

ATTRACT SEE
Transnational attractiveness synthesis report
(activity 4.3)

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By



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Introduction

1. Premise: a territorial perspective for attractiveness

“Territorial cohesion is about ensuring the harmonious development of all these (EU) places and about making sure that their citizens are able to make the most of inherent features of these territories. As such, it is a means of transforming diversity into an asset that contribute to sustainable development of the entire EU. (.omissis..)”

“Increasingly, competitiveness and prosperity depend on the capacity of the people and businesses located there to make the best use of all territorial assets. In globalising and interrelated world economy, however, competitiveness also depends on building links with other territories, to ensure that common assets are used in a coordinated and sustainable way. (.omissis..)”

“Public policy can help territories to make best use of their assets. (.omissis..) Many of the problems faced by territories cut across sectors and effective solutions require an integrated approach and cooperation between the various authorities and stakeholders involved. (.omissis..)”

After six years of heavy structural crisis, these words from the introduction of *“Turning Territorial Diversity into Strength”*¹, are perhaps more actual than ever. The Green Paper on Territorial Cohesion² came after two decades of reflection held at European scale on the meaning of *“territorial cohesion”*, started in 1989 with the *“ESDP - European Spatial Development Perspective”*³, followed by the 1996-2001 Terra project⁴, until the more recent developments linked with ESPON, the EU Territorial Agenda and the new generation of the European Territorial Cooperation programmes.

All these experiences started from the questions: *“is such diversity a weakness or an opportunity, for Europe?”* ... *“how do we keep together such apparently different concepts like “competitiveness” and “cohesion”?* .. *“how should we manage to make the best use of this diversity?”* ... *“how should policies take this into consideration, helping integration and mutual strengthening of actions?”*.

Quite an entire generation of policy makers and practitioners dealt with these questions, until – just when the structural crisis was blowing – the Green Paper on Territorial Cohesion came to launch an organized debate on these issues, that within one year brought 388 contributions from public and private actors all over the EU, providing a picture made of the most diversified points of view, experiences, the evidence of potential policy conflicts or synergies, suggestions for improvement.

ESPON **ATTREG Project**⁵ first addressed the concept of attractiveness from a territorial perspective, considering several European case studies from territories with different characteristics, and eventually provided a framework definition of attractiveness intended as *the interaction of a complex set of characteristics based on the presence/absence of certain forms of Territorial Capital with the attraction of*

¹ European Commission: *Turning Diversity into strength Green Paper on Territorial Cohesion*”; COM(2008) 616 final

² COM(2008) 616 final

³ http://ec.europa.eu/regional_policy/archive/innovation/innovating/terra/main/policy.html

⁴ http://ec.europa.eu/regional_policy/archive/innovation/innovating/terra/index.html

⁵ ATTREG – The Attractiveness of European regions and cities for residents and visitors,
http://www.espon.eu/main/Menu_Projects/Menu_AppliedResearch/attreg.html

various “audiences”, referring it to the different dimensions of Territorial Capital (Environmental; Economic and Human; Anthropic; Socio-Cultural and Institutional).

Introduced by the OECD Territorial Outlook in 2001, the **concept of Territorial Capital**⁶ has been utilized by Attract-SEE partner Emilia-Romagna, in its Territorial Plan (PTR, a strategic scheme for territorial sustainable development) which makes specific reference to *Territorial Capital* as “a system of assets – both material and non-material, public, collective and private – that supports the growth of quality of life as well as the efficiency and competitiveness of the regional economy. Four main dimensions of the concept in the PTR are: knowledge capital, social capital, landscape and ecosystem capital, settlement and infrastructural capital”.

Today, the issues cohesion vs. competitiveness, the role of public policies in delivering development, the capacity of cooperation and actually “making integration” towards the disruptive push of crisis – are still of the utmost relevance in finding out effective solutions for joint growth, job generation and sustainability.

Taking into consideration all this background and according to the specific experiences of Slovenia, Austria, Serbia, Hungary, Croatia, Bosnia-Herzegovina, Macedonia and – on the side of Italy – of Emilia-Romagna – in 2011 all the future Attract-SEE partners started a common reflection on these issues, asking ourselves in particular:

- *How do we actually address – in our real policies - issues like “competitiveness” and “attractiveness” and how do they deal with the wider concept of “territorially-based development policy”?*
- *How should be considered – and managed – the potential “attractiveness trade-offs” raising among countries and regions addressing the same targets?*
- *How should we deal with the potential “policy conflicts” within our own (national and/or) regional contexts? How far should the territorial scale of policies vary according the nature of the issues/problems addressed?*
- *Could the “Territorial Capital” concept be considered as an actual basis for establishing a real common perspective and create a common basis for monitoring territorial changes?*

The report came after a two-year debate focused on addressing shared answers to the afore mentioned issues, tackling, at the same time, the following problems:

- the lack of a common understanding on the concept of “Territorial Attractiveness”;
- the multiplicity of programmes, strategies, schemes, all focusing on “attractiveness” policies, without defining it, if not marginally;
- the monitoring systems, established with the most different purposes, dealing with issues (and the related indicators) that address directly or indirectly “attractiveness” (territorially-based or not);
- the fact that – beyond any statements – policies and in particular sectoral policies, carried a lot of potential “conflicts of interest” between the different policy makers, their targets, their stakeholders.

⁶ After OECD Territorial Outlook 2001, the concept of Territorial Capital has been included by the European Commission in its Scoping document and summary of political messages for an assessment of the Territorial State and Perspectives of the European Union in May 2005.

What Attract SEE did, on one side, was to start a very intense interchange of experience and perspectives among all the partners and, on the other side, to establish a common working table with all stakeholders, public and/or private, to discuss, amend and validate both the approach and the results, to establish a common ground for future cooperation on these topics.

The project achieved the following goals: a common understanding on Territorial Attractiveness, a common system of indicators, forming the base for a Common Territorial Monitoring Framework, a common Policy Coordination tool. Each partner was stimulated to think about its own *territorial attractiveness* to set a specific report on it, using both the common indicators and all the other information considered relevant.

This report, that comes at the end of a long list of reports, elaborations, guidelines and other operational schemes⁷, tries to systematize the new knowledge achieved so far, with the purpose of reinforcing integration at the “internal” scale of each partner, also in view of strengthening the mutual cooperation within our “common space” of cooperation.

⁷ See short description of the core deliverables in the next paragraph.

2. The Report

This Transnational Attractiveness Report aims at giving an overall picture of the attractiveness issue across South-East Europe, by supporting the policy makers on territorial attractiveness, providing integration and cross-cutting analysis of project outputs.

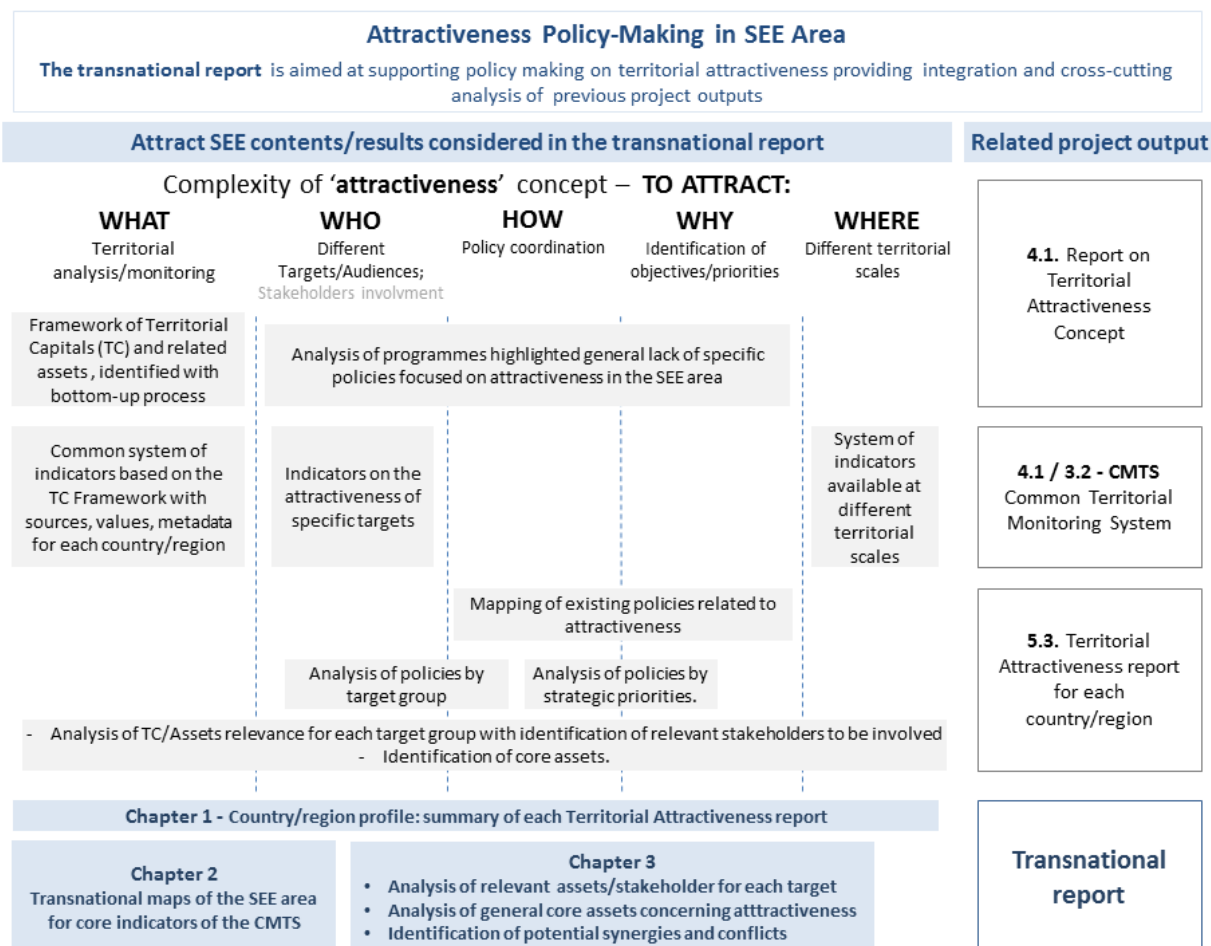


Figure 1- Contents and outputs related to the Attract SEE Transnational Report

Territorial attractiveness concept

The methodological approach to reach the objective of getting a common framework of Territorial Attractiveness included 3 steps, developed complementarily.

The **first step** was looking through the official documents (strategic and/or operational Plans and Programmes) adopted by PPs country/region, with an eye towards seeing what “territorial attractiveness” means according to the different characteristics and vocations⁸.

⁸ Report on Territorial Attractiveness Concept (act. 4.1)

For the purpose it has been developed a *Tool of Inquiry*⁹ addressing the following issues: a) the territorial monitoring systems in use in the partners' countries/regions and the identification of specific best practices; b) the definition of Territorial Attractiveness through 3 assessment questionnaires concerning the concept, the assets and (if any) the specific indicators emerged from the survey on available datasets.

Step 2 aimed at assessing the answers provided by partners with a first outlook of the concept of Territorial Attractiveness (TA) in use in each context and its implications (e.g. attracting whom, where, how, etc) and a preliminary classification of the territorial capital assets to be considered. The analysis of official documents programmes highlighted a general lack of specific policies focused on attractiveness in the SEE area. Anyway, Attract-SEE partners tended to identify similar assets that needed to be "classified" and ordered according to a common perspective. These elements have been considered as a basic condition for establishing a common framework for attractiveness concept.

In the **Step 3**, the international stakeholders and partners were subsequently asked to express their opinion on the relevance of the territorial assets identified for Territorial Attractiveness assessment, in view to obtain an updated overview of the TA concept and of the assets to be considered, adjusted to the perspectives and needs of each partner.

At the end of this process, a Common Framework of the Territorial Capitals and related assets have been developed:

Table 1 -Common Framework of the Territorial Capitals and related assets

Environmental capital	
Environmental quality	Environmental quality (air, water, waste, greenhouse gases, etc.)
Territorial/ecosystem integrity	Territorial/ecosystem fragmentation
	Biodiversity
	Risk management
Natural resources and energy	Natural resources management (renewable/non renewable)
	Energy management (fossil fuels / renewable resources)
Anthropic capital	
Urban quality	Access to public services
	Towns/settlements revitalisation/networking
	Urban health/liveability /env. services
Landscape quality	Visual attractiveness
	Landscape diversity
	Balanced urban-rural relations
Infrastructures	Local/global accessibility
	Basic infrastructures for daily life (to be detailed:)
Socio-cultural capital	
Culture	Cultural heritage
	Multiple cultural services
Quality of life	Welfare/Cost of living
	Social equity/poverty reduction
	Multicultural integration
	Sense of belonging/citizenship
	Gender mainstreaming
Economic/human capital	
Knowledge & Innovation	Research
	Education/capacity building
	Attracting/holding competences
Employment	Employment
Specializations / Key sectors	Diversified economic activities/services
Tourism	Attractiveness for tourism
Investment Promotion	Foreign investments attraction
	Quality business locations/services

⁹ Tool of Inquiry (act. 3.1)

	Partnerships relations
Population	Population growth , % pop in age 15-64 years
Institutional capital	
Governance	Effective governance arrangements
International relations	Cross-border cooperation
	Internationalization

WHAT – Territorial analysis/monitoring

The Common Framework of the territorial capitals and related assets was preliminary to the definition of a database of common set of indicators, representing Territorial Attractiveness at regional/country level, as far as at SEE transnational scale, to be developed within a **Common Territorial Monitoring Framework (CTMF)**. In the document *list of common set of indicators in SEE*¹⁰ project partners agreed upon a common list of 31 indicators related to territorial capital and assets. For each “aggregated” TC asset, it has been identified at least a couple of core-indicators, one *state* and one *pressure* (in analogy with the DPSIR model¹¹).

In the **country/regional attractiveness reports**¹², each partner could integrate the common list with additional indicators in relation to its specific territorial characteristics and vocations.

The “**Transnational” Attractiveness Report**¹³, based on each country/regional attractiveness reports prepared by PPs at national/regional level, aims at summarizing the highlights from the regional report and giving an overall picture of the attractiveness across SEE.

WHERE – System of indicators available at different territorial scales (NUTS)

Each partner agreed that territorial scales and diversity of places are key features to assess the attractiveness of the territories. It is on diversity that depends the generation of flows from one place to another, while the effectiveness of different strategies - such as specialization or balanced mix of factors depends on the context and the dimension of the area considered.

The analysis of each indicator of the common framework was committed to collect information concerning availability of the data with respect to NUTS level, time period and territorial capital and assets involved.

WHO – Targets/Audiences

It can be said that attractiveness is intended as the interaction between a complex set of territorial assets and a certain type of target/audience. Attract-SEE partners agreed upon a range of subjects and objects to attract and hold, which led to the identification of a set of four main categories:

- Investments
- Skills and knowledge
- Tourists

¹⁰ list of common set of indicators in SEE (WP 4, Act. 4.1 and WP 3, Act. 3.2)

¹¹ DPSIR stands for: Driving forces, Pressures, State, Impacts, Responses and refers to the causal framework for describing the interactions between society and the environment. Firstly proposed by the OECD in 1994, DPSIR was further developed by the European Environment Agency (EEA, 1999).

¹² country/regional attractiveness reports (act. 5.3)

¹³ Preparation of common - transnational attractiveness synthesis report (activity 4.3)

- Residents

Among partners there was a high level of agreement on the fact that becoming an “attractive territory” means to find the right balance of the territorial endowments, according to the groups that are the objects of attraction strategies (e.g. skilled workers, second home owners, tourists, entrepreneurs, etc.).

WHY – Identification of objectives/policy priorities

Each *country/regional attractiveness report*, after a first mapping of the existing policies priorities related to attractiveness, developed a conceptual framework of analysis on the relevant Territorial Capitals and related assets (by target and by cross-cutting issues) with the identification of the stakeholders to be involved. The high level of attractiveness of a target can be related to a territorial vocation, while a low level may lead to opportunities and potentialities not yet exploited.

In the “**Transnational**” Report several aspects emerged as strategic for integrated attractiveness policies, because more “transversal” with respect to different types of audiences, while others turned out to be focused on specific target groups.

HOW – Policy coordination

While there is no *one policy to attract all* target audiences, each of them representing different and potentially conflictive expectations, however proper answers could be found in the coordination of policies.

In fact, models of governance mostly “vertical”, based upon a sectoral partition of Public Administrations, show a strong need for internal “horizontal” coordination, to address target audiences that develop different perspectives over the same places (according to their own economic, social, cultural interests). Policy coordination can support the management of conflicts of objectives, identifying practices that need to be addressed.

This implies to strengthen policy coordination both horizontally, among different sectors at the same territorial scale (local, regional, etc.) – and vertically – between different scales, seeking to identify conflicts/synergies. An issue also addressed by the **Policy coordination process handbook**¹⁴, prepared as methodological and communicational guidance to territorial development actors, facilitating and moderating the process and dialogue among the actors involved.

Effective monitoring system and better coordination among different sectoral policies are basic conditions for setting up an attractiveness strategy and achieving objectives that are coherent with the territorial vision, exploiting the synergies between different sectors and managing potential conflicts.

The Transnational Attractiveness Report is structured as follows.

Chapter 1 provides a summary of each national/regional attractiveness report (act. 5.3), by highlighting the most relevant issues and giving an overall picture of the attractiveness across the SEE area.

Chapter 2 introduces the Common Territorial Monitoring Framework (CTMF), which has been designed according to the monitoring practices in use in the project partner countries and regions.

¹⁴ Policy coordination process handbook (WP 6)

Chapter 3 provides a summary of the main findings and represents an attempt to summarize the target audiences profiles emerged from the analysis, the list of assets which are more likely to attract them, also showing the territorial assets considered to be common at transnational level, along with the identification of potential synergies and conflicts.

Chapter 4 simply tries to extract some operational conclusions, with a “practical” perspective on the usability of the results, hoping to provide useful elements for the debate.

The Annex “List of Maps” provides a comprehensive collection of transnational maps at SEE scale, elaborated with the representation of the core indicators of the common dataset, over a time series of years.

Chapter 1 - An overview of the country/regional attractiveness reports

Each summary of the country/regional attractiveness reports was drafted according to common terms of reference (ToR)¹⁵: in fact, a common structure of the reports was a pre-condition to get a basic level of homogeneity of the outputs and pave the way for the further developments foreseen by Attract-SEE.

The chapter, by providing a summary of each country/regional report, highlights contents that can be useful for policy makers in the SEE area:

- the general objectives of the territorial attractiveness strategy and the listing of policy priorities in each country/region (*attractiveness strategy*).
- the main outcomes of the in-depth analysis of each selected policy priority (*analysis of the policies priorities for Territorial Attractiveness*).
- integrations among the different policy priorities of the territorial attractiveness strategy, by identifying potential conflicts and/or synergies.

As concerns the identification of policy priorities:

- Austria, Bosnia and Herzegovina, Emilia-Romagna, FYR Macedonia and Serbia adopted the same list of priorities as concerns the target groups;
- Bosnia and Herzegovina, Hungary, Serbia and Slovenia identified the priorities inside the selected policy documents;
- In the Slovenian and Macedonian reports, the analysis pointed out the link between the relevant policies and specific target groups.

¹⁵ The Tor provided the following common structure for each Country/regional attractiveness report:
Chapter 1 - Context analysis: territorial capital and assets in your territory
Chapter 2 - Attractiveness strategy: general objectives and list of policy priorities
Chapter 3 - Analysis of the policy priorities for Territorial Attractiveness
Chapter 4 - Integration of the different priority policies

Austria

Attractiveness strategy

The list of general objectives and related policy priorities concerning attractiveness is extrapolated from national/regional documents and from sectoral programmes and concepts coming from Lower Austria, the City of Vienna, others areas (i.e. Burgenland) and from workshops organized with policy-makers and other actors.

The list refers to the following Policy Documents

- STRAT.AT (Einzelstaatlicher Strategische Rahmenplan)
- Austrian Spatial Development Concept 2011 - ÖREK 2011 (Österreichisches Raumentwicklungskonzept)
- Urban development plan Vienna 2005 – STEP 05 (Stadtentwicklungsplan Wien)
- Spatial Development Concept Lower Austria (Niederösterreichisches Landesentwicklungskonzept)
- Spatial Development Concept of Burgenland 2011 (Landesentwicklungsprogramm Burgenland - LEP 2011)

Sectoral Programmes and Concepts in Lower Austria

- Spatial Development Concept of Lower Austria (Niederösterreichisches Landesentwicklungskonzept)
- The Central-Location Spatial Planning Programme (1973, 1992)
- The Spatial Planning Programme for the Development of Tourism (1975)
- The Spatial Planning Programme for Education (1976, 1981)
- The Spatial Planning Programme for Recreation and Leisure (1978)
- The Spatial Planning Programme for the Exploitation of Mineral Resources (1998)
- The Spatial Planning Programme for Open Landscapes (2007)
- Tourism Strategy Lower Austria (2015)
- Economic Strategy Lower Austria (2015)

Sectoral Programmes and Concepts in the City of Vienna

- Tourism Concept Vienna 2015 (Tourismuskonzept Wien)

Sectoral Programmes and Concepts in others areas

- The Transportation Concept Burgenland 2002

Analysis of the policy priorities for Territorial Attractiveness

Austria adopted the following list of priorities:

Target-focused policies priorities:

1. *Attraction of investments*
2. *Attraction of skills and knowledge in the territories*

3. *Attraction of tourists/visitors through the specialization of touristic districts and of the single destinations*
4. *Attraction of new inhabitants in the region by ensuring high quality of life and services*

Cross-cutting policy priorities:

5. *Climate change, adoption and resource efficiency*
6. *Attractions of inhabitants: cooperative and efficient handling structures*

Policy priority 1 – Attraction of investments

The further development and strengthening of Austria's economy in a global context requires long-term and integrated location development, along with corridor planning. This includes high priority networks, supply and disposal systems as well as further development of telecommunications networks. The requirements of SMEs in all types of regions and sectors of the economy and the capability to survive in growing, increasingly competitive international economic regions, are critical issues. In addition to the task of linking these issues to the national research, technology and innovation strategy, priority must be given to the adaptation of the current national and regional frameworks to the needs of SMEs and the creation of regional (sector-specific) clusters, networks, and innovation and technology-based infrastructures. This strategy will enable regional employment growth only if the quality of education and the qualification measures for workers and enterprises can be guaranteed (also by providing life-long learning) considering the rapidly changing requirements.

Policy priority 2 – Attraction of skills and knowledge

Research, technology, innovation and qualified workforce are the critical factors for an export-based economy with a relatively high wage level, but also high productivity. Additionally, they do not only strengthen the economic performance, but represent an important contribution to tackle major social, ecological and regional challenges. The "innovation union" will take an integrative approach with the aim of consolidating the fragmented policy prevailing up to now. The success of these strategic processes depends largely on how the relevant research, technology and innovation actors will collaborate, especially universities, colleges and non-university research institutions.

Policy priority 3 – Attraction of tourists/visitors

Attraction of tourists/visitors is committed to the specialization of touristic districts and of the single destinations, along with strengthening the relationship among tourism, agriculture and forestry.

Policy priority 4 – Attraction of inhabitants

Migration is one the key factors of demographic change and population growth in Austria and it no longer affects only the large urban areas. The institutions that provide basic public services are faced with enormous challenges, i.e. changed demographic conditions (out-migration and aging), extensive privatization and liberalization and a lack of funds in the government budget. The task of "*securing basic services locally and regionally*" covers the search for strategies and instruments for the cost-conscious and user-based adaptation to changed demand structures and mobility options. The significant rise in residential space per capita, the rising number of second residences for work purposes or leisure time need to be taken into consideration and this will entail higher demand for building land in some form or other.

Apart from a demographic and a socio-economically-triggered rise in building land use, the growing demands for retail, tourism and transport purposes must be considered.

Policy priority 5 – Climate Change, Adoption and Resource Efficiency

Climate change in Austria influences the long-term uses of space and spatial development potentials in many different ways. Reducing greenhouse gas emissions can be supported by lowering energy consumption (e.g. by raising energy efficiency), by substituting fossil fuels with renewable energy sources and by environmentally friendly consumption and transport behavior. A planned and harmonized spatial distribution of industrial and commercial locations can significantly support climate protection. Compact settlement structures (especially multi-storey residential buildings) are more energy efficient and therefore benign to climate.

Policy priority 6 – Cooperative and Efficient Handling Structures

In Austria, spatial development and spatial planning are considered a joint task of the Federal State, the federal regions (Bundesländer) and the municipalities. In this context, a specific form of distribution of spending and competences has evolved historically and has become established within the multi-level system of the territorial authorities and taking into account the diverse interests to be satisfied. The further improvement of these basic cooperative structures is one of the most important ideas of the Austrian Spatial Development Concept which advocates a “*space for all*”. The hubs need to be optimised and the mutual consideration of the actors guaranteed within the current system of spatial planning and spatial development. Today, more can be achieved in collaboration; “*space for all*” also stands for a participative planning process that includes the political-administrative system as well as companies, associations and the civil society.

Integration assessment

In order to identify synergies and potential conflicts, the following aspects emerged:

- Planning is often **sectoral** with little integration;
- Stakeholders reported different **interest and intentions** as a general challenge in spatial planning;
- **Regional disparities** within Austria and therefore different targets and/or criteria for achievements have been observed;
- In Austria territorial planning is under the responsibility of the **federal states**: there are 9 federal states in Austria, each having its own planning laws with a great variety of topics/targets/measures. There isn't one common planning law for Austria on national level;
- **Synergies** emerged between Attract-SEE (as an initiative to support territorial monitoring on European / transnational level) and national initiatives in Austria (e.g. done by the ÖROK¹⁶);
- Planning documents in Austria are generally not structured according to the **target groups** that are defined in Attract-SEE (tourists/visitors, investors, human resources, inhabitants). These target groups tend to be addressed indirectly;
- The same remark can be done as concerns overall **concept of attractiveness**. “Attractiveness” as such is not defined or specifically addressed in most of the documents; but it is addresses indirectly (e.g.: when speaking about quality of life, quality of regions, etc.);

¹⁶ÖROK stands for Österreichische Raumordnungskonferenz (Austrian national spatial planning advisory board)

- In Austria there is a **wide diversity of territorial capitals** and therefore the listed results are not representative for all over Austria but only for the eastern part. The diverse needs and targets of each region and federal county might also result from the fact that there is not a national planning strategy but there are 8 different strategies which work on regional level.

