

CREACT  **MED**

CREATIVE MEDITERRANEAN

Cultural & Creative Industries in Jordan

Salient Features

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Creact4med



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This report is produced by the Euro-Mediterranean Economists Association (EMEA) as part of the mapping of the cultural and creative industries (CCI) carried out under the CREAT4MED project, funded by the European Union and coordinated by EMEA.

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CREACT4MED engages with CCI players to enhance networking, collaboration, visibility, financial opportunities and market access. Join the CREAT4MED community at:
<https://platform.creativemediterranean.org>

A GENERAL OVERVIEW

Population size: 10.2 million in 2020

GDP per capita: \$4282.76 (current USD) in 2020

GDP: \$43.69 billion (current USD) in 2020

GDP growth rate: -1.55% in 2020

Inflation rate: 0.33% in 2020 (consumer prices)

Unemployment rate: 18.5% of total labour force in 2020 (modeled ILO estimate)

Youth unemployment rate: 37.28% of total labour force aged 15-24 in 2019 (modeled ILO estimate)

Female unemployment rate: 23.81% of female labour force in 2019 (modeled ILO estimate)

Female labour force participation rate: 14.59% of female population aged 15+ in 2019 (modeled ILO estimate)

Rank in the Global Gender Gap Index: 131 out of 156 countries (2020)*



Source:

World Development Indicators (WB)- Last Updated: 07/21/2021 (<https://databank.worldbank.org/source/world-development-indicators>)

World Economic Forum's Global Gender Gap Report 2021 (<https://www.weforum.org/reports/global-gender-gap-report-2021>)

*The countries at the bottom of the ranking have a greater distance from gender parity

Overall Context

The Hashemite Kingdom of Jordan weathered the COVID-19 pandemic crisis better than most of the other countries in the region. The economy contracted by only 1.5% in 2020 and, according to forecasts, a slow recovery is underway (WB, 2022). However, due to the pandemic, the country's existing problems have been exacerbated, such as high unemployment, especially amongst young people. The female participation rate is one of the lowest in the world, at around 15%. There is a narrow fiscal space with high government debt, reaching almost 106% of GDP in 2020 (WB, 2022). Unlike many other countries in the region, natural resources are scarce. Neighbouring countries suffer from political instability, leading to waves of refugees entering the country, mainly from Palestine and Syria: registered Syrian refugees alone represented 7% of the total population in 2017 (MedCulture, 2018).

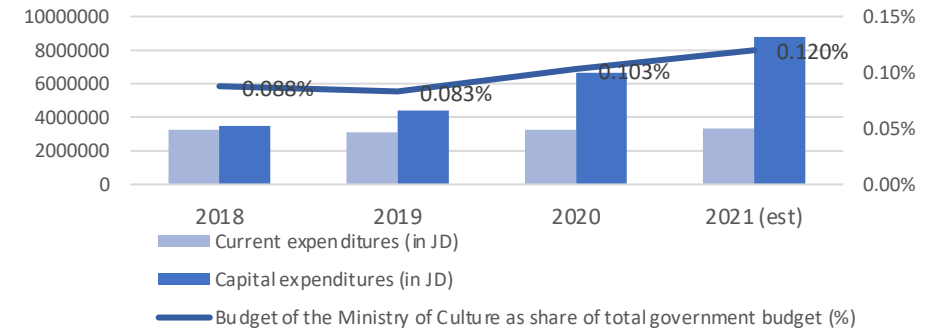
Nonetheless, the country has made good progress in carrying out structural reforms in spite of economic difficulties (IMF, 2022).

Key CCI Figures In Jordan

The importance of cultural and creative industries (CCI) is well recognised across the globe. Many countries have dedicated efforts and formulated strategies to support the growth of the CCI. However, the Jordanian government has not yet dedicated specific attention to these industries. At present, there is no official definition of CCI in Jordan and no national strategies targeting these industries. This substantial lack of dedicated attention is mirrored by the small budget allocated to the Ministry of Culture which, since 2018, has represented only 0.1% of the government's total budget (Jordan Government Budget, 2020).

The absence of a national definition for the CCI makes the process of obtaining ready and accurate information on size, characteristics and economic contribution of the creative economy very difficult. There are a number of definitions for CCI in the literature. In this report, we adopt a broad definition inspired from different sources¹, which classifies the CCI into 3 main groups: Arts and Culture, Media, and Design.

Budget allocated to the Ministry of Culture



Source: Jordan Government Budget, 2020 (Capital and current expenditures allocated to the Ministry of Culture)



Source: Own elaboration

¹Amongst numerous CCI classifications available in the literature, we are mainly inspired by the ones of UN (EY, 2015), UK (DCMS, 2019), Singapore (ERC-CI, 2002) and the European Commission (EC, 2010).

