

# European Industrial Strategy

**Essential Guide for the National Clusters Association  
Members**

**Version 2**

## Preface

**This document provides essential insights into the European Industrial Strategy and serves as a guide for members of the National Cluster Association in identifying their role within the appropriate Industrial Ecosystem.**

The European Industrial Strategy, first introduced by the European Commission in March 2020, was designed to drive the twin transition—advancing Europe toward a greener and more digital economy. Its goals are strengthening the EU’s global competitiveness, reinforcing strategic autonomy, and creating a resilient and sustainable industrial landscape.

Recognising the impact of the COVID-19 pandemic, the strategy was updated in May 2021 to address emerging challenges and accelerate economic recovery. This update builds on existing efforts, identifying key priorities and lessons learned while reinforcing the EU’s commitment to sustainability, digital transformation, and resilience.

A fundamental aspect of the strategy is the role of SMEs (small and medium-sized enterprises), which are key drivers of innovation and economic growth across all industrial ecosystems. To support them, the EU has introduced measures to reduce regulatory burdens, strengthen the Single Market, lessen supply chain dependencies, and facilitate the green and digital transitions. Additionally, targeted initiatives address SME resilience, tackle late payments, and promote solvency support.<sup>1</sup>

**The strategy is structured around seven key action areas<sup>2</sup>:**

- Strengthening the Single Market
- Ensuring a global level playing field
- Supporting industry’s transition to climate neutrality
- Advancing the circular economy
- Promoting industrial innovation
- Enhancing skills development
- Investing in infrastructure

At the heart of the strategy are 14 industrial ecosystems, encompassing all stakeholders in a value chain—from start-ups to large corporations, as well as academia, research institutions, service providers, and suppliers. These ecosystems represent the diverse economic sectors driving Europe’s industrial transformation:

- Construction
- Digital industries
- Healthcare
- Agri-food

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<sup>1</sup> [https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/europe-fit-digital-age/european-industrial-strategy\\_en](https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/europe-fit-digital-age/european-industrial-strategy_en)

<sup>2</sup> <https://clustercollaboration.eu/in-focus/industrial-ecosystems>

- Renewable energy
- Energy-intensive industries
- Mobility, transport, and automotive
- Electronics
- Textile
- Aerospace and defence
- Cultural and creative industries
- Tourism
- Proximity and social economy
- Retail

As Europe moves forward, the Industrial Strategy positions the EU industry at the forefront of global change, ensuring that it remains competitive, innovative, and resilient. By fostering sustainability, technological leadership, and economic autonomy, the EU is paving the way for a stronger, greener, and more digital future.



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**NATIONAL CLUSTER  
ASSOCIATION MEMBERS**

The [National Cluster Association \(NCA\)](#) is a strong authority taking care of the common interests of its members. It draws attention to the importance of clusters in the system of support for innovation and competitiveness in the Czech Republic. The NCA is a strong authority in relation to negotiations with the regions, the state, and the EU. Successful clusters have knowledge and skills that can be advantageously used in the areas of Digital Innovation Hubs, RIS3 and other modern topics.

NCA is a non-state, non-profit organization that brings together entities and individuals with the aim of coordinated and sustainable development of cluster initiatives and development of cluster policy in the Czech Republic based on the concentration of knowledge, experience and expertise to strengthen the competitiveness of the Czech Republic.

To this date, the NCA brings together 31 clusters and technology platforms and 5 research and support organisations that bring together over 1000 companies and other members with over 250,000 employees.



**Association for Applied Research in IT**  
[www.aavit.cz](http://www.aavit.cz)

DIGITAL / HEALTH



**Association for Innovation in Logistics**  
[www.apil.cz](http://www.apil.cz)

DIGITAL / MOBILITY, TRANSPORT & AUTOMOTIVE



**AUTOKLASTR**  
[www.autoklastr.cz](http://www.autoklastr.cz)

MOBILITY, TRANSPORT & AUTOMOTIVE



**BizGarden**  
[www.bizgarden.cz](http://www.bizgarden.cz)

DIGITAL



**BRNO SPACE CLUSTER**  
[www.brnospacecluster.cz](http://www.brnospacecluster.cz)

AEROSPACE & DEFENCE



**CE Digital & Enviro Grouping (CEDEG)**  
[www.cedeg.eu](http://www.cedeg.eu)

DIGITAL



**Klastr MECHATRONIKA**  
[www.klastrmechatronika.cz](http://www.klastrmechatronika.cz)

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**Cluster of General Engineering**  
[www.maestroj.cz](http://www.maestroj.cz)

