decorative Pottery in Al Wahat
- Decorative Pottery in Garagos
- Traditional Wood hand-carving products for home in Hegaza

Design Clusters
- Habitat Design in Cairo

Publishing clusters
- Publishing in Cairo

Film clusters
- Film production in Cairo

Music clusters
- Music in Cairo

Advertising clusters
- Advertising in Cairo

JORDAN

1. Cultural and Creative Industries in Jordan

While the overall climate in Jordan is very conducive to the development of Cultural and Creative Industries, their average weight is still small: some fields are well developed and benefit from an international reputation (e.g. architecture or publishing), other segments (such as visual arts, performing arts, audiovisual, music, etc.) are less dynamic and have a lower critical mass. They also lack the presence of a complete value chain, a supportive network of services, etc. Furthermore, the existing traditional skills and know-how have largely disappeared and, for most parts, today's handicraft is the result of revitalization efforts for certain objects, patterns, or skills. Throughout Jordan, artisans and cooperatives tend to produce the same products, with standardized/similar designs thus lacking a story or a unique association to a region or other elements of cultural heritage or diversity. Over 25,000 micro businesses, 98% of which are informal, produce all the Jordanian goods with a focus on textiles (including embroidery and weaving), ceramics and pottery, mosaic and other products such as jewelry, olive wood products, etc.

2. Existing cluster framework and cluster programmes in Jordan

Currently, there is not national cluster policy; several initiatives were started, including the most recent one by the Ministry of Planning and International Cooperation, but no actual implementation has taken place. For example, JEDCO is elaborating, in collaboration with the Chamber of Commerce and Industry and the Royal Geographic Centre, a mapping of the whole economy. With regards to Cultural and Creative Industries, the Jordan Handicrafts Traders Association and the Jordan Handicrafts Producers Association work to establish horizontal linkages within the sector. Also, larger institutionalized NGOs, usually under the patronage of the royal Hashemite family, play a major role in developing and reviving crafts.

3. Potential clusters in Cultural and Creative Industries in Jordan

The lack of geographical specialization of the handicraft production, together with an early state of development for most CCI industries, resulted in the identification of mostly Amman-based clusters. Economic realities outside the capital are much smaller, and do not fulfil the 5 cluster criteria. The clusters are:

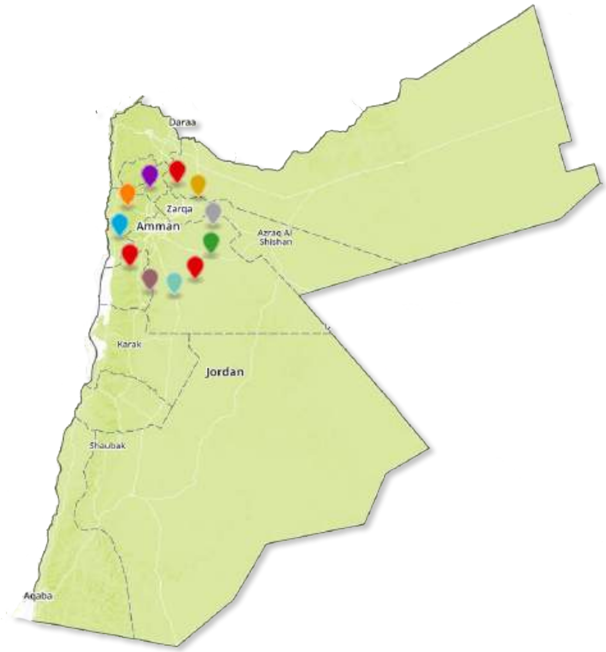
- Advertising in Amman
- Architecture in Amman
- Clothing in Amman/Irbid
- Decorative pottery and ceramics in Amman
- Filming in Amman
- Furniture in Amman
- Habitat High End designers in Amman
- Mosaic and crafts in Madaba/Amman
- Publishing in Amman
- Stones in Amman
- Weaving & Embroidery in Amman.

4. Other economic realities in Cultural and Creative Industries in Jordan

These economic concentrations do not fulfil the 5 cluster criteria but are potentially important for further development assistance:

- Crafts in Jerash, Aqaba and Petra: Most cities are developing crafts but are too small and not sufficiently specialised to work as clusters
- Performing arts and music: the Jordanian performing arts do not have a sufficient critical mass to be considered as a cluster
- Videogames: this is a young and promising sector with strong growth potential but currently without the critical mass to work as a cluster
- Online media: this too is a young and promising sector with strong growth potential but currently without the critical mass to work as a cluster
- Digital arts: this is another young and promising sector with strong growth potential but currently without the critical mass to work as a cluster
- Shoes and Leather: there are only few SMEs operating in the sector; they do not have the critical mass to operate as a cluster
- Gold and jewelry: there is neither a geographical concentration nor a sufficient amount of companies to operate as a cluster.

5. Map of the clusters in Jordan



Stone & marble clusters
- Stones in Amman

Architecture clusters
- Architecture in Amman

Film clusters
- Filming in Amman

Advertising clusters
- Advertising in Amman

Publishing clusters
- Publishing in Amman

Textile & clothing clusters
- Clothing in Amman/Irbid

Furniture clusters
- Furniture in Amman

Home textiles
- Weaving & Embroidery in Amman

Decoration clusters
- Decorative pottery & ceramics in Amman
- Habitat High End designers in Amman
- Mosaic and crafts in Madaba/Amman

LEBANON

1. Cultural and Creative Industries in Lebanon

Already, Cultural and Creative industries contribute almost 5% to the country's GDP and 4.5% to national employment, with average annual growth rate of over 8%. These numbers become even more significant when taking into account the general absence of public support and of a clear development strategy. In fact, the strength and dynamism of Cultural and Creative industries in Lebanon are rooted in multifaceted cultural influences, deep-rooted private initiative and the country's privileged geographical location. Beirut, for instance, has been regaining/consolidating its role as a regional hub in design, advertising, architecture, fashion, gastronomy and publishing - even if the related value chains are often not completely covered and if some important linkages (such as collaborative work and initiatives, investments, etc.) are still weak. The national industrial production base is also limited, even though efforts to revive local production have been recorded. Still, the current flourishing of Beirut's design ecosystem sharply contrasts with the mixed fortune endured in the last decades by most of Lebanon's traditional crafts; several craft hubs, agglomerating hundreds of producers in different Lebanese regions, have lost their critical mass or are no longer active. There is however a growing general consciousness in favour of their revitalization, with rallying voices of academia, the private sector, development organizations, NGOs and civil society. And, while technical know-how is commonly recognized to be still available locally, marketing is identified as the crafts' main hurdle, which calls for the upgrading of designs (through stronger and more regular linkages between artisans and design professionals) and the enhancement of business skills.

2. Existing cluster framework and cluster programmes in Lebanon

Historically, the focus of the country's economic efforts has been oriented towards sectorial programmes, and is now shifting towards the establishment of industrial zones in remote areas, with the objective of regrouping enterprises and other agents in common locations, offering facilities and fostering economies of scale as well as the development of better infrastructures. The Investment Development Authority of Lebanon (IDAL) has been providing incentives to encourage Lebanese entrepreneurs to invest in remote areas and generate employment. In addition, IDAL also occasionally subsidizes the participation of Lebanese firms from certain sectors in international trade fairs. However, no specific public policy has been set up yet to support the development of cluster initiatives on a national basis. Lebanon is also characterized by the strong role played by its private sector, through enterprises and through their representations. The Lebanese private sector has already expressed its interest in the cluster concept, even though this collective culture is relatively new: in 2010, the Lebanon Creative Cluster, funded by USAID, was created to focus on advancing creative industries in Lebanon; unfortunately, the initiative did not succeed. In 2011, the Beirut Creative Cluster (BCC), with the financial support of the European Union, was incepted to gather enterprises positioned on several different segments of ICT. The existence of previous experiences is a very positive sign for the progressive development of more projects to facilitate the emergence of cluster initiatives. Today, the implication of ALI (Association of Lebanese Industrialists in a program of support for the furniture cluster in Tripoli is another element that reinforce the attractiveness of this concept in order to facilitate the development and to foster the competitiveness of traditional and innovative sectors.