Focus on territorial capitals

The focus on territorial capitals reported that:

Environmental capital

- **a synergetic effect comes from protected areas and green areas within cities** that contribute positively to the environmental quality (air, water, waste, greenhouse gases, etc.) and the management of **natural resources**;
- the importance of the use and management of **alternative energies**

Anthropic capital is strongly connected to urban and landscape quality:

- **a balanced urban-rural relation** is not easy to find; rural and landscape quality is defined via diversity;
- **accessibility, networks and availability of services** not only connects regions and facilitates mobility and exchange on various levels, but can also **influence the price of labour force, real estate, production, etc.**

Socio-cultural capital is an important factor for the **quality of life**:

- **Cultural services as well as heritage sites** are the core element for describing cultural values. They also mean a positive influence on tourism.

Economic/human capital depends on and influences various factors like innovation, employment, tourism, investment and the population:

- Knowledge and innovation are important for research, specialisations and key sectors and generally for employment;
- **Foreign students have a great influence on the country (or a city like Vienna) in terms of economy and science**;
- Tourism depends on urban and rural quality but also on existing offers (attractions);
- Growth of population and share of population by age (0-14, 15-64, 65+) is strongly related to employment. The population age 15-64 is the most relevant range regarding employment and unemployment;
- **The promotion of investments depends on knowledge and innovation as well as on employment and specialisation. But also the quality of business locations and services is relevant as well as the possibility to establish partnership relations.**

Institutional capital is strongly connected to international relations and is represented by **cross-border cooperations and projects**, as well as international institutions in the region.

Bosnia and Herzegovina

Attractiveness strategy

Attractiveness strategy doesn't exist as such in Bosnia and Herzegovina, where twenty sectoral strategies were analyzed, in order to make a selection of the most relevant policies which are able to increase the territorial attractiveness. Lack of horizontal harmonization of strategies between themselves and also with spatial plans emerged as an important issue.

The strategic documents analyzed are the following:

1. Strategy of Bosnia and Herzegovina and Action Plan for Biodiversity and Landscape's Protection - NBSAP BiH 2008-2015
2. Development strategy of Bosnia and Herzegovina
3. Water management strategy in FB&H
4. Rural development strategy in FB&H
5. Strategy of agriculture in FB&H
6. Strategy development of tourism of FB&H
7. Strategy development of science of FB&H

Analysis of the policies priorities by target audience and territorial capital

Bosnia and Herzegovina analyzed the policy documents according to the following list of policy priorities grouped by target:

1. Attraction of investments
2. Attraction of skills and knowledge in the territories
3. Attraction of tourists/visitors through the specialization of touristic districts and of the single destinations
4. Attraction of new inhabitants or visitors in the region by ensuring high quality of life and services.

The analysis of the selected policies priorities may not represent a coherent strategy, but rather a collection of different goals to be achieved, coming from the different selected programmes.

Attraction of Investments

- Improvement of governance in the institutions as well as better quality of urban planning documents can better attract investments;
- The orientation towards greenfield investments, instead of stronger support to brownfield investments should be more effective.

Economic, anthropic, environmental and institutional capitals are relevant for this topic.

Attraction of new inhabitants or visitors

- Population in Bosnia and Herzegovina is decreasing, with young qualified people and other segments leaving the country due to economic and political issues;
- Urban-rural relation is an important issue.

Anthropic, socio-cultural and human capitals are the most relevant ones for this priority.

Attraction of tourist/visitors

- Bosnia and Herzegovina has its specific identity which is becoming recognizable;
- Besides traditional destinations, other forms of tourism like business, adventure, sports, which are not place-dependant, can be further developed in Bosnia and Herzegovina;
- The number of foreign tourists is increasing after the period of political and economic instability.

Tourism is an asset in the framework of the economic/human territorial capital.

Integration assessment

The analysis committed to highlighting synergies and potential conflicts among the selected policies priorities reported that the most important assets involved in the territorial attractiveness belong to Economic/Human capital: education, employment, research.

Conflicts can be recognized in the domains of:

- Economic development vs. Environmental protection
- Towns vs. villages

The table below gives an overview on the state of the art and goals to be reached by each policy priority.

Table 1.1 - Matching different policy priorities of the territorial attractiveness strategy

Attractiveness features Objectives	Territorial scale	Audience/ Targets	Stakeholders involved	State of the art/ Performance indicators (quantitative)	Goal to be reached	Timeline
Priority 1 Resident Population	National Local	-youth -aging population -qualified population -foreigners	- ministries - local self- government - national employment agency	- diverse demographic indicators	- reduce unemployment	-
Priority 2 Tourism	National Regional Local	-foreign tourists -domestic tourists -national institutions -local institutions -population employed in tourism -potential investors in tourism	- national tourist organization - local tourist organizations - local authorities - natural protected areas - cultural heritage sites	-tourist capacities in rural households - annual number of tourists and overnight staying - number and surface of proclaimed tourist areas	- development of main tourist destinations: -Sarajevo,Mostar, Neum -Ski centre Bjelasnica, Ski centre Jahorina, Ski centre Vlasic, Visičica. -National park Una, Jajce, Blagaj, Pocitelj, Sanctuary in Siroki Brijeg - Fojnica spa centre Olovo spa centre, Gradacac spa center. -Corridor Vc	2018
Priority 3 Investments	National Regional Local	- investors - entrepreneurs - public administration	- ministries of economy, regional development, urbanism and others, - regional development agencies	- foreign direct investments by region - investment rate - multinational companies in region - employment in foreign companies in total employment - share of foreign companies in export	- increase the share of industry in the economic activities of the country	-

Croatia

Attractiveness strategy¹⁷

The three most important Koprivnica-Križevci county territorial policies related with attractiveness are listed below.

1) Koprivnica-Križevci County Development Strategy for the period 2011-2013

The most extensive part of the document is the Basic Analysis, which provides an insight into the overall situation in all relevant areas in Koprivnica-Križevci County. For each area the main problems and challenges are identified, as well as development needs to be implemented in the future.

The Vision: County in service of people

- County of tradition, natural and cultural values, competitive economy and high living standard
- Competitive economy: measures to support export growth
- Strengthening of human resources and raising social standards
- Development of transport and common infrastructures
- Sustainable use of natural, cultural values and energy management

2) Physical Plan of the Koprivnica-Križevci County

The objectives for spatial development are:

- the need to encourage small and medium-scale cities in the urban system of Croatia;
- containment cities on farmland and along roads;
- **the importance of the international transport corridors**; the planning of the construction/reconstruction of **highways, railway** (second railway track to Hungary; electrification), **airports for passenger traffic**; establishment of free zones for border counties and strengthening the position of **multimodal transport**; improvement of the **water supply network** and increase the capacity of sewer system; **reduction of pollution** of the rivers;
- require the **farms with boosting tourism** and need more tourist evaluation of **geothermal resources**, for the production of heat and electricity;
- the need to control the **illegal exploitation of large amounts of sand and gravel**;
- organization of **waste collection** in the entire area and rehabilitation of existing landfills;
- **protection from erosion and soil degradation**, development of **organic agriculture** and troubleshooting Hungarians and small holdings.

3) Study of transport

The Study has the main objective to contribute to the further development of the overall transport system of the county (road and rail transport networks, public transport of passengers and goods), articulating the basic objectives of the county development, minimizing environmental impact, rationalizing construction and technical solutions, etc.

¹⁷ Croatia participated in Attract-SEE with its Koprivnica-Križevci county; all results are thus referred to this scale.

Focus on the policies priorities for Territorial Attractiveness

As concerns the identification of priorities, Croatia adopted the same list of priorities grouped by target, as Austria, Bosnia and Herzegovina, Emilia-Romagna; FYR Macedonia and Serbia did.

1. Attraction of investments

- high technology sectors in the main regional value chains (agro-food, pharmacy)
- green economy
- sustainable agriculture, natural resources management and food quality and safety.
- renewable energies (geothermal and biomass)

2. Attraction of tourists/visitors through the specialization of touristic area and of the single destinations

- attraction of tourists in the county
- promotion of Regional park Mura-Drava, Biospher Reserve Danube-Mura-Drava and other natural value (protected areas, Natura 2000 network, etc.)
- promotion of cultural sites (Naive art)
- promotion of the territory by integrating tourism, agriculture and environment

3. Attraction of new inhabitants or visitors in the region by ensuring high quality of life and services, through:

- high quality of life and education services
- high social cohesion and effective welfare
- cultural events

Croatia also reported two cross-cutting policy priorities:

4. Increasing the mobility of people in the region by improving its accessibility

- through the optimization of regional logistics and transports
- by promoting network of hospitality/accommodations/receptivity (comprising also access to the first house for the residents and second house for non-residents)
- by ensuring internet accessibility and connectivity to allow effective services and integration in international networks

5. Increasing the ecological quality and environmental sustainability of the regional territory

- integrated waste management and increase of separated collection of the different waste streams
- improvement of surface and subterranean water quality through an integrated management of the water cycle and raising efficiency in water consumption
- improvement of air quality, in particular in urban environments, by reducing emissions and their impacts on the environment and human health
- biodiversity protection and increase, through the implementation of the Natura 2000 network all across the regional space

Integration assessment

The analysis focused on Priority 1 – Attraction of investments reported a strong relationship with economic and human capital. “Infrastructures/granting accessibility” are considered a core asset along with “Welfare/cost of living”. Synergies can be found in the relationship between innovative companies and the

availability of high skilled human resources. Several actors as research network, companies and entrepreneurial associations are strategic. Start-ups are promoting at the same time new investments and innovation.

Emilia-Romagna

Attractiveness strategy

Although there is no official definition of “territorial attractiveness”, Emilia – Romagna has two documents that afford the issue:

- a. the “Regional Territorial Plan – An attractive Region” (PTR, delivered 2010);
- b. the Programme for development of “Production Activities” 2012-2015 (PAP-PRRIIT)

The other important regional documents are:

DEVELOPMENT PROGRAMMES

- the Regional Operational Programme 2007-2013 (ROP ERDF)
- the Regional Programme for Rural Development (RRDP 2007-2013).

INFRASTRUCTURAL DEVELOPMENT PLANS

- The Regional Integrated Plan for Transportation (PRIT)
- The Regional Energy Plan (PER)
- The Regional Telematic Plan (PiTER 2011-2013)

ENVIRONMENTAL AND LANDSCAPE PLANS

- The Regional Action Plan for a Sustainable Future
- The Regional Landscape Plan (PTPR)

SOCIAL DEVELOPMENT PLANS

- The Social and Healthcare Plan
- The Regional Operational Programme 2007-2013 (ROP ESF)

Analysis of the policies priorities for TA

Emilia-Romagna attractiveness has been analysed focusing on a set of policy priorities that concern different territorial capitals, assets, targets and audiences. The priorities identified put specific assets in relation with attractiveness targets/objectives/audiences.

Target-focused policies priorities

Priority 1 - Attraction of investments

Priority 2 - Attraction of skills and knowledge in the territories

Priority 3 - Attraction of tourists/visitors through the specialization of touristic districts and of the single destinations

Priority 4 - Attraction of new inhabitants or visitors in the region by ensuring high quality of life and services

Some core assets related to more than one attractiveness target have been further analysed to better understand their state-of-the-art and potentialities, and collected together in following three cross-cutting policy priorities.

Cross-cutting policy priorities

Priority 5 - Increasing the mobility of people in the region by improving its accessibility

Priority 6 -Increasing ecological quality and environmental sustainability of the regional territories

Priority 7 - Preserving and improving social cohesion and the integration capacity of the regional society

Integration assessment

The analysis of the presence/absence of matching between a specific asset and a policy reported that some Territorial Capitals are more strategic than others for the attainment of each priority. The level of relevance has been summarized in the tables below by considering both quantitative aspects (the number of assets involved for any TC) and qualitative ones (the relevance of the assets according to the priority).

Table 1.2 - Relevance of any TC for the attainment of a specific Policy Priority

	Target/Audience priorities				Cross-cutting priorities		
	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5	Priority 6	Priority 7
Environmental capital	M	M	H	M	M	H	H
Anthropic capital	M	H	H	H	H	H	H
Socio-cultural capital	L	M	H	H	M	L	H
Economic/human capital	H	H	M	M	H	M	M
Institutional capital	H	M	L	M	H	M	M

H= High; M = Medium; L = Low

Table 1.2 can be useful to identify a first matching, but it's very general. A **second step consisted in identifying the same matching between Priorities and "main Assets"** as in Table 1.3.

Table 1.3 - Relevance of any main asset for the attainment of a specific Policy Priority

	Target/Audience priorities				Cross-cutting priorities		
	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5	Priority 6	Priority 7
Environmental capital							
Environmental quality	L	M	H	H	M	H	H
Territorial/ecosystem integrity	M	L	M	M	M	H	H
Natural resources and energy	M	L	M	L	L	H	H
Anthropic capital							
Urban quality	M	H	M	H	H	H	H
Landscape quality	L	L	H	H	M	H	H
Infrastructures	H	H	H	H	H	L	L
Socio-cultural capital							
Culture	L	M	H	H	M	L	H
Quality of life	M	H	L	H	M	L	H
Economic/human capital							
Knowledge & Innovation	H	H	L	L	M	M	L
Employment	H	H	L	H	H	L	H
Specializations / Key sectors	H	H	L	L	L	L	L
Tourism	L	L	H	L	H	H	L
Investment Promotion	H	H	L	L	H	L	L
Population	M	M	L	M	M	L	H
Institutional capital							
Governance	H	M	L	H	M	M	H
International relations	M	M	L	L	M	L	L

H = High; M = Medium; L = Low

Identification of synergies and/or conflicts among different policy priorities, focused on territorial capitals

✓ **Environmental Capital** has a particular strong relation with increase of ecological quality and environmental sustainability (priority 6) on one side, and prevent/improvement of social cohesion on the other (priority 7). This capital seems to be less relevant for attraction of investments (priority1) and increase of mobility (priority5), while it's very relevant for attraction of tourists/visitors (priority 3) and also Inhabitants (priority 4).

✓ **Anthropic capital** appears to be particularly relevant for attraction of new inhabitants (priority 4) and tourists/visitors (priority 3). Mobility of people and accessibility (priority 5) are very strictly linked with infrastructures. "local/global accessibility" is one of the most strategic assets for regional attractiveness because is relevant for five priorities out of seven. At the same time attraction of investments and skills and knowledge don't consider landscape quality as a core asset.

✓ **Socio-cultural capital** is particularly relevant for "attraction of inhabitants" (priority 4) and to "preserve and improve social cohesion" (priority 7). Quality of life is strictly related to these priorities (but also to attraction of human resources), while attraction of tourists and visitors is related mostly to the asset "culture". Priority 6 (increase of ecological quality and environmental sustainability) shows a weaker connection with this territorial capital. Also "attraction of investments" doesn't show a strong relation with this capital, even if "quality of life" is an important asset to get a friendly context for new economic activities.

✓ **Economic and human capital** is a core asset for attraction of investments (priority 1) and skills and knowledge (priority 2). This capital has also a strong relation with mobility of people (priority 5), since infrastructures represent a key factor to improve economy and availability of human resources. "employment" is a core asset for territorial attractiveness and matches with all the priorities identified in the report, except priority 3 (tourists/visitors) and priority 6 (environmental quality). "knowledge and innovation" and "key sectors" are assets strictly linked with priorities 1, 2. Population, meant as growth trend, it's not considered as a core asset, probably because it's more an effect than a cause of attractiveness.

✓ **Institutional capital** (as Economic/Human) has a stronger relation with attraction of investments (priority 1), skills and knowledge (priority 2) and mobility of people (priority 5). It seems much less relevant for attraction of tourists/visitors (priority 3).

Hungary

Attractiveness strategy

The Hungarian report identifies the measures related to attractiveness by analysing selected policy documents (programmes, plans, strategic documents).

'National Development 2030' - National Development and Territorial Development Concept (NDTDC)

NDTDC can be considered as the overall framework strategic document for national development. It defines the country's long term strategic development objectives, but it sets also mid-term priorities for 2014-2020 corresponding with the EU's next programming period:

- National economy on a base of SMEs in connection with corporate partnership
- Towards the full employment and a knowledge-based society
- On the way to the resource and energy efficiency and energy independence
- Population and social change
- Territorial integration, regional and local development on the base of local economy

STRATEGIC DOCUMENTS

National Rural Development Strategy

The National Rural Development Strategy sets out the objectives and basic principles for rural development on the basis of a vision of the future that focuses on sustainability and the values of rural life, in harmony with priority national strategy plans and comprehensive EU strategic documents:

- the preservation of landscapes, natural values and resources
- diverse and viable agricultural production
- secure food supply and food safety
- assuring the existential basis of the rural economy, increasing rural employment
- strengthening of rural communities, improving the quality of life of the rural population

Wekerle Plan

The plan aims at fostering "Carpathian-basin-wide economic growth for Hungary", within a cooperative framework of East-Central European Countries:

- harmonizing of the infrastructure
- establishing a common job market

INFRASTRUCTURAL DEVELOPMENT PLANS

National Energy Strategy 2030

- energy efficiency measures spanning the entire supply and consumption chain
- increasing the share of low CO₂-intensive electricity generation based primarily on renewable sources of energy

- promoting renewable and alternative methods of heat generation
- increasing the share of low CO₂-emission modes of transport

ENVIRONMENTAL AND LANDSCAPE PLANS

National Sustainable Development Strategy

- create a sustainable population policy
- improve health status
- strengthen social cohesion and improve employment
- protect natural values
- combating climate change
- sustainable water management
- strengthen competitiveness in a sustainable manner
- strengthen sustainable production and consumer habits
- transform Hungary's energy economy
- create sustainable mobility and spatial structure

DEVELOPMENT PLANS/OPERATIONAL PROGRAMMES

a. Competitive Central Hungary Operational Programme (CCHOP2014-2020)

- improving the competitiveness of enterprises, stimulating employment and developing the knowledge economy
- development of financial instruments and services
- settlement development
- regional integrated Community-Led Local Development programmes (CLLD)
- energy efficiency developments for the infrastructural background of public services
- improving the quality of the services
- social inclusion
- promoting employability

b. Territorial and Settlement Development Operational Programme TOP 2014-2020

- regional economic development for promoting employment
- development and renewal of the environment in the cities and their surroundings
- transition into a low carbon economy, especially in urban areas
- strengthening social inclusion and development of local public services
- Community-Led Local Development (CLLD-type developments)
- human resource developments, social inclusion and employment promotion at county and local level

From this analysis emerged the following final list of cross-cutting policy priorities.

List of policies priorities for TA

1. Bulding a competitive economy

- Strenghtening SMEs
- Supporting economic activity based on local resources
- Fostering innovation
- Strenghtening tourism

- Promoting healthcare industry

2. Development of viable rural regions

3. Knowledge-based, healthy and solidary society

4. Preserving use of natural resources

FYR Macedonia (Former Yugoslav Republic of Macedonia)

Attractiveness strategy

The most relevant policies priorities which are related to the attractiveness of Macedonia's territory and also have a spatial dimension are reported below. They are divided into two categories: policies focused on the territory's status and development goals (Strategies) and policies that contain specific actions to achieve the goals of the Strategies (Operational Programs).

According to the analysis on territorial programs, plans and policy documents, 46 policies and development documents have an explicit spatial dimension, while 26 policies/documents lack such dimension¹⁸. A need to incorporate the spatial dimension in strategic policies to the highest possible degree emerged regarding agriculture and rural development, Pre-accession Economic Program, Strategy for Poverty Reduction.

STRATEGIES

- Spatial Plan of the Republic of Macedonia (2004 - 2020)
- National Strategy for Sustainable Development of the Republic of Macedonia (NSSD 2009-2030)
- National Strategy for Reduction of Poverty and Social Exclusion for the period 2010 – 2020
- Regional Development Strategy 2009 – 2019
- Industrial Policy of the Republic of Macedonia 2009 – 2020
- Innovation Strategy of the Republic of Macedonia 2012 – 2020
- National Employment Strategy of the Republic of Macedonia 2015
- National Strategy for Rural Tourism 2012 – 2017
- Strategy for Public Administration Reform in the Republic of Macedonia (2010 - 2015)

OPERATIONAL PROGRAMS

- Program of the Government of the Republic of Macedonia for the period 2011 – 2015
- Pre-accession Economic Program 2014 – 2016
- Action Plan for the Implementation of the Strategy for Regional Development of the Republic of Macedonia 2013 – 2015
- National Program for Development of Agriculture and Rural Development for the Period 2013 - 2017
- 2014 Operational Plan for Active Employment Programs and Measures
- 2015 Action Plan for Youth Employment in Macedonia

OTHER SOURCES

- National Program for the Adoption of the EU Acquis
- Annual Reports of the European Commission to monitor the progress of country's accession to the EU

¹⁸ A matrix in the report categorized the documents by their relevance to specific types/assets of territorial capital, and also pointed out the link between policies and specific target groups (see focus on Chapter 3).

Analysis of the cross-cutting policies priorities for TA

Target-focused policies priorities¹⁹

1. Attracting investors/investments;
2. Retaining the population in the territory of living by creating conditions for socio-economic development and welfare;
3. Attracting tourists/visitors.

Integration of the different priority policies

Territorial capital and its assets for each of the goals of the Strategy for TA of FYR Macedonia

The analysis reported that the assets with the highest strategic importance to the three attractiveness priorities of the FYR Macedonia belong to institutional capital, economic and human capital, anthropic capital. Environmental capital with its assets is also of great strategic importance, although focusing on the fragmentation of ecosystems and biodiversity protection, it can be considered more directly related to the third priority. Socio-cultural capital is of strategic importance to Priority 2; while the protection of cultural heritage and the provision of diversified cultural services are related primarily to the third priority.

Synergies and conflicts between priorities

From the analysis of the impact of each type of territorial capital and its assets on the accomplishment of goals related to the three priorities of territorial attractiveness high level of synergy among goals, policies, programmes emerged.

As far as conflicts are concerned, the analysis pointed out some issues among **the goals of tourism development/tourist attraction, and those relating to biodiversity protection**. It should be noted though, that **the negative impact on biodiversity** may also be made by investment programs for **development of various forms of infrastructure** which are not necessarily directly related to tourism development (energy systems, roads, etc.).

The solutions to this identified conflict should be sought in the realm of "**good governance**", especially in terms of processes, policies and programs for spatial development, which should integrate individual goals and translate them into integrated spatial solutions, thereby giving guidelines on how to achieve a high degree of coordination and synergy. Only in that way could multiple effects of policies and implemented activities be achieved.

Investments should, according to law, be subject to **environment and nature impact assessment** and such assessment should be made extremely consistently, especially when planning investment in Protected Areas. The State should sanction the loss of biodiversity, and fully and consistently implement the Law on Nature Protection²⁰.

¹⁹ During the second stakeholder workshop, held in Skopje on May 19th 2014, the proposed territorial attractiveness priorities were unanimously accepted, and throughout the discussion comments and suggestions were made and acted upon in the consolidated Report version

²⁰ The National Strategy for Sustainable Development of the Republic of Macedonia provides the basis for this effort because one of the long-term strategic goals is to ensure the protection of nature in Macedonia based on the principles of "Natura 2000" Network,

Serbia

Attractiveness strategy

Attractiveness strategy doesn't exist as such in Serbia, but it should be identified in the existing strategic documents²¹. Among the 115 strategies and action plans which define policy priorities in Serbia, two can be characterized as comprehensive: the strategy for sustainable development and the strategy for regional development. Lack of horizontal harmonization of strategies among themselves and also with spatial plans emerged from the analysis.

To summarize, 25 documents were analysed (10 spatial plans²² and 15 strategies) referring to four main target groups to be attracted:

- resident population
- tourists
- investments
- knowledge and skills.

The Spatial Plan of the Republic of Serbia (2010 – 2020)

In the spatial plan, attractiveness is related to the topics of landscape, infrastructure, renewable energy sources, investments, agricultural land, healthy environment, natural and cultural heritage, urban renewal, communal infrastructure, intermodal terminals, rural development and so-called weekend houses. The Spatial Plan of the Republic of Serbia makes reference to the concept of “actual and potential attractiveness”, delivering a matrix which is giving an estimation of actual and potential attractiveness for 22 cities, focusing in particular on the “potentials” for urban renewal and use of brownfield locations for investments. Apart of “internal factors” as landscape, infrastructure, agricultural, natural and cultural heritage, etc. also exogenous factors should be considered (e.g. new competition, substitutes, intensity of rivals, negotiation, demand).

Analysis of the policies priorities for TA

Serbia adopted the same list of priorities grouped by target, as Austria, Bosnia and Herzegovina, Croatia, FYR Macedonia and Emilia-Romagna did.

Policy priority 1 – Resident Population

- Population in Serbia is decreasing, with young qualified and other segments leaving the country due to economic and political issues.

Relevant territorial capitals and assets to be considered are anthropic, socio-cultural and human capitals. Urban-rural relations should be more taken into account for this topic, since the urban-migrations are an important demographic aspect for territorial attractiveness.

while the Rules adopted on the proclamation of protected and strictly protected species provide explicit legal protection of a number of selected wild species (and their habitats) in the country.

²¹ Spatial planning documents define policies at three administrative levels – national, regional and local, and also some sectoral areas, such as infrastructure, protected sites, water accumulations and mining areas.

²² Spatial Plan of the Republic of Serbia and 9 regional spatial plans.

Policy priority 2 – Tourism

- Number of foreign tourists is increasing again following the period of political and economic instability. Serbia has its specific identity which is becoming recognizable.

Tourism is an asset in the framework of the economic/human territorial capital.

Policy priority 3 – Investments

- Serbia has the goal to increase the sharing of industry in economic activities of the country up to 26.4%

Assets in the framework of economic, anthropic, environmental and institutional capitals are relevant for this topic. Improvement of governance in the institutions as well as better quality of urban planning can better attract investments.