Key CCI Figures⁺ In Jordan Continued

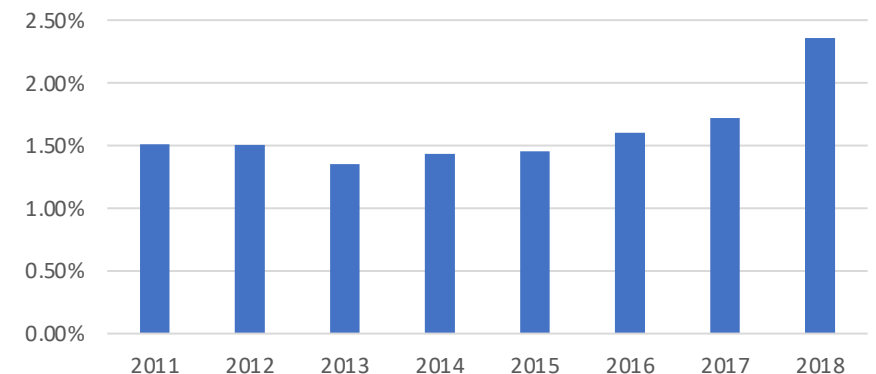
Jordan's media market accounted for \$317 million USD in 2018, translating into an average annual growth rate of 2% since 2014. Although print is still the biggest media industry, its share has been declining over time and lost 4% of its market share between 2014 and 2018 (Arab Media Outlook 2016-2018).

In order to calculate the contribution of CCI to the economy, we relied on the definition of CCI developed by the UK Government's Department for Culture, Media and Sport (DCMS, 2001). Based on data by the Department of Statistics (DoS) on the ISIC-4 decomposition of output by economic activities, it has been estimated that CCI in Jordan contributed to 2.36% of GDP in 2018. The contribution of the CCI in terms of value added was then calculated as gross output minus intermediate consumption for those economic activities belonging to the adopted definition of the CCI. (One should note that, according to the DCMS definition of CCI, heritage and cultural sites, including libraries and archives, as well as museums, historic and heritage sites are not included.)

In terms of the added value of CCI, between 2011 and 2018 the creative economy showed an average annual growth of 13% (see Sandri & Alshyab, 2022).



CCI contribution as a percentage of GDP



Source: Authors based on ISIC-4 data by DoS, 2020

Key CCI Figures In Jordan Continued

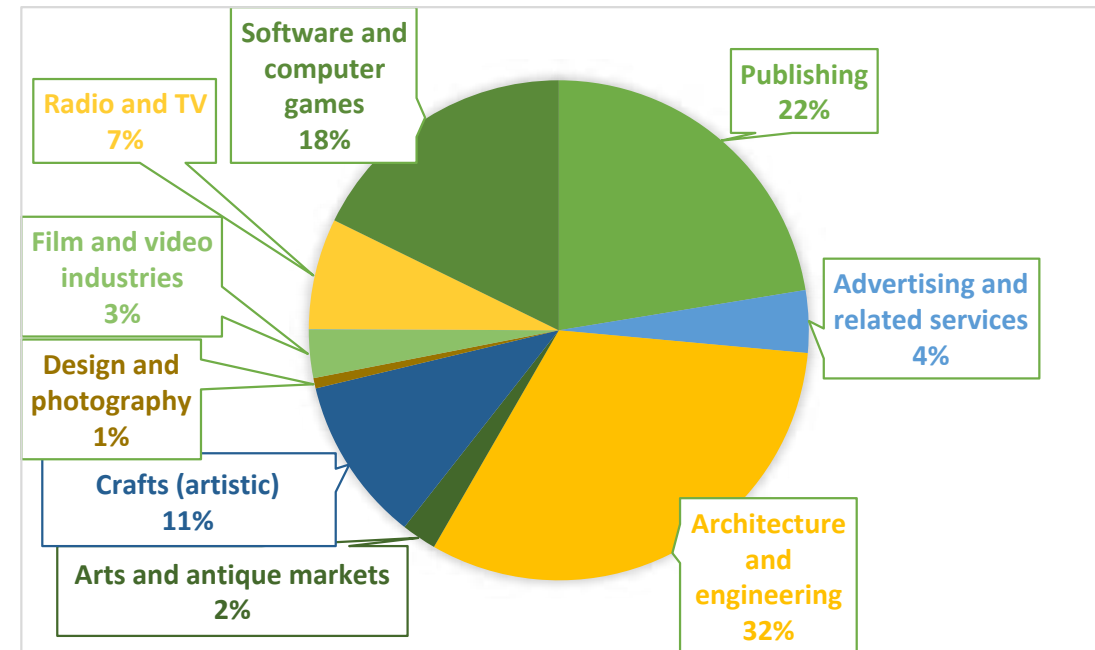
The most important CCI sub-sectors in terms of value added are architecture and engineering (32%), publishing (22%), software and computer games (18%), crafts (11%), and radio and TV (7%):

Value added of CCI (in 1,000 JD) and its annual growth (%)