3. Potential clusters in Cultural and Creative Industries in Lebanon

The mapping exercise allowed for the identification of the following clusters:

- Audiovisual and multimedia in Beirut (BCC)
- Contemporary art in Beirut
- Copper crafts in Tripoli/Qalamoun
- Cutlery in Jezzine
- Furniture in Mkalles
- Furniture in Tripoli
- Haute couture in Beirut
- High-end habitat design in Beirut
- Home textiles in El-Fekha/Aarsal
- Jewellery in Bourj Hammoud/Beirut
- Leather in Bourj Hammoud
- Marble and granite in Wata Mousseitbeh (Beirut)
- Publishing in Beirut
- Traditional clothing in Saida

4. Other economic realities in Cultural and Creative Industries in Lebanon

Several former clusters that have considerably lost their critical mass or are no longer active:

- Basketry/straw weaving in Baissour: the know-how was introduced through a development initiative but the cluster remained inactive
- Basketry/straw weaving in Kweshra: the know-how is available but there is at present no production due to the lack of a market
- Basketry/straw weaving in the Beqaa Valley: former cluster, which is no longer active
- Copper crafts in Saida: only one or two workshops remaining
- Furniture in Saida: only few workshops remaining
- Glass blowing in Sarafand: only one workshop remaining
- Leather production in Mashghara: the sector is deactivated
- Loom weaving in Zouk Mikaël: only 12 individual workshops remain for the production of clothing and home textiles
- Pottery in Rachaiya el Foukhar: the Jihad Esber's workshop is the only one left in the town
- Silk weaving in the Chouf: former cluster, which is no longer active

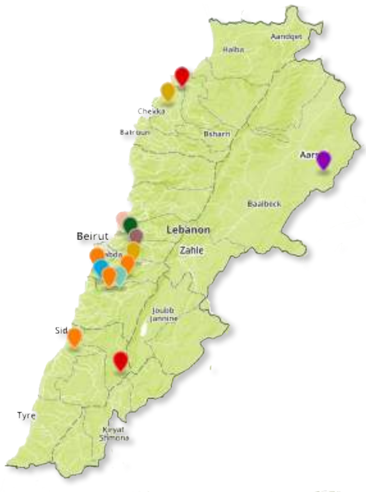
Former clusters targeted by present/potential revitalization attempts (development initiatives):

- Revival of local crafts production in Byblos(for example glass blowing)
- Strengthening needlework handicrafts and jewellery workshops in Anjar

Flourishing sectors (geographical concentrations without critical mass or sufficient value chain coverage):

- In addition to the identified/mapped marble and granite cluster in Wata Mousseitbeh (Beirut), there are other geographical concentrations of manufacturers of decorative building materials in Lebanon, for example in Zekreet (Greater Beirut) or in Jezzine (South). However, these are by far not as renowned and consolidated, and their value chain coverage is not as complete as the Wata Mousseitbeh cluster
- Mentioned in some specialized reports as a promising sector, the Lebanese cinema, which is concentrated in Beirut, is more characterized by an independent wave of production and a low annual number of films produced in Lebanon

5. Map of the clusters in Lebanon



Textile and clothing clusters
- "Haute couture" in Beirut / Bourj Hammoud
- Leather in Bourj Hammoud
- Traditional clothing in Saida

Stone and marble / Building materials
- Marble and granite in Wata Mousseitbeh / Beirut

Publishing clusters
- Publishing in Beirut

Audiovisual clusters
- Audio-visual and multimedia in Beirut

Performing arts / Scenic arts clusters
- Contemporary art in Beirut

Architecture and design clusters
- High-end habitat design in Beirut

Carpets and home textiles clusters
- Home textiles in El-Fekha/Aarsal

Decoration clusters
- Copper craft in Tripoli/Qalamoun
- Cutlery in Jezzine

Furniture clusters
- Furniture in Mkalles / Beirut
- Furniture in Tripoli

Jewellery clusters
- Jewellery in Bourj Hammoud / Beirut

MOROCCO

1. Cultural and Creative Industries in Morocco

The government's culture policy is to facilitate access to culture for the population and to sustain artistic creation, with the will to develop and reinforce the teaching of arts and culture as well as the artistic creation. Cultural and Creative Industries are often represented by leading sectors such as textiles, leather and handicrafts. They benefit from strong private sector support that allowed the country to become an interesting sourcing platform for textile and leather production; currently, companies need to regroup and become more competitive. Handicrafts in Morocco benefit from a very rich cultural background and century-old traditions; the sector remains largely dominated by mono-artisans and the informal economy. Furthermore, the cluster diversity indicates that Morocco has the potential to improve its presence on national and international markets despite facing important challenges, such as a limited export capacity, the necessity to integrate informal workers, etc. In 2007, the Ministry of Handicrafts and Social Economy established the "Vision 2015", a strategic development programme to develop the handicraft sector. Deriving from this vision, the Ministry developed the Regional Handicrafts Development Plans or PDRAs to support artisans and SMEs and artisans. At the operational level, the Ministry is active in each region or city with the Handicrafts Regional Delegation (or DRAs) and with Chambers of Handicrafts. Concurrently, the Ministry is implementing a National Label for handicraft to preserve values and the professional environment.

2. Existing cluster framework and cluster programmes in Morocco

Historically, the first step towards a cluster-like policy was based on the concept of "Système Productif Local" (SPL), which mainly on industrial sectors. Thereafter, the government designed what would progressively become the national cluster policy: in 2006, the "Plan Emergence" gave a first strong orientation for the most important industrial sectors - such as automotive and aeronautics - and their respective industrial platforms. In 2009, the government implemented the "Initiative Maroc Innovation" strategy to strengthen cooperation between public research entities and the industry, implement the Moroccan offer for innovating products and services, and promote financial mechanisms to strengthen innovation. The initiative produced 3 pilot projects dedicated to ICT, microelectronics, electronics and mechatronics. In 2010, a process was set up in order to identify potential cluster projects in accordance with national development strategies, develop a roadmap for cluster development based on best practices at the international level (benchmark), and develop specifications for cluster selection (labeling). The process is led by the Ministry of Industry, Trade, Investment and the Digital Economy. Until now, 9 clusters were selected and integrated into the national cluster policy programme.

3. Potential clusters in Cultural and Creative Industries in Morocco

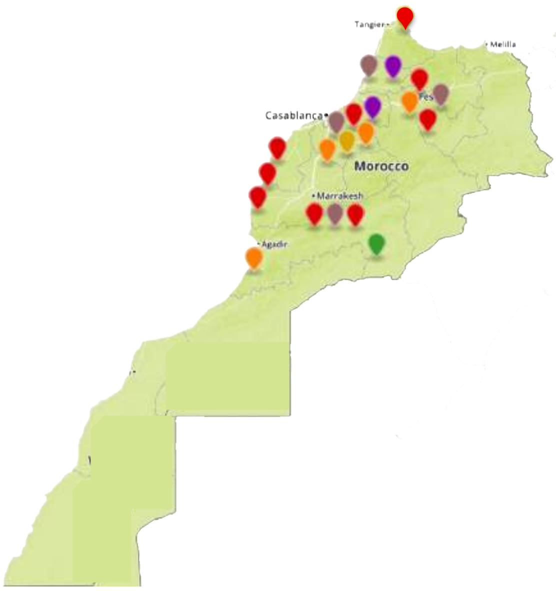
The cluster realities identified relate to handicrafts (15 clusters), textile and leather (4 clusters), construction (2 clusters) and culture (1 cluster); they are:

- Carpets in Rabat
- Ceramic building material in Casablanca
- Ceramic and pottery decoration in Salé
- Cinema in Ouarzazate
- Copperware in Fes
- Copperware in Marrakech
- Decoration/furniture in Fes
- Decoration/furniture in Marrakech
- Decoration in Casablanca/Kénitra
- Decoration in Tétouan/Tanger
- Denim textile in Casablanca
- Furniture in Casablanca
- Home textile in Casablanca/Rabat
- Leather in Marrakech
- Marble in Kénitra-El Jadida
- Pottery in Safi
- Shoes and leather goods in Casablanca
- Shoes and leather goods in Fes
- Silver Jewelery in Tiznit
- Wood decoration (Marquetry) in Essaouira
- Zellige Ceramic in Fes.