DIGITAL / MOBILITY, TRANSPORT &  
AUTOMOTIVE / ELECTRONICS



**CREA Hydro & Energy**  
[www.creacz.com](http://www.creacz.com)

DIGITAL / RENEWABLE ENERGY / ENERGY  
INTENSIVE



**Czech Hemp Cluster**  
[www.czechemp.cz](http://www.czechemp.cz)

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RENEWABLE ENERGY / TEXTILES / CREATIVE  
& CULTURAL INDUSTRIES



**CZECHIMPLANT**  
[www.czechimplant.cz](http://www.czechimplant.cz)

**Cluster of Czech Furniture Manufacturers**  
[www.furniturecluster.cz](http://www.furniturecluster.cz)

CREATIVE & CULTURAL INDUSTRIES



**CLUTEX - Technical textile cluster**  
[www.clutex.cz](http://www.clutex.cz)

TEXTILES



**Czech footwear and leather association**  
[www.coka.cz](http://www.coka.cz)

TEXTILES



**Czech Optical Cluster**  
[www.optickyklastr.cz](http://www.optickyklastr.cz)

ELECTRONICS / AEROSPACE & DEFENCE



**Defence and Security Industry Association of  
the Czech Republic**  
[www.aobp.cz](http://www.aobp.cz)



HEALTH

AEROSPACE & DEFENCE / DIGITAL / ELECTRONICS /  
HEALTH / TEXTILES



**EDUINO - Association for education and innovation in education**  
[www.eduino.cz](http://www.eduino.cz)



**HR Development Cluster**  
[www.rhrklastr.cz](http://www.rhrklastr.cz)

CULTURAL AND CREATIVE INDUSTRIES ECOSYSTEM

PROXIMITY&SOCIAL ECONOMY



**IT Cluster**  
[www.itcluster.cz](http://www.itcluster.cz)



**MedChemBio**  
[www.medchembio.cz](http://www.medchembio.cz)

DIGITAL

HEALTH



**Mendel University in Brno**  
[www.mendelu.cz](http://www.mendelu.cz)



**Czech Aerospace Cluster**  
[www.czech-aerospace.cz](http://www.czech-aerospace.cz)



**Moravian-Silesian Hydrogen Cluster**  
[www.ms-vk.cz](http://www.ms-vk.cz)

RENEWABLE ENERGY / ENERGY INTENSIVE INDUSTRIES / MOBILITY, TRANSPORT & AUTOMOTIVE

AEROSPACE & DEFENCE



**NANOPROGRESS**  
[www.nanoprogess.eu](http://www.nanoprogess.eu)  
CONSTRUCTION / HEALTH / AGRI-FOOD



**National Creative Cluster**  
[www.nakk.cz](http://www.nakk.cz)

CULTURAL AND CREATIVE INDUSTRIES ECOSYSTEM



**National Machinery Cluster**  
[www.nskova.cz](http://www.nskova.cz)

CONSTRUCTION / HEALTH / AGRI-FOOD / TEXTILES



**Network Security Monitoring Cluster**  
[www.nsmcluster.com](http://www.nsmcluster.com)

DIGITAL



**Plastic Cluster**  
[www.plastr.cz](http://www.plastr.cz)

HEALTH / RENEWABLE ENERGY



**Regional Food Cluster**  
[www.repok.cz](http://www.repok.cz)

AGRI-FOOD



**Science and Technology Park, Palacky University Olomouc**  
[www.vtpup.cz](http://www.vtpup.cz)



**SINEC Cluster of Social Innovation and Enterprises**  
[www.klastr-socialnich-podniku.cz](http://www.klastr-socialnich-podniku.cz)

TEXTILE / CREATIVE & CULTURAL INDUSTRIES



**Technology Centre Prague**  
[www.tc.cz](http://www.tc.cz)



**The Czech Membrane Platform**  
[www.czemp.cz](http://www.czemp.cz)



**The Czech Moravian Glass Cluster**  
[www.czechartofglass.com](http://www.czechartofglass.com)

RENEWABLE ENERGY



**Tomas Bata University in Zlin**  
[www.utb.cz](http://www.utb.cz)

CREATIVE & CULTURAL INDUSTRIES



**WASten**  
[www.wasten.cz](http://www.wasten.cz)

CREATIVE & CULTURAL INDUSTRIES

# I. Aerospace & Defence Ecosystem

## Aerospace & Defence Ecosystem

The Aerospace & Defence (A&D) Ecosystem is a vital component of the European Industrial Strategy, encompassing a diverse range of stakeholders involved in the development, production, and maintenance of aerospace and defence technologies, equipment, and services. This ecosystem plays a crucial role in Europe's economic growth, technological innovation, security, and strategic autonomy. This ecosystem also plays a critical role in achieving climate neutrality, maintaining Europe's competitiveness in global food markets, and ensuring a resilient and sustainable food supply.

### Sectors included in the ecosystem

The Aerospace and Defence ecosystem covers manufacturing companies in aeronautics, space and defence; space operators and data and service providers; research institutes.

- Manufacture of computer, electronic and optical products & Manufacture of electrical equipment C26<sup>\*3</sup>, C27\*
- Manufacture of other transport equipment C30\*
- Warehousing and support activities for transportation H52\*
- Security and investigation activities N80
- Manufacture of electrical equipment C27\*
- Manufacture of fabricated metal products, except machinery and equipment C25\*
- Repair and installation of machinery and equipment C33\*
- Telecommunications J61\*
- Air transport H51\*

Ecosystem	NACE_R2	Description	Share*
Aerospace & Defence	C25	Manufacture of fabricated metal products, except machinery and equipment	0.03^
Aerospace & Defence	C26	Manufacture of computer, electronic and optical products	0.44
Aerospace & Defence	C27	Manufacture of electrical equipment	0.23
Aerospace & Defence	C30	Manufacture of other transport equipment	0.68
Aerospace & Defence	C33	Repair and installation of machinery and equipment	0.09^
Aerospace & Defence	H51	Air transport	0.09
Aerospace & Defence	H52	Warehousing and support activities for transportation	0.18
Aerospace & Defence	J61	Telecommunications	0.07
Aerospace & Defence	N80	Security and investigation activities	1

<sup>3</sup> \*Sector only partially attributed to the ecosystem

## **C25 Manufacture of fabricated metal products, except machinery and equipment**

This division includes the manufacture of “pure” metal products (such as parts, containers and structures), usually with a static, immovable function, as opposed to the following divisions 26-30, which cover the manufacture of combinations or assemblies of such metal products (sometimes with other materials) into more complex units that, unless they are purely electrical, electronic or optical, work with moving parts.

The manufacture of weapons and ammunition is also included in this division.

**This division excludes:**

- specialised repair and maintenance activities, see 33.1
- specialised installation of manufactured goods produced in this division in buildings, such as central heating boilers, see 43.22

## **C26 Manufacture of computer, electronic and optical products**

This division includes the manufacture of computers, computer peripherals, communications equipment, and similar electronic products, as well as the manufacture of components for such products. Production processes of this division are characterised by the design and use of integrated circuits and the application of highly specialised miniaturisation technologies.

The division also contains the manufacture of consumer electronics, measuring, testing and navigating equipment, irradiation, electromedical and electrotherapeutic equipment, optical instruments and equipment, and the manufacture of magnetic and optical media.