Source: Authors based on ISIC-4 data by DoS, 2020

Output contribution of CCI in 2018



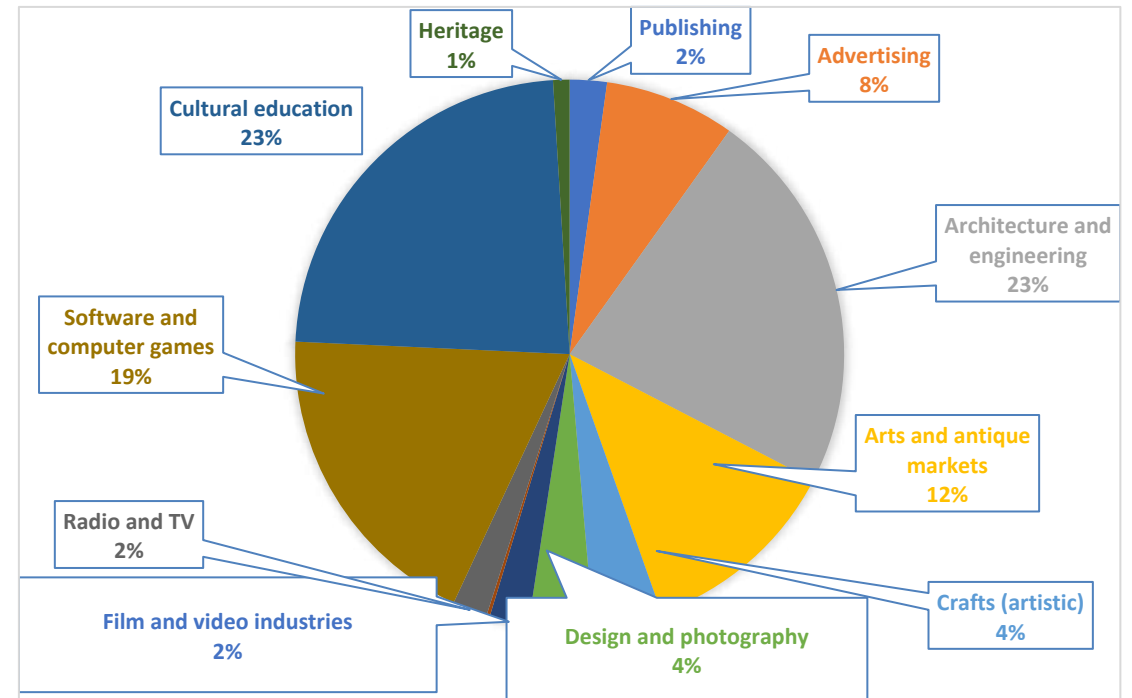
Source: Authors based on ISIC-4 data by DoS, 2020



Key CCI Figures In Jordan Continued

In terms of employment contribution of the CCI, data was obtained from the Establishment Surveys by the Jordan DoS. Following the ISIC-4 methodology, it was found that in 2018 a total of 25,339 individuals were employed by the creative economy, representing 3% of total employees in the country. Furthermore, almost 28% of employees in the CCI are women. Cultural education and architecture and engineering contribute the most to job creation in CCI, each accounting for 23% of overall CCI jobs. Software and computer games is next, responsible for 19% of created jobs.