Policy priority 4 – Knowledge and Skills

- Human resources have been weakened due to long period of crisis, since the beginning of transition
- Strategies of education, research, information society and information technologies are recognized as the most relevant
- Technoparks with business incubators in Belgrade, Novi Sad and Niš might be new places for dissemination of knowledge and skills
- Universities in Belgrade, Novi Sad, Niš and Kragujevac have tradition of education and research. Numerous institutes, mostly in Belgrade, are becoming international. Private universities are becoming stronger and have more and more capacities for partnership

Research, education and capacity building are the most important assets belonging to internationalisation in the framework of the institutional capital is very important in the global area when scientists and professionals from Serbia can exchange knowledge and information more easily due to opportunities given by internet, having in mind, still rather weak economic situation.

Integration assessment

The table below gives an overview on the state of the art and goals to be reached by each policy priority

Table 1.4 - Policy priorities for Territorial Attractiveness in Serbia

Objectives	Attractiveness features	Territorial scale	Audience/ Targets	Stakeholders involved	State of the art/ Performance indicators (quantitative)	Goal to be reached	Timeline
Priority 1 – Resident Population		National Local	- youth -aging population -qualified population - foreigners	- ministries -local self-government -national employment agency	- diverse demographic indicators	- reduce unemployment to 10,32%	2020
Priority 2 – Tourism		Naitonal Regional Local	- foreign tourists -domestic tourists -national institutions -local institutions -population employed in tourism -potential investors in tourism	-national tourist organization - local tourist organizations -local authorities -natural protected areas -cultural heritage sites	-tourist capacities in rural households - annual number of tourists and overnight staying - number and surface of proclaimed tourist areas	- development of main tourist destinations: Belgrade, Kopaonik, Fruška Gora, Novi Sad, Tara-Drina, Stara Planina, Vlasina-Krajište, Corridor X (transit tourism)	2015
Priority 3 – Investements		National Regional Local	- investors - entrepreneurs - public administration	- ministries of economy, regional development, urbanism and others, - regional development agencies	- foreign direct investments by region - investment rate - multinational companies in region -employment in foreign companies in total employment -share of foreign companies in export	- share of industry 26,4% in economic activities of the country	2020
Priority 4 – Skills and Knowledge		National Local	- researchers - qualified population - information technology experts - skilled workers - foreign experts	- ministries of education, science, research, information society - universities - institutes	- employment in research and in high technologies - expenditure on research - broadband access	- cover of 100% of territory by broadband at speed of at least 1 Mb/s	2020

Identification of synergies and/or conflicts among different policy priorities

Synergies are reported concerning the assets **education, employment, investments, ICT and research**. Education and employment refer to human resources and their capacity to manage and improve attractiveness of target audiences. Investments in housing, tourist facilities, economic activities and in R&D will be well distributed; ICT technologies applied in all spheres of life; research is crucial for innovation and progress. Developments in those fields are seen as beneficial for all priorities.

Conflicts that can be recognized are in the domains of:

Economic development vs. environmental protection

- Economic development can bring more activities and opportunities, but it can also put in danger the environment, the social well-being of certain population groups and cultural identity and

heritage. The idea of sufficiency is challenging and it should be considered. Competitiveness is a strong motivation mechanism which should be regulated.

SMEs and large enterprises

- Small and medium enterprises are grass-root enterprises which might be able to grow in big enterprises;
- Competitiveness is very important, as well as principles of market economy, partnerships, comparative advantage, economic and political stability and other factors play their roles in survival and progress of enterprises;
- Attractive locations of existing enterprises as well as newly created can be in the same time an asset and a target. Brownfield and greenfield locations have variety of territorial attractiveness levels.

Towns and villages

- Regional development is increasingly gaining importance. Urbanisation is an ongoing process. Every region has its urban centre and surrounding rural area. Rural areas can't be addressed without considering urban-rural relations.

Slovenia

Attractiveness strategy

The list of policy objectives and priorities concerning attractiveness refers to the following documents:

- Spatial Development Strategy of Slovenia (SDSS)
- Operativni program 2014-2020 / Operational Programme for implementation of EU cohesion policy 2014 – 2020
- National Energy Programme
- Slovenian Tourism Strategy 2012 – 2016
- Rural Development programme 2014 – 2020
- National Housing programme 2014 -2023
- Smart Specialization Strategy

The analysis shows that two policies address all territorial capitals connected to territorial attractiveness: a) the Spatial Development Strategy of Slovenia (SDSS); b) the EU cohesion policy addressed on national level via its Operational Programme. Other national policies are more sectoral and more focused on specific objectives.

The most addressed capitals are: Economic/Human capital, Socio cultural and Anthropic Capital. Institutional capital is addressed by a few policy priorities.

Analysis of the policies priorities for Territorial Attractiveness

As concerns the identification of priorities, Slovenia analysed the policy programmes/plans, considering every measure as a priority, so every priority is a sub-group of a programme. Then, each measure has been assessed according to the target groups considered (companies/investments, skills and knowledge, tourists, residents, migrants) assigning a number of relevance for each target (see Chapter 3, FOCUS: Case study n° 1 – the Slovenian analysis).

Attraction of investments

All analysed national policies programmes address the attraction of investments, even if not directly, but by supporting measures committed to improving conditions for investments (spatial conditions, labour mobility, infrastructure improvements and quality of services or supply and supporting innovation and competitiveness of business environment).

Attraction of tourists/visitors through the specialization of touristic districts and of the single destinations

National, sectoral, regional and local policies do exist to retain local population especially in less accessible and remote areas. There are also policies to attract visitors and tourists both of national and of foreign origin. Some locations of tourist attractions have developed specific programmes offering different products and price discounts especially in low seasons.

The Ministry of Economic Development, National Tourist Office, Regional Development Agencies and individual municipalities have been formulating and implementing different strategies, programmes and

projects for different types of tourist products and infrastructure – but the emphasis is not on massive and global tourism, in order to secure sustainability of different regions and the well-being of local areas.

The attractiveness of less accessible and remote (especially mountain) areas have been further subsidised by investments in local infrastructure, jobs and municipal services, tourist accommodation capacities with eco-farming facilities, in order to stop depopulation and improve wellbeing of local inhabitants in these areas while at the same time protecting the natural environment.

The *improvement of quality of life and well-being as balanced regional development* are considered main prerequisites of successful tourism development; *green tourism infrastructure* and *accessibility infrastructure* are meant as prerequisite for development of tourism as part of national economy.

Improvement of attractiveness of the territory for residents

Residents as a target audience are addressed by the majority of the analysed documents. Most of policy priorities have an influence or a planned impact on residents, tending to improve quality of life, accessibility to jobs, quality of services and infrastructure, housing opportunities and to reduce energy costs etc. Residents are the primary target audience of the national housing programme, aiming at the improvement of the quality of housing conditions, of mobility and the access to housing. The social categories considered are: young people (solving its housing problem for a first time), young families, older population (in particular facing the problem of high housing costs and low income) and residents having a special needs.

Attraction of migrants by ensuring high quality of life and services

Migrants are not directly addressed by any of the analysed policies. Even the housing policy addresses the target audience – in this case foreign migrants - mentioning foreign migrants as a special social category, having housing needs and problems that are different from those of the resident population, but not providing any policy measures to improve the situation.

Stakeholders opinion on attractiveness of Slovenian regions

Slovenia reported the stakeholders opinion on attractiveness and lack of attractiveness (focused on target groups, cooperation of different levels and segments of the government), along with the expectations for the future development of the region's attractiveness.

A. Attractiveness of Slovenia

- Slovenia is well known as the “green jewel of Europe” for its high quality of life for (local) population, and it has a rich and diverse natural and cultural heritage;
- Western part of Slovenia (NUTS 2 West Slovenia with the capital city of Ljubljana) shows higher attraction for migrants, more educated people, as well as tourists;
- Internal migrations are more oriented towards larger jobs centres and university centres or towards suburban areas in the functional areas of important cities;
- Slovenia is becoming attractive for medical doctors and nurses from some EU countries;
- Quality of living environment (natural and recreational possibilities) in the countryside is attracting young families, when commuting possibilities to employment centres (towns) are relatively good;
- Retired people, moving to Western Slovenia, are also attracted due to the quality of living environment.

B. Lack of attractiveness of Slovenia

- Slovenia is not developing massive tourism due to lack of capacities and infrastructure (despite improvements in the past 10 years), but diversified type of tourist products;
- Attractiveness for foreign students and workers is relatively low due to language barriers, high property prices, average incomes, and rather less accessible job market, especially in Ljubljana and Western Slovenia;
- Lack of appropriate jobs may continue in future causing less in-migration of foreign citizens and higher numbers of out-migrations of Slovenian population;
- Less accessible mountain and border regions with less job opportunities are facing depopulation of particularly highly educated young people;
- Until now no conflicts between residents and visitors are significant, but some tension do exist in the areas where foreigners are buying property for vacations or retirements (and not speaking the Slovene language).

C. Cooperation of different levels and segments of the government (i.e. citizens, businesses and knowledge institutions, etc) to optimize the attractiveness for specific groups

- Different policies (e.g. regional, spatial, social, transport, housing policy, etc) in Slovenia are not well integrated both horizontally and vertically;
- Municipal governments are very locally oriented, with few international connections.

D. The expectations for the future development of the region's attractiveness

- Strategies for (future) tourist development will need to be enhanced with better cooperation between different (especially local) actors and marketing activities in order to be more propulsive over the whole year and not only in high seasons (summer/winter);
- The national economy and the flexibility of the labour market seem to be the main drivers of regional attractiveness and pull factors for domestic and international migration. Functional areas of larger urban centres are gaining and most probably will continue to gain population in future on behalf of less accessible peripheral areas. Cities might improve their attractiveness with improvement of environmental conditions, and further investments in public transport and local services.

Integration assessment

An assessment of the interrelations between policy priorities and target audiences is reported in the Slovenian attractiveness report (see Chapter 3, FOCUS: Case study n° 1 – the Slovenian analysis).

Chapter 2 – Monitoring attractiveness at SEE level

2.1. Identifying common indicators

A core output of the Attract-SEE project is the Common Territorial Monitoring Framework (CTMF)²³, aimed at providing a common basis for reporting on Territorial Attractiveness in the SEE area.

The CTMF is committed to address needs set on a double level: on one side, a framework of indicators shared among the project partners, useful for benchmarking the main territorial trends according to the different perspectives of the Territorial Capital dimensions; on the other side, the CMTF should play the role of helping the assessment of the policy performance and supporting the integration of policies with different territorial effects.

The Common Framework of the territorial capitals and related assets (see Table 1) was preliminary to the definition of a database of common set of indicators. In the document *list of common set of indicators in SEE*²⁴ project partners agreed upon a common list of indicators related to territorial capital and assets. For each “aggregated” TC asset, it has been identified at least a couple of core-indicators, one *state* and one *pressure* (in compliance with the DPSIR definitions²⁵).

For some indicators, datasets with a transnational vocation have been adopted (e.g. Eurostat, OECD, European Commission, European Environmental Agency, United Nations, UNECO, World Bank, ESPON projects). For other indicators, the CTMF provides a collection of data adopting as sources different national/regional datasets.

The final selection of indicators on transnational level was collected and calculated in the document “*Data analysis - creation of country/region specific indicators*”, after the analysis on data availability²⁶.

Project partners agreed upon the final selection of **31 indicators on transnational level**; for 9 of them, geographical cover and time series are missing.

The final set of indicators is provided in the tables below, while the related values and maps are calculated only for 22 indicators with geographical cover and with values extending over a series of years (highlighted in grey), and showed in the annex “List of Maps”.

²³ See work package 3

²⁴ list of common set of indicators in SEE (WP 4, Act. 4.1 and WP 3, Act. 3.2)

²⁵ DPSIR stands for: driving forces, pressures, states, impacts, responses and refers to the causal framework for describing the interactions between society and the environment adopted by the European Environment Agency (EEA).

²⁶ on the basis of the methodology coming from WP4 (act. 4.2).

Table 2.1 - The Attract SEE common set of indicators.

Environmental capital

<i>Environmental quality</i>	
1.	Greenhouse gas emission (Europe 2020 indicator)
2.	Air pollution: PM10
3.	Air pollution: Ozone concentration
4.	Population connected to urban waste water treatment with at least secondary treatment

<i>Territorial/ecosystem integrity</i>	
5.	Artificial surface by Corine Land Cover

<i>Natural resources and energy</i>	
6.	Electricity generated from renewable sources
7.	Consumption of water per capita

Anthropic capital

<i>Urban quality</i>	
8.	Urban/rural population (or Urban rural classification)

<i>Landscape quality</i>	
9.	% of terrestrial area protected

<i>Infrastructures</i>	
10.	Population with accessibility to high-speed broadband (1 Mbit/second up and down)

Socio-cultural capital

Culture	
11.	Number of theatres, museums, galleries and public libraries per 10,000 inhabitants
12.	European cultural sites on the Unesco World Heritage List, 2010

Quality of life	
13.	Life expectancy at birth by sex (Europe 2020 indicator)
14.	Gross disposable household income
15.	People at risk of poverty or social exclusion (Europe 2020 indicator)

Economic/human capital

Knowledge & Innovation	
16.	Population aged 25-64 with tertiary education
17.	Numbers employed in the Research & Development out of the total labour force
18.	Research & Experimental Development expenditure as % of GDP (Europe 2020 indicator)
19.	Patent applications submitted to the Office European Patent per million population

Employment	
20.	Employment rate 20-64 years by sex [%] (Europe 2020 indicator)
21.	Youth unemployment rate

Specializations / Key sectors	
22.	Share of employment by sector

Tourism	
23.	Number of overnight stays of tourists per capita per year
24.	Share of tourism related employment in total employment

Investment Promotion	
25.	Building permits (Commercial, Industrial, Institutional, Residential) [in €]
26.	% of GDP of foreign direct investment

Population	
27.	Population growth rate
28.	% of population in age 20-64 years
29.	Ageing index

Institutional capital

Governance	
30.	Composition of local government expenditures

International relations	
31.	Number of foreign students and/or professors

Chapter 3 - Trans-national attractiveness: sharing common keys of interpretation

Introducing common keys of interpretations

The concept of territorial attractiveness refers to how a place is perceived and what types of assets has to offer to the different types of audiences. From the perspective of territorial development, it is important to identify the roles of environmental, social, economic and institutional assets that influence the attractiveness for each target group.

The following main variables should be taken into account:

- The different groups of *mobile audience* to be attracted, consisting of people (e.g. residents, migrants, tourists), organizations (e.g. enterprises/corporations, R&D organizations), non-material flows (e.g. financial investments, knowledge), etc.
- The *mix of territorial assets* composing the attractiveness of a place, that varies according to the audiences to be attracted and it's influenced by policies promoted at country/regional level;
- The *policy goals* which can be closer to some specific "*mobile audience*", even if policies mostly do not address directly target groups, acting on territorial assets which in turn influence the targets²⁷;
- The *territorial/spatial scale* at which the analysis is conducted (transnational, national, regional, etc.) can strongly influence the dynamics of attractiveness.
- The *time scale*, depending on the fact that the audiences are meant to be attracted for a short/long term period.

The relation among these dimensions is represented by the following scheme.

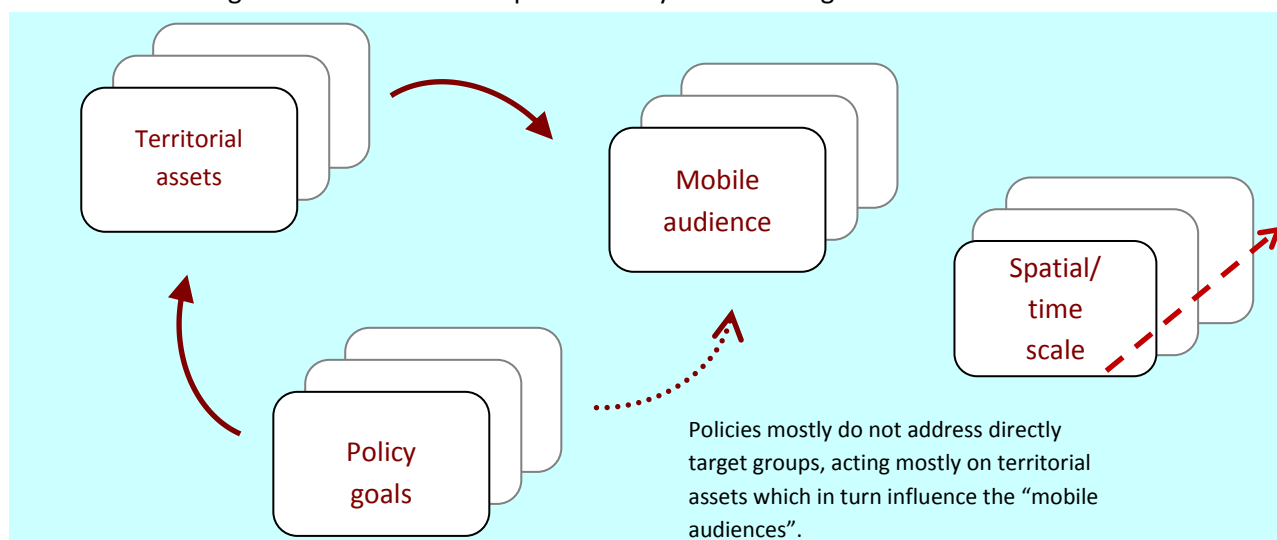


Figure 3.1 - The relation among territorial assets, mobile audiences, policy goals.

²⁷ A focus on the Slovenian report on attractiveness aiming at further explaining the "cause-effect relationship", helps to better define the relationship between the territorial assets and the target audiences (see the good practice – the Slovenian case).

The analysis provides a summary of the main findings, emerged from different perspectives at transnational level, and represents an attempt to define the list of assets which are more likely to attract the audiences profiles (based upon the relevance/non relevance attributed to each asset by partners). The identification of potential synergies and conflicts will be useful for strengthening the country/regional policy makers in seeking better policy coordination and supporting the decision making process.

Attraction of investments

International investments have been an important driver of globalisation and have grown quickly over the last decades due to the rapid emergence of *global value chains*.

According to ATTRACT SEE partnership, Economic/Human capital and Institutional capital are highly strategic for investment promotion. All the assets related to these capitals have been considered relevant: knowledge and innovation, employment, specialization, investment promotion, population, governance and international relations.

Ac concerns Anthropic capital, local/global accessibility, including especially infrastructures and access to public services, are considered highly relevant for this target. towns/settlements revitalization/networking' is also considered relevant.

Environmental capital is also strategic for this target, especially as concerns environmental quality and energy management (close to the business needs). In the Socio-cultural capital, the more relevant asset is welfare/cost of living. According to the partners, territorial and ecosystem integrity, natural resources and energy are not meant as strategic assets. That means that investors may not consider Environmental quality as a core asset to decide whether to set up their company. Also quality of life doesn't appear to be an important asset for this policy priority, even if strategic for availability of skilled human resources.

Stakeholders involvement

The stakeholders to be involved for effective investment promotion belong to a wide range of categories: Companies/investments (that are the final target) and Entrepreneurial associations; State, Regional and local Authorities and Administrations (especially the one related to the strategic assets mentioned above); Development/Investment promotion agencies and operators; organizational units for local economic development and urban planning in municipalities, Educational and Research institutions; Infrastructure operators/providers; International Trade Fairs; Interest groups.

Attraction of skills and knowledge

In general terms, "skills & knowledge" is driven forward by a set of factors not too different from "attraction of investments".

Economic/Human capital is the most represented capital, especially as concerns Knowledge & Innovation, Employment and Specializations. Investment promotion is also considered strategic, since it includes also strategies for attraction of talents.

Institutional capital is considered strategic, but only for the assets related to International relations (Cross-border cooperation and Internationalization) and not for the general Governance.

Environmental quality and also biodiversity are considered more relevant than the other assets of the Environmental Capital. In the Anthropic Capital, local/global accessibility and access to public services are more strategic assets, while, in the Socio-Cultural capital, welfare/cost of living is considered more relevant.

Stakeholders involvement

The key stakeholders to be involved for attraction of skills and knowledge belong to a wide range of categories: first of all Educational and Research institutions (Universities/Masters, Research networks/laboratories, Training bodies, Public bodies supporting start ups and training, Associations supporting training, etc.); State, Regional and local Authorities and Administrations (especially for the sectors related to Education and Innovation); Companies and Entrepreneurial associations; Financial assistance bodies and other Funds related to human resources development; Social organisations, NGOs.

Attraction of tourists and visitors

In this priority, the concept of attractiveness refers to how a place is perceived and what types of assets it has to offer to the different types of tourists and visitors.

Anthropic capital is strategic for this priority. The more relevant assets seems to be those related to Landscape quality, in particular visual attractiveness and landscape diversity, together with local/global accessibility, that remains a key-asset for all the priorities in Attract See.

In Socio-Cultural capital, the more strategic assets are those related to Culture: cultural heritage and multicultural services.

As far as the Environmental capital is concerned, biodiversity²⁸ and natural resources management are the most relevant assets, followed by environmental quality.

International relations (Institutional capital) have a strong relationship with attraction of tourists.

Attraction of tourists is also considered as a specific asset of the Economic/Human capital in Attract See framework, together with Sectoral specializations. That means that a territory can plan to have a more active approach with respect to tourism, seen as economic sector.

Stakeholders involvement

Key stakeholders are: national/local tourist organization/operators, state, regional, local authorities, natural protected areas and cultural heritage sites operators, companies especially in tourism/Ho.Re.Ca sectors, Chambers of Commerce, Public Tourism Promotion Agencies.

The attractiveness of a place stems not only from the combination of different assets but also from the coordination of activities among the local authorities and the actors active in the “promotion”. It represents the capacity of stakeholders to target specific users (or audiences) by implementing a particular vision of the territory and its future development. It may concern specific actions such as territorial marketing

²⁸ FYR Macedonia report points out that tourism development/promotion and biodiversity have not to be in conflict. Investments in the tourism sector should be subjected to environment and nature impact assessment and such assessment should be made consistent, especially when planning investment in Protected Areas. The State should also sanction the loss of biodiversity.

and/or branding (e.g. the choice of some cities to privilege mainly cultural forms of tourism, some regions characterised by coastal areas that try to attract flows of wealthy retired migrants).

Attraction of inhabitants

The analysis suggests that the regional characteristics that are associated with attracting new inhabitants are broader than purely economic factors, and involve many assets referring to Socio-cultural capital: multiple cultural services, welfare/cost of living, social equity/poverty reduction, multicultural integration, sense of belonging/citizenship.

The analysis also confirms that Anthropoc capital plays a key role, especially with the assets: access to public services (and levels of service provision), towns revitalisation, urban health, liveability, environmental services.

Increased local/global accessibility and basic infrastructures for daily life, also by means of enhanced public local transport and networks among small and medium-sized towns, lead to improved job opportunities and services.

Attracting and maintaining inhabitants means also taking into account balanced urban-rural relations as rural areas are increasingly functionally interlinked with urban development in terms of flows, exchange processes, institutional links and interdependencies. Due to factors such as the availability of residential or leisure spaces within metropolitan areas, appealing rural areas should be provided with increasing accessibility to services of general interest. Close links in rural areas to territorial hubs should be facilitated by ICT.

Stakeholders involvement

Main stakeholders to be involved for policies on attraction of inhabitants are: State, Regional and local Authorities and Administrations (especially for the sectors related to Welfare, Healthcare, Education), associations of municipalities, national/local employment agencies, cultural agencies / NGOs, association of categories, e.g. households.

Potential synergies and conflicts between different target groups

From the table below, several assets emerge as strategic for integrated attractiveness policies, because more “transversal” with respect to different types of audiences, while other assets turns out to be more relevant for a specific target group, and less relevant for the others.

		Investments	Skills and knowledge	Tourists and visitors	Inhabitants	Total
Environmental capital						
Environmental quality	Environmental quality (air, water, waste, greenhouse gases, etc.)	3	3	2	4	12
Territorial/ ecosystem integrity	Territorial/ecosystem fragmentation	1	0	1	2	4
	Biodiversity	1	2	4	1	8
	Risk management	2	0	2	3	7
Natural resources and energy	Natural resources management (renewable/non renewable)	2	0	3	1	6
	Energy management (fossil fuels / renewable resources)	4	0	0	1	5
Anthropic capital						
Urban quality	Access to public services	4	3	0	4	11
	Towns/settlements revitalisation/networking	3	1	1	4	9
	Urban health/liveability /env. services	0	1	0	4	5
Landscape quality	Visual attractiveness	0	0	4	1	5
	Landscape diversity	0	0	4	2	6
	Balanced urban-rural relations	1	0	0	4	5
Infrastructures	Local/global accessibility	4	4	4	4	16
	Basic infrastructures for daily life	3	1	0	4	8
Socio-cultural capital						
Culture	Cultural heritage	0	0	4	2	6
	Multiple cultural services	0	1	4	4	9
Quality of life	Welfare/Cost of living	3	3	0	4	10
	Social equity/poverty reduction	0	0	0	4	4
	Multicultural integration	0	0	2	4	6
	Sense of belonging/citizenship	0	0	0	4	4
	Gender mainstreaming	1	1	0	1	3
Economic/human capital						
Knowledge & Innovation	Research	4	4	0	0	8
	Education/capacity building	3	4	0	3	10
	Attracting/holding competences	3	4	0	0	7
Employment	Employment	4	4	0	4	12
Specializations / Key sectors	Diversified economic activities/services	4	4	3	1	12
Tourism	Attractiveness for tourism	3	0	4	0	7
Investment Promotion	Foreign investments attraction	4	3	2	0	9
	Quality business locations/services	4	3	0	0	7
	Partnerships relations	4	3	0	0	7
Population	Population growth , % pop in age 15-64 years	3	0	0	4	7
Institutional capital						
Governance	Effective governance arrangements	4	0	0	2	6
International relations	Cross-border cooperation	4	4	3	0	11
	Internationalization	4	3	3	2	12

Figure 3.2- TC and Assets more involved for each Target group of the territorial attractiveness strategy

The table is the result of the analysis carried out in some national/regional attractiveness reports (Emilia-Romagna, Austria, Serbia, Bosnia and Herzegovina). The comments that follow have been integrated with the results emerged from the workshop: “*Trans-national attractiveness: sharing common keys of interpretation*” (see Annex), and with two case studies elaborated by the Slovenian and Macedonian partners (see focus below). Anyway, these results have to be read as a result of the ATTRACT SEE analysis, not representing a picture that cannot be changed, but rather an useful guideline for introducing complexity of attractiveness policies at transnational level.