4. Other economic realities in Cultural and Creative Industries in Morocco

- Publishing: production is in steady decline, there are no more than 20 editors and 4 to 5 distribution companies for 100 bookstores nationwide; the limited critical mass does not allow for a cluster dimension
- Audio-visual and Multimedia/Videogames: Maroc Numeric Cluster (MNC) is dedicated to the development of mobile solutions and services, which outside of the CCI scope. For fields with CCI, the growth potential is very interesting but the current lack of critical mass doesn't allow for a cluster qualification
- Music: while the Moroccan music scene is very lively, there is no complete value chain that would allow for the development of a cluster initiative
- Performing arts: no cluster reality has been identified as not all the value chain is covered and there is no geographical concentration
- Visual arts: No cluster reality has been identified in this segment as they did not fufill the 5 cluster criteria
- Heritage management: a new institution dedicated to national museums - the National Foundation for Museums - has been created but no cluster reality has been identified in this sector
- Advertising: advertising agencies are service providers that do not, at this stage, participating in a cluster reality
- Architecture: there are 3,500 to 4,000 architects but no formal cluster as architects tend to regroup for specific projects only
- Handicrafts: Other realities have also been detected but they lack critical mass, have a limited coverage of the value chain and focus on local demand; they include basketry in the Eastern and Rif region, ceramic and palm tree products in the Drâa Valley, pottery in Oued Laou, rural carpets in the Atlas region, and Sahara oasis products in Guelmin.

5. Map of the clusters in Morocco



Jewellery clusters
- Silver Jewelery in Tiznit

Clothing and accessories clusters
- Denim textile in Casablanca Region
- Leather in Marrakech
- Shoes & leather goods in Casablanca
- Shoes & Leather goods in Fès

Stone and marble / Building materials
- Ceramic building material in Casablanca Region
- Marble in Kénitra-El Jadida

Film clusters
- Cinema in Ouarzazate

Carpets and Home textiles clusters
- Carpets in Rabat Region
- Home textile in Casablanca-Rabat

Decoration clusters
- Ceramic decoration in Salé
- Copperware in Fès
- Copperware in Marrakech
- Decoration in Casablanca/Kénitra
- Decoration in Tétouan/Tanger
- Pottery in Safi
- Wood decoration (Marquetry) in Essaouira
- Zellige Ceramic in Fès

Decoration / furniture clusters
- Decoration / furniture in Fès
- Decoration / furniture in Marrakech

Furniture clusters
- Furniture in Casablanca

PALESTINE

1. Cultural and Creative Industries in Palestine

Despite government efforts to assign more importance to Cultural and Creative Industries, exogen factors have resulted in a decrease of support for sector. Overall, private companies in CCI mainly relate to design-based industries with only few operating in other CCI sectors, such as advertising or theatre. The large number of civil society actors, which have an active role in promoting Palestinian identity, cultural heritage and preservation of culture, has to be highlighted. Also, Cultural and Creative Industries in Palestine, as other industries in the country, have suffered from mobility restrictions and export limitations which affect the overall competitiveness of companies competing in CCI.

2. Existing cluster framework and cluster programmes in Palestine

There is currently no specific national cluster policy; however, the Ministry of Economy is participating in a cluster initiative from the Agence Francaise de développement (AFD), which seeks to develop 5 cluster initiatives. 3 out of 5 cluster initiatives relate to CCI and were identified during the mapping exercise (furniture in Salfit, leather and shoes in Hebron, and stone and marble in Betlehem).

3. Potential clusters in Cultural and Creative Industries in Palestine[2]

The main clusters belong to the habitat industries (stone and marble, and furniture), the decoration products (pottery and glass), textile and also religious gift products; they include:

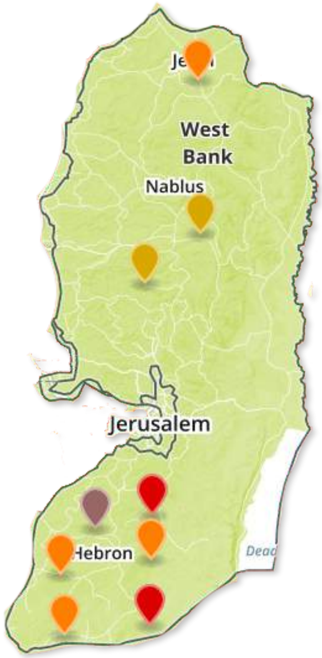
- Embroidery in Hebron
- Furniture in Nablus
- Furniture in Salfit
- Garments in the North of the West Bank
- Leather and Shoes in Hebron
- Pottery and Ceramic in Hebron
- Religious Gifts (Olive wood carving and Mother of Pearl Cluster) in Bethlehem, Beit Sahour, and Beit Jala
- Stone and Marble Cluster in Hebron and Bethlehem
- Textiles and Garments in Bethlehem.

4. Other economic realities in Cultural and Creative Industries in Palestine

- Glass in Hebron: despite its long tradition and its main concentration in Hebron, it lacks a critical mass to be considered as a cluster
- Architecture in Ramallah: Around 20 companies are based in Ramallah, and most of them are focused on the local demand, which does not correspond to the cluster criteria
- Advertising in Ramallah: the companies mainly address the local markets and lack the critical mass to be assessed as a cluster.

2 The mapping was only conducted in the West Bank as it was not possible to access the Gaza strip

5. Map of the clusters in Palestine



Decoration clusters

- Pottery in Hebron
- Religious Gifts in Betlehem - Beit Sahour

Furniture clusters

- Furniture in Nablus
- Furniture in Salfit

Shoes clusters

- Leather Shoes in Hebron

Stone and marble clusters

- Stone and Marble in Betlehem & Hebron

Textile and clothing clusters

- Embroidery
- Garments in the North of West Bank
- Textile and garments in Beit Jala & Betlehem

TUNISIA

1. Cultural and Creative Industries in Tunisia

During the last few years, cultural activities and events bloomed throughout Tunisia, with strong private sector participation and cooperation from external communities. Continuity thus sustainability is a key challenge, as these activities strongly rely, in the absence of private sponsorship, on national and international support. And, despite the promising potential of many initiatives, there is a strong sectoral fragmentation and a lack of critical mass, as well as the absence of a local supportive value chain or local productive agents; accordingly, most cultural industries (e.g. audiovisual, cinema, TV and radio, visual arts, etc.) do not qualify as clusters, also because of geographical dispersion. In creative industries, more clusters or concentrations of companies can be found, especially in handicrafts and design-based industries such as ceramics, pottery, carpets, embroidery, jewelry, furniture and decoration as well as a myriad of other artisanal produce. Tunisia excels in almost all artisanal fields, with more than 117,000 craftsmen registered with the Office National de l'Artisanat or ONA (National Handicraft Office), over 12,000 workshops or artisanal companies registered by the Agence de Promotion de l'Industrie et l'Innovation or API (Industry and Innovation Promotion Agency), and around 10,000 artisanal furniture companies registered by the Centre Technique de l'Industrie du Bois et de l'Ameublement or CETIBA (Technical Centre for the wood industry and furniture). The artisanal businesses benefit from a very rich heritage and are often concentrated in the same geographical areas.