Employment contribution of CCI



Source: Authors based on ISIC-4 data by DoS, 2020

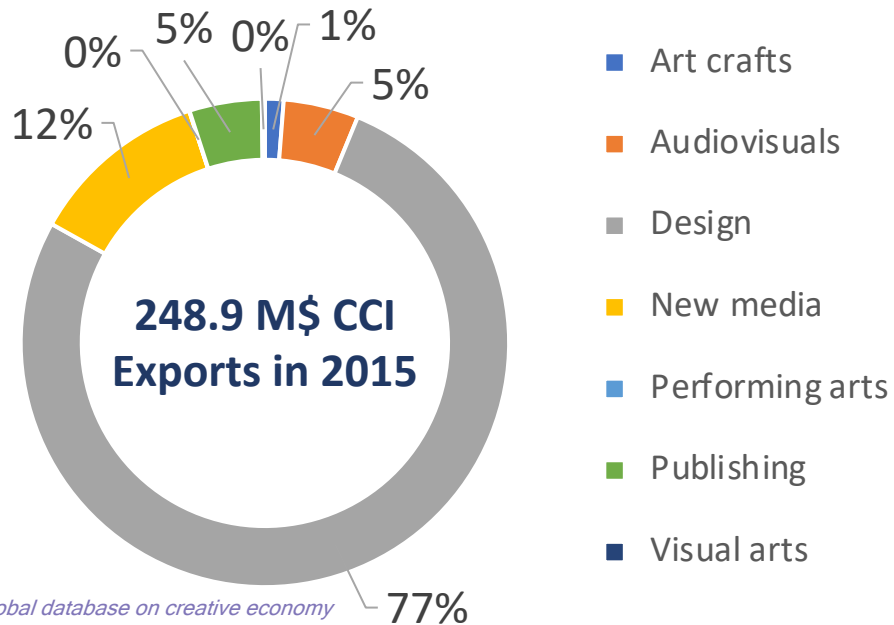
CCI

Exports of Jordan

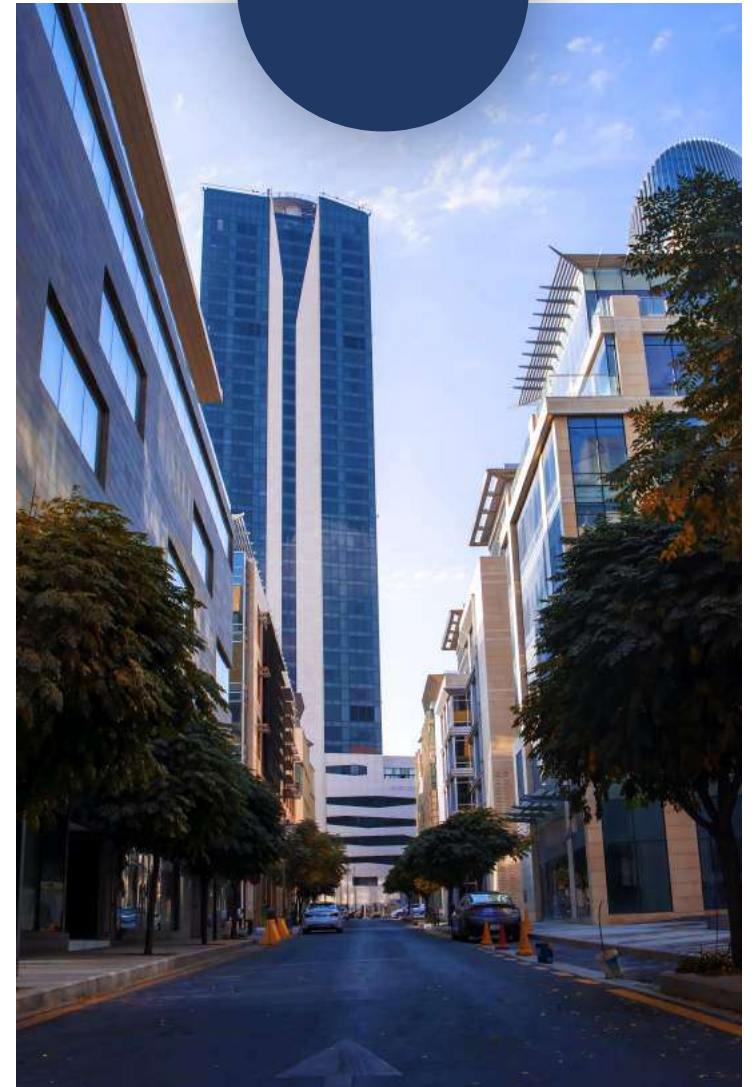


According to the UNCTAD report on creative industries (UNCTAD, 2018), Jordan's CCI exports reached \$285 million USD in 2015, with 77% of these exports in design, including architecture, fashion, interiors, toys and jewellery. Meanwhile, the country's CCI imports greatly exceed those of exports, reaching \$510 million USD in 2015.

Creative Goods Exports 2015



Source: UNCTAD global database on creative economy



CULTURAL INFRASTRUCTURE

The Jordan Museum:
<https://www.jordanmuseum.jo/>



15 Museums

Royal culture center:
<https://www.linkedin.com/company/royal-cultural-center/about/>



3 Theaters

TAJ cinema

<https://www.fercoseating.com/projects/all/taj-cinemas-install-the-turino/>



24 Cinemas

National Library of Jordan:

https://m.facebook.com/NationalLibrary/photos/?tab=album&album_id=195903333268892



26 Libraries

Numbers up to the end of 2021; a non-exhaustive list based on inputs provided by CREAT4MED Technical Experts for Jordan.

MAIN CCI ACTORS

CCI Ecosystem

01

Governmental

02

Private Sector



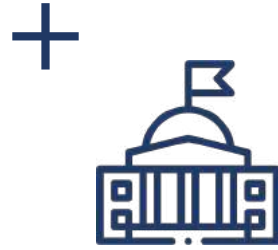
03

Associations & NGOs

04

Academia

Governmental Actors



The main governmental entities promoting CCI include but are not limited to:

- Ministry of Culture (<https://culture.gov.jo/Default/Ar>)
- Jordan Enterprises Development Corporation, JEDCO (<https://jedco.gov.jo/Default/En>)
- Royal Film Commission (<http://www.film.jo/>)
- Ministry of Digital Economy And Entrepreneurship (<https://www.modee.gov.jo/Default/En>)
- The Higher Council for Youth
(https://portal.jordan.gov.jo/wps/wcm/connect/gov/egov/government+ministries+_+entities/higher+council+for+youth/higher+council+for+youth)
- Ministry of Tourism and Antiquities (<http://www.tourism.jo/Default/En>)
- National Centre for Culture & Arts
(<https://www.kinghuseinfoundation.org/en/EntityPage/National%20Center%20for%20Culture%20and%20Art/9>); this plays an important role in promoting performing arts in Jordan.