Assets relevant for many target groups

- Infrastructures/Local global accessibility

Local and global accessibility is among the most relevant assets for all the selected target groups. Attractiveness is generally enhanced by good basic transport, digital infrastructures and accessibility.

- Environmental quality

Environmental quality (air, water, waste, greenhouse gases, etc.) is also relevant for all the target groups.

Potential conflicts (Accessibility & Infrastructures/Environmental quality): policies for transport and infrastructures make some regions more accessible than others, but sometimes less “attractive” in terms of the quality of their landscape and environment.

- Employment

Employment is a core asset for all target groups except tourists. High employment rate expresses the ability of a national/regional labour market to be at the same time competitive and inclusive. Even if higher employment is not directly related to tourists attraction, is also true that tourism industry can improve the employment level. So, direct conflicts among the target groups didn't emerge with respect to the development of tourist promotion.

- Welfare/Cost of living

Welfare/cost of living appears to be crucial for inhabitants (including migrants), companies (in close relationship with labour and real estates costs), skills and knowledge (high skilled workers). This asset doesn't appear to be directly related to tourists attraction. Anyway, tourism industry can influence both the cost of living and the welfare conditions of certain places.

- International relations

International relations (including cross-border cooperation and Internationalization) appear to be relevant for Investments/companies, Skills and knowledge and Tourists, while seem to be less relevant for Inhabitants, according to the Attract SEE analysis. Important themes of cooperation are joint territorial marketing, coordination in planning for infrastructure and the environment, cultural events and students exchange.

- Access to public services

This asset appears to be relevant for companies, skills & knowledge and inhabitants. Under this profile, attractiveness can be conceived as the presence of services, either for residents, students and specific types of enterprises. Tourism, even if not directly involved by this asset in Attract SEE analysis, doesn't seem to have conflictual interests.

- Education

This asset is highly strategic for companies, skills and knowledge and inhabitants. Universities and other training institutions can be a strong factor of attractiveness, especially if the territorial system is able to turn the students in future inhabitants/employees.

- Economic/human capital: integration between attraction of investments, skills and knowledge and other target groups

The assets belonging to Economic/human capital, appear to be particularly strategic for the attraction of investments/companies and skills and knowledge. Even if some assets are relevant also for inhabitants (e.g.: employment, education population), other assets as Knowledge and innovation (research, competences) and Investment promotion (FDI attraction, business locations, partnership relations) are highly focused on the two former target groups. Policies for attraction of investments can improve the average R&D and education system, making the economic system stronger enough to overcome local sectoral industrial crisis. Diversified economic activities/services are an asset relevant also for tourism, than can be a suitable economic specialization.

Potential conflicts can emerge from the attraction of investments that, even providing employment, have to respect criteria concerning quality of life and social cohesion (e.g.: pollution, traffic, competition with local companies, short-term localizations, increasing housing and land prices).

Assets relevant only for one/two target groups (potential conflict)

Some specific assets appear to be very relevant only for one or two target groups. Policy makers in SEE area have to be careful about these assets to avoid potential conflicts among different audiences.

Assets considered highly relevant only for tourists: visual attractiveness, landscape diversity, biodiversity.

Assets considered highly relevant only for inhabitants: social equity/poverty reduction, sense of belonging/citizenship, balanced urban-rural relationships.

Assets considered highly relevant only for tourists and inhabitants: cultural heritage, multicultural services, multicultural integration.

Assets not considered relevant for attractiveness policies (potential conflict)

Gender mainstreaming has been considered among the less relevant assets by the national/regional reports, even if its relevance has been considered slightly higher by the transnational workshop.

Territorial ecosystem integrity has been considered among the less relevant assets, even if it represents a basic condition for the sustainable development. So attractiveness policies don't have to forget the assets that are less relevant for promotional activities, but represent a minimum condition for safety/quality of life.

FOCUS: Case study n° 1 – Priorities of different national policies addressing target audiences in Slovenia

In the Slovenian report there is an in-depth analysis of the relationship between the national territorial policies, that are mostly ‘assets-oriented’, and the target audiences involved. The Slovenian team assessed each measure of the programmes defining its influence with respect to each type of audience. Every relation between the policies and the audiences was assessed on the scale between 0 – no influence - and 5 – high influence²⁹.

Table 3.1 – Example of the Slovenian case study: assessment of the measures of the Spatial Planning Strategy with respect to the audiences considered

	Priority	Priority	Companies/Investments	Skills and knowledge	Tourists	Residents	Migran
Spatial Planning Strategy of Slovenia	Rational and effective spatial development	1	3,5	1,5	0,8	3,5	1,5
	Polycentric development of the network of cities, towns and other settlements	2	3,5	1,3	0,8	3,0	2,0
	Increased competitiveness of Slovenian towns in Europe	3	3,5	3,0	1,5	2,8	2,0
	High-quality development and attractiveness of cities, towns and other settlements	4	3,5	3,0	2,3	3,3	1,0
	Harmonious development of areas with common spatial development characteristics	5	0,8	0,3	2,0	3,0	0,3
	Complementarity of rural and urban area functions	6	1,3	1,5	2,0	2,5	2,0
	Integration of infrastructure corridors with the European infrastructure systems	7	2,5	1,0	2,8	2,8	1,5
	Prudent use of natural resources	8	1,0	2,0	1,3	4,0	0,0
	Spatial development harmonized with spatial limitations	9	1,8	0,8	1,3	3,3	0,0
	Cultural diversity as the foundation of the national spatial identity	10	0,8	0,8	2,8	3,5	0,0
	Nature conservation	11	0,3	0,0	3,3	3,5	0,0
	Environmental protection	12	1,5	1,5	2,0	3,5	0,0

From the case study of Slovenia it appears that:

- the **attraction of investments** is mostly addressed by improving the conditions for investments: spatial conditions, labour mobility, infrastructure improvements and quality of services or supply, along with supporting innovation and competitiveness;
- public policies addressing **attractiveness of tourists** are mostly seeking to support the framework conditions, by improving the quality of services, nature, environment and cultural heritage;
- policies addressing **residents and visitors** as targets have an impact on the quality of life, accessibility to jobs, quality of services and infrastructure, housing opportunities, energy efficiency.

²⁹ The case study combines data analysis (assessment) with a more qualitative policy review based on interviews with representatives of governments, businesses, knowledge institutions and other stakeholders. For further information, see the National Territorial Attractiveness Report from Slovenia.

FOCUS: Case study n° 2– Analysis of Territorial Policies in FYR Macedonia

In the FYR Macedonian report, the relevant policies and development documents related to the socio-economic and infrastructural development, environment protection and social protection have been categorized by their relevance to specific types/assets of territorial capital. The analysis also pointed out the link between policies and specific target groups.

Table 3.2 – Example of the relationship between policies containing territorial capital assets and target groups (Environmental quality)

Territorial capital	Policies	Spatial dimension		Attractiveness for target groups		
		Yes	No	Population	Tourists	Investors
Environmental Capital						
Environmental quality						
Ambient air quality	National Plan for Ambient Air Protection 2013 - 2018	X		X	X	X
	Program for Pollution Reduction and Ambient Air Quality Improvement (municipal programs for specific zones and agglomerations)	X		X	X	X
Water management	National Water Strategy 2011 - 2041	X		X	X	X
	Water Management Master Plan of the Republic of Macedonia (under preparation)	X		X	X	X
	River Basins Management Plans (under preparation)	X		X	X	X
Waste management	Waste Management Strategy of the Republic of Macedonia 2008 - 2020	X		X	X	X
	Waste Management National Plan of the RM 2009 - 2015 Municipalities prepare Local Waste Management Plans The establishment of waste management structures at the regional level is underway	X		X	X	X
Climate change	3rd Communication to the UN Framework Convention on Climate Change (2014)	X		X	X	X
Integrated approach to environmental (ecological capital) preservation	Second National Environmental Action Plan (2006 - 2012) - subject of revision Municipalities prepare Local Environmental Action Plans Studies for assessment of the strategic environmental impact are prepared with regard to all policies and development documents, especially the ones that contain a spatial dimension	X		X	X	X

From the case study it appears that:

- **territorial capitals are almost entirely addressed through integrated and sectoral policies**, not taking into account other important documents which are currently being revised or are in the process of preparation;
- in terms of analysis of the priorities associated with the territorial attractiveness, currently there is no valid national/sectoral environmental protection policy in FYR Macedonia: **the environmental capital is critical**;
- as far as the economic and human capital are concerned, emerged a **the lack of strategic documents for the development of tourism and SMEs**;
- as regards **target groups**, it can be concluded that **all the policies and documents analysed** are aimed at providing **better living conditions** (and therefore, at retaining the population), and most of them **have both direct and indirect impact on attracting (and retaining) visitors (tourists) and investments (investors)**.

Chapter 4 - What's next: the key role of governance

The key assumption of the ATTRACT SEE project is that the way in which territorial capitals and related assets are used, changed and valorised bring about shifts in the “positioning” of regions with respect to their attractiveness and development potentials. Because of the principle of »no policy fits all«, often policy makers need to understand what strategy for attractiveness better suits to the different assets of a specific territory and how to better balance the mix of sectoral policies in view to maximize synergy and reduce trade-offs.

According to the most important European spatial policy document (from ESDP to EU2020 and TA2020), two aspects represent core issues for policy coordination: on the one hand, reinforcing the network relations and synergies with other territories with similar vocations, on the other hand, making best value of the differences, by specializing territories according to their peculiar vocations. These two aspects, that are considered »two sides of the same coin«, are strategic both at »vertical« multi-scalar level (from the local to the EU level) and at the »horizontal« level of inter-sectoral (non-spatial) policy coordination.

In general terms, Attract-SEE project provided an analysis of the complex relations among the different assets forming territorial capitals, and the differential ability of places to attract and retain different target audiences. The mere presence of the assets of territorial capital do not automatically lead to the attraction and retention of specific target audiences: the non-linear interaction among the different assets calls for the coordination and integration of policies, that seems essential.

This is rather often eased (or on the contrary obstaculized) by the arrangements in institutional governance. The long and in-depth appraisal process carried out by each partner on its own strategies and policies, according to a common scheme (whose results were analysed in chapters 1 – 3), showed the difficulty of an actual achievement of consistency and synergies among policies, avoiding trade-offs and conflicts. It is also according to these facts that the partnership developed the »Policy coordination Handbook«.

Since the approach of this Transnational Report is mainly aimed at supporting policy-makers in SEE area to set up effective attractiveness policies, some key points have been highlighted concerning the key role of governance.

A reliable governance is a core attractiveness asset

Reflecting on attractiveness from a governance point of view, brings to underline that Governance by itself can be considered as a key-factor of attractiveness: i.e. a well established and reliable governance system of a “place” may become a factor of localisation, e.g. for enterprises but also for citizens and/or knowledge workers.

Governance has to balance different needs and demands

In each territory, while there is a range of “different users” that do not have uniform needs and demands, finding a way of reconciling differing (and often conflictive) needs is a mark of an inclusive governance system. A critical point is thus how a governance system can balance out those needs and demands.

The coordination and a unitary approach towards the target audiences that are object of any attractiveness policy can strongly influence the way the local policy-makers create, exploit, supplement and/or replenish the territorial capitals or the way they transform liabilities into assets. Anyway, it's hard to find a unique

strong relation between a policy priority and a territorial capital asset, even if some assets maybe more strategic than others for the attainment of the priority. On the other hand, the attraction exerted by a place on some “target audiences” may either strengthen, or on the contrary reduce, the attractiveness that the same place has for the others audiences.

Governance has to involve the relevant stakeholders

Regional strategies that want to address “attractiveness” with an integrated approach, should thus secure the participation of the widest range of stakeholders, able to mobilise resources coming from different sectors (e.g. the private sector and civil society) in pursuit of long term goals. The effectiveness of governance arrangements can depend on the ability to involve all the relevant stakeholders to design and implement shared strategies and policies oriented to a specific (desired) target audience. Networking actions (e.g. partnerships, including PPP) among different actors are critical issues³⁰ and attractiveness strategy can be a combination of top-down EU and state policies and bottom-up initiatives of local and regional stakeholders.

Governance: which scale for what policy?

Over the last two decades, the EU is becoming a core actor in the definition of policy agendas , with an approach that pursues a “balanced mix” of territorial cohesion and competitiveness. Great deal of sectoral policies - carried out at the EU, national or sub-national levels - impact on territorial development: among these, various policies are generally recognised as »territorially-relevant«, including economic and regional development, transport, energy generation and supply, environmental policy; agriculture and rural development policy, etc.

The horizontal integration of these sectoral policies at EU level has been advocated in the TA 2020, and, to some extent, in the last Cohesion Reports. Policy integration is also on the agenda in the Europe 2020 strategy. At the same time, it has to be stressed that a sustainable development process in heterogeneous regions cannot be always effectively and efficiently pursued with homogenous strategies and policies.

The assessment of “which scale for what policy”, varying from the very local (cities and regions covering smaller spatial units not covered by the EU statistical analysis) to country level, cross-border regions or – again – functional regions³¹, appears still to be solved. But this also suggests the importance of a system of multi-level governance that is able to integrate and coordinate the actions of actors operating at different scales on the same issues, but also operating at the same level, on the different issues that support sectoral policies (see also Attract-SEE Policy Coordination Handbook).

Governance and external context

It is also to be considered that the level of attractiveness may vary according to the factors that are often out of the control of the planner: this is about e.g. the presence of *other driving forces* that can be considered “external” or “global”(e.g. issues such as climate change or demographic changes or the economic crisis that cause critical spatial effects).

³⁰ Chapter 3 of this report provides lists of relevant stakeholders to be involved to attract specific targets.

³¹ At this respect, the experience held by the English regional policy, with the establishment of the City-Regions and its further partial overcoming by the Local Enterprise Partnership (LEP) policy, appear paradigmatic.

In a globalizing and interrelated world economy, competitiveness (and attractiveness) also depends on building links with other territories, to ensure that common assets are used in a integrated and sustainable way at the different territorial scales (e.g. climate change adaptation/mitigation): these issues force planners to go beyond their specific local/regional/national context, which is their natural habitat for problem solving.

Annexes

List of Maps

Environmental capital and attractiveness in the SEE area

Map 1 - Air pollution: Ozone concentration

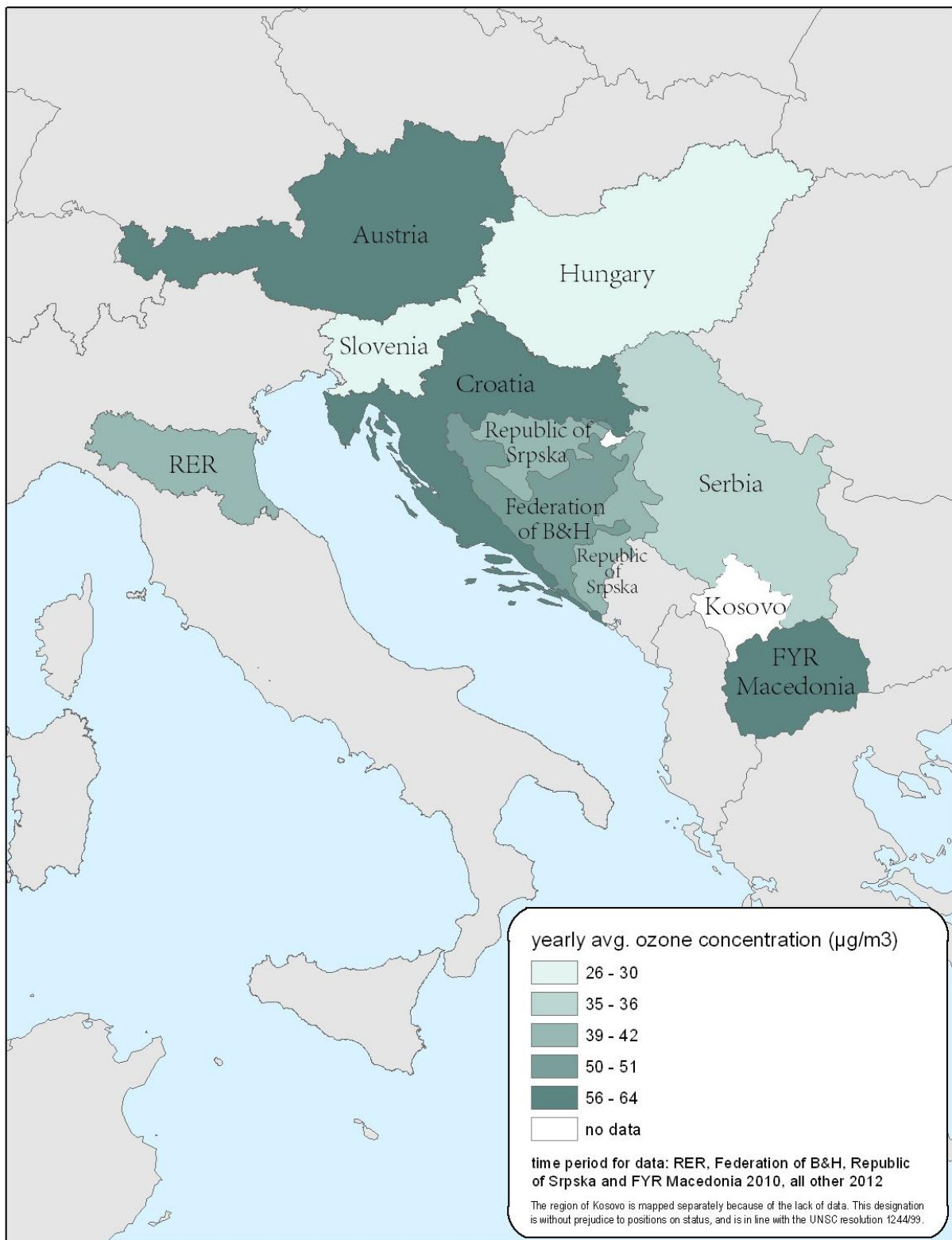
Name	Air pollution: Ozone concentration
Asset	<i>Environmental quality</i>
Capital	Environmental capital
Definition	Indicator defined as the number of days with ground level concentration exceedances of more than 120 $\mu\text{g}/\text{m}^3$.
Purpose	Attractive regions of high ecological values and strong territorial capital. The indicator tries measuring the degree of reductions in emissions for healthier natural living environments.
Determination	Territorial distribution of the annual average of exceedings of the concentration limit established by law.
Maintenance/ publishing frequency	Annual
Data source	European Environmental Agency, national, region
Geographic name	Country/region
Spatial level	National/region
Type	State

Comprehensive table with values extending over a series of years
Air pollution: Ozone concentration ($\mu\text{g}/\text{m}^3$)

PROJECT PARTNER	TIME PERIOD (YEAR)					
	2008	2009	2010	2011	2012	2013
Slovenia			32,67	31,32	29,96	
Austria					56,00	
Emilia-Romagna			42,00			
Hungary					26,07	
Serbia			8,73	23,00	35,21	35,5
Croatia				58,68	59,95	56,53
BiH	<i>Federation of B&H</i>	49,00	48,00	50,00		
	<i>Republika Srpska Brcko district</i>	43,00	42,00	39,00		
FYR Macedonia	87,57	80,83	63,33			

** values in cells coloured are presented on map*

Air pollution: Ozone concentration



Map 2 - Population connected to urban waste water treatment with at least secondary treatment

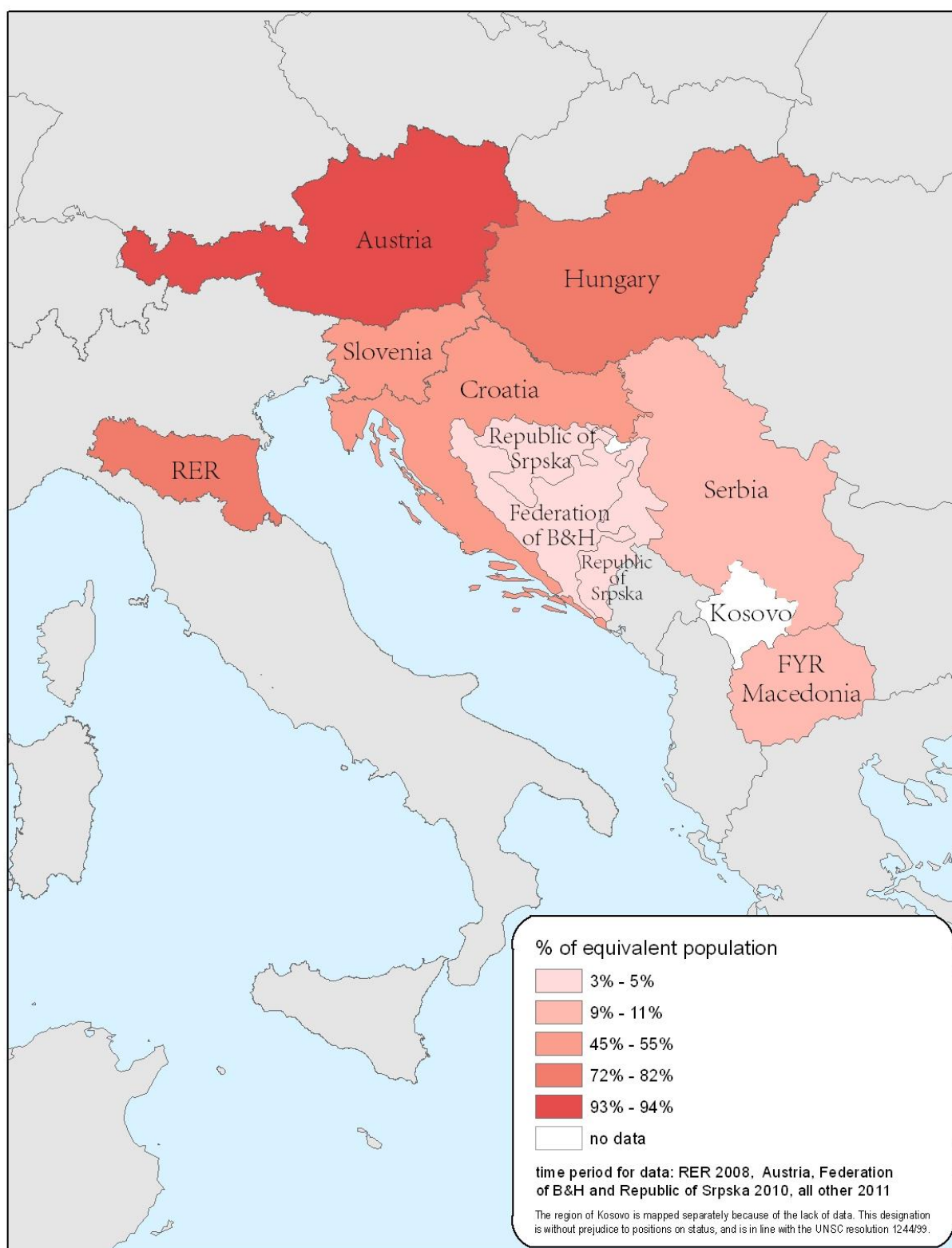
Name	Population connected to urban waste water treatment with at least secondary treatment
Asset	<i>Environmental quality</i>
Capital	Environmental capital
Definition	This indicator is defined as the percentage of the population connected to waste water treatment systems with at least secondary treatment.
Purpose	Thereby, urban waste water is treated by a process generally involving biological treatment with a secondary settlement or other process, resulting in a biochemical oxygen demand (BOD) removal of at least 70% and a chemical oxygen demand (COD) removal of at least 75%.
Determination	% of equivalent population
Maintenance/ publishing frequency	Annual
Data source	EUROSTAT, national, region
Geographic name	Country/region
Spatial level	National/region
Type	Response

Comprehensive table with values extending over a series of years
Population connected to urban waste water treatment with at least secondary treatment (%)

PROJECT PARTNER	TIME PERIOD (YEAR)					
	2008	2009	2010	2011	2012	2013
Slovenia	50,00	52,00	53,00	54,50	56,00	
Austria	92,80		93,90			
Emilia-Romagna	81,59					
Hungary	71,00	72,03	72,30	72,71	74,04	
Serbia	7,10	8,54	8,91	9,33		
Croatia	42,27	44,67	50,16	45,42	40,42	
BiH <i>Federation of B&H Republika Srpska Brcko district</i>			4,50 3,90			
FYR Macedonia	11					

** values in cells coloured are presented on map*

Population connected to urban waste water treatment with at least secondary treatment