2. Existing cluster framework and cluster programmes in Tunisia

A decade ago, Tunisia already encouraged the formation of export consortiums to foster the organization of groups of companies. In 2008, the Strategy Study Plan for the Horizon 2016 switched to the cluster model as a growth driver, with a first focus on textile and clothing in Monastir, the agro food sector In Bizerte, and ICT in Sfax. Also, a policy related to the Pôles de Compétitivité (competitiveness hubs) and to technopoles (technology parks) was enabled to focus on innovation for enhanced competitiveness. Currently, the Ministry of Industry is working on a new policy to support cluster development in collaboration with other ministries and with support from the EU-funded PASRI programme (Programme d'Appui au Système de Recherche et d'Innovation). This programme foresees the inception of 10 to 15 clusters, both in technological and more traditional sectors, also covering disadvantaged regions.

3. Potential clusters in Cultural and Creative Industries in Egypt

Mapping the CCI industries in Tunisia: the clusters identified
The following clusters have been identified in the field of the Cultural and Creative Industries in Tunisia:

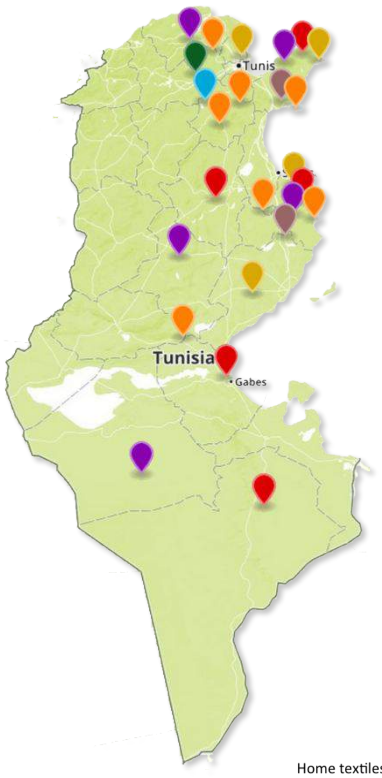
- Alfa made items in Kasserine
- Brides in Mahdia
- Carpets (tapis ras) in the South
- Carpets in Keirouan, Kasserine and Sidi Bouzid
- Ceramic building materials (and building decoration) in Nabeul
- Decoration and table accessories ("arts de la table") in Sfax
- Decorative ceramics in Nabeul
- Fashion clothing in Tunis
- Fashion denim clothing in the Sahel
- Furniture in Sousse and Monastir
- Furniture in Sfax
- Furniture in Tunis
- Furniture and ornaments in Kelibia
- Garden pottery in Moknine
- Home textiles in Bizerte
- Home textiles in Nabeul
- Home textiles in the Sahel
- Jewelry and goldsmithery in Sfax
- Jewelry and goldsmithery in Tunis
- Leather shoes in Tunis
- Leather shoes in Nabeul
- Mosaic in El Jam
- Palm made items in Gabes, Tozeur and Gebelli
- Publishing in Tunis
- Scenic Arts in Tunis.

4. Other economic realities in Cultural and Creative Industries in Tunisia

Some other economic realities have appeared during the mapping exercise:

- Haute couture in Tunis: there is a small concentration of fashion designers and creators in Tunis, which aims at developing a complete value chain (similarly to the Lebanese fashion cluster)
- Berbère carpets in Ain Draham: while there is a concentration of artisans who manufacture Berbère carpets, the value chain is incomplete, there is a lack of critical mass
- Rattan furniture in Air Draham: a "spontaneous" concentration of artisans working with rattan has appeared in Air Draham but there is no critical mass
- Silver jewellery in Mahdia: while there is no critical mass to be able to consider the silver jewelry as a cluster in its own right, it could integrate the "traditional brides cluster" together with clothing companies
- Jewelry and silversmithery in Djerba: the artisans only sell locally, without ambition to export
- White ceramics in Djerba: the potters of Djerba, essentially concentrated in Guellala, the artisans produce clay-made-pottery in small underground workshops
- Traditional pottery in Sejnane (Bizerte): the pottery of Sejnane testifies to an ancestral know-how on limestone, stoneware, and red and white clay. The 250 potters of Sejnane are women who subscribed to an economic interest group (GIE) but the value chain is incomplete
- Lingerie in Monastir: The region of Monastir, which is very well known for its textile production, presents a concentration of lingerie subcontractors. Some companies have already integrated design competencies but there is a lack of critical mass
- Lingerie in Sfax: There is a lack of total critical mass and since the value chain in incomplete, this economic reality doesn't reach the minimum criteria to be considered a cluster
- Leather items (as leather shoes, etc.) in other areas, such as Tataouine, in the south, and Djerba: numerous skills remain in various territories but are very dispersed
- "Briques plaines" in Tozeur (bricks to be used as building materials): the value chain is incomplete
- Cinema and Audio-visual in Sfax, Sousse and Tunis: there is quite a complete value chain for radio and TV services and over 650 professionals, 100 active production houses and some training centres for the film value chain; however, the production is too limited to fulfil a broader demand
- Heritage management: while there is an impressive archaeological heritage in the country, private companies were not able to grow and constitute a comprehensive value chain of heritage services. The situation is positively evolving and could present cluster opportunities in the near future
- Music: with more than 10,000 active musicians, 30 production houses and 70 micro enterprises, the music industry is dynamic and shows a good potential of development but some elements of the value chain remain weak (e.g. distribution) while public actors continue to play a predominant role in the promotion of the music industry
- Visual arts and design: while there are already between 300 and 400 artists in the visual arts segment, the critical mass is still too low to be considered as a cluster
- Digital creative industries and media (videogames, digital applications, etc.): there are leading companies in the area of Tunis-Nabeul but still no critical mass; however, indications are very good that this concentration could become a major player for the entire region.

5. Map of the clusters in Tunisia



Textile & clothing clusters
- Fashion clothing in Tunis
- Denim clothing in the Sahel
- Brides in Mahdia

Shoes clusters
- Leather shoes in Nabeul
- Leather shoes in Tunis

Jewelry clusters
- Jewelry and goldsmithery in Sfax
- Jewelry and goldsmithery in Tunis

Furniture clusters
- Furniture in Sfax
- Furniture in Sousse and Monastir
- Furniture in Tunis
- Traditional furniture and ornaments in Kelibia

Carpets clusters
- Carpets (tapis ras) in the South
- Carpets in Keirouan, Kasserine and Sidi Bouzid

Home textiles
- Home textiles in Bizerte
- Home textiles in Nabeul
- Home textiles in the Sahel

Decoration clusters
- Decoration and art de table in Sfax
- Decorative ceramics & art de table in Nabeul
- Alfa made decoration & habitat in Kasserine
- Garden pottery in Moknine
- Palm made decoration & habitat in Gabes, Tozeur, Gebelli

Building materials (& decoration)
- Ceramic building materials (& decoration) in Nabeul
- Mosaic in El Jam