We did not observe any systematic coordination to further develop CCI among these actors.

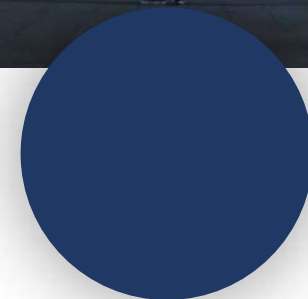
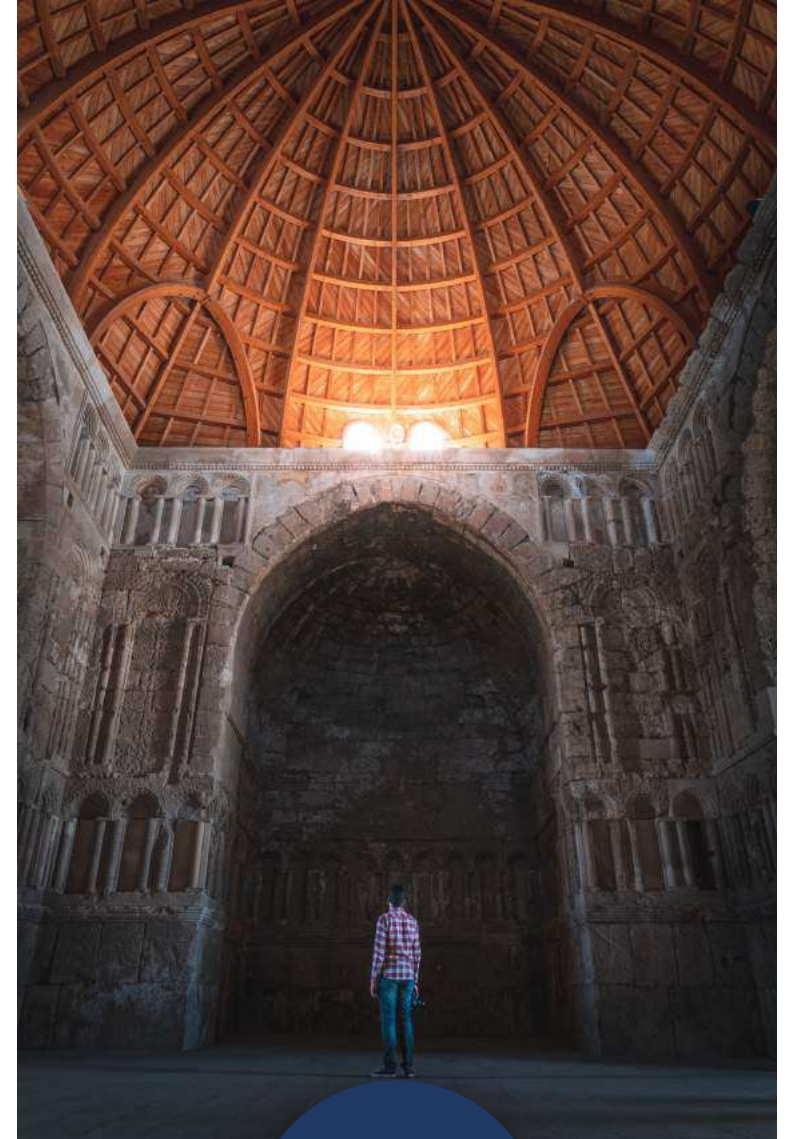


Private Sector Actors



Private sector CCI actors include not only artists, designers, architects and other individual creative workers, but also incubators and Business Support Organisations (BSO), such as:

- Oasis500 (<https://oasis500.com/en/>), one of the most influential seed funding and venture capitalists in Jordan, with a focus on tech but also the creative industry. Besides funding, the company provides training and mentorship. Since its establishment in 2010, following the direction of King Abdullah II, it has invested around \$9 million USD in more than 150 startups.
- INJAZ (<https://www.injaz.org.jo/>)
- Luminous Shamal Start (<https://www.shamalstart.com/>), mainly active in manufacturing and the service sector. It was established by Luminus Education, with financial support from the European Union, in 2016. Amongst other things, it provides one of the 20 largest digital fabrication laboratories in the world.