Map 3 - Electricity generated from renewable sources

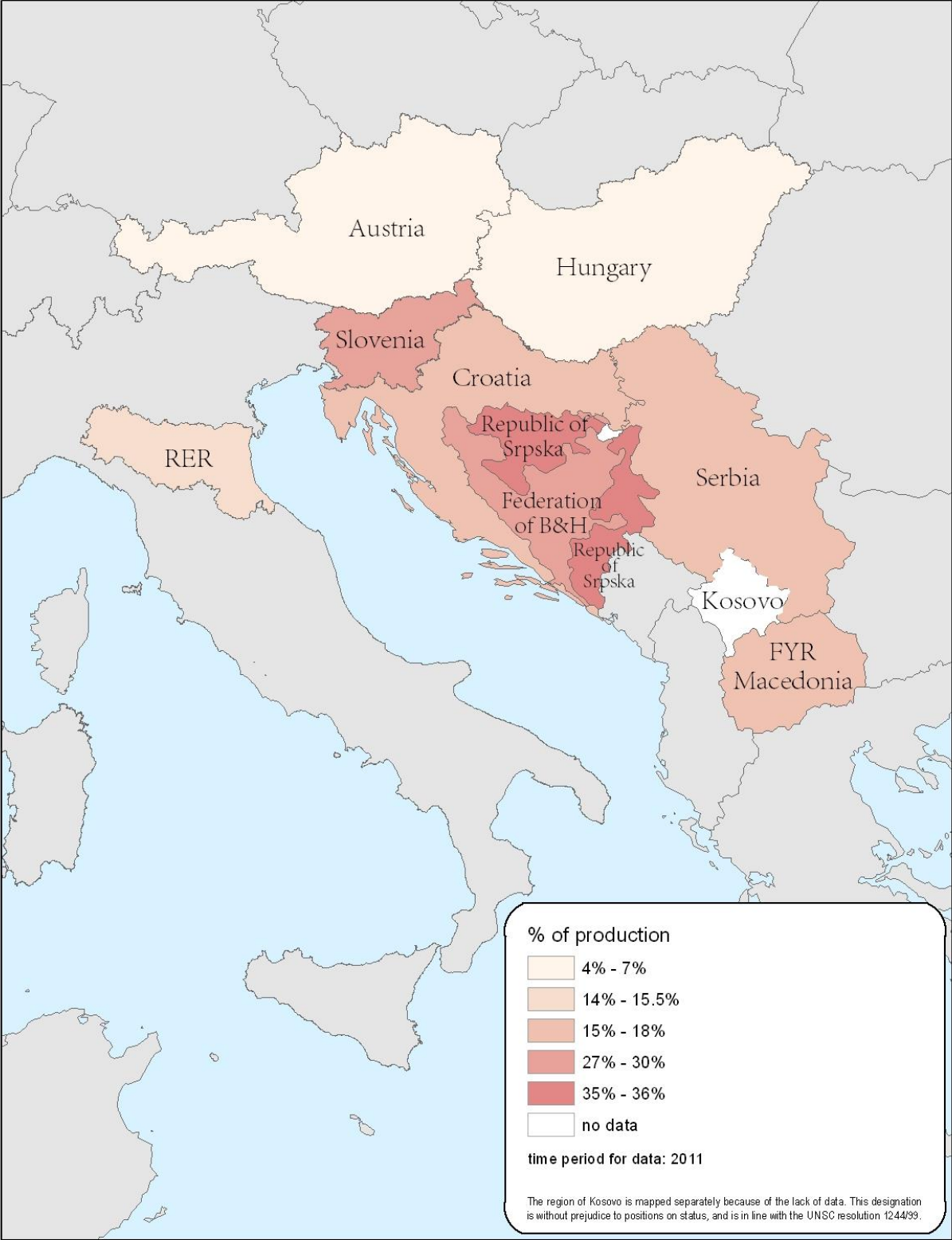
Name	Electricity generated from renewable sources
Asset	<i>Natural resources and energy</i>
Capital	Environmental capital
Definition	<p>This indicator is the ratio between the electricity produced from renewable energy sources and the gross national electricity consumption for a given calendar year. It measures the contribution of electricity produced from renewable energy sources to the national electricity consumption.</p> <p>Electricity produced from renewable energy sources comprises the electricity generation from hydro plants (excluding pumping), wind, solar, geothermal and electricity from biomass/wastes. Gross national electricity consumption comprises the total gross national electricity generation from all fuels (including autoproduction), plus electricity imports, minus exports.</p>
Purpose	<p>Renewable energy resources and significant opportunities for energy efficiency exist over wide geographical areas, in contrast to other energy sources, which are concentrated in a limited number of countries. Rapid deployment of renewable energy and energy efficiency, and technological diversification of energy sources, would result in significant energy security and economic benefits.</p> <p>http://en.wikipedia.org/wiki/Renewable_energy_-_cite_note-19</p>
Determination	% of production
Maintenance/ publishing frequency	Annual
Data source	Eurostat, national, region
Geographic name	Country/region
Spatial level	National/region
Type	Response

Comprehensive table with values extending over a series of years
Electricity generated from renewable sources (%)

PROJECT PARTNER		TIME PERIOD (YEAR)					
		2008	2009	2010	2011	2012	2013
	Slovenia	29,11		27,04	27,46	27,88	
	Austria	4,60	4,60	5,00	4,80	4,80	
	Emilia-Romagna	7,34	11,26	11,06	14,20	19,10	
	Hungary	5,30	7,00	7,10	6,40		
	Serbia		21,20	21,00	17,80	18,10	
	Croatia	12,10	13,10	14,30	15,40	16,80	
BiH	<i>Federation of B&H</i>	33,53	40,97	48,77	29,43	30,95	
	<i>Republika Srpska Brcko district</i>			51,39	36,32	35,05	
	FYR Macedonia	9,30	15,40	28,00	15,00		

** values in cells coloured are presented on map*

Electricity generated from renewable sources



Map 4 - Consumption of water per capita

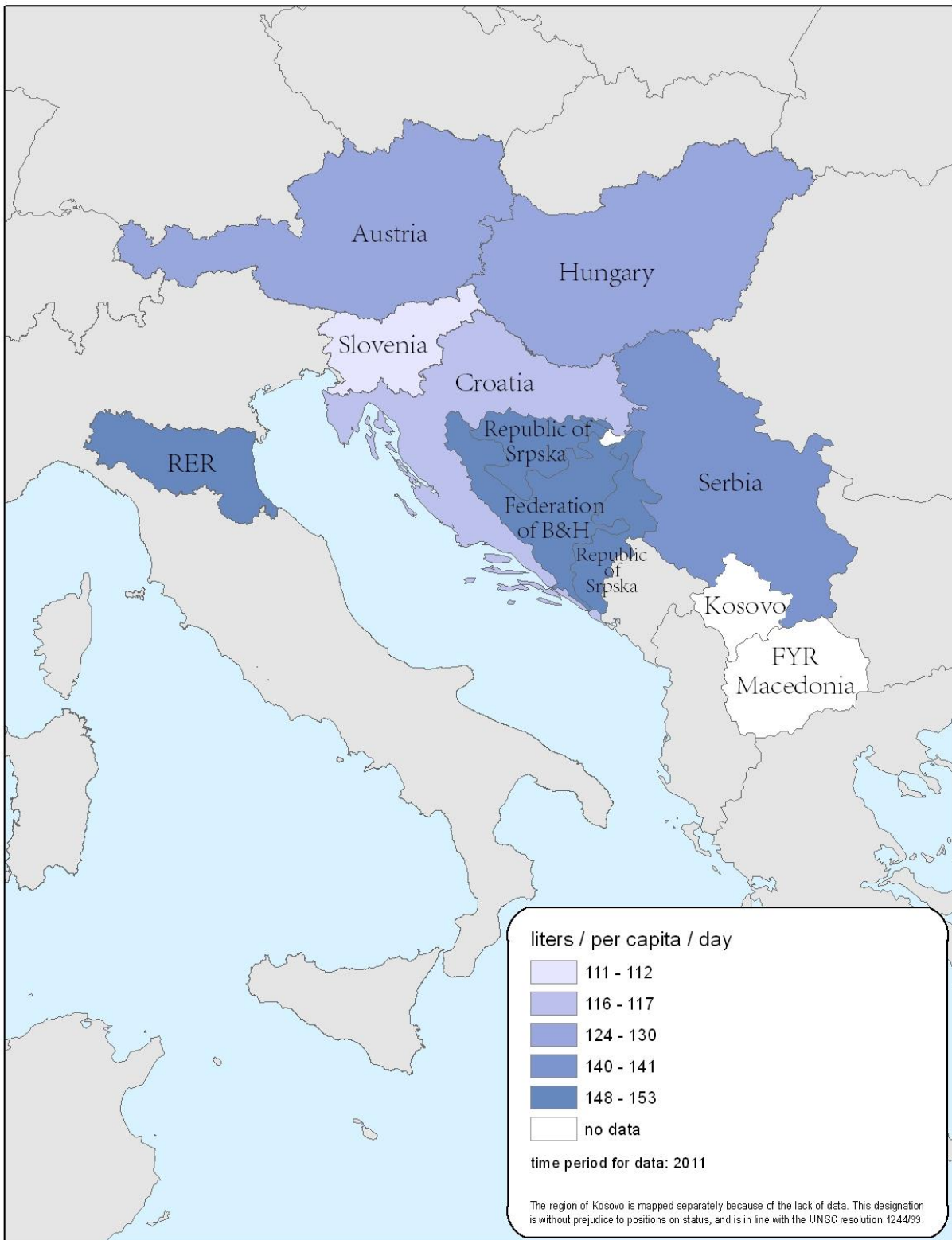
Name	Consumption of water per capita
Asset	<i>Natural resources and energy</i>
Capital	Environmental capital
Definition	This indicator measures how much water does the average person use per day/year.
Purpose	To monitor freshwater issues in order to provide recommendations, develop case studies, enhance assessment capacity at a national level and inform the decision-making process.
Determination	Liters per capita per day
Maintenance/ publishing frequency	Annual
Data source	European Environmental Agency, United Nations, national, region
Geographic name	Country/region
Spatial level	National/region
Type	Pressure

Comprehensive table with values extending over a series of years
Consumption of water per capita (Liters per capita per day)

PROJECT PARTNER	TIME PERIOD (YEAR)					
	2008	2009	2010	2011	2012	2013
Slovenia	119,56	115,17	113,13	111,52	112,84	
Austria				130,00		
Emilia-Romagna	167,27	166,69	155,77	152,25		
Hungary		131,69	124,39	124,51	124,47	
Serbia	157,12	150,44	146,56	140,07	138,24	
Croatia	113,05	113,49	117,42	116,92	118,06	
BiH <i>Federation of B&H</i>	162,00	149,00	148,00	147,70	144,05	
	<i>Republika Srpska</i>	150,00	155,00	145,00	150,00	145,00
<i>Brcko district</i>						
FYR Macedonia						

** values in cells coloured are presented on map*

Consumption of water per capita



Anthropic capital and attractiveness in the SEE area

Map 5 - % of terrestrial area protected (total and by ecological region)

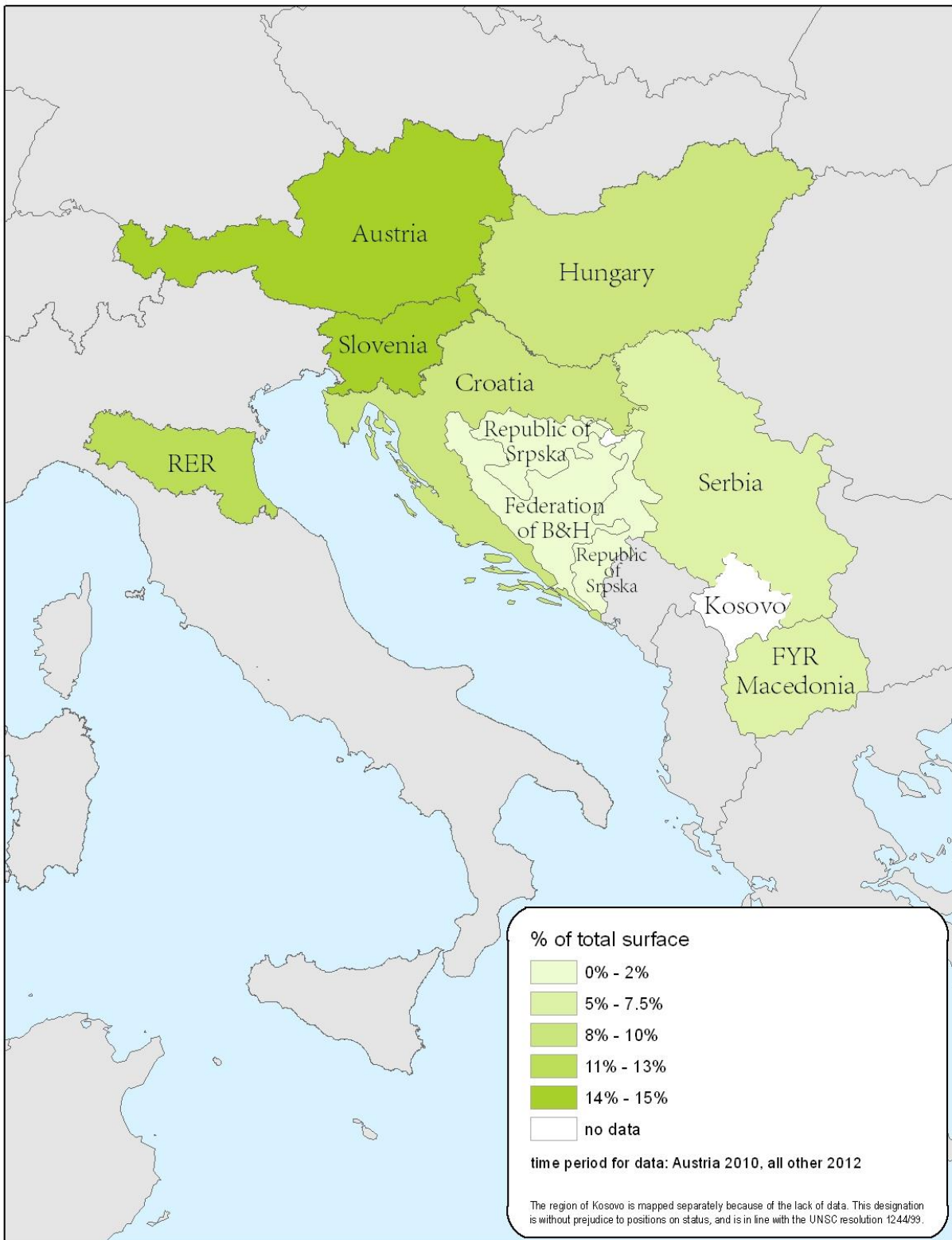
Name	% of terrestrial area protected (total and by ecological region)
Asset	<i>Landscape quality</i>
Capital	Anthropic capital
Definition	The indicator is defined as the share of terrestrial area that has been reserved by law or other effective means to protect part or all of the enclosed environment. It can be calculated separately for different terrestrial ecological regions. The indicator may also be disaggregated by management category of the protected areas.
Purpose	The indicator represents the extent to which areas important for conserving biodiversity, cultural heritage, scientific research (including baseline monitoring), recreation, natural resource maintenance, and other values, are protected from incompatible uses. It shows how much of each major ecosystem is dedicated to maintaining its diversity and integrity. Protected areas are essential for maintaining ecosystem diversity in countries and ecological regions, in conjunction with management of human impacts on the environment.
Determination	% of total surface
Maintenance/ publishing frequency	N/A
Data source	United Nations, European Environmental Agency, EUROSTAT, state, region
Geographic name	Country/region
Spatial level	National/region
Type	State

**Comprehensive table with values extending over a series of years
% of terrestrial area protected**

PROJECT PARTNER	TIME PERIOD (YEAR)					
	2008	2009	2010	2011	2012	2013
Slovenia	12,45		14,02	14,49	14,96	
Austria			14,70			
Emilia-Romagna	11,61		11,99	11,99	12,20	
Hungary	9,51	9,60	9,60	9,59	9,64	
Serbia	6,42	5,80	5,77	5,89	5,90	5,98
Croatia	9,87	9,87	9,33	7,60	8,43	37,63
BiH <i>Federation of B&H Republika Srpska Brcko district</i>					1,54 0,43	
FYR Macedonia	4,87	4,87	7,27	7,27	7,27	

** values in cells coloured are presented on map*

% of terrestrial area protected



**Map 6 - Population (or households) with accessibility to high-speed broadband
(1 Mbit/second up and down)**

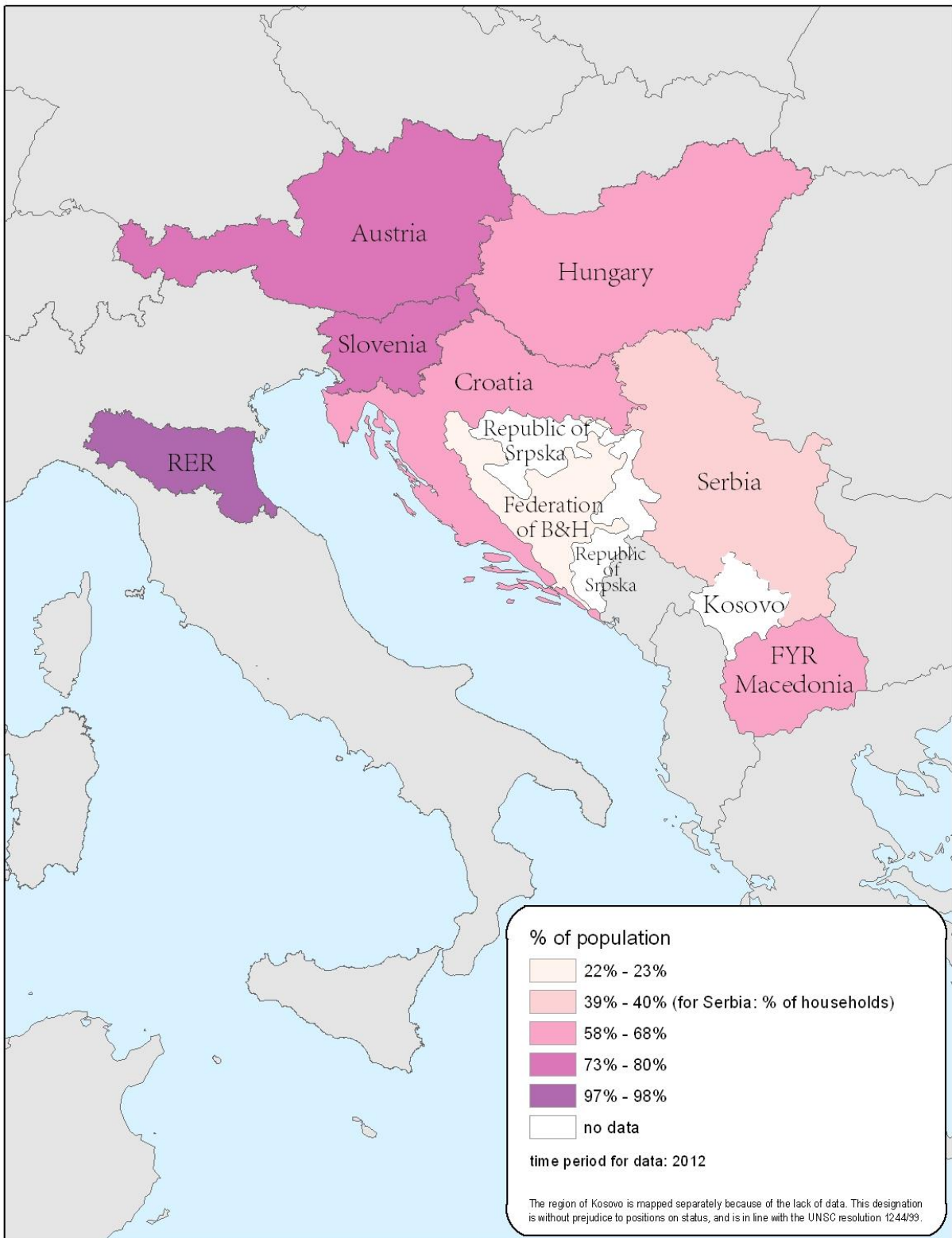
Name	Population with accessibility to high-speed broadband (1 Mbit/second up and down)
Asset	<i>Infrastructures</i>
Capital	Anthropic capital
Definition	This indicator is a share of population (households) with broadband access.
Purpose	Ensure an increase in the innovation capacity of each region which in turn will result in increases in employment and economic activities
Determination	% of population with accessibility to high-speed broadband
Maintenance/ publishing frequency	Annual
Data source	OECD, EU Digital Scoreboard, national, region
Geographic name	Country/region
Spatial level	National/region
Type	State

**Comprehensive table with values extending over a series of years
% of Population with accessibility to high-speed broadband (1 Mbit/second up and down)**

		TIME PERIOD (YEAR)					
PROJECT PARTNER		2008	2009	2010	2011	2012	2013
	Slovenia	50,00	56,00	62,00	67,00	73,00	74,00
	Austria	69	69,80	72,90	75,40	79,30	80,90
	Emilia-Romagna					97,40	
	Hungary	42,00	51,00	52,00	61,00	68,00	71,00
	Serbia				34,00	39,00	
	Croatia	27,00	39,00	49,00	56,00	60,00	64,00
BIH	<i>Federation of B&H Republika Srpska Brcko district</i>	10,00	16,10	18,80	20,10	22,50	
	FYR Macedonia	23,00	34,00	37,00	42,10	58,10	65,00

** values in cells coloured are presented on map*

Population with accessibility to high-speed broadband (1 Mbit/second up and down)



Socio-cultural capital and attractiveness in the SEE area

Map 7 - European cultural sites on the UNESCO World Heritage List, 2010

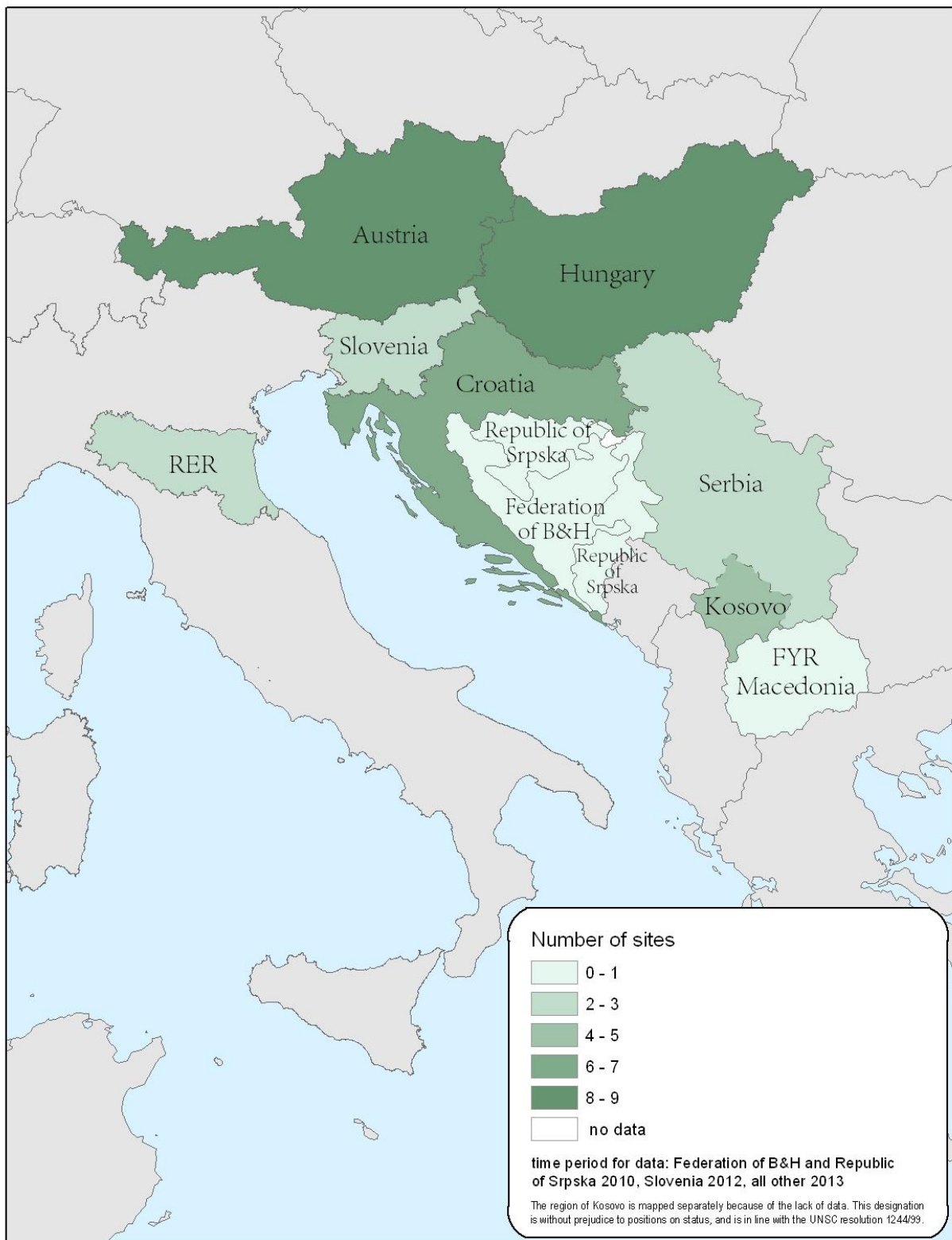
Name	European cultural sites on the UNESCO World Heritage List, 2010
Asset	Culture
Capital	Socio-cultural capital
Definition	Listed by the UNESCO as of special cultural or physical significance.
Purpose	The programme catalogues, names, and conserves sites of outstanding cultural or natural importance to the common heritage of humanity.
Determination	Number of sites
Maintenance/ publishing frequency	N/A
Data source	UNESCO, state, region
Geographic name	Country/region
Spatial level	National/region
Type	State

**Comprehensive table with values extending over a series of years
Number of European cultural sites on the Unesco World Heritage List**

PROJECT PARTNER	TIME PERIOD (YEAR)					
	2008	2009	2010	2011	2012	2013
Slovenia	1	1	1	2	3	
Austria	8	8	8	9	9	9
Emilia-Romagna	3	3	3	3	3	3
Hungary	8	8	8	8	8	8
Serbia	3 (Serbia) 4 (Kosovo)	3 (Serbia) 4 (Kosovo)	3 (Serbia) 4 (Kosovo)	3 (Serbia) 4 (Kosovo)	3 (Serbia) 4 (Kosovo)	3 (Serbia) 4(Kosovo)
Croatia	6	6	6	6	6	6
BiH <i>Federation of B&H Republika Srpska Brcko district</i>	1	1	1	1	1	1
	1	1	1	1	1	1
FYR Macedonia	1	1	1	1	1	1

* values in cells coloured are presented on map

European cultural sites on the Unesco World Heritage List, 2010



Map 8 - Life expectancy at birth by sex (Europe 2020 indicator)