Publishing clusters
- Publishing in Tunis

Performing arts clusters
- Scenic Arts in Tunis

ANNEX I

Main magnitudes of the clusters in Algeria

	# Companies	# Jobs	Turnover	Exports	Creative comp. advantage
Advertising in Algiers city	Approx. 20 consolidated advertising agencies. Approx. 2,500 to 3,000 total agents on the sector value chain in Alger	Minimum 5,000 (Source: Estimation from interviews).	Around USD 150 M (national level: USD 190 M)	Very limited (2-4 % max.)	Creative workforce with strong cultural and managerial connection to the local demand.
Berber jewellery in Tizi Ouzou region	Approx. 40-50 SMEs. 585 jewellers registered + about the same number of informal agents (Source: CAM Tizi Ouzou)	Jewellery production only: around 1.500 jobs.	Around USD 4 M (Source: Own estimation, based on interviews)	Few exports realised (<3-5%), high export capacity.	Hundreds-of-year old traditions, traditional Berber design and production style
Brass works in Constantine	140 (local Chamber of Arts and Crafts), approx. same number of informal artisans (Source: CAM Constantine)	Around 300-400 jobs. (Source: Estimation from interviews)	Estimated at USD 1,7M (Source: Estimation by the local CAM)	Few exports (<2-4%). Interesting potential for habitat.	Tradition of brass and copper forging stems from the Middle Ages, typical floral design, quality
Carpets and other home textiles in Laghouat region	10 ateliers / TPEs + 300 atéliers	800 (formal), 2,000 (informal)	Around USD 5,3 M	None	Traditional geometric design, natural colourings, reputed heritage
Carpets in Ghardaïa region	Approx. 10 SMEs + min. 50 ateliers / TPEs	Approx. 9,000 (est.; formal + informal) for all the value chain (Estimation: interviews)	USD 17 M. (Estimation)	None yet. Important potential (Estimation interviews)	Regional cultural heritage (families and tribes implication), large range of products
Carpets in Khenchela region / Eastern regions	Network of approx. 30-50 workshops (1-3 employees) with support of craftspeople (Source: Estimation from interviews)	Approx. 600 (Source: Estimation from interviews)	USD 1,4 M production (Source: Estimation, based on interviews)	Occasional yet good potential. Weak distribution capacity.	Special design with natural colourings, rooted in local family's culture, and history (rise of the Berber tribes).
Carpets in Tizi Ouzou region	Approx. 20 workshops (2-3 employees) plus craftsmen (87 registered artisans in the Tizi Ouzou region) + informal ateliers	Approx. 250 (Source: Estimation from interviews)	USD 1,4 M estimated carpets production	No exports, potential exists.	Traditional designs and production know-how rooted in families' traditions.
Gold and silver jewellery in Batna region	30 – 50 SMEs + high number of smaller workshops	900 (formal), >3000 informal	Around USD 11,5 M. (Estimation, CAM Batna)	<3%.	Traditional silver jewelry (Chaoui jewel), ancient design and symbolism.

High-end ceramics in Algiers region	100-150 companies. Max. 10-20 are SMEs with 6-20 employees (Source: AYADI + Estimation from interviews)	400 – 500 (Source: Estimation from interviews).	USD 1,25 M (source: AYADI estimation). Around USD 6 M. (estimation)	Few exports (<3-4%) yet high capacity	A very varied range of products. Traditional and modern styles and designs.
Leather accessories in Jijel region	120 registered ateliers+ around 350 informal	Min. 500 (est)	Around USD 5,8 M. (Estimation, CAM Jijel)	None	Flexibility of adaption of products with new designs and colours.
Pottery in Kabylia region	Approx. 40 workshops (2-5 persons) plus craftspeople with smaller ateliers (244 registered craftsmen). + informal ateliers (estimation interviews)	Approx. 500 (Source: Estimation from interviews)	Around USD 7 M	No exports, but international exhibitions.	Special design going back hundreds of years in history, including transmission of the Tifinagh alphabet.
Publishing in Algiers	Approx. 200 companies (15-20 consolidated ones)	Approx. 1,500	Approx. USD 13 M	< 2-3%	Limited with the exile of part of the Algerian Authors
Traditional clothing of camel hair on Djelfa region	20 SMEs	>1000 (formal)	About USD 5,7 M	< 5%	Special design, local embroideries and techniques
Traditional textile in Algiers region	10 consolidated SMEs + dense network of craftswomen	Approx. 1,200	n/a.	Very limited On Algerian Diaspora (<5%)	Specific Algiers style and capacity to integrate all Algerian styles
Traditional textile in Constantine	Around 10 leading dressmaker's ateliers. 980 artisans registered at the local Chamber of Arts + 1,000 – 1,500 non registered artisans	Minimum of 2,000 jobs. (Source: Estimation from interviews).	n/a.	Few exports (<5%, mainly France), Potential exists	Traditional designs, deeply rooted in Algerian culture, going back to ottoman times.
Traditional textile in Tlemcen/Oran region	Approx. 10 consolidated SME's + network of 800 craftspeople (Source: Estimation from interviews)	Approx. 7,000 formal and 10,000 informal jobs. (Source: CAM Tlemcen)	Around USD 5,8 M per year (source: CAM Tlemcen)	Very few exports Export potential	Special Tlemcen style wedding dress (UNESCO Intangible Cultural Heritage of Humanity).
Tuareg jewellery in the "Grand Sud" region	120 registered artisans in the Tamanrasset region. Number including informal ateliers up to 120-150 (Source: Estimation from interviews)	>500 direct jobs (difficult to estimate due to high percentage of informality). (Source: Estimation from interviews)	Around USD 300,000 (estimation Tamanrasset CAM) Estimate USD 3,4 M year	Limited export (<4-5%), via tourists and collecting agents ("ramasseurs").	Special design of jewellery going back several hundred years, integral part of Tuareg culture.

ANNEX 2

Main magnitudes of the clusters identified in Egypt

	# Companies	# Jobs	Turnover	Exports	Creative competitive adv.
Leather shoes & fashion accessories in 10th Ramadan City	~100 comp.	NA	NA	$187 M in 2013*	Creative production process
Leather shoes and fashion accessories in Alexandria	~50 comp	NA	NA	$187 M in 2013*	Creative production process
Hand-made Leather goods in Shalateen	NA	150	NA	NA	Hand made cultural inspiration
Jewelry in Cairo	6.000 workshop (29 comp.)	NA	20 Billion LE (in 2010)	$ 924 M (2013)	Own creative designs
Garments Decorative Embroidery designs in North Sinai	39 families	~100 **	NA	NA	Creative designs (colours, motifs)
Garments Decorative Embroidery designs in South Sinai	NA	~100 **	NA	NA	Creative designs (colours, motifs)
Garments Decorative Tally-Embroidery design Shandawil	20 workshops	NA	NA	NA	Creative design with silver
Garments Traditional Scarves in Naqada	n/d	300-500	n/d	n/d	Artisans creative designs
Furniture in Damietta	36.000 (9.000 comp.)	~100.000	934 M $ (2010)	$ 351 M in 2013*	Develop their own designs (style)
Furniture in Cairo	20.000	>70.000	934 M $ (2010)	$ 351 M in 2013*	Replica and own designs
Furniture in Alexandria	5.000 (247 companies)	15.000	934 M $ (2010)	$ 351 M in 2013*	Replica and own designs
Lighting in Cairo	~30 comp / work. (5 big comp.)	NA	NA	Middle East, Afr, EU, US	Traditional techniques ,own design
Garments and Home Textile in El-Mahalla El-Kubra	46	36.086	NA	$2157 M (2013)*	Manufacturing excellence
Garments and Home Textile in 6th October City	24 + workshops	638	NA	$2157 M (2013)*	Design improvements needs
Garments and Home Textile in El Sadate City	21 + workshops	3.281	NA	$2157 M (2013)*	Design needs improvements
Garments and Home Textile in El Obour City	61	2.001	NA	$2157 M (2013)*	Design needs improvements
Garments and Home Textile in Shubra Al Khaymah	99	16.938	NA	$2157 M (2013)*	Design needs improvements
Garments and Home Textile in Bourj Al Arab	42	5.521	NA	$2157 M (2013)*	Design needs improvements