Private Sector Actors



- Dezain (<https://www.facebook.com/dezainjo>), supported by ZAIN INNOVATION CAMPUS and Zain, which provides one of the first platforms in Jordan exclusively for fashion and product designers. Amongst other things, it offers training, mentorship, networking opportunities, and funding.²
- iPark (<https://www.ipark.jo/>)
- Ibda3 (<https://www.ibda3.com/index.html>), one of the first accelerators in the MENA region specialising in CCI startups and SMEs.³
- Dash Ventures (<http://dashventures.com/>), a capital firm focussed on the MENA region. Its focus lies in businesses in the fields of information technology, energy efficiency, lifestyle consumer brands and the creative industries.
- MENA Apps (<https://www.f6s.com/menaapps>), an early-stage accelerator founded in 2011 specialising in e-entrepreneurship amongst the Arab youth.
- Flat6Labs (<https://www.flat6labs.com/Location/jordan/>)
- Garment Design & Training Services Centre (GSC) (<https://www.gsc.com.jo/Default/En>)
- Design Institute Amman (<http://diamman.com/>)
- Business Development Centre Jordan (<https://bdc.org.jo/>)
- JoPack (<https://jopack.org/>)

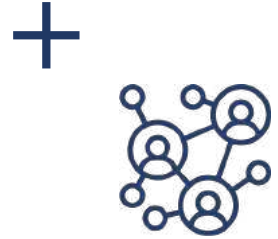
We did not observe any systematic coordination to further develop CCI among these actors.

² <https://dezain-space.netlify.app/>

³ <https://www.startupmgzn.com/english/news/ibda3-startup-accelerator-launches-in-jordan-specializes-in-multiple-creative-industries/> and <https://www.ibda3.com/index.html>



Associations & NGOs



Various associations are promoting CCI in Jordan, including:

- Jordan River Foundation (<https://www.jordanriver.jo/en>)
- King Abdallah II Fund for Development (<https://www.kafd.jo/en/>)
- Jordanian Hashemite Fund for Human Development (<https://www.johud.org.jo/>)
- King Hussein Foundation (<https://www.kinghusseinfoundation.org/en/Home>)
- Abdul Hameed Shoman Foundation (<https://shoman.org/en>)
- Jordan Media Institute (<https://jmi.edu.jo/>)
- Spark (<https://spark.ngo/middle-east-and-north-africa/jordan/>)
- Drosos Foundation in Jordan (<https://drosos.org/en/about/#levante>)
- Arab Fund for Arts and Culture - AFAC (<https://www.arabculturefund.org/>)
- Jordan Fashion Week (<https://jordanfashionweekofficial.com/>)
- Turning Tables (<https://turningtablesmena.org/>) active in Jordan and Lebanon
- Jordan Gaming Lab (<https://www.gaminglab.jo/>)

The following international organisations are particularly active on the ground: United Nations Organisation for Industrial Development (UNIDO); Italian Agency for Development Cooperation in Jordan; Gesellschaft für internationale Zusammenarbeit (GIZ); Goethe Institut; British Council; Institut Francais; USAid; NESTA; International Labour Organisation (ILO); OXFAM; EUNIC.

We did not observe any systematic coordination to further develop CCI among these actors.





Academia +



At the educational level, universities and training institutions with programmes in arts and design play a crucial role in enhancing knowledge of CCI and entrepreneurship. These institutions include but are not limited to:

- The University of Jordan (<http://ju.edu.jo/home.aspx>), a public university highly involved in publishing, theatre, and visual and performing arts (MedCulture, 2018)
- Jordan University of Science and Technology (<https://www.just.edu.jo/Pages/Default.aspx>)
- Hashemite University (<https://hu.edu.jo/>)
- Yarmouk University (<https://www.yu.edu.jo/en/>)
- Luminus Technology University College and its incubator (<https://www.luminuseducation.com/index.php/luminus-technical-university-college/>)
- The Arab League Educational, Cultural and Scientific Organisation (ALECSO), a Tunis-based institution of the Arab League, established in accordance with article 3 of the Arab Cultural Unity Charter. It works in the domain of coordination of cultural, educational and scientific activities (<http://www.alecso.org/nsite/en/>)

We did not observe any systematic coordination to further develop CCI among these actors.

GOVERNMENTAL INITIATIVES TO PROMOTE CCI

At present, no strategies have been formulated in Jordan with reference to the CCI as a whole. From a broader review of existing national strategies, no specific reference to the creative economy can be found; neither the Jordan Economic Growth Plan 2018-2022 nor the national strategy for digitalisation (REACH2025 - From Vision to Action), which was released in 2016, make specific reference to the CCI.

The only exception in this regard is the handicraft sector, which is mentioned by the National Strategy for Tourism Handicraft in Jordan 2010-2015 and the National Tourism Strategy of 2011-2015. These documents formulate Jordan's aspirations to revive handicrafts, with a view to enhancing job creation, mostly for rural women, tourism development, and heritage conservation.



GOVERNMENTAL INITIATIVES TO PROMOTE CCI CONTINUED

Additionally, several NGOs and royal foundations have contributed considerably to handicraft development:

- The Noor al Hussein Foundation has created numerous job opportunities by establishing several handicraft centres across the country.
- The handicraft/artisan production programmes of the Jordan River Foundation predominantly aim to empower women, especially in rural areas. For example, the Bani Hamida Women's Weaving Project.
- The Jordanian Hashemite Fund for Human Development and the Royal Society for the Conservation of Nature are major players supporting handicrafts.
- Smaller local foundations and NGOs, such as the Ghor al Safi Women's Group, the Women's Trade Cooperation in Salt and the Iraq al Amir Women's Cooperative Society are also promoting the handicraft sector.
- Recently, young social entrepreneurs have become involved too: an example is the Diamond Hands organisation, which created 2,000 jobs during 2018 and 2019 through the provision of skills training, as well as sales and marketing platforms.