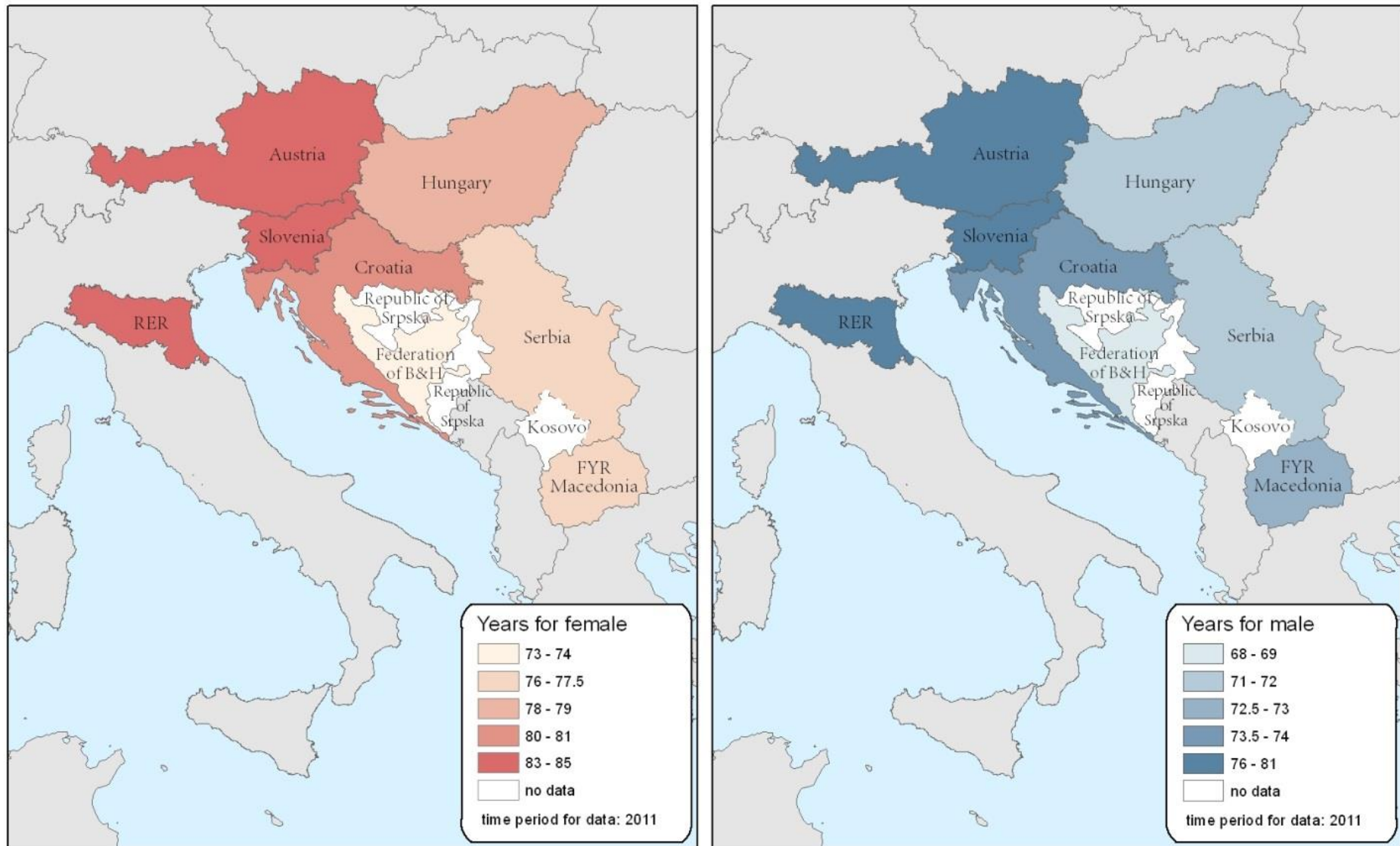
Name	Life expectancy at birth by sex (Europe 2020 indicator)
Asset	<i>Quality of life</i>
Capital	Socio-cultural capital
Definition	Simple indicator expressing the average life expectancy at birth for both women and men in years.
Purpose	This indicator represents a proxy for the overall quality of the health-care system in a region. It tells us about healthiness of living environment and together with ageing index it allows to assess social policies projections and risk of exclusion.
Determination	Years by sex
Maintenance/ publishing frequency	Annual
Data source	EUROSTAT, national, region
Geographic name	Country/region
Spatial level	National/region
Type	State

Comprehensive table with values extending over a series of years
Life expectancy at birth by sex (years)

PROJECT PARTNER	TIME PERIOD (YEAR)					
	2008	2009	2010	2011	2012	2013
Slovenia	F 82,26 M 75,42		F 83,17 M 76,38	F 83,56 M 76,86	F 83,94 M 77,34	
Austria	F 82,96 M 77,59	F 82,85 M 77,39	F 83,14 M 77,66	F 83,9 M 78,3	F 83,28 M 78,25	
Emilia-Romagna	F 84,4 M 79,4	F 84,5 M 79,7	F 84,8 M 79,9	F 84,9 M 80,3	F 84,9 M 80,2	
Hungary	F 78,3 M 70,0	F 78,4 M 70,3	F 78,6 M 70,7	F 78,7 M 71,2	F 78,7 M 71,6	
Serbia	F 75,99 M 70,53	F 76,40 M 71,11	F 76,62 M 71,43	F 76,83 M 71,64	F 77,29 M 72,22	
Croatia	F 79,70 M 72,30	F 79,70 M 72,80	F 79,90 M 73,40	F 80,40 M 73,80	F 80,60 M 73,9	
BiH <i>Federation of B&H</i> <i>Republika Srpska</i> <i>Brcko district</i>	F 72,5 M 66,7	F 73,0 M 67,5	F 73,3 M 67,7	F 73,7 M 68,2	F 74,1 M 68,8	
FYR Macedonia	F 76,3 M 72,1	F 76,7 M 72,5	F 76,9 M 72,7	F 77,2 M 72,9		

* values in cells coloured are presented on map

Life expectancy at birth by sex



The region of Kosovo is mapped separately because of the lack of data. This designation is without prejudice to positions on status, and is in line with the UNSC resolution 1244/99.

Map 9 - Gross disposable household income

Name	Gross disposable household income
Asset	<i>Quality of life</i>
Capital	Socio-cultural capital
Definition	The indicator (GDHI) is the amount of money that individuals (i.e. the household) have available for spending or saving. This is money left after expenditure associated with income, e.g. taxes and social contributions, property ownership and provision for future pension income. It is calculated gross of any deductions for capital consumption.
Purpose	This indicator measures the welfare of residence population in a region and reflect the level of poverty.
Determination	Amount in euros
Maintenance/ publishing frequency	Annual
Data source	EUROSTAT, OECD, national, region
Geographic name	Country/region
Spatial level	National/region
Type	State

Comprehensive table with values extending over a series of years

Gross disposable household income (euros)

PROJECT PARTNER		TIME PERIOD (YEAR)					
		2008	2009	2010	2011	2012	2013
	Slovenia	25.784	25.753	25.947	26.553	27.228	
	Austria	20.200	20.300	31.759			
	Emilia-Romagna	33.611	33.827	34.414			
	Hungary	14.584	13.044	13.512	14.248	13.925	
	Serbia						
	Croatia	19.020	18.869	19.219	18.965	19.043	
BiH	<i>Federation of B&H</i>	9.149	9.393	9.149	9.148		
	<i>Republika Srpska Brcko district</i>	9.664	9.389	9.498	9.936	9.827	
	FYR Macedonia			4.675			

* values in cells coloured are presented on map

Gross disposable household income



Map 10 - People at risk of poverty or social exclusion (Europe 2020 indicator)

Name	People at risk of poverty or social exclusion (Europe 2020 indicator)
Asset	Quality of life
Capital	Socio-cultural capital
Definition	<p>This indicator is the share of people with an equivalised disposable income (after social transfer) below the at-risk-of-poverty threshold, which is set at 60 % of the national median equivalised disposable income after social transfers.</p> <p><i>It's a union of the three sub-indicators below:</i></p> <ul style="list-style-type: none"> - People living in households with very low work intensity: People living in households with very low work intensity are people aged 0-59 living in households where the adults work less than 20% of their total work potential during the past year - Severe material deprivation rate - At-risk-of poverty rate: The persons with an equivalised disposable income below the risk-of-poverty threshold, which is set at 60% of the national median equivalised disposable income.
Purpose	This indicator does not measure wealth or poverty, but low income in comparison to other residents in that country, which does not necessarily imply a low standard of living.
Determination	Percentage of total population
Maintenance/ publishing frequency	Annual
Data source	EUROSTAT, national, region
Geographic name	Country/region
Spatial level	National/region
Type	Pressure

Comprehensive table with values extending over a series of years
People at risk of poverty or social exclusion or % in risk of poverty (%)

PROJECT PARTNER	TIME PERIOD (YEAR)					
	2008	2009	2010	2011	2012	2013
Slovenia	17,10	17,10	18,30	19,30	19,60	
Austria	18,60	17,00	16,60	16,90	18,50	
Emilia-Romagna	13,90	13,80	12,80	14,90	15,70	
Hungary	28,20	29,60	29,90	31,00	32,40	
Serbia					24,60	
Croatia			30,70	32,30	32,30	
BIH <i>Federation of B&H Republika Srpska Brcko district</i>	18,56					
FYR Macedonia	28,70	31,10	30,90	30,40		

** values in cells coloured are presented on map*

People at risk of poverty or social exclusion or % in risk of poverty



Economic and human capital and attractiveness in the SEE area

Map 11 - Population aged 25-64 with tertiary education

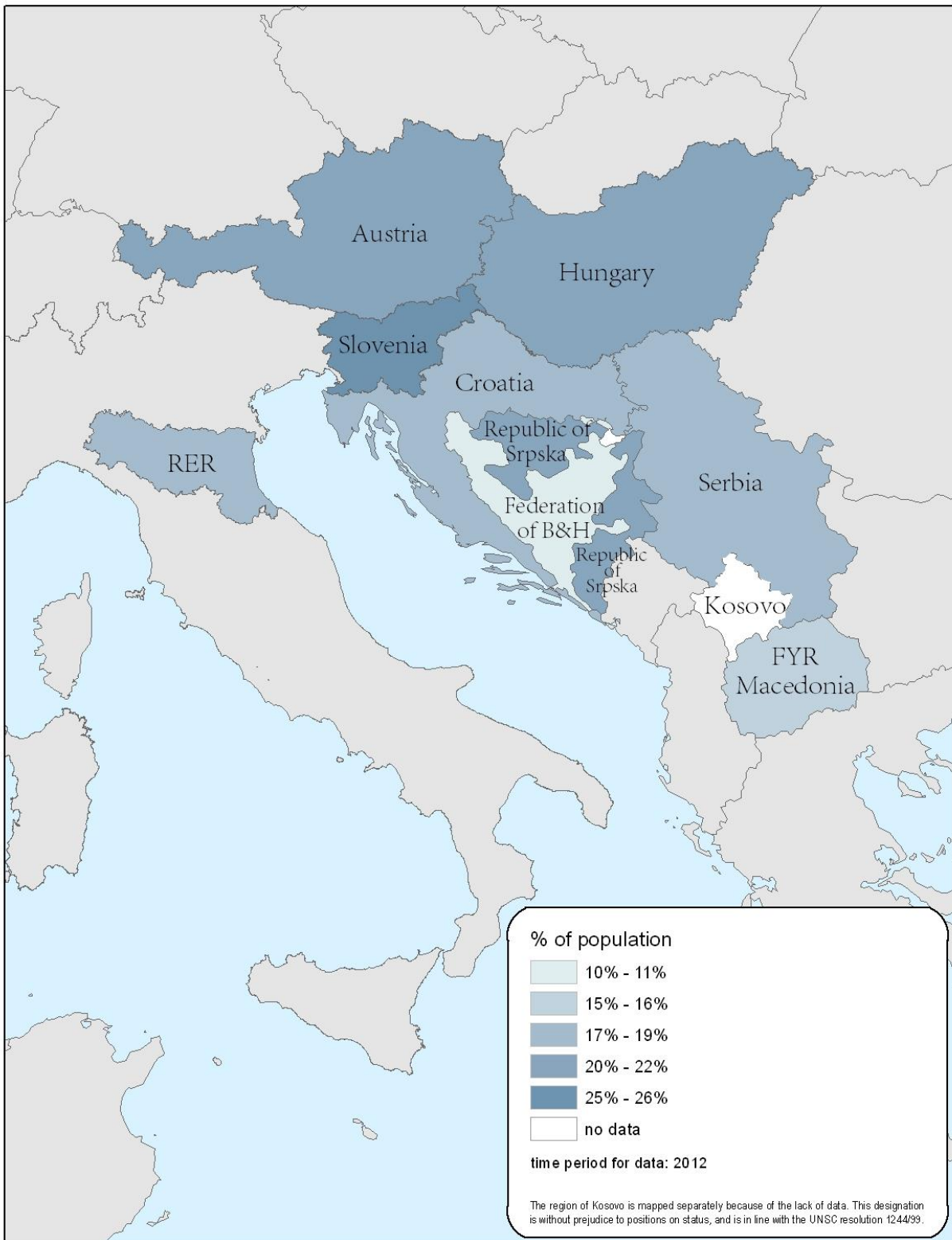
Name	Population aged 25-64 with tertiary education
Asset	<i>Knowledge & Innovation</i>
Capital	Economic/human capital
Definition	Indicator is defined as population aged 25-64 with tertiary education as percentage of all population aged 25-64.
Purpose	This indicator measures the highly-qualified labour force as basis for future R&D activities. Human capital is an essential factor for innovation potential.
Determination	% of population aged 25-64 with tertiary education
Maintenance/ publishing frequency	Annual
Data source	EUROSTAT, national, region
Geographic name	Country/region
Spatial level	National/region
Type	State

Comprehensive table with values extending over a series of years
Population aged 25-64 with tertiary education (%)

PROJECT PARTNER	TIME PERIOD (YEAR)					
	2008	2009	2010	2011	2012	2013
Slovenia	22,60	23,30	24,47	25,34	26,21	
Austria	18,10	19,00	19,30	19,30	20,00	
Emilia-Romagna	15,90	16,40	16,00	17,20	17,90	17,80
Hungary	21,90	21,40	21,30	21,20	21,10	
Serbia	16,50	16,90	17,20	17,50	18,30	19,50
Croatia	16,60	17,70	18,40	18,10	18,60	
BiH	<i>Federation of B&H</i>	7,77	8,38	9,20	10,49	10,30
	<i>Republika Srpska</i>	15,69	16,40	18,10	18,79	20,00
	<i>Brcko district</i>					
FYR Macedonia	10,75	12,10	13,04	14,52	15,24	

* values in cells coloured are presented on map

Population aged 25-64 with tertiary education



**Map 12 - Research & Experimental Development expenditure as % of Gross Domestic Product
(Europe 2020 indicator)**

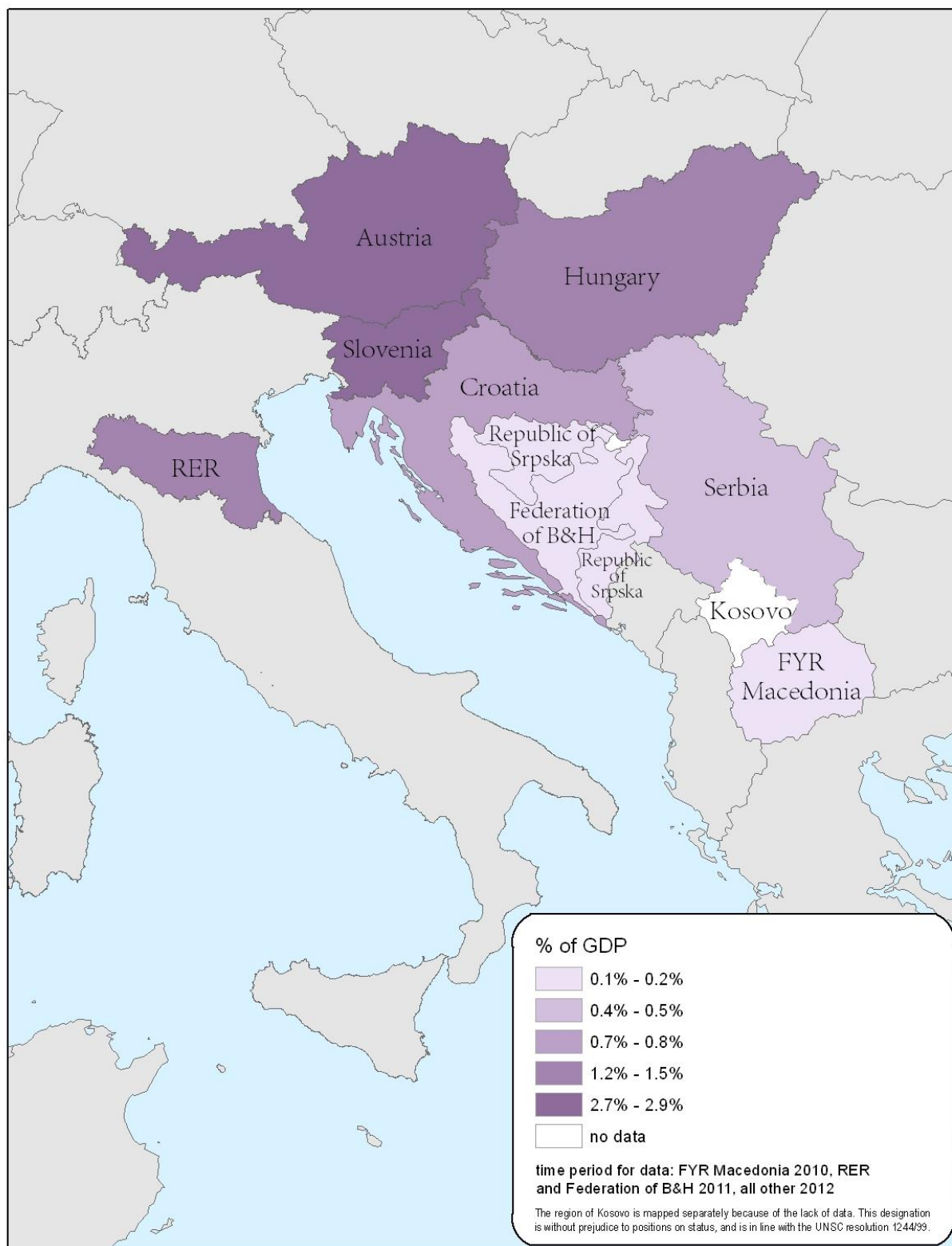
Name	Research & Experimental Development expenditure as % of Gross Domestic Product (Europe 2020 indicator)
Asset	<i>Knowledge & Innovation</i>
Capital	Economic/human capital
Definition	This indicator is total gross domestic expenditure on research and experimental development (GERD) as a percentage of gross domestic product (GDP).
Purpose	R&D expenditure represents one of the major drivers of economic growth in a knowledge-based economy. As such, trends in the R&D expenditure indicator provide key indications of the future competitiveness and wealth of the EU. GERD includes expenditure from business enterprise, higher education, government and private non-profit expenditure on R&D. The indicator measures the key R&D investments that support future competitiveness and result in higher GDP.
Determination	Percentage of GDP
Maintenance/ publishing frequency	Annual
Data source	EUROSTAT, national, region
Geographic name	Country/region
Spatial level	National/region
Type	Response

**Comprehensive table with values extending over a series of years
Research & Experimental Development expenditure as % of GDP**

		TIME PERIOD (YEAR)					
PROJECT PARTNER		2008	2009	2010	2011	2012	2013
	Slovenia	1,66	1,85	2,10	2,47	2,71	
	Austria	2,67	2,71	2,80	2,77	2,84	3,76
	Emilia-Romagna	1,28	1,38	1,45	1,43		
	Hungary	1,00	1,17	1,17	1,21	1,29	
	Serbia	0,40	0,40	0,40	0,40	0,40	
	Croatia	0,90	0,85	0,75	0,76	0,75	
BiH	<i>Federation of B&H</i>	0,10	0,10	0,10	0,10		
	<i>Republika Srpska Brcko district</i>	0,10	0,10	0,10	0,10	0,10	
	FYR Macedonia	0,23	0,20	0,19			

** values in cells coloured are presented on map*

Research & Experimental Development expenditure as % of GDP



Map 13 - Employment rate 20-64 years by sex [%] (Europe 2020 indicator)

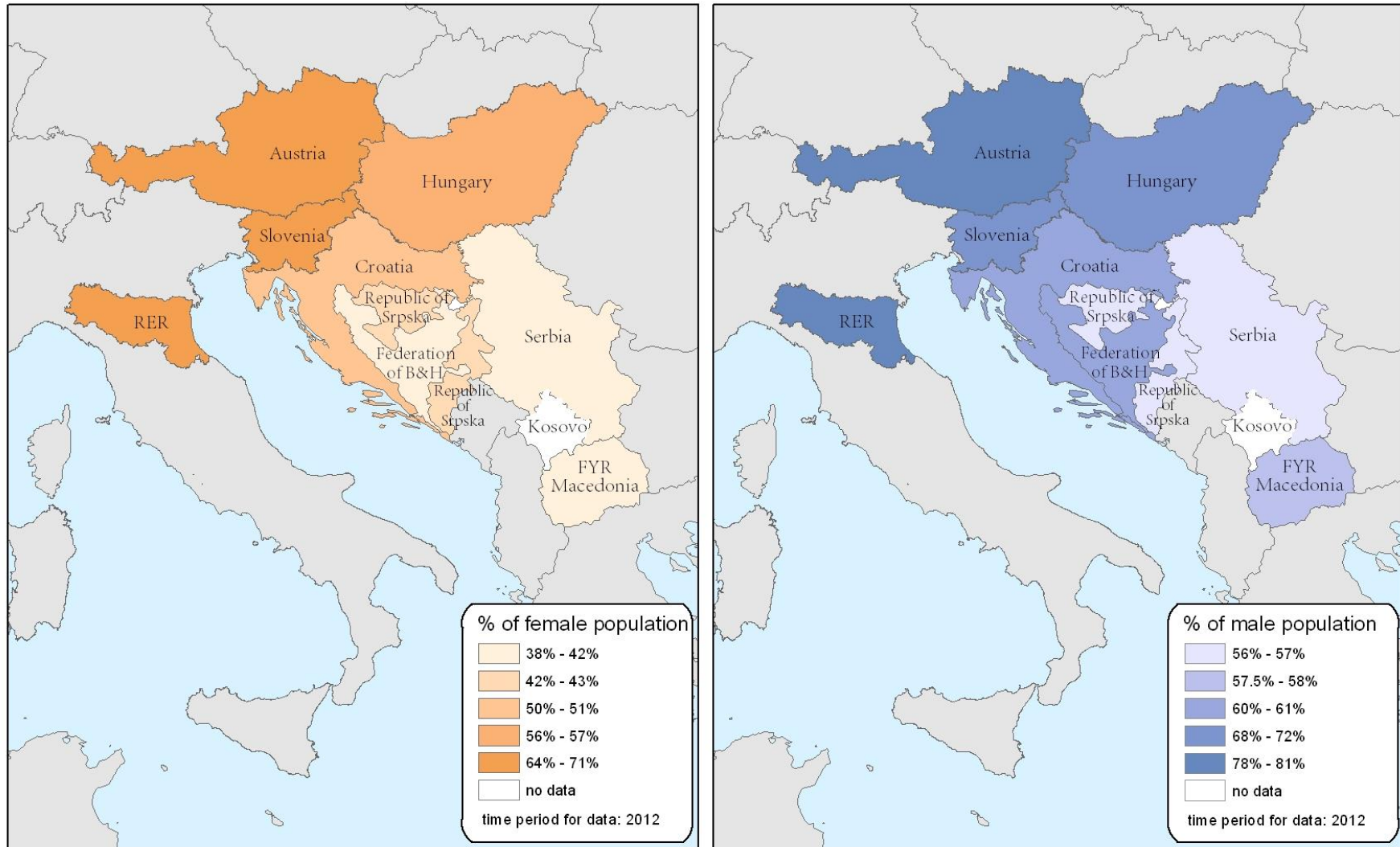
Name	Employment rate 20-64 years by sex [%] (Europe 2020 indicator)
Asset	<i>Employment</i>
Capital	Economic/human capital
Definition	The employment rate is calculated by dividing the number of persons aged 20 to 64 (by sex) in employment by the total population of the same age group.
Purpose	The employment rate, in other words the proportion of the working age population in employment, is considered as a key social indicator for analytical purposes when studying developments within labour markets.
Determination	% of population (20-64 y.o.)
Maintenance/ publishing frequency	Annual
Data source	EUROSTAT, national, region
Geographic name	Country/region
Spatial level	National/region
Type	State

Comprehensive table with values extending over a series of years
Employment rate 20-64 years by sex (%)

PROJECT PARTNER	TIME PERIOD (YEAR)					
	2008	2009	2010	2011	2012	2013
Slovenia	F 68,5 M 77,4	F 67,9 M 75,6	F 66,5 M 74,0	F 64,8 M 71,8	F 64,6 M 71,8	F 63,0 M 71,2
Austria	F 68,6 M 81,7	F 69,4 M 80,1	F 69,6 M 80,2	F 69,6 M 80,8	F 70,3 M 80,9	F 70,8 M 80,3
Emilia-Romagna	F 65,8 M 82,8	F 65,1 M 80,0	F 63,4 M 79,6	F 64,4 M 79,8	F 64,9 M 78,7	F 63,3 M 78,0
Hungary	F 55,1 M 69	F 54,4 M 67	F 55 M 66	F 54,9 M 66,8	F 56,4 M 68,1	F 57,0 M 69,7
Serbia	F 48,9 M 67,5	F 46,4 M 63	F 43,5 M 59,2	F 41,7 M 56,8	F 41,12 M 56,71	F 43,1 M 59,5
Croatia	F 55,2 M 70,7	F 55,4 M 68,2	F 53,0 M 64,7	F 50,9 M 63,2	F 50,2 M 60,6	F 49,7 M 58,3
<i>Federation of B&H</i>	F 37,9 M 62,1	F 38,7 M 61,2	F 39,2 M 60,8	F 39,4 M 60,6	F 39,7 M 60,1	
BIH <i>Republika Srpska</i>	F 49,0 M 50,1	F 42,5 M 57,5	F 42,9 M 57,1	F 43,1 M 56,9	F 43,3 M 56,7	
<i>Brcko district</i>						
FYR Macedonia	F 36,2 M 56,2	F 37,1 M 58,4	F 37,5 M 58,4	F 38,8 M 57,8	F 38,7 M 57,5	F 40,7 M 59,7

* values in cells coloured are presented on map

Employment rate 20-64 years by sex [%]



The region of Kosovo is mapped separately because of the lack of data. This designation is without prejudice to positions on status, and is in line with the UNSC resolution 1244/99.