Home Textiles Applique Embroidery Designs "khayameya" in Cairo	~30 workshops (in Cairo)	NA (10 leading crafts)	NA	NA	Creative designs, colours, drawings. Local culture.
Home Textiles Bed Throws in Akhmim	+ 30 workshops	NA	NA	NA	Creative designs (colours,…)
Home textiles blankets and Embroidery Designs in Siwa	40 workshops	NA	NA	UK, Italy, France	Traditional product
Home Textiles crochet goods in Quseir	~30 workshops	NA	NA	NA	Traditional product
Carpets (Flat-woven carpet "Kilim") in Siwa	+ 30 workshops	NA	NA	NA	Creative designs
Carpets (flat-woven carpet "Kilim") in Al Wahat	+ 30 workshops	NA	NA	NA	Creative designs
Carpets (Flat-woven carpet "Kilim") in Fowa	40 workshops	NA	NA	NA	Creative designs
Carpets (Traditional Carpets) in Saqiet Abou Shaara	450 workshops + 1 cooperative (86 workshops)	3.500 (1.000 are self artisans)	10.000 m^2 of silk; 50.000 m2 of silk and wool, 8.500 m2 pure wool	Fr, Dnk, Can., Jdn, Syria, Lebanon & Iraq	Traditional (Iranian and Egyptian) and modern styles more creative
Carpets (Traditional Carpets) in Giza	+30 workshops	NA	NA	NA	Traditional product
Carpets (Traditional Carpets) in Minya	~30 workshops	NA	NA	NA	Traditional product
Carpets in 10th Ramadan City	+30 comp/ws	NA	NA	$400 M in 2013*	Traditional product.
Marble and Granite in Cairo (Sha'a El Te'Aban)	152	2.057	NA	$353 M (2013)*	Yes. Colours, shapes
Marble, Granite, and mosaics decoration in Alexandria	~50	NA	NA	$353 M (2013)*	Mosaics introduce cultural identity
Art Table & Pottery in Tunis (Faiyum)	(10 Pottery studios)	~200 artisans	NA	NA	Creativity, local cultural heriatge
Artistic Glassware in Cairo	~30 ws (7-8 big companies)	400	~ $ 20 M	EU, Tky, Gulf & Africa	Creative product using traditional techniques
Basketry decoration and art de table in Al Wahat	+ 30 workshops	NA	NA	NA	Traditional products using local ressources
Basketry decoration and art de table in Shalateen	NA	~300	NA	NA	Traditional products using local ressources
Basketry decoration and art de table in Fayoum	Self artisans (150)	150	NA	NA	Traditional products using local ressources
Decorative Alabaster in Cairo Region	~ 40-50 workshops	NA	NA	NA	Product Design with local alabaster
Decorative Marble and Alabaster in Gorna	+ 30 workshops	NA	NA	NA	Creative natural stones designs

Decorative "Noubian Art" in Nouba	Self-artisans (600)	600	2 M. LE	Germany Nederl.	Uniqueness of Noubian Art
Decorative Pottery in Al Wahat	+ 30 workshops	NA	NA	NA	Traditional product inspired culture
Decorative Pottery in Garagos	+ 30 workshops	NA	NA	NA	Traditional art products (Coptic..)
Traditional Wood hand-carving products for home in Hegaza	30 workshops (in 2008)	~1.800	NA	NA	Creative designs traditional techniques (learned 20 years ago)
Habitat Design in Cairo	>100	>100	NA	Middle East	Very creative. Design own products
Publishing in Cairo	Publishers: 150 Printers: 2.000	~18.000	2 Billion LE	250.000 M LE	Creative content. L ow level of creativity
Film production in Cairo	2.000 (~70 producers)	~2.500	120 M. LE (cine) 1,2 B LE Tv series	Approx. 520 M LE	Inspiration in local cultural and heritage
Music in Cairo	Almost 300	Almost 3.000	3-4 M. L.E / comp.	NA	Creative inspired in cultural roots.
Advertising in Cairo	1.103	NA	$936 M (2013)	Gulf	Creative (ideas and campaigns)

ANNEX 3

Main magnitudes of the clusters in Jordan

	# Companies	# Jobs	Turnover	Exports	Creative comp. advantage
Advertising in Amman	Approx. 400 advertising +500 marketing (Amman CC)	NA	NA	Low	High creative inputs, limited heritage factors
Architecture in Amman	Approx. 90% of 1000 (33 large-medium, 250 medium, 700 small offices) (A&E)	Approx. 2400 (in the 33 large) + 3600 in the rest (A&E)	Net income of 112 million USD 2013 (A&E)	28 million USD 2013	High creativity, heritage elements for certain segments
Clothing in Amman/Irbid	Approx. 90% in Amman and Irbid of 300 (JGATE, GDSC)	Approx. 90% of 40.000 (14.000 are local employment)	1.2 billion USD 2006 (Dept. of stat.)	1.01 billion USD (ITC)	Very limited links to elements of heritage
Decorative Pottery & ceramics in Amman	Approx. 30 (12 large) (Handicrafts prod association)	Approx. 250	4,2 million US$	70% foreigners	Elements of heritage, know how and cultural design skills
Filming in Amman	Approx. 90% of 400 agents (Royal film commission)	NA	249 projects in 2014 (283 in 2013)	NA	Creative input, some heritage elements
Furniture in Amman	Approx. 90-95% of 3.000 entities (98% workshops, 2% big factories (JFEMA)	Approx. 10,000; 35% are local employment (JFEMA)	Total 154 million USD in 2006 (Dept. of Stat.)	Total 70 million USD (ITC)	No particularly linked to elements of heritage (industry began in 1950)
Habitat High End designers in Amman	Approx. 50 (20 creators)	NA	NA	A little, to the Gulf mainly	Elements of heritage (either Jordanian or Arab) elements linked to culture and territory
Mosaic and crafts in Madaba and Amman	3 large companies (industrial production) + approx.150-200 individual/small	Approx. 200	Size of production: around 5000m^2/year	80% for tourists 20% locals	Unique link to heritage (roman remains)
Publishing in Amman	Approx. 300 (180 publishing houses (Union of Publishers)	Approx. 500 in the publishing houses	> 10,000 publications per year	34 million USD (ITC)	Know how in scientific publishing
Stones in Amman	Approx. 80% of (approx.) 1000 comp. (JoSTONE)	NA	Total Industry: 144 million USD in 2006 (Dept. of Stat.)	5 million USD (ITC)	Very limited creative input, no elements of heritage
Weaving & Embroidery in Amman	Hundreds, but most production is concentrated at homes (unofficial)	Estimate: thousands of households	NA	80% for tourists 20% locals	Rich heritage elements, different designs depending on the region

ANNEX 4

Main magnitudes of the clusters in Lebanon

	# Companies	# Jobs	Turnover	Exports	Creative comp. adv.
Audio-visual and multimedia in Beirut	50 enterprises	480 (+ 100 freelancers / year)	USD 7-10 million/year	Around 70%	Historical tradition of creative profiles and higher-education institutions
Contemporary art in Beirut	Very dense network of artists. More than 25 galleries	NA	NA	Strong export capacity	Beirut and Lebanese artists' fame; strong creative networks (design, architecture etc.)
Copper craft in Tripoli/ Qalamoun	Around 15 workshops (family businesses)	Around 150-200	NA	Only indirect exports	Strong artistic heritage; open to new design ideas
Cutlery in Jezzine	13 manufacturing enterprises	Around 50-100	Around USD 150-200,000/ year	No direct exports	Unique design and cultural heritage at the national level
Furniture in Mkalles / Beirut	Approx. 50	Approx. 1,750	USD 15-20 Million / year	Approx. 10%	Limited: mostly copies of classic styles.
Furniture in Tripoli	Around 2,000	Approx. 25,000 (Syndicate of Wood and Furniture Industry in the North), 5,000-8,000 active (ALI – Association of Lebanese Industrialists)	Around USD 300 million / year	Around 20%	Heritage value of the manual work of craftspeople, notably in the woodcarving specialty
"Haute couture" in Beirut	Around 80-100 design houses	Around 2,000	Around USD 50/70 million / year	Around 80%	Products blending both European and Middle Eastern styles; Lebanese designers touch and fame
High-end habitat design in Beirut	More than 80 design studios	Around 500-700 direct jobs	Around USD 200-250 million / year	Around 70%	Multicultural vision and know-how, strong creative talent
Home textiles in El-Fekha/Aarsal	Around 20 workshops	More than 100 jobs	Limited because of the low demand at present	No direct exports	Handmade unique products, closely linked to the local cultural heritage and identity