## **C27 Manufacture of electrical equipment**

This division includes the manufacture of products that generate, distribute and use electrical power. Also included is the manufacture of electrical lighting, signalling equipment and electric household appliances.

**This division excludes** the manufacture of electronic products (see division 26).

## **C30 Manufacture of other transport equipment**

This division includes the manufacture of transportation equipment such as ship building and boat manufacturing, the manufacture of railroad rolling stock and locomotives, air and spacecraft and the manufacture of parts thereof.

## **C33 Repair and installation of machinery and equipment**

This division includes the specialised repair of goods produced in the manufacturing sector with the aim to restore machinery, equipment and other products to working order. The provision of general or routine maintenance (i.e. servicing) on such products to ensure

they work efficiently and to prevent breakdown and unnecessary repairs is included. This division does only include specialised repair and maintenance activities. A substantial amount of repair is also done by manufacturers of machinery, equipment and other goods, in which case the classification of units engaged in these repair and manufacturing activities is done according to the value-added principle which would often assign these combined activities to the manufacture of the good. The same principle is applied for combined trade and repair. The rebuilding or remanufacturing of machinery and equipment is considered a manufacturing activity and included in other divisions of this section. Repair and maintenance of goods that are utilised as capital goods as well as consumer goods is typically classified as repair and maintenance of household goods (e.g. office and household furniture repair, see 95.24).

Also included in this division is the specialised installation of machinery. However, the installation of equipment that forms an integral part of buildings or similar structures, such as installation of electrical wiring, installation of escalators or installation of air-conditioning systems, is classified as construction.

## **H51 Air transport**

This division includes the transport of passengers or freight by air or via space.

### **This division excludes:**

- crop spraying, see 01.61
- overhaul of aircraft or aircraft engines, see 33.16
- operation of airports, see 52.23
- aerial advertising (sky-writing), see 73.11
- aerial photography, see 74.20

## **H52 Warehousing and support activities for transportation**

This division includes warehousing and support activities for transportation, such as operating of transport infrastructure (e.g. airports, harbours, tunnels, bridges, etc.), the activities of transport agencies and cargo handling.

## **J61 Telecommunications**

This division includes the activities of providing telecommunications and related service activities, that is transmitting voice, data, text, sound and video. The transmission facilities that carry out these activities may be based on a single technology or a combination of technologies. The commonality of activities classified in this division is the transmission of content, without being involved in its creation. The breakdown in this division is based on the type of infrastructure operated.

In the case of transmission of television signals this may include the bundling of complete programming channels (produced in division 60) into programme packages for distribution.

## **N80** Administrative and support service activities

This section includes a variety of activities that support general business operations. These activities differ from those in section M, since their primary purpose is not the transfer of specialised knowledge.



## **II. Agri-Food Ecosystem**

## Agri-Food Ecosystem

The Agri-Food Ecosystem encompasses the entire food value chain, from primary agricultural production to food processing, distribution, and retail. This ecosystem is essential for food security, rural development, and sustainability in Europe.

### Sectors included in the ecosystem

The agri-food ecosystem covers **all operators in the food supply chain** (farmers, food industry, food retail and wholesale, and food service) **and their suppliers of inputs and services** (seeds, pesticides, fertiliser, machinery, packaging, repair, transport, finance, advice and logistics). The ecosystem hence has a very long border - and overlaps - with the Tourism and Retail ecosystems.

- Manufacture of food products; beverages and tobacco products C10-C12
- Crop and animal production, hunting and related service activities A01
- Forestry and logging A02
- Fishing and aquaculture A03

ECOSYSTEM	NACE_R2	DESCRIPTION	SHARE
Agri-food	A	Agriculture, forestry and fishing	1
Agri-food	C10	Manufacture of food products	1
Agri-food	C11	Manufacture of beverages	1
Agri-food	C12	Manufacture of tobacco products	1

### **A01** Crop and animal production, hunting and related service activities

This division includes two basic activities, namely the production of crop products and production of animal products, covering also the forms of organic agriculture, the growing of genetically modified crops and the raising of genetically modified animals. This division includes growing of crops in open fields as well in greenhouses. Group 01.5 (Mixed farming) breaks with the usual principles for identifying main activity. It accepts that many agricultural holdings have reasonably balanced crop and animal production, and that it would be arbitrary to classify them in one category or the other. This division also includes service activities incidental to agriculture, as well as hunting, trapping and related activities.

Agricultural activities exclude any subsequent processing of the agricultural products (classified under divisions 10 and 11 (Manufacture of food products and beverages) and division 12 (Manufacture of tobacco products)), beyond that needed to prepare them

for the primary markets. The preparation of products for the primary markets is included here. The division excludes field construction (e.g. agricultural land terracing, drainage, preparing rice paddies etc.) classified in section F (Construction) and buyers and cooperative associations engaged in the marketing of farm products classified 19 in section G. Also excluded is the landscape care and maintenance, which is classified in class 81.30.

## **A02 Forestry and logging**

This division includes the production of roundwood as well as the extraction and gathering of wild growing non-wood forest products. Besides the production of timber, forestry activities result in products that undergo little processing, such as firewood, charcoal and roundwood used in an unprocessed form (e.g. pit-props, pulpwood etc.). These activities can be carried out in natural or planted forests.

**Excluded** is further processing of wood beginning with sawmilling and planning of wood, see division 16.

## **A03 Fishing and aquaculture**

This division includes capture fishery and aquaculture, covering the use of fishery resources from marine, brackish or freshwater environments, with the goal of capturing or gathering fish, crustaceans, molluscs and other marine organisms and products (e.g. aquatic plants, pearls, sponges etc.).

Also included are activities that are normally integrated in the process of production for own account (e.g. seeding oysters for pearl production). Service activities incidental to marine or freshwater fishery or aquaculture are included in the related fishing or aquaculture activities.