Map 14 - Youth unemployment rate

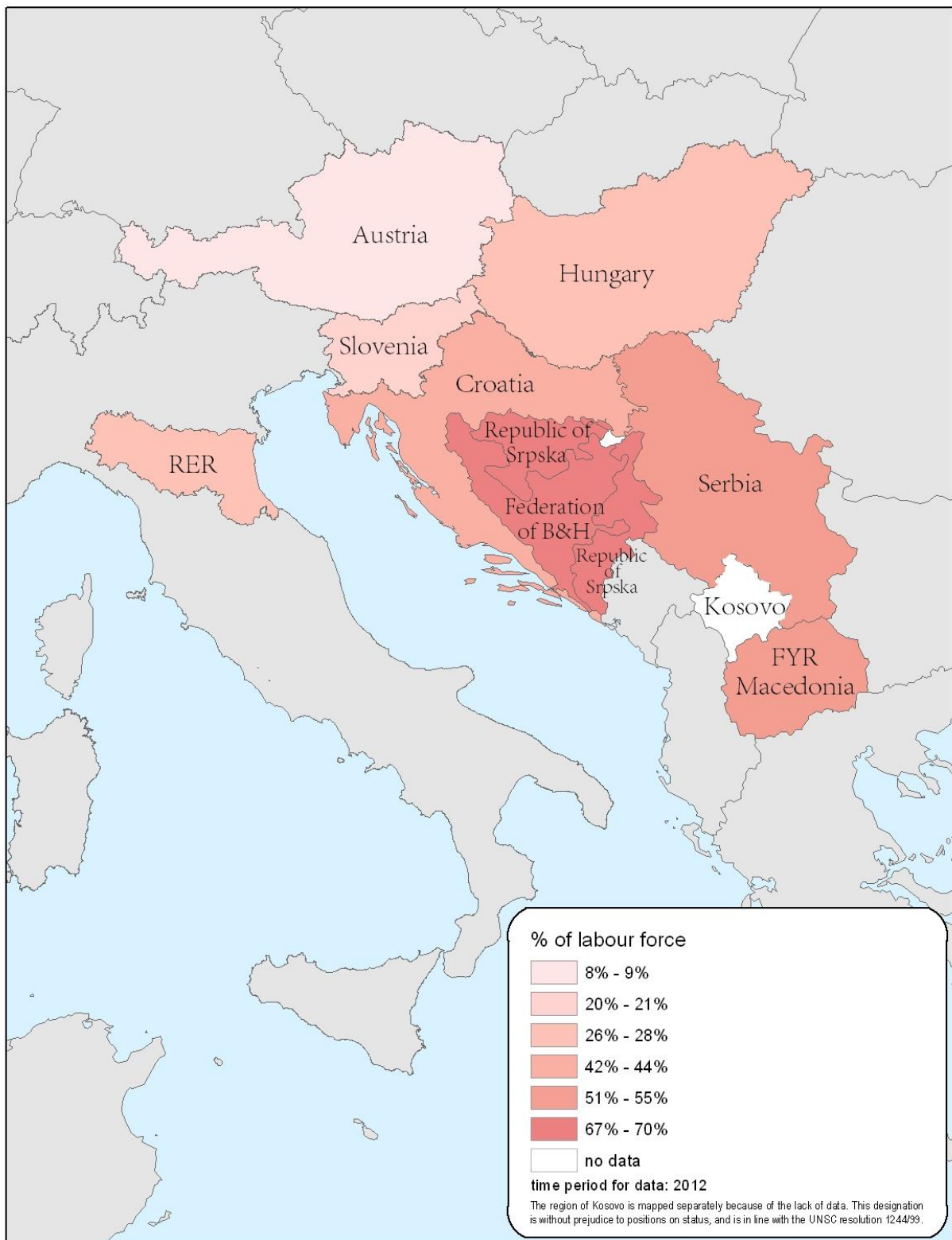
Name	Youth unemployment rate
Asset	Employment
Capital	Economic/human capital
Definition	This indicator refers to the share of the labour force ages 15-24 without work but available for and seeking employment.
Purpose	High youth unemployment rates do reflect the difficulties faced by young people in finding jobs. However, this does not necessarily mean that the group of unemployed persons aged between 15 and 24 is large because many young people are studying full-time and are therefore neither working nor looking for a job (so they are not part of the labour force which is used as the denominator for calculating the unemployment rate).
Determination	% of labour force (15-24 y.o.)
Maintenance/ publishing frequency	Annual
Data source	WORLD BANK, EUROSTAT, national, region
Geographic name	Country/region
Spatial level	National/region
Type	Pressure

Comprehensive table with values extending over a series of years
Youth unemployment rate, % of labour force (15-24 y.o.)

PROJECT PARTNER	TIME PERIOD (YEAR)						
	2008	2009	2010	2011	2012	2013	
Slovenia	10,40	13,60	14,70	15,70	20,60	21,60	
Austria	8,00	10,00	8,80	8,30	8,70	9,20	
Emilia-Romagna	11,10	18,30	22,40	21,80	26,40	33,30	
Hungary	19,90	26,50	26,60	26,10	28,10	27,20	
Serbia					51,05		
Croatia	21,90	25,10	32,60	36,10	43,00	49,70	
BiH	<i>Federation of B&H</i>	51,90	53,90	62,30	59,70	67,10	
	<i>Republika Srpska Brcko district</i>	52,30	57,30	67,40	68,20	69,00	
FYR Macedonia	56,40	55,10	53,70	55,30	53,90	51,90	

** values in cells coloured are presented on map*

Youth unemployment rate



Map 15 - Share of employment by sector

Name	Share of employment by sector
Asset	Specializations / Key sectors
Capital	Economic/human capital
Definition	This indicator refers to the share of the employment in different sector. I Agriculture II. Industry and construction: Mining and quarrying; Manufacturing, electricity, gas, steam and air conditioning supply; Water supply, sewerage and waste management; Construction II. Services: Market services: Wholesale and retail trade; Accommodation and food service activities; Communication; Financial and insurance activities; Real estate activities; Professional scientific and technical activities; Administrative and support service activities. <i>Mainly non market services:</i> Public administration; Education; Health; Arts, entertainment and recreation; Other services activities; Activities of households as employers; Activities of extraterritorial organisations.
Purpose	Regional sector specialisation is broadly understood to be the extent to which particular economic sectors attract larger shares of employment or output in one region as compared with another.
Determination	% of employment
Maintenance/ publishing frequency	Annual
Data source	EUROSTAT, state, region
Geographic name	Country/region
Spatial level	National/region
Type	State

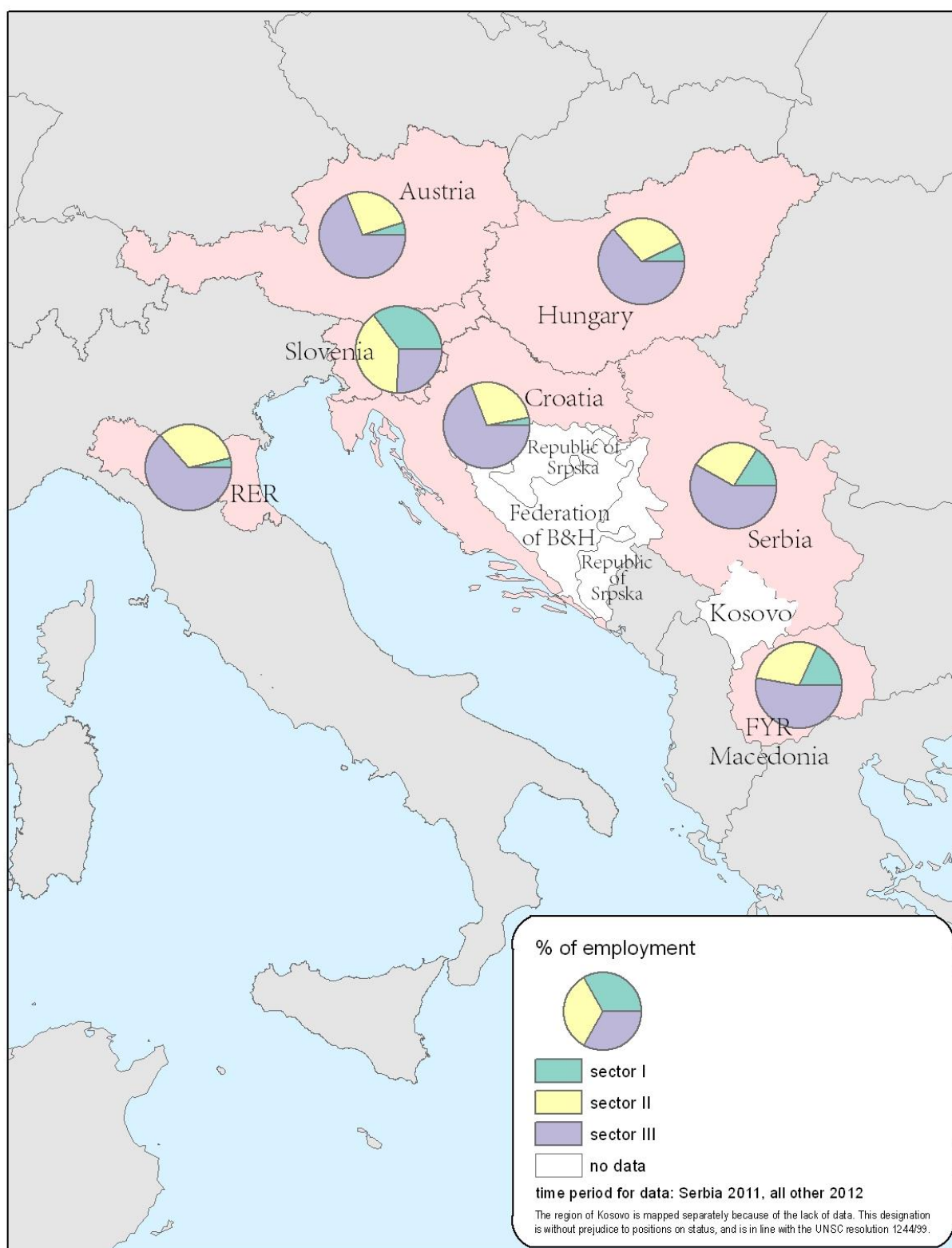
Comprehensive table with values extending over a series of years

Share of employment by sector (%)

PROJECT PARTNER	TIME PERIOD (YEAR)					
	2008	2009	2010	2011	2012	2013
Slovenia		I. 39,14 II. 37,76 III. 23,10	I. 37,03 II. 38,45 III. 24,51	I. 35,91 II. 38,75 III. 25,34	I. 35,05 II. 39,09 III. 25,86	I. 34,11 II. 39,34 III. 26,54
Austria				I. 0,6% II. 26,1% III. 73,3	I. 4,9 II. 26,2 III. 68,9	
Emilia-Romagna	I. 3,9 II. 34,3 III. 61,8	I. 3,9 II. 34,1 III. 62,0	I. 3,9 II. 33,8 III. 62,3	I. 3,8% II. 33,5 III. 62,6	I. 3,8 II. 32,8 III. 63,4	I. 3,4 II. 32,7 III. 63,9
Hungary	I. 7.09 II. 31 III. 61.9	I. 6.9 II. 30.1 III. 63	I. 6.9 II. 29.3 III. 63.8	I. 7.09 II. 29.7 III. 63.2	I. 7,4 II. 28,9 III. 63,7	
Serbia				I. 15,90 II. 25,69 III. 57,78		
Croatia	I. 2 II. 32 III. 66	I. 2 II. 32 III. 66	I. 2 II. 30 III. 68	I. 3 II. 29 III. 68	I. 3 II. 28 III. 69	
BIH <i>Federation of B&H Republika Srpska Brcko district</i>						
FYR Macedonia	I. 20,76 II. 30,20 III. 49,04	I. 19,03 II. 29,50 III. 51,47	I. 19,68 II. 28,80 III. 51,52	I. 19,57 II. 29,19 III. 51,24	I. 18,17 II. 29,01 III. 52,82	

* values in cells coloured are presented on map

Share of employment by sector



Map 16 - Number of overnight stays of tourists per capita per year

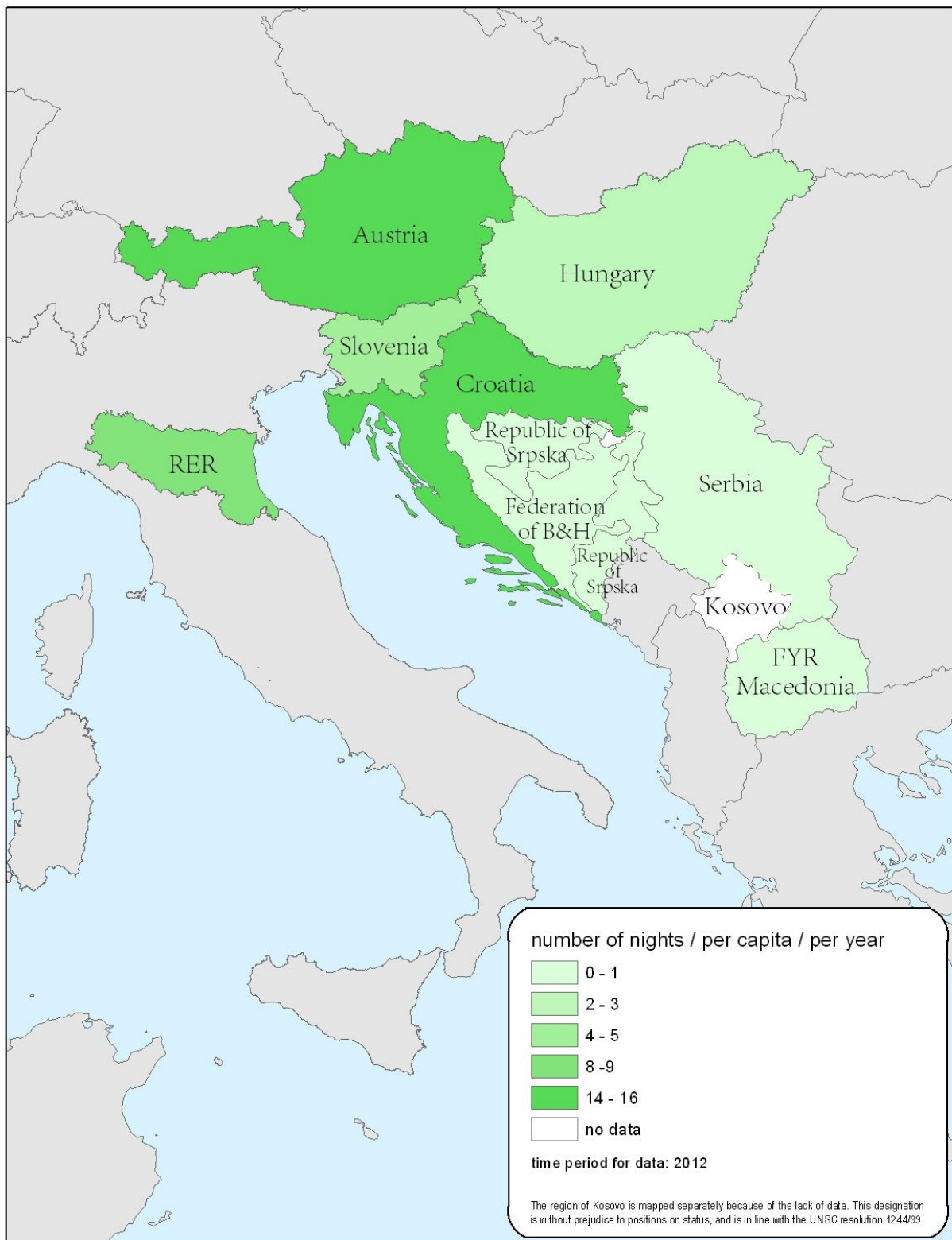
Name	Number of overnight stays of tourists per capita per year
Asset	<i>Tourism</i>
Capital	Economic/human capital
Definition	This indicator is a ratio of yearly tourist stays by total resident population.
Purpose	This indicator defines land use change and pressure.
Determination	Number per capita
Maintenance/ publishing frequency	Annual
Data source	National, region
Geographic name	Country/region
Spatial level	National/region
Type	Pressure

Comprehensive table with values extending over a series of years
Number of overnight stays of tourists per capita per year

PROJECT PARTNER	TIME PERIOD (YEAR)					
	2008	2009	2010	2011	2012	2013
Slovenia	4,60	4,44	4,35	4,58	4,63	
Austria					15,52	
Emilia-Romagna	8,97	8,82	8,57	8,71	8,37	
Hungary	2,60	2,62	2,60	2,60	2,60	2,58
Serbia	1,02	0,94	0,89	0,92	0,92	
Croatia	12,88	12,71	12,77	14,1	14,70	
BIH	<i>Federation of B&H</i>	0,31	0,29	0,34	0,36	0,42
	<i>Republika Srpska Brcko district</i>	0,47	0,42	0,43	0,46	0,47
FYR Macedonia	1,09	1,02	0,98	1,05	1,04	

* values in cells coloured are presented on map

Number of overnight stays of tourists per capita per year



Map 17 - Share of tourism related employment in total employment

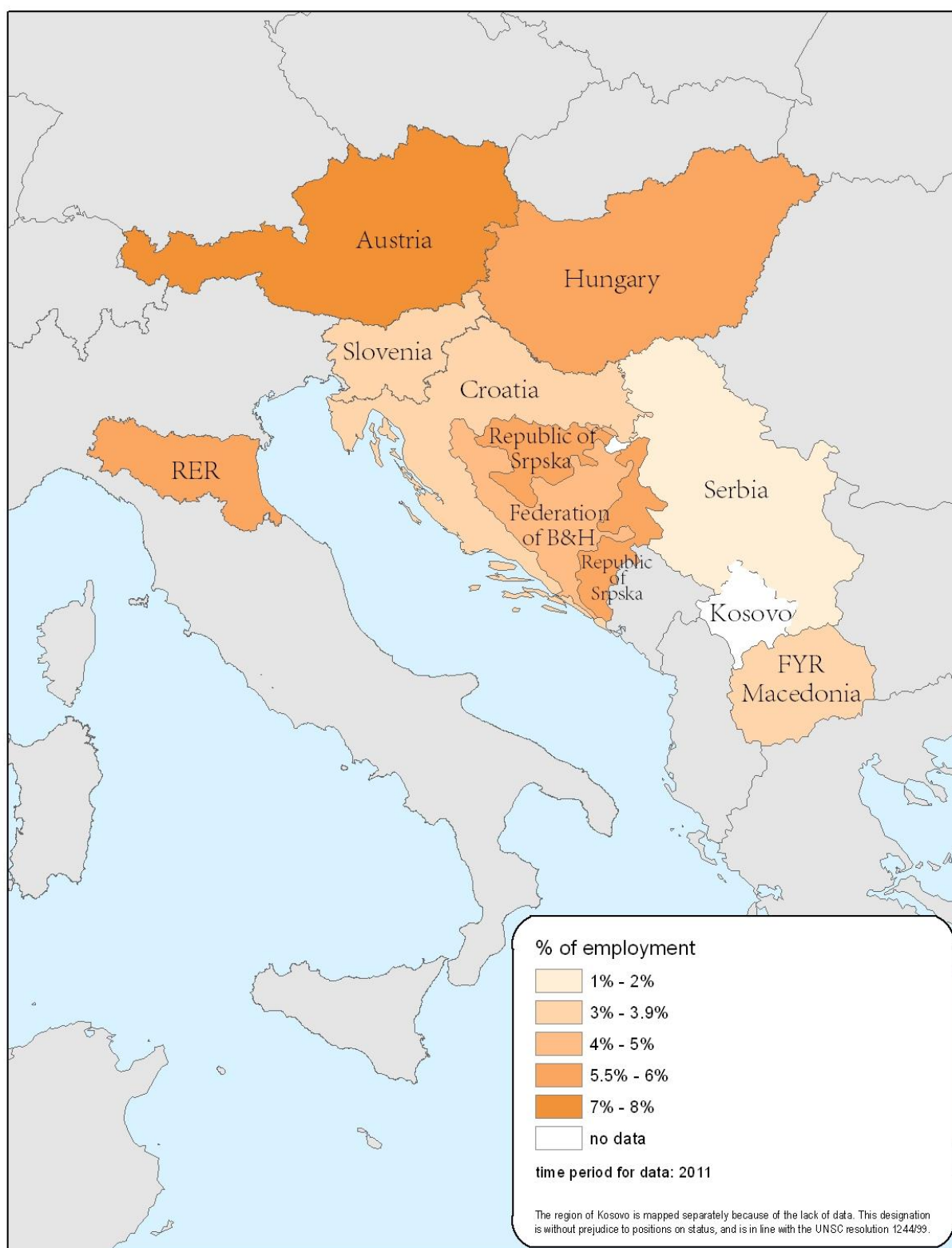
Name	Share of tourism related employment in total employment
Asset	<i>Tourism</i>
Capital	Economic/human capital
Definition	This indicator refers to the share of employees working in tourism related employment to total employment.
Purpose	The importance of employment in tourism are: - continuous growth of tourism in the last decades - importance of economic contribution of tourism to national economies (TSA) - general recognition of tourism as a major job generator, especially for youth, women, unqualified workers, etc.
Determination	% of employment
Maintenance/ publishing frequency	Annual
Data source	OECD, national, region
Geographic name	Country/region
Spatial level	National/region
Type	Pressure

Comprehensive table with values extending over a series of years
Share of tourism related employment in total employment (%)

PROJECT PARTNER	TIME PERIOD (YEAR)					
	2008	2009	2010	2011	2012	2013
Slovenia		3,82	3,93	3,86	3,87	3,87
Austria	5,24	5,29	5,39	7,30		
Emilia-Romagna	5,77	5,70	5,68	5,99		
Hungary	4,95	4,85	4,93	5,50	5,33	
Serbia		1,18	1,19	1,16	1,17	1,19
Croatia	3,57	3,45	3,59	3,74		
BIH	<i>Federation of B&H</i>	4,00	4,20	4,10	4,04	3,84
	<i>Republika Srpska Brcko district</i>	6,42	5,84	5,20	4,95	4,75
FYR Macedonia	3,14	3,47	3,49	3,65	3,61	

** values in cells coloured are presented on map*

Share of tourism related employment in total employment



Map 18 - % of GDP of foreign direct investment stock

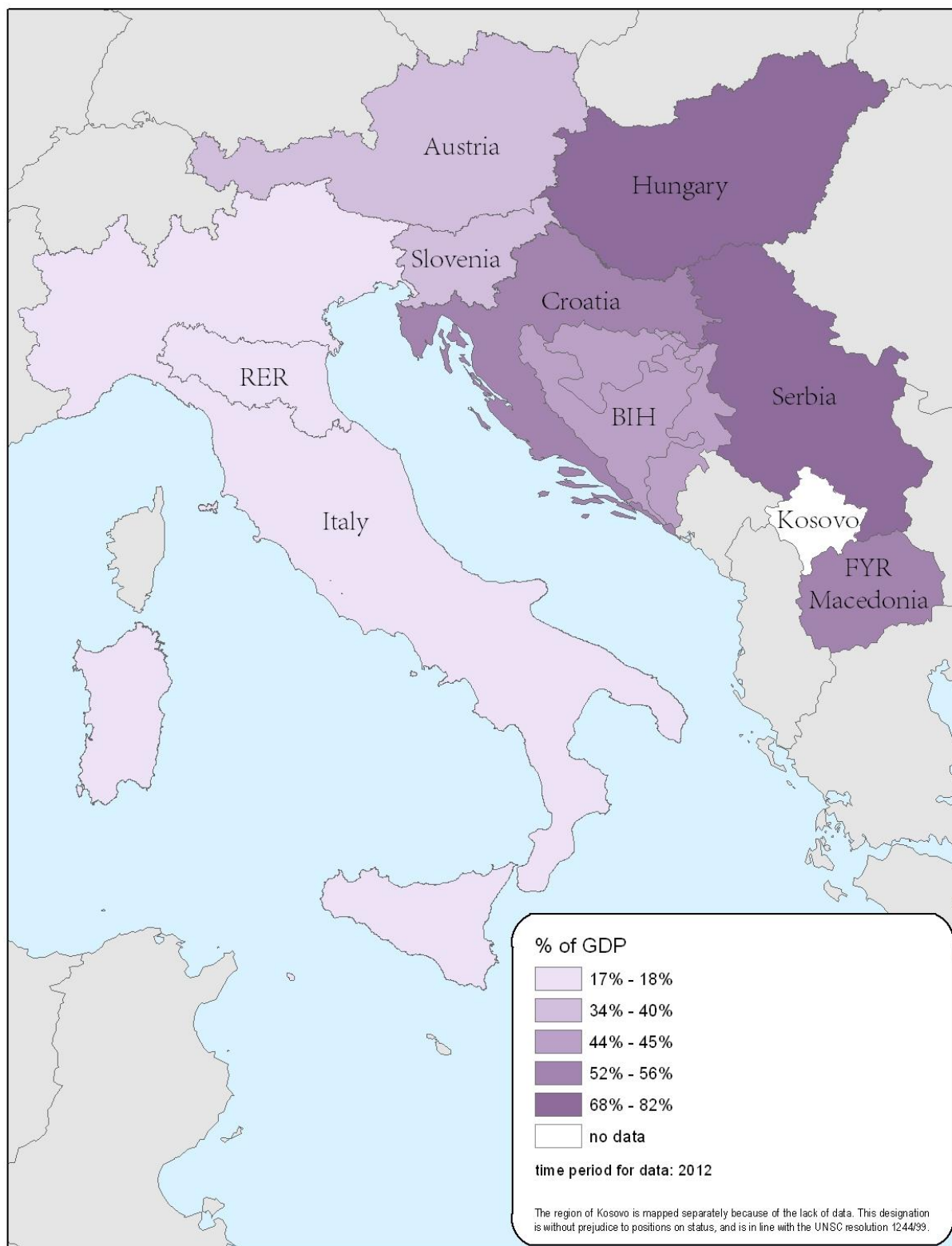
Name	% of GDP of foreign direct investment stock
Asset	<i>Investment Promotion</i>
Capital	Economic/human capital
Definition	This indicator refers to the share of foreign direct investment (stock) in GDP.
Purpose	Foreign direct investment (FDI) is defined as an investment involving a long-term relationship and reflecting a lasting interest in and control by a resident entity in one economy (foreign direct investor or parent enterprise) of an enterprise resident in a different economy (FDI enterprise or affiliate enterprise or foreign affiliate). Such investment involves both the initial transaction between the two entities and all subsequent transactions between them and among foreign affiliates. FDI stock is the value of the share of their capital and reserves (including retained profits) attributable to the parent enterprise, plus the net indebtedness of affiliates to the parent enterprises.
Determination	% of GDP
Maintenance/ publishing frequency	Annual
Data source	UNCTAD, Division on Investment and Enterprise
Geographic name	Country/region
Spatial level	National/region
Type	State