<https://www.kinghuseinfoundation.org/en/Home/Her-Majesty-Queen-Noor>



GOVERNMENTAL INITIATIVES TO PROMOTE CCI CONTINUED

A public-private partnership between the Ministry of Culture, the Jordanian Association for Arts and Crafts, and major trade centres led to the establishment of an initial market for cultural industry products and handicrafts being agreed in August 2020.

From a legal perspective, the “status of Artist” is not defined. There exists the Artists’ Association and the Writers’ Association, though neither of these offers legal protection, social security or health insurance to their members. Furthermore, the laws on income tax for cultural workers are not straightforward and rather confusing, with some exemptions envisaged (Med Culture, 2018).

Intellectual Property Rights (IPR)

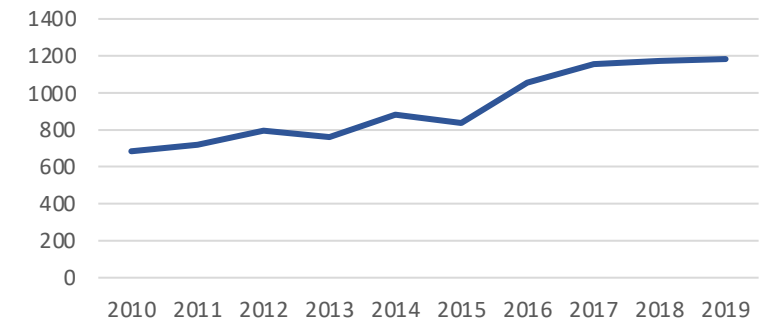


According to the World Intellectual Property Organisation (WIPO), intellectual property (IP) refers to “creations of the mind, such as inventions; literary and artistic works; designs; and symbols, names and images used in commerce”. Hence, IP is crucial for the creative industries to thrive. Jordan joined the WIPO in 1972 and is an active member, developing 65 IP-related laws and signing 46 treaties.⁴ According to the WIPO (2017), copyright industries contributed to 2.43% of overall GDP in Jordan 2014.

National IP offices in Jordan are:

- Copyright office: Department of the National Library under the Ministry of Culture (<https://www.nl.gov.jo/Default/Ar>)
- Industrial property office: Industrial Property Protection Directorate under the Ministry of Industry, Trade and Supply (<http://ippd.mit.gov.jo/>)
- The number of patent filings, as a proxy for innovation and creativity, have been slowly on the rise in the past decade.

**Patent Filings (Resident + Abroad,
Including Regional)**



Source: WIPO statistics database. Last updated: November 2021

⁴ https://www.wipo.int/members/en/details.jsp?country_id=86



Takween

<https://www.goethe.de/en/kul/ges/ser/kuk/tak.html>

The Goethe-Institut Jordan has initiated the Takween programme, designed to support young designers and creative entrepreneurs in Jordan, through various learning opportunities, to build networks and a creative community. The focus of the programme is on the design sector. Through this project, a co-working space, Takween creative space, was made accessible to creative workers and was the venue for The Amman Design Week 2019. The project also hosts the digital knowledge platform Ebtedy.



Food: Fabrik

<https://www.goethe.de/ins/jo/ar/kul.html>

Developed by the Goethe-Institut Jordan, the Food Fabrik programme encourages the creation of novel ideas for the future of food by relying on design thinking.



Masarat grants programme

<https://www.britishcouncil.jo/en/programmes/arts/masarat-grants>

Developed by the British Council, the Masarat grant aims to respond to the needs of artists and cultural practitioners by providing financial support and supporting production, training and showcasing activities.



Creative Jordan

<https://www.instagram.com/creativejor/?hl=en>

Creative Jordan is part of the regional project 'CREATIVE MEDITERRANEAN – Resilience Through Creativity', funded by the EU and the Italian Development Cooperation and implemented by UNIDO. In the Jordanian context, among other activities, it established the Amman Fashion Cluster, with the aim of supporting SMEs with technical assistance and helping them to gain access to new markets. Creative Jordan was developed in collaboration with the GSC and works with Jordanian designers and local manufacturing factories. Within the framework, the fashion design label "Jo"! was also launched.



LevelUP – Advancing Jordanian Industries

<https://levelupjordan.org/>

A UNIDO multi-component project, in partnership with The Ministry of Industry, Trade and Supply (MITS) in Jordan and The Italian Agency for Development Cooperation (AICS). The objective of the project is to create decent job opportunities for women and young people.

Cultural heritage creates jobs

<https://drosos.org/en/projekte/cultural-heritage-creates-jobs/>

A capacity-building programme by the Drosos Foundation, with the goal of reorganising the archaeological and historical monument conservation sector in a sustainable way.