This division **does not include** building and repairing of ships and boats (30.1, 33.15) and sport or recreational fishing activities (93.19). Processing of fish, crustaceans or molluscs is excluded, whether at land-based plants or on factory ships (10.20).

## **C10 Manufacture of food products**

This division includes the processing of the products of agriculture, forestry and fishing into food for humans or animals, and includes the production of various intermediate products that are not directly food products. The activity often generates associated products

of greater or lesser value (for example, hides from slaughtering, or oilcake from oil production).

This division is organised by activities dealing with different kinds of products: meat, fish, fruit and vegetables, fats and oils, milk products, grain mill products, animal feeds and other food products. Production can be carried out for own account, as well as for third parties, as in custom slaughtering.

Some activities are considered manufacturing (for example, those performed in bakeries, pastry shops, and prepared meat shops etc. which sell their own production) even though there is retail sale of the products in the producers' own shop. However, where the processing is minimal and does not lead to a real transformation, the unit is classified to wholesale and retail trade (section G).

Preparation of food for immediate consumption on the premises is classified to division 56 (Food and beverage service activities).

Production of animal feeds from slaughter waste or by-products is classified in 10.9, while processing food and beverage waste into secondary raw material is classified to 38.3, and disposal of food and beverage waste in 38.21.

**This division does not include the preparation of meals for immediate consumption, such as in restaurants.**

## **C11** Manufacture of beverages

This division includes the manufacture of beverages, such as non-alcoholic beverages and mineral water, manufacture of alcoholic beverages mainly through fermentation, beer and wine, and the manufacture of distilled alcoholic beverages.

**This division excludes:**

- production of fruit and vegetable juices, see 10.32
- manufacture of milk-based drinks, see 10.51
- manufacture of coffee, tea and mate products, see 10.83

## **C12** Manufacture of tobacco products

This division includes the processing of an agricultural product, tobacco, into a form suitable for final consumption.

### **III. Construction Ecosystem**

## Construction Ecosystem

The Construction Ecosystem is a key sector within the European Industrial Strategy, covering all activities related to the design, development, renovation, and maintenance of buildings and infrastructure. It is one of the largest industrial ecosystems in the EU, employing millions and contributing significantly to economic growth and sustainability goals.

### Sectors included in the ecosystem

The construction ecosystem covers contractors for building and infrastructure projects, some construction product manufacturers<sup>203</sup>, engineering and architectural services as well as a range of other economic activities (e.g. rental and leasing of machinery and equipment, employment agencies).

- Construction F
- Architectural and engineering activities; technical testing and analysis M71
- Services to buildings and landscape activities N81
- Manufacture of furniture C31

ECOSYSTEM	NACE_R2	DESCRIPTION	SHARE
Construction	C31	Manufacture of furniture	1
Construction	F	Construction	1
Construction	M71	Architectural and engineering activities; technical testing and analysis	1 <sup>^</sup>
Construction	N81	Services to buildings and landscape activities	1

### C31 Manufacture of furniture

This division includes the manufacture of furniture and related products of any material except stone, concrete and ceramic. The processes used in the manufacture of furniture are standard methods of forming materials and assembling components, including cutting, moulding and laminating. The design of the article, for both aesthetic and functional qualities, is an important aspect of the production process. Some of the processes used in furniture manufacturing are similar to processes that are used in other segments of manufacturing.

For example, cutting and assembly occur in the production of wood trusses that are classified in division 16 (Manufacture of wood and wood products). However, the multiple processes distinguish wood furniture manufacturing from wood product manufacturing. Similarly, metal furniture manufacturing uses techniques that are also employed

in the manufacturing of roll-formed products classified in division 25 (Manufacture of fabricated metal products).

The moulding process for plastic furniture is similar to the moulding of other plastic products. However, the manufacture of plastic furniture tends to be a specialised activity.

## **F Construction**

This section includes general construction and specialised construction activities for buildings and civil engineering works. It includes new work, repair, additions and alterations, the erection of prefabricated buildings or structures on the site and also construction of a temporary nature. General construction is the construction of entire dwellings, office buildings, stores and other public and utility buildings, farm buildings etc., or the construction of civil engineering works such as motorways, streets, bridges, tunnels, railways, airfields, harbours and other water projects, irrigation systems, sewerage systems, industrial facilities, pipelines and electric lines, sports facilities etc. This work can be carried out on own account or on a fee or contract basis. Portions of the work and sometimes even the whole practical work can be subcontracted out. A unit that carries the overall responsibility for a construction project is classified here.

Also included is the repair of buildings and engineering works.

This section includes the complete construction of buildings (division 41), the complete construction of civil engineering works (division 42), as well as specialised construction activities, if carried out only as a part of the construction process (division 43). The renting of construction equipment with operator is classified with the specific construction activity carried out with this equipment.

This section also includes the development of building projects for buildings or civil engineering works by bringing together financial, technical and physical means to realise the construction projects for later sale. If these activities are carried out not for later sale of the construction projects, but for their operation (e.g. renting of space in these buildings, manufacturing activities in these plants), the unit would not be classified here, but according to its operational activity, i.e. real estate, manufacturing etc.

### **M71 Architectural and engineering activities; technical testing and analysis**

This division includes the provision of architectural services, engineering services, drafting services, building inspection services and surveying and mapping services. It also includes the performance of physical, chemical, and other analytical testing services.

### **N81 Services to buildings and landscape activities.**

This division includes the provision of a number of general support services, such as the provision of a combination of support services within a client's facilities, the interior and exterior cleaning of buildings of all types, cleaning of industrial machinery, cleaning of trains, buses, planes, etc., cleaning of the inside of road and sea tankers, disinfecting and exterminating activities for buildings, ships, trains, etc., bottle cleaning, street

sweeping, snow and ice removal, provision of landscape care and maintenance services and provision of these services along with the design of landscape plans and/or the construction (i.e. installation) of walkways, retaining walls, decks, fences, ponds, and similar structures.