Comprehensive table with values extending over a series of years and trend % of GDP of foreign direct investment stock

PROJECT PARTNER	TIME PERIOD (YEAR)					
	2008	2009	2010	2011	2012	2013
Slovenia	28,7	30,7	30,7	30,0	34,1	
Austria	35,8	45,0	42,5	36,3	39,7	
Italy	14,2	17,3	15,9	15,4	17,7	
Hungary	57,1	78,0	70,8	60,9	81,7	
Serbia	39,6	50,7	58,4	58,3	69,2	
Croatia	44,4	58,8	58,8	49,4	55,3	
BiH <i>Federation of B&H Republika Srpska Brcko district</i>	33,8	40,6	40,6	39,6	45,0	
FYR Macedonia	42,0	48,6	46,8	46,5	52,7	

* values in cells coloured are presented on map

% of GDP of foreign direct investment



Map 19 - Population growth rate

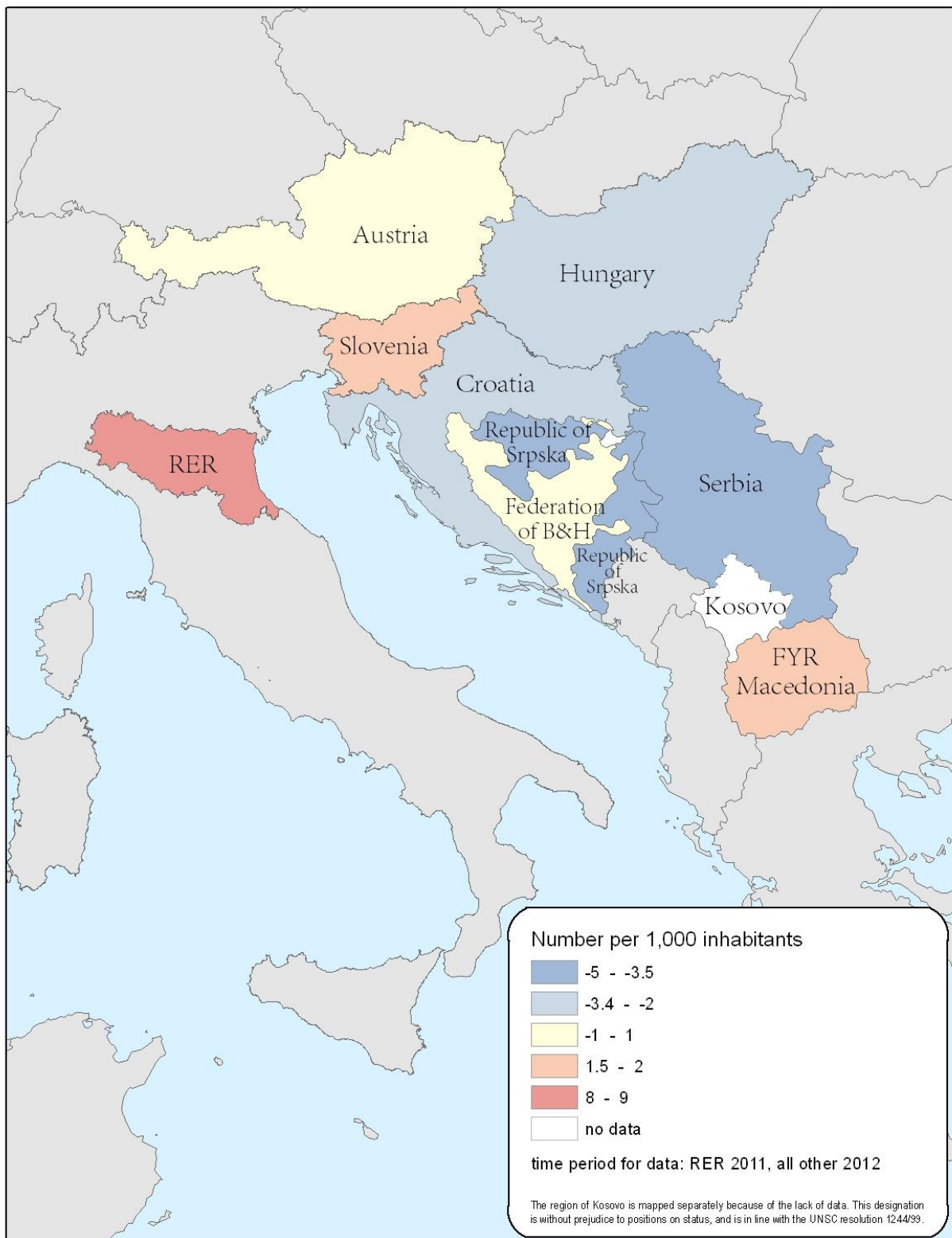
Name	Population growth rate
Asset	Population
Capital	Economic/human capital
Definition	The indicator corresponds to the number of births and deaths during the certain period and the number of people migrating to (immigration) and from (emigration) a country.
Purpose	Population growth rate is a measure of change of population of a certain area. The rate of population growth is identified by Agenda 21 of the United Nations as one of the crucial factors affecting long-term sustainability of natural resources. Rapid population growth can impose limitations on a country's capacity for handling a wide range of economic, social, and environmental issues, particularly when rapid population growth occurs in connection with poverty and lack of access to natural resources.
Determination	Number per 1.000 inhabitants
Maintenance/ publishing frequency	Annual
Data source	OECD, EUROSTAT, national, region
Geographic name	Country/region
Spatial level	National/region
Type	State

Comprehensive table with values extending over a series of years
Population growth rate (Number per 1.000 inhabitants)

		TIME PERIOD (YEAR)					
		2008	2009	2010	2011	2012	2013
	PROJECT PARTNER						
	Slovenia	10,9	7,2	1,6	2,6	1,6	
	Austria	0,3	-0,1	0,2	0,2	-0,1	
	Emilia-Romagna	14,43	9,04	8,35	8,31		
	Hungary	-1,79	-1,59	-2,20	-4,20	-2,61	-2,42
	Serbia	-4,26	-4,01	-4,02	-7,89	-4,85	
	Croatia	-3,03	-2,06	-3,08	-3,3	-3,22	
BiH	<i>Federation of B&H</i>	3,51	2,99	2,05	1,18	0,77	
	<i>Republika Srpska</i>	-3,30	-3,17	-3,37	-4,10	-3,82	
	<i>Brcko district</i>						
	FYR Macedonia	1,9	2,3	2,5	1,6	1,7	

* values in cells coloured are presented on map

Population growth rate



Map 20 - % of population in age 20-64 years

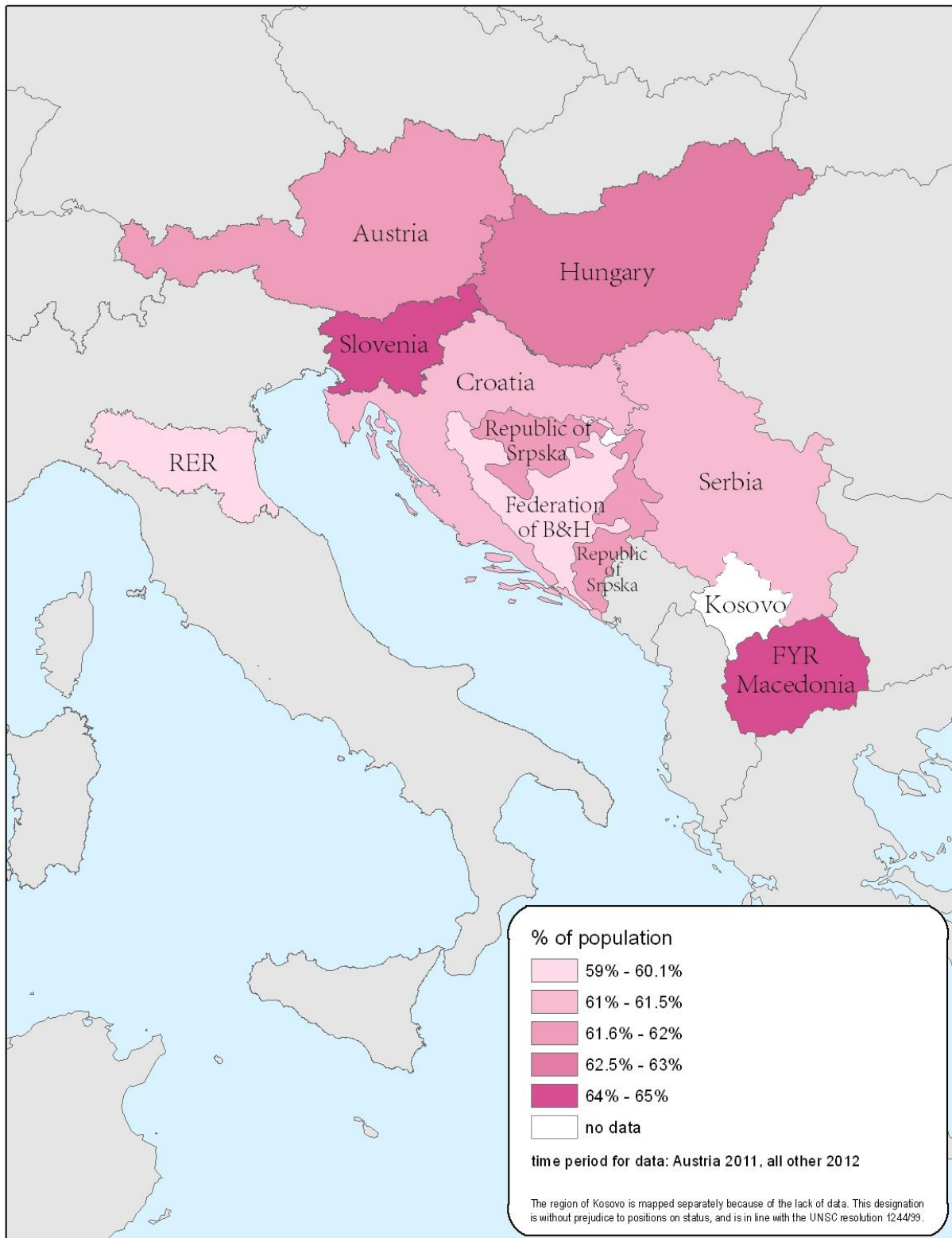
Name	% of population in age 20-64 years
Asset	<i>Population</i>
Capital	Economic/human capital
Definition	This indicator refers to the share of persons aged 20-64 to total population.
Purpose	This indicator measures working <i>age</i> persons out of total population. With employment rate is the best measure of labour market conditions. Europe 2020 headline target is that 75 % of population aged 20-64 should be employed by 2020.
Determination	% of population
Maintenance/ publishing frequency	Annual
Data source	EUROSTAT, OECD, national, region
Geographic name	Country/region
Spatial level	National/region
Type	Pressure

Comprehensive table with values extending over a series of years
% of population in age 20-64 years

		TIME PERIOD (YEAR)					
		2008	2009	2010	2011	2012	2013
	PROJECT PARTNER						
	Slovenia		64,22	64,28	64,28	64,00	63,63
	Austria				61,80		
	Emilia-Romagna	60,58	60,51	60,36	60,41	60,04	59,70
	Hungary	62,78	62,72	62,72	62,95	62,91	62,51
	Serbia	61,55	61,84	62,17	61,34	61,33	
	Croatia	61,50	61,80	61,50	61,40	61,20	
BiH	<i>Federation of B&H</i>	58,70	57,50	58,20	56,90	58,70	
	<i>Republika Srpska Brcko district</i>	64,60	64,10	64,10	65,40	62,00	
	FYR Macedonia	63,00	63,00	63,00	64,00	64,00	

* values in cells coloured are presented on map

% of population in age 20-64 years



Map 21 - Ageing index

Name	Ageing index
Asset	Population
Capital	Economic/human capital
Definition	Indicator is defined as the ratio of the population aged 64 and above divided by population of 15 years and below.
Purpose	This indicator measures the balance of the age structure of the society.
Determination	% (ratio)
Maintenance/ publishing frequency	Annual
Data source	EUROSTAT, OECD, national, region
Geographic name	Country/region
Spatial level	National/region
Type	Pressure

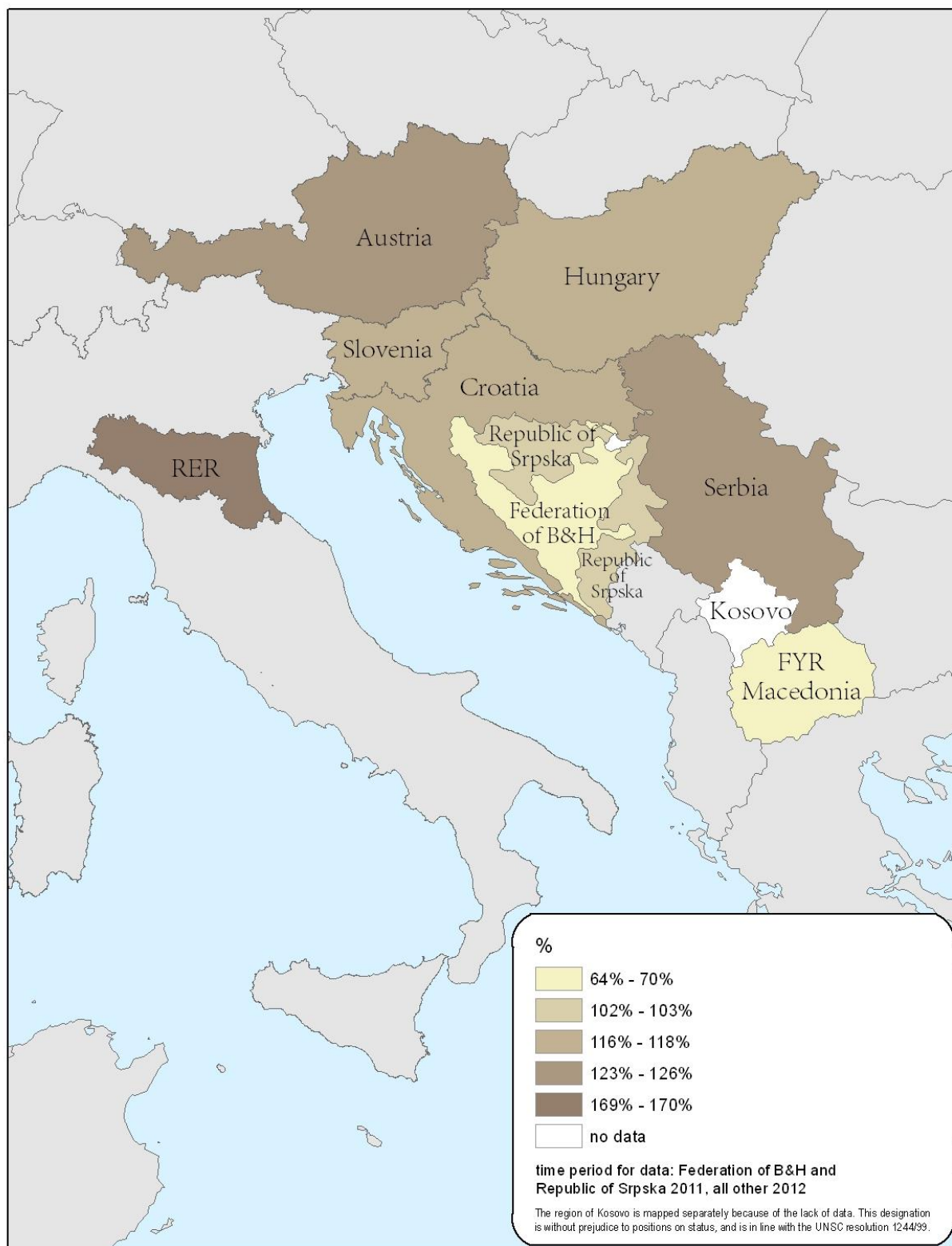
Comprehensive table with values extending over a series of years

Ageing index (%)

PROJECT PARTNER	TIME PERIOD (YEAR)					
	2008	2009	2010	2011	2012	2013
Slovenia	115,53	116,08	115,13	116,02	117,40	118,65
Austria	113,30	116,80	119,20	121,00	123,70	
Emilia-Romagna	178,10	174,40	172,00	169,60	169,60	170,10
Hungary	107,63	109,89	112,64	114,68	116,36	118,93
Serbia	105,90	108,62	111,43	121,94	125,38	
Croatia	105,20	107,60	110,30	115,70	117,80	
BIH <i>Federation of B&H Republika Srpska Brcko district</i>				64,90 102,68		
FYR Macedonia	64,00	66,00	67,00	69,00	70,00	

* values in cells coloured are presented on map

Ageing index



Institutional capital and attractiveness in the SEE area

Map 22 - Number of foreign students

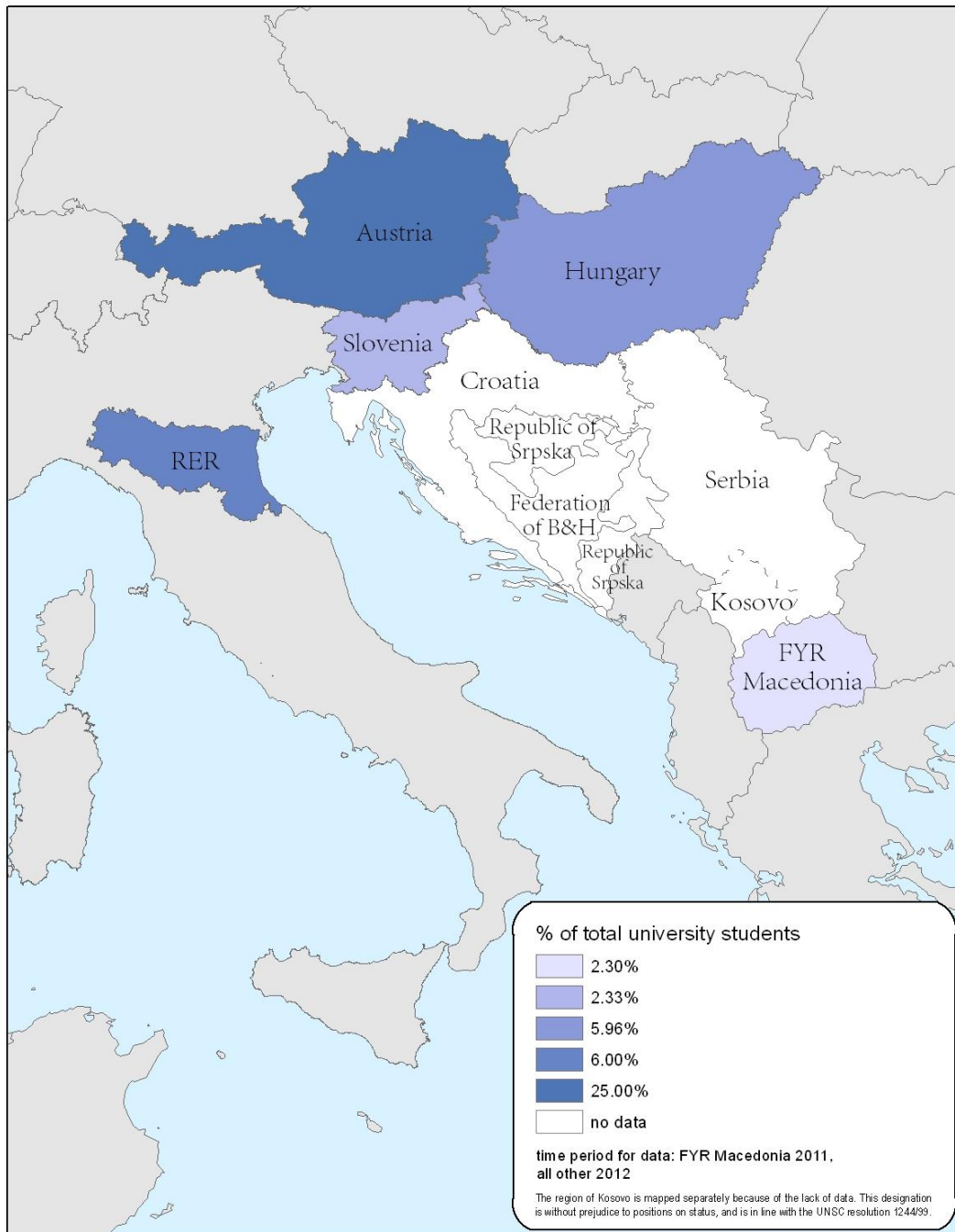
Name	Number of foreign students
Asset	<i>International relations</i>
Capital	Institutional capital
Definition	The indicator refers to a number of international students and/or professors enrolled in tertiary education.
Purpose	International strategies at universities are much more than simply the numbers of international faculty and students, but these serve as strong measures of institutions with advanced strategies in this area.
Determination	number and % of total university students
Maintenance/ publishing frequency	Annual
Data source	OECD, national, region
Geographic name	Country/region
Spatial level	National/region
Type	State

Comprehensive table with values extending over a series of years Foreign university students (number and % of total students)

PROJECT PARTNER	TIME PERIOD (YEAR)					
	2008	2009	2010	2011	2012	2013
Slovenia	Number: 1674 %: 1.45	Number: 1969 %: 1.72	Number: 2185 %: 1.90	Number: 2272 %: 2.12	Number: 2532 %: 2.33	
Austria	Number: 47071	Number: 54411	Number: 59058	Number: 63781	Number: 67710 %: 25	
Emilia-Romagna	Number: 7251 %: 5.19	Number: 7799 %: 5.36	Number: 8136 %: 5.56	Number: 8530 %: 5.86	Number: 8525 %: 6.0	
Hungary	Number: 15459 %: 4.06	Number: 16916 %: 4.57	Number: 18154 %: 5.02	Number: 18850 %: 5.24	Number: 20176 %: 5.96	
Serbia						
Croatia						
BIH <i>Federation of B&H Republika Srpska Brcko district</i>						
FYR Macedonia	%: 2.28	%: 2.10	%: 2.59	%: 2.30		

* values in cells coloured are presented on map

Number of foreign students



Workshop: “Trans-national attractiveness: sharing common keys of interpretation”

Given the complexity of the concept and considering the different profiles, competences, experiences and perspectives of the partners on “territorial attractiveness”, the partnership agreed to debate the main outputs of the project within a workshop, held in Bologna on the 1st of April 2014, during the Attract-SEE project – partner meeting (March 31 – April 2, 2014).

During the workshop, the participants were asked to express their opinion on the relevance of the territorial assets and target audiences identified for Territorial Attractiveness assessment, in view to obtain an updated overview, adjusted to their most recent perspectives.

Participants were divided in three groups. Each group was asked to identify which target/audience profile emerges from the analysis of the regional/national attractiveness reports, and which types of assets are more likely to support them. The answers were collected and discussed by each group, providing the results summarized in the table below. In order to have an updated perspective on the core territorial assets, the workshop outcomes (total 2) were compared with the results emerged from the country/regional attractiveness reports (total 1 - baseline). The cells with identified correspondence have been filled with the value 1 – high influence. The assessment was done by showing, in the column “results”, the trends of each territorial asset, compared to the baseline. However, one should be aware that the final results (absence or presence of relations) are dependent on the interpretation of priorities, with differences in terms of profiles, competences, experiences and perspectives on the country/regional attractiveness documents. Furthermore, the participants were asked to highlight the divergences/discrepancies between policy objectives set at national/regional level and the transnational assets.

		Tot.1	Workshop			Tot 2	Results
			Group 1	Group 2	Group 3		
Environmental capital							
Environmental quality	Environmental quality (air, water, waste, greenhouse gases, etc.)	12	1	1	1	15	↑ 3
Territorial/ ecosystem integrity	Territorial/ecosystem fragmentation	4		1		5	→ 1
	Biodiversity	8		1		9	→ 1
	Risk management	7	1	1		9	→ 2
Natural resources and energy	Natural resources management (renewable/non renewable)	6			1	7	→ 1
	Energy management (fossil fuels / renewable resources)	5	1		1	7	→ 2
Anthropic capital							
Urban quality	Access to public services	11			1	12	→ 1
	Towns/settlements revitalisation/networking	9				9	↓ 0
	Urban health/liveability /env.services	5				5	↓ 0
Landscape quality	Visual attractiveness	5		1		6	→ 1
	Landscape diversity	6		1		7	→ 1
	Balanced urban-rural relations	5	1	1		7	→ 2
Infrastructures	Local/global accessibility	16	1	1	1	19	↑ 3
	Basic infrastructures for daily life	8	1	1		10	→ 2
Socio-cultural capital							
Culture	Cultural heritage	6		1		7	→ 1
	Multiple cultural services	9		1		10	→ 1
Quality of life	Welfare/Cost of living	10	1	1	1	13	↑ 3
	Social equity/poverty reduction	4		1		5	→ 1
	Multicultural integration	6	1	1	1	9	↑ 3
	Sense of belonging/citizenship	4			1	5	→ 1
	Gender mainstreaming	3			1	4	→ 1
Economic/human capital							
Knowledge & Innovation	Research	8		1	1	10	→ 2
	Education/capacity building	10	1	1		12	→ 2
	Attracting/holding competences	7		1		8	→ 1
Employment	Employment	12	1		1	14	→ 2
Specializations / Key sectors	Diversified economic activities/services	12	1	1	1	15	↑ 3
Tourism	Attractiveness for tourism	7	1		1	9	→ 2
Investment Promotion	Foreign investments attraction	9	1	1		11	→ 2
	Quality business locations/services	7	1	1		9	→ 2
	Partnerships relations	7		1		8	→ 1
Population	Population growth , % pop in age 15-64 years	7		1		8	→ 1
Institutional capital							
Governance	Effective governance arrangements	6	1		1	8	→ 2
International relations	Cross-border cooperation	11		1		12	→ 1
	Internationalization	12				12	↓ 0

The workshop confirmed that the most relevant transnational asset for environmental/ecosystem capital is environmental quality, along with sustainable energy and risk management. Local/global accessibility is considered the most important asset for the anthropic capital, where also a balanced rural/urban relationships is considered relevant. As far as the socio-cultural capital is concerned, welfare appears to be crucial along with the capacity to provide fair social conditions, for example in terms of price/quality ratio of houses and accommodation and by overcoming problems of integration. *The vast majority of assets belonging to the economic capital proved to be driving factors for the success of a transnational attractiveness strategy, focused on FDI.* Effective government arrangements play a primary role as a cross-cutting issue.