Rise Talent Contest

<https://www.risecontestjo.com/>

Since 2018, the European Union (EUNIC) in Jordan has created and funded the RISE Talent Contest, to promote and celebrate Jordan's youth talent in different artistic dimensions.



All around Culture

<https://allaroundculture.com/>

Co-funded by the European Union, this project provides support to cultural institutions, initiatives and individuals to strengthen their capacities and increase their reach through funding, knowledge exchange and networking opportunities.

Irbid Garment Design and Training Services Centre

<https://jordankmportal.com/resources/success-story-irbid-garment-design-and-training-services-center>

The USAid-supported Jordan Workforce Development Project enabled the establishment of a design and vocational training centre in Irbid, as a new branch of the Garment Design and Training Services Centre (GSC), to provide women with training in design and other fashion-related skills.

CHALLENGES & OPPORTUNITIES

Challenges:

Some of the most important challenges faced by the CCI in Jordan are:

- **Lack of official support and institutional coordination:** there is no national strategy for the sector, in addition to which the existing efforts and initiatives are scattered and do not build synergies;
- **Insufficient protection of copyrights:** piracy is a serious threat, hampering CCI growth, notably in the publishing and design sectors;
- **Skills mismatch:** despite a highly educated workforce, there is a gap between the skills provided by formal education and what is required by the labour market. In addition, vocational training is still perceived as a second choice;
- **Lack of public awareness and recognition of CCI potential:** the status of Artist is not legally defined, hence young people are reluctant to choose a career path in the creative economy and many artists refer to their activities as being hobbies or part-time jobs;
- **Small domestic market and lack of access to international markets,** in addition to major competition from large established players;
- **Reluctance of banks and financing bodies to support CCI:** this is also linked to the lack of recognition of the sector and, overall, to Jordan's largely risk-averse credit providers;
- **High levels of informality,** especially amongst creative workers, which puts them amongst the vulnerable groups of population;
- **Weak (entrepreneurial) qualifications and professionalisation.**

CHALLENGES & OPPORTUNITIES

Opportunities:

The main opportunities for CCI in Jordan are:

- Diverse and rich cultural backgrounds and numerous world-renowned heritage sites;
- Likelihood that CCI will be a pillar for resilience post the COVID-19 pandemic, receiving significant support and recognition in the years to come;
- Relatively developed design and fashion industry, and the potential to become a regional hub in these industries;
- Young and vibrant population that can be both a source of supply and demand for creative goods and services;
- Acceleration in digitalisation due to COVID-19, bringing in a number of opportunities for creative workers to access international markets.



POLICY + RECOMENDATIONS

Mainstreaming CCI in public policy in Jordan:

- Take steps to define, recognise and foster the creative economy; a national definition of CCI and official quality data collection is needed.
- Implement a national strategy to channel more funds and support for CCI sectors.
- Promote coordination within the CCI ecosystem. There is currently a plurality of initiatives launched by different and mostly international stakeholders; the lack of coordination often jeopardises efforts and does not enable the exploitation of synergies between sectors, actors and initiatives. A more holistic approach to the sector would be beneficial.

Tailor-made support to existing creative business:

- The horizontal dimension of the CCI requires a need for a global and integrated approach to the sector.
- Special attention should be given to areas such as intellectual property protection, data protection and the persistence of informality within the CCI.
- Specific allocations could be given to the sector within the different incentive mechanisms and instruments dedicated to SMEs, Starts-ups, Vocational training and especially for young people, in order to increase job opportunities.

Promoting exports to overcome the limited size of domestic markets:

- Education and communication: Build the “public of tomorrow” through institutional programmes (education, awareness amongst young people and parents).
- Provide training programmes in the necessary technical areas of CCI to enhance the quality of production and also training in the domain of cultural management.
- Increase support to CCI institutions, foundations and stakeholders, with the aim of opening new horizons for young people.

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Creative + Mediterranean

The Creative Economy has become a strategic asset for innovative job creation around the world. Cultural and Creative Industries (CCI) represent nearly 30 million jobs worldwide and are major drivers of the economies of developed and developing countries (UNESCO). CCI contributed as much as 7% to the global GDP and was estimated to be around 10% of the GDP in the MENA Region (World Bank 2017). Within the CCI (mainly architecture, design and photography), there were 1.2 million cultural enterprises, generating €193 billion of value added in the EU. It is a growing and promising industry that has become strategic, not only because of its impact on employment creation, but also due to its influence on the creativity and social cohesion of societies.

CREACT4MED is an EU-funded project focused on strengthening CCI businesses and job creation, giving support to entrepreneurs, start-ups and SMEs in particular, and targeting young people and women in the Southern Neighbourhood of the European Union.

Budget: €2,220,675, 90% of which funded by the EU Commission

Timeline of implementation: March 2020 - February 2024

Our Partners & Associates

Coordinated by: Involved in Implementation:



COORDINATING INSTITUTION

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