# IV. Cultural and Creative Industries Ecosystem

## Cultural and Creative Industries Ecosystem

The Cultural and Creative Industries ecosystem is a vital sector within the European Industrial Strategy, encompassing industries that rely on creativity, cultural heritage, and intellectual property. This ecosystem includes fields such as arts, media, film, music, design, publishing, architecture, gaming, and cultural tourism. It plays a key role in Europe's economy, identity, and social cohesion.

### Sectors included in the ecosystem

The CCIs are a varied group<sup>221</sup>. The biggest industries are audiovisual (TV, video games, VOD, cinema, VR/AR), music, books and press publishing, advertising, cultural heritage (museums, historical sites), performance (theatre, dance) and visual arts. In Europe, culture and creativity are regarded as a public good and may receive public support (e.g. public funds play an important role in the AV industry or the heritage sector) while many creative entrepreneurs are driving the creative economy (e.g. music, publishing and media, architecture, design). Cultural education is considered part of the ecosystem.

- Publishing activities. J58
- Creative, arts and entertainment; libraries, archives, museums and other cultural activities. R90 - R91\*<sup>4</sup>
- Education p\*
- Motion picture, video, television programme production; programming and broadcasting activities. J59-J60
- Advertising and market research. M73
- Other professional, scientific and technical activities; veterinary activities. M74 - M75\*
- Printing and reproduction of recorded media. C18
- Retail trade, except for motor vehicles and motorcycles. G47\*
- Other service activities: Activities of membership organisations & Repair of computers and personal and household goods. S94\*; S95\*
- Other manufacturing. C32\*

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<sup>4</sup> \*Sector only partially attributed to the ecosystem

ECOSYSTEM	NACE_R2	DESCRIPTION	SHARE
Cultural and Creative Industries	C18	Printing and reproduction of recorded media	1
Cultural and Creative Industries	C32	Other manufacturing	0.08
Cultural and Creative Industries	G47	Retail trade, except of motor vehicles and motorcycles	0.01
Cultural and Creative Industries	J58	Publishing activities	1
Cultural and Creative Industries	J59	Motion picture, video and television programme production, sound recording and music publishing activities	1
Cultural and Creative Industries	J60	Programming and broadcasting activities	1
Cultural and Creative Industries	N77	Rental and leasing activities	0.0006^
Cultural and Creative Industries	P85	Education	0.1
Cultural and Creative Industries	R90-R92	Creative, arts and entertainment activities; libraries, archives, museums and other cultural activities; gambling and betting activities	0.8
Cultural and Creative Industries	S94	Activities of membership organisations	0.02
Cultural and Creative Industries	S95	Repair of computers and personal and household goods	0.26

## C18 Printing and reproduction of recorded media

This division includes printing of products, such as newspapers, books, periodicals, business forms, greeting cards, and other materials, and associated support activities, such as bookbinding, plate-making services, and data imaging. The support activities included here are an integral part of the printing industry, and a product (a printing plate, a bound book, or a computer disk or file) that is an integral part of the printing industry is almost always provided by these operations.

Processes used in printing include a variety of methods for transferring an image from a plate, screen or computer file to a medium, such as paper, plastics, metal, textile articles, or wood. The most prominent of these methods entails the transfer of the image from a plate or screen to the medium through lithographic, gravure, screen or flexographic printing. Often a computer file is used to directly “drive” the printing mechanism to create the image or electrostatic and other types of equipment (digital or nonimpact printing). Though printing and publishing can be carried out by the same unit (a newspaper, for example), it is less and less the case that these distinct activities are carried out in the same physical location.

This division also includes the reproduction of recorded media, such as compact discs, video recordings, software on discs or tapes, records, etc.

**This division excludes** publishing activities (see section J).

## C32 Other manufacturing

This division includes the manufacture of a variety of goods not covered in other parts of the classification. Since this is a residual division, production processes, input materials and use of the produced goods can vary widely and usual criteria for grouping classes into divisions have not been applied here.

## **G47 Retail trade, except for motor vehicles and motorcycles**

This division includes the resale (sale without transformation) of new and used goods mainly to the general public for personal or household consumption or utilisation, by shops, department stores, stalls, mail-order houses, door-to-door sales persons, hawkers, consumer cooperatives etc.

Retail trade is classified first by type of sale outlet (retail trade in stores: groups 47.1 to 47.7; retail trade not in stores: groups 47.8 and 47.9). Retail trade in stores includes the retail sale of used goods (class 47.79). For retail sale in stores, there exists a further distinction between specialised retail sale (groups 47.2 to 47.7) and non-specialised retail sale (group 47.1). The above groups are further subdivided by the range of products sold. Sale not via stores is subdivided according to the forms of trade, such as retail sale via stalls and markets (group 47.8) and other non-store retail sale, e.g. mail order, door-to-door, by vending machines etc. (group 47.9).

The goods sold in this division are limited to goods usually referred to as consumer goods or retail goods. Therefore goods not normally entering the retail trade, such as cereal grains, ores, industrial machinery etc. are excluded.

This division also includes units engaged primarily in selling to the general public, from displayed merchandise, products such as personal computers, stationery, paint or timber, although these products may not be for personal or household use. Handling that is customary in trade does not affect the basic character of the merchandise and may include, for example, sorting, separating, mixing and packaging.

This division also includes the retail sale by commission agents and activities of retail auctioning houses.

### **This division excludes:**

- sale of farmers' products by farmers, see division 01
- manufacture and sale of goods, which is generally classified as manufacturing in divisions 10-32
- sale of motor vehicles, motorcycles and their parts, see division 45
- trade in cereal grains, ores, crude petroleum, industrial chemicals, iron and steel and industrial machinery and equipment, see division 46
- sale of food and drinks for consumption on the premises and sale of takeaway food, see division 56
- renting of personal and household goods to the general public, see group 77.2)

## **J58 Publishing activities**

This division includes the publishing of books, brochures, leaflets, dictionaries, encyclopaedias, atlases, maps and charts; publishing of newspapers, journals and periodicals; directory and mailing list and other publishing, as well as software publishing.