Jewellery in Bourj Hammoud / Beirut	More than 400	More than 5,000	Around USD 180 million	Around 80%	Heritage and reputation of Armenian jewelry and the cluster; strong skills; high-quality handmade products
Leather in Bourj Hammoud	Around 100 entities	More than 1,000	Around USD 30 million / year	Around 5-10%	Extensive know-how, skills and reputation; flexibility in terms of design and production (small size of workshops)
Marble and granite in Wata Mousseitbeh / Beirut	Around 20 enterprises	Around 1,000	At least USD 50 million per year	More than 50%	Historical reputation (national and regional reference in terms of marble and granite products)
Publishing in Beirut	Around 200 publishing houses	Around 25,000	Around USD 450 million / year	90%	Diversity of products in different languages, availability of creative authors and designers, high-quality printing
Traditional clothing in Saida	Around 15 enterprises	Around 150 direct jobs in production	Around USD 9 million / year	Around 20%	No specific design and style for embroidery but skilled workforce (elder women)

ANNEX 5

Main magnitudes of the clusters in Morocco

	# Companies	# Jobs	Turnover	Exports	Creative comp. adv.
Carpets in Rabat Region	Over 13 companies + about 500 craftsmen	Approx. 3,400	Approx. 25 M US$	Around 9% of the production	Rabat is the carpet capital. Important and skilled workforce.
Ceramic building material in Casablanca Region	Approx. 12-15 consolidated companies plus network of SMEs	NA	Approx. USD 300 M	Approx. 60-70%	Limited link with heritage. Innovation oriented to big series of industrial products
Ceramic and pottery decoration in Salé	Over 4 consolidated SMEs+ 200 craftsmen	Approx. 2,100	Approx. 12 M US$	Around 8% of the production	Specialized designers, Design and fine arts schools
Cinema in Ouarzazate	Minimum of 30-40 companies specialized on cinema + all the support industry + tourism complementary industry	At least 3,000 + movies extras	NA	No direct export. Strongly oriented towards international productions	Compliance of services with international needs and standards in terms of creativity (special effects, costumes, etc.)
Copperware in Fes	Approx. 10-12 consolidated SMEs + elevated number of craftsmen	Approx. 1,200	USD 12 M	Approx. 10% of the production	Rich cultural background, Fes copper work tradition and fame
Copperware in Marrakech	Approx. 15-20 consolidated SMEs + elevated number of craftsmen	Approx. 600	USD 6 M	Approx. 10% of the production	Tradition and fame, Special / unique products by design oriented SMEs, dynamic environment
Decoration/ furniture in Fes	More than 50 SMEs + cooperatives and craftsmen	Approx. 9,700	Approx. USD 92 M	Approx. 0,8 M US$ (0,9% of the production)	One of the centers of Moroccan Design, Cultural heritage, skilled workforce
Decoration/ furniture in Marrakech	>120 SMEs + network of craftsmen	Approx. 10,000	Approx. USD 106 M	Approx. USD 10,3 M	Design capacities, skilled craftsmen, creativity innovation capacity based on cultural heritage.
Decoration in Casablanca/ Kénitra	Approx. 120 companies	Approx. 17,000	Approx. US$ 380 M	Less than 5%	Specialized designers and training centers, R&D centers (Craft Academy in Casablanca), design integrators.
Decoration in Tétouan/Tanger	Over 60 (+ 500 craftsmen and cooperatives)	Approx. 8,300	Approx. US$ 66 M	Below 2%	Cultural diversity in original products, new cultural trends

Denim textile in Casablanca Region	17 in the formalized Cluster (500 estimated nationally)	Approx. 3,700 (60,000 for the national sector)	Approx. USD 240 M	Approx. USD 190 M	Capacity to innovate and integrate innovative techniques (serigraphy, printing, tie and dye, etc.)
Furniture in Casablanca	Over 40 companies	Approx. 10,000	Approx. USD 176 M	Less than 5%	Strong design capacity, designers' availability. Presence of design integrators.
Home textile in Casablanca-Rabat	Approx. 170 companies (<50 Formal)	Approx. 22,000 jobs	60-70% nat. turnover: approx. USD 350 Millions	Approx. 10%	Integrated design in leading companies and external designers support
Leather in Marrakech	Over 31 plus large number of mono artisans	Approx. 5,000	Approx. US$ 23 M	N.A.	Rich cultural background, genuine Moroccan products and designs
Marble in Kénitra-El Jadida	Nearly 100 well structured SMEs	Approx. 3000/5000	Approx. 360 M US$	Limited export due to internal demand and structural issues	Limited creativity due to the very high proportion of basic decorative buildings materials
Pottery in Safi	9 consolidated SMEs plus elevated number of craftsmen	Approx. 1,700-2000 direct jobs	Approx. USD 10-12 M	Approx. 10%	Rich cultural background, pottery tradition: know-how and specific design
Shoes & leather goods in Casablanca	Over 120 (60% of shoes sector)	Around 12,000 – 14,000 jobs	Approx. 540 M US$	80% of the production	Design (internal for own brands, external for subcontractors), technical schools and specialized institutes
Shoes & Leather goods in Fes	Over 20 companies + large number of mono artisans	Approx. 14,640	Approx. US$ 102 M	Approx. US$ 0,2 M	Rich cultural background, genuine Moroccan products, designs with specific know-how
Silver Jewelery in Tiznit	Approx. 1 SME + 150 shops and workshops + cooperatives and craftsmen	Approx. 3,500	Approx. US$ 10-12 M	Less than 2% of the production	Ethnic design and Cultural heritage in silver based craft, skilled workforce for local/ethnic design
Wood decoration (Marquetry) in Essaouira	1 main company + large number of craftsmen, workshops and cooperatives	Approx. 2,300: 75% of handicraft production in Essaouira	Approx. USD 17 M	Estimated < than 10%	Rich cultural background. Local know-how of thuja woodworking.
Zellige Ceramic in Fes	More than 30 consolidated SMEs + approx. 200 craftsmen	Approx. 2,600 jobs	Approx. USD 55 M	Less than 10%	Local specialized designers, "zellige de Fes" National label, Fes market attractiveness

ANNEX 6

Main magnitudes of the clusters in Palestine

	# Companies	# Jobs	Turnover	Exports	Creative competitive advantage
Embroidery in Hebron	Approx. 3.000 facilities (home based working women) (ICC)	Approx. 4.000 (ICC)	NA	NA	Distinctive colors and design, elements of heritage, know- how and cultural design skills
Furniture in Nablus	Estimate 300 workshops and 10 SME's	Estimate 3.000 jobs	Estimate 60 Million USD	Estimate approx. 20%, mainly Israel	Modern style products, no creativity linked to heritage components
Furniture in Salfit	52 registered firms. 3 big factories (Salfit furniture)	Estimate 3.000 jobs	Estimate 20 Million USD	NA (but mainly to Israel)	Modern style products, no creativity linked to heritage components
Garments in the North of West Bank	Approx. 250 companies (interviews)	Approx. 5.000 employees	Approx. 25 Million USD	85% Mainly to Israel	Not specific links with cultural heritage
Leather Shoes in Hebron	Approx. 360 companies, incl. 8 tanneries (PLIU – Palest.Leather Industries Union)	Approx. 4.000 employees (PLIU)	3 Million USD (PLIU)	5% exports	Low links to cultural heritage, only for design of traditional sandals
Pottery and ceramicsin Hebron	Approx.44 registered companies (6 large) (PTI)	Approx.. 200 (PTI)	Approx. 5 Million USD (PTI)	Approx. 70% exports (30% Israel) (PTI)	Creativity linked to traditions and local heritage combined with modern models and designs
Religious Gifts in Betlehem - Beit Sahour	Approx. 85 registered workshops (70 wood carving + 15 mother of pearl) (ICC Study on Handicrafts)	700 jobs (ICC)	14,3 Million USD (76% wood carving) (ICC and PTI)	Approx. 35%, exports	Very linked to cultural heritage, traditional knowhow of olive wood carving and mother of pearl tradition, combined with uniqueness of being made in Holy Land
Stone and Marble in Betlehem & Hebron	Approx. 600 (USM - Union of Stone and Marble)	About 9.000 employees (USM)	300 million USD (USM)	Exports 70%, (55% Israel) (USM)	Raw material - Jerusalem stone, distinctive for color and texture, but limited creative input, no elements of heritage
Textile and garments in Beit Jala & Betlehem	Approx. 200 companies (50 large) (TGF - Textile and garment Feder.)	Approx. 2.200 (TGF)	Approx. 32 Million USD (TGF)	85% (Mainly to Israel, subcontracting companies)	Not specific links with cultural heritage