Publishing includes the acquisition of copyrights to content (information products) and making this content available to the general public by engaging in (or arranging for) the reproduction and distribution of this content in various forms. All the feasible forms of publishing (in print, electronic or audio form, on the Internet, as multimedia products such as CDROM reference books etc.), except publishing of motion pictures, are included in this division.

This division excludes the publishing of motion pictures, videotapes and movies on DVD or similar media (division 59) and the production of master copies for records or audio material (division 59). Also excluded is printing (see 18.11, 18.12) and the mass reproduction of recorded media (see 18.20.)

### **J59 Motion picture, video, television programme production**

This division includes production of theatrical and non-theatrical motion pictures whether on film, video tape or disc for direct projection in theatres or for broadcasting on television; supporting activities such as film editing, cutting, dubbing etc.; distribution of motion pictures and other film productions to other industries; as well as motion picture or other film productions projection. Buying and selling of motion picture or other film productions distribution rights is also included.

This division also includes the sound recording activities, i.e. production of original sound master recordings, releasing, promoting and distributing them, publishing of music as well as sound recording service activities in a studio or elsewhere.

### **J60 Programming and broadcasting activities**

This division includes the activities of creating content or acquiring the right to distribute content and subsequently broadcasting that content, such as radio, television and data programs of entertainment, news, talk, and the like. Also included is data broadcasting, typically integrated with radio or TV broadcasting. The broadcasting can be performed using different technologies, over-the-air, via satellite, via a cable network or via Internet.

This division also includes the production of programs that are typically narrowcast in nature (limited format, such as news, sports, education, and youth-oriented programming) on a subscription or fee basis, to a third party, for subsequent broadcasting to the public.

**This division excludes** the distribution of cable and other subscription programming (see division 61).

### **J62 Computer programming, consultancy and related activities**

This division includes the following activities of providing expertise in the field of information technologies: writing, modifying, testing and supporting software; planning and designing computer systems that integrate computer hardware, software and communication technologies; on-site management and operation of clients' computer

systems and/or data processing facilities; and other professional and technical computer-related activities.

### **J63 Information service activities**

This division includes the activities of web search portals, data processing and hosting activities, as well as other activities that primarily supply information.

### **M71 Architectural and engineering activities; technical testing and analysis**

This division includes the provision of architectural services, engineering services, drafting services, building inspection services and surveying and mapping services. It also includes the performance of physical, chemical, and other analytical testing services.

### **M73 Advertising and market research**

This division includes the creation of advertising campaigns and placement of such advertising in periodicals, newspapers, radio and television, or other media as well as the design of display structures and sites.

### **M74 Other professional, scientific and technical activities**

This division includes the provision of professional scientific and technical services (except legal and accounting activities; architecture and engineering activities; technical testing and analysis; management and management consultancy activities; research and development and advertising activities).

### **M75 Veterinary activities**

This division includes the provision of animal health care and control activities for farm animals or pet animals. These activities are carried out by qualified veterinarians in veterinary hospitals as well as when visiting farms, kennels or homes, in own consulting and surgery rooms or elsewhere.

It also includes animal ambulance activities.

### **N77 Rental and leasing activities**

This division includes the renting and leasing of tangible and non-financial intangible assets, including a wide array of tangible goods, such as automobiles, computers, consumer goods, and industrial machinery and equipment, to customers in return for a periodic rental or lease payment. It is subdivided into: (1) the renting of motor vehicles, (2) the renting of recreational and sports equipment and personal and household equipment, (3) the leasing of other machinery and equipment of the kind often used for business operations,

including other transport equipment and (4) the leasing of intellectual property products and similar products.

Only the provision of operating leases is included in this division.

**This division excludes:**

- financial leasing, see 64.91
- renting of real estate, see section L
- renting of equipment with operator, see corresponding classes according to activities carried out with this equipment, e.g. construction (section F), transportation (section H).

## **R90 Creative, arts and entertainment gambling and betting activities**

This division includes the operation of facilities and provision of services to meet the cultural and entertainment interests of their customers. This includes the production and promotion of, and participation in, live performances, events or exhibits intended for public viewing; the provision of artistic, creative or technical skills for the production of artistic products and live performances. This division excludes: - the operation of museums of all kinds, botanical and zoological gardens; the preservation of historical sites; and nature reserves activities, see division 91 - gambling and betting activities, see division 92 - sports and amusement and recreation activities, see division 93. Some units that provide cultural, entertainment or recreational facilities and services are classified in other divisions, such as: - motion picture and video production and distribution, see 59.11, 59.12, 59.13 - motion picture projection, see 59.14 - radio and television broadcasting, see 60.1, 60.2

## **R91 Libraries, archives, museums and other cultural activities**

This division includes the activities of libraries and archives; the operation of museums of all kinds, botanical and zoological gardens; the operation of historical sites and nature reserves activities.

It also includes the preservation and exhibition of objects, sites and natural wonders of historical, cultural or educational interest (e.g. world heritage sites, etc.).

**This division excludes:**

- sports and amusement and recreation activities such as the operation of bathing beaches and recreation parks, see division 93

## **R92 Gambling and betting activities**

This division includes the operation of gambling facilities such as casinos, bingo halls and video gaming terminals and the provision of gambling services, such as lotteries and off-track betting.

## **S94 Other service activities: Activities of membership organisations**

This division includes activities of organisations representing interests of special groups or promoting ideas to the general public. These organisations usually have a constituency of members, but their activities may involve and benefit non-members as well. The primary breakdown of this division is determined by the purpose that these organisations serve, namely interests of employers, self-employed individuals and the scientific community (group 94.1), interests of employees (group 94.2) or promotion of religious, political, cultural, educational or recreational ideas and activities (group 94.9).

## **S95 Repair of computers and personal and household goods**

This division includes the repair and maintenance of computers peripheral equipment such as desktops, laptops, computer terminals, storage devices and printers.

It also includes the repair of communications equipment such as fax machines, two-way radios and consumer electronics such as radios and TVs, home and garden equipment such as lawn-mowers and blowers, footwear and leather goods, furniture and home furnishings, clothing and clothing accessories, sporting goods, musical instruments, hobby articles and other personal and household goods.

Excluded from this division is the repair of medical and diagnostic imaging equipment, measuring and surveying instruments, laboratory instruments, radar and sonar equipment, see 33.13.



# V. Digital Ecosystems

## Digital Ecosystems

The Digital Ecosystem is a critical part of the European Industrial Strategy, encompassing all industries and businesses that rely on digital technologies, data, and connectivity. It plays a crucial role in driving innovation, economic growth, and the EU's strategic autonomy in the digital sector.

### Sectors included in the ecosystem

The digital ecosystem covers ICT Manufacturing, Services (excluding telecommunications), and Telecommunications. ICT Services account for 95% of the total ICT value added.

- Computer programming, consultancy, and information service activities J62-J63
- Telecommunications J61
- Publishing activities. J58
- Manufacture of computer, electronic and optical products C26\*
- Repair of computers and personal and household goods S95\*

ECOSYSTEM	NACE_R2	DESCRIPTION	SHARE
Digital	C26	Manufacture of computer, electronic and optical products	0.22
Digital	J58	Publishing activities	1
Digital	J61	Telecommunications	0.97
Digital	J62	Computer programming, consultancy and related activities	1
Digital	J63	Information service activities	1
Digital	S95	Repair of computers and personal and household goods	0.48

### **C26** Manufacture of computer, electronic and optical products

This division includes the manufacture of computers, computer peripherals, communications equipment, and similar electronic products, as well as the manufacture of components for such products. Production processes of this division are characterised by the design and use of integrated circuits and the application of highly specialised miniaturisation technologies.

The division also contains the manufacture of consumer electronics, measuring, testing and navigating equipment, irradiation, electromedical and electrotherapeutic equipment, optical instruments and equipment, and the manufacture of magnetic and optical media.

## **J58 Publishing activities**

This division includes the publishing of books, brochures, leaflets, dictionaries, encyclopaedias, atlases, maps and charts; publishing of newspapers, journals and periodicals; directory and mailing list and other publishing, as well as software publishing.

Publishing includes the acquisition of copyrights to content (information products) and making this content available to the general public by engaging in (or arranging for) the reproduction and distribution of this content in various forms. All the feasible forms of publishing (in print, electronic or audio form, on the Internet, as multimedia products such as CDROM reference books etc.), except publishing of motion pictures, are included in this division.

**This division excludes** the publishing of motion pictures, videotapes and movies on DVD or similar media (division 59) and the production of master copies for records or audio material (division 59). Also excluded is printing (see 18.11, 18.12) and the mass reproduction of recorded media (see 18.20.)

## **J61 Telecommunications**

This division includes the activities of providing telecommunications and related service activities, that is transmitting voice, data, text, sound and video. The transmission facilities that carry out these activities may be based on a single technology or a combination of technologies. The commonality of activities classified in this division is the transmission of content, without being involved in its creation. The breakdown in this division is based on the type of infrastructure operated.

In the case of transmission of television signals this may include the bundling of complete programming channels (produced in division 60) in to programme packages for distribution.

## **J62 Computer programming and consultancy**

This division includes the following activities of providing expertise in the field of information technologies: writing, modifying, testing and supporting software; planning and designing computer systems that integrate computer hardware, software and communication technologies; on-site management and operation of clients' computer systems and/or data processing facilities; and other professional and technical computer-related activities.

## **J63 Information service activities**

This division includes the activities of web search portals, data processing and hosting activities, as well as other activities that primarily supply information.

## **S95 Repair of computers and personal and household goods**

This division includes the repair and maintenance of computers peripheral equipment such as desktops, laptops, computer terminals, storage devices and printers.

It also includes the repair of communications equipment such as fax machines, two-way radios and consumer electronics such as radios and TVs, home and garden equipment such as lawn-mowers and blowers, footwear and leather goods, furniture and home furnishings, clothing and clothing accessories, sporting goods, musical instruments, hobby articles and other personal and household goods.

**Excluded from this division** is the repair of medical and diagnostic imaging equipment, measuring and surveying instruments, laboratory instruments, radar and sonar equipment, see 33.13.

# VI. Electronics Ecosystem

## Electronics Ecosystem

The Electronics Ecosystem is a vital industrial sector in Europe, covering the design, manufacturing, and supply of electronic components, semiconductors, consumer electronics, and industrial electronics. It plays a crucial role in the digital transformation, automation, and competitiveness of European industries.

### Sectors included in the ecosystem

The electronics ecosystem covers design and manufacturing of electronic components; includes raw materials (semiconductor wafers) and manufacturing tools. The value chain stretches from design to semiconductor manufacturing to ‘assembly-test-packaging’ facilities, before reaching end-user companies, which integrate the chips into their product solution. Materials, equipment and related services and tools, including specific design tools and so-called functional blocks, enable design and manufacturing.

- Manufacture of computer, electronic and optical products. C26
- Manufacture of machinery and equipment n.e.c. C28\*

ECOSYSTEM	NACE_R2	DESCRIPTION	SHARE
Electronics	C26	Manufacture of computer, electronic and optical products	1
Electronics	C28	Manufacture of machinery and equipment n.e.c.	0.10 <sup>^</sup>

### **C26** Manufacture of computer, electronic and optical products

This division includes the manufacture of computers, computer peripherals, communications equipment, and similar electronic products, as well as the manufacture of components for such products. Production processes of this division are characterised by the design and use of integrated circuits and the application of highly specialised miniaturisation technologies.