ANNEX 7

Main magnitudes of the clusters in Tunisia

	# Companies	# Jobs	Turnover	Exports	Creative comp. advantage
Alfa made Habitat in Kasserine	Approx. 11 workshops, +500 craftsmen (API, ONA)	Approx. 500 -600 + 1000 (harvest)	Estimated between 0,5 and 1,5 M€	No exports	Local heritage (local raw material), cultural tradition and local design
Brides in Mahdia (clothing, silver accessories, home textiles)	Approx. 170 workshop (ONA) +1500 craftsmen	Approx. 500 formal (ONA) +1500 craftsmen	Estimation between 15 and 20 M€	Estimation between 1 and 5 M€	Strong traditional know how (golden thread + silver accessories)
Carpets ("tapis ras") in the south	Approx. 279 workshops + 3 industrial +11.000 craftsmen	Approx. 1500 (ONA, API) +11.000 craftsmen	Estimation between 5 and 8 M€ (ONA, API)	Estimation 80% sold to tourist	Very strong know how, strongly linked to the territory
Carpets in Kairouan, Kasserine and Sidi Bouzid	Approx. 771 workshops + 5 industrial +24.400 craftsmen (ONA, API)	Approx. 2500 +24.400 craftsmen	Estimation of 10 -15 M€	Estimation 80% sold to tourist (ONA)	Very strong local identity, well implanted local know how, denomination of origin (Keirouan)
Ceramic building materials (and decoration) in Nabeul	Approx. 8 industrial + 107 workshop +300 craftsmen (API, ONA)	Approx. 800 + 300 craftsmen + 2500 informal	Estimation between 10 and 15 M€	Estimation between 1 and 5 M€	Heritage, Local know how, very strong elements of tradition
Decoration and table accessories in Sfax	Approx. 250 workshops + 4 industrial +3.500 craftsmen	Approx. 1.300 + 3.500 craftsmen (API, ONA)	Estimation between 10 and 20 M€	Low	Strong local identity, elements of heritage, traditional cultural elements
Decorative ceramics and art de table in Nabeul	Approx. 300 workshops + 981 craftsmen	Approx. 1.200 + 8.000 informal	Estimation between 5 and 10 M€	Approx. 3,9 M€ (ONA)	Local identity, traditional know how
Fashion clothing in Tunis	Approx. 304 industrial companies (API)	Approx. 25.965 formal jobs (API)	Estimated 100-200 M€	Estimated 50-100 M€	International product (usually not linked to local heritage)
Denim clothing in the Sahel	Approx. 140 (95 confection + 40 fading) (CETTEX)	Approx. 16.912 formal (API)	272 M€ (CETTEX)	217 M€ (CETTEX)	Regional historic skills, non linked to heritage factors

Furniture in Sousse and Monastir	Approx. 35 industrial + 1500 workshops	Approx. 7.598 (API, CETIBA)	Estimation 50-100 M€	Estimation 5-10 M€	Non particularly linked to heritage, local know how
Furniture in Sfax	Approx. 1.500 workshops + 38 industrial +1000 craftsmen	Approx. 5.000 +1000 craftsmen (API, CETIBA)	Estimation 50-70 M€	Very low	Lack of link with tradition (contemporary furniture)
Furniture in Tunis	Approx. 37 workshops + 31 industrial +1500 craftsmen (API, CETIBA)	Estimation 4.500 formal & informal (CETIBA)	Estimation 50-70 M€	Very low	Traditional workshops are linked to heritage factors, industrial companies not much
Traditional furniture and ornaments in Kelibia	Approx. 300 workshops (CETIBA)	Approx. 1.200	Estimation 5-7 M€	Very little	Local elements of heritage, local tradition (know how in the wood work and sculpture)
Garden pottery in Moknine	Approx. 70 workshops + 3 industrial + 300 craftsmen	Approx. 200 +300 craftsmen (ONA)	3,04 M€ (ONA Regional delegation)	1,3 M€	Know how strongly linked to the tradition and cultural heritage
Home textiles in Bizerte	Approx. 71 workshops + 5 industrial + 1.056 craftsmen (ONA, API)	Approx. 500 +1000 craftsmen (ONA, API)	Estimation 3-5 M€	Very little	Traditional know how, heritage, local heritage in embroidery and lacemaking
Home textiles in Nabeul	Approx. 69 workshops + 8 industrial + 700 craftsmen	Approx. 600 + 700 craftsmen + 5000 informal	Estimation 3-6M€ (ONA)	Approx. 87.000 Euros	Very strong elements of tradition, local identity (unique Nabeul design)
Home textiles in the Sahel	Approx. 240 workshops + 22 industrial) +1.214 craftsmen	Approx. 1.800 +1.214 craftsmen (ONA, CETTEX)	Estimation 15-20 M€	Estimation 4-7M€	Local traditional know how, come heritage elements
Jewelry and goldsmithery in Sfax	Approx. 728 workshops + 2 industrial +1.300 craftsmen	Approx. 2.200 +1.300 craftsmen (API, ONA)	Estimated 10-20 M€	National coverage	Traditional know how, some general elements of heritage
Jewelry and goldsmithery in Tunis	Approx. 559 workshops +1000 craftsmen (API, ONA)	Approx. 1.300 +1.000 craftsmen	Estimated 10-20 M€	National coverage	Traditional know how, some general elements of heritage

Leather shoes in Tunis	Approx. 112 industrial + 84 workshops +160 craftsmen	Approx. 8.142 (API, ONA)	Estimated 75-150 M€	Estimated 40-80M€	International product, not linked to eventual traditional elements
Leather shoes in Nabeul	Approx. 97 industrial + 20 workshops (API)	Approx. 9.350	Estimated 100-150 M€	Estimated 80-100 M€	Traditional leather work evolved towards the shoe industrial industry
Mosaic in El Jem	Approx. 35 workshops + 4 industrial + 300 craftsmen	Approx. 200 + 300 craftsmen (ONA + API)	2,17 M€ (ONA Regional Delegation)	1 M€	Unique know how, local elements of heritage (linked to roman remains)
Palm made habitat in Gabes, Tozeur, Gebelli	Approx. 154 workshops +2316 craftsmen (API, ONA)	Approx. 2800	Estimation 1-2 M€	Estimation 1M€ mainly to tourists	Strong local identity, elements of heritage, traditional cultural elements
Publishing in Tunis	Approx. 100 (60 printers and publishing houses + 100 sleeping pub. houses) (API, interviews)	Approx. 3.415	Between 30-50 M€	Approx. 3,3 M€	Rich culture, number of writers (more than 700 Tunisian writers)
Scenic Arts in Tunis	Approx. 250 troupes + 6 centers of dramatic art + 770 registered impresarios (license to produce shows) + 10.000 active musicians, for a total number of 2500 shows (source Ministry of Culture)		Estimated 7-10 M€	Small	Cultural tradition for theatre. Certain placements (i.e. Le Keff) very strong heritage

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