The division also contains the manufacture of consumer electronics, measuring, testing and navigating equipment, irradiation, electromedical and electrotherapeutic equipment, optical instruments and equipment, and the manufacture of magnetic and optical media.

### **C28** Manufacture of machinery and equipment n.e.c.

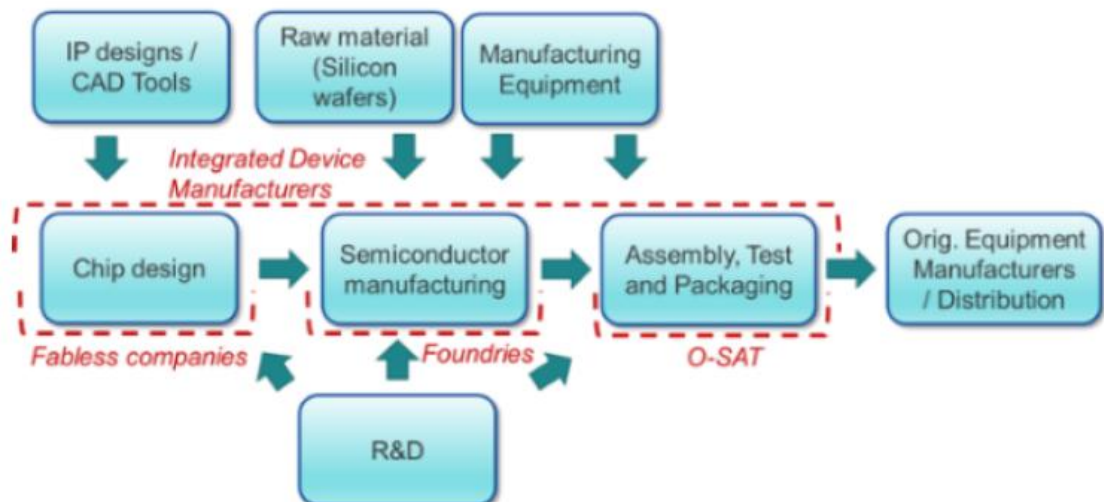
This division includes the manufacture of machinery and equipment that act independently on materials either mechanically or thermally or perform operations on materials (such as

handling, spraying, weighing or packing), including their mechanical components that produce and apply force, and any specially manufactured primary parts. This includes the manufacture of fixed and mobile or hand-held devices, regardless of whether they are designed for industrial, building and civil engineering, agricultural or home use. The manufacture of special equipment for passenger or freight transport within demarcated premises also belongs within this division.

This division distinguishes between the manufacture of special-purpose machinery, i.e. machinery for exclusive use in a NACE industry or a small cluster of NACE industries, and general-purpose machinery, i.e. machinery that is being used in a wide range of NACE industries.

This division also includes the manufacture of other special-purpose machinery, not covered elsewhere in the classification, whether or not used in a manufacturing process, such as fairground amusement equipment, automatic bowling alley equipment, etc.

This division excludes the manufacture of metal products for general use (division 25), associated control devices, computer equipment, measurement and testing equipment, electricity distribution and control apparatus (divisions 26 and 27) and general-purpose motor vehicles (divisions 29 and 30).



# VII. Energy-Intensive Industries Ecosystem



## Energy-Intensive Industries Ecosystem

The Energy-Intensive Industries (EII) Ecosystem plays a crucial role in the European economy, comprising industries that require significant amounts of energy for production processes. These industries are fundamental to multiple supply chains and include sectors such as steel, cement, chemicals, glass, paper, and non-ferrous metals.

### Sectors included in the ecosystem

The Energy-Intensive Industries (EII) Ecosystem covers chemicals, Steel, Paper, Plastics, Mining, extraction and quarrying, Refineries, Cement, Wood, Rubber, Non-ferrous metals, Glass, Ceramics. **They supply intermediate products to each other and to many downstream sectors of the economy, are closely integrated with energy providers as well as with the waste and recycling industries** due to their need for secondary raw materials.

- Manufacture of chemicals and chemical products C20
- Manufacture of rubber and plastic products C22
- Manufacture of basic metals C24
- Manufacture of other non-metallic mineral products C23
- Manufacture of paper and paper products C17
- Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials C16
- Manufacture of coke and refined petroleum products C19

ECOSYSTEM SHARE	NACE_R2	DESCRIPTION	
Energy Intensive Industries	C16	Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	1
Energy Intensive Industries	C17	Manufacture of paper and paper products	1
Energy Intensive Industries	C19	Manufacture of coke and refined petroleum products	1
Energy Intensive Industries	C20	Manufacture of chemicals and chemical products	1
Energy Intensive Industries	C22	Manufacture of rubber and plastic products	1
Energy Intensive Industries	C23	Manufacture of other non-metallic mineral products	1
Energy Intensive Industries	C24	Manufacture of basic metals	1

## **C16 Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials**

This division includes the manufacture of wood products, such as lumber, plywood, veneers, wood containers, wood flooring, wood trusses, and prefabricated wood buildings. The production processes include sawing, planing, shaping, laminating, and assembling of wood products starting from logs that are cut into bolts, or lumber that may then be cut further, or shaped by lathes or other shaping tools. The lumber or other transformed wood shapes may also be subsequently planed or smoothed, and assembled into finished products, such as wood containers. With the exception of sawmilling, this division is subdivided mainly based on the specific products manufactured.

This **division does not include** the manufacture of furniture (31.0), or the installation of wooden fittings and the like (43.32, 43.33, 43.39).

## **C17 Manufacture of paper and paper products**

This division includes the manufacture of pulp, paper and converted paper products. The manufacture of these products is grouped together because they constitute a series of vertically connected processes. More than one activity is often carried out in a single unit. There are essentially three activities: The manufacture of pulp involves separating the cellulose fibres from other matter in wood, or dissolving and de-inking of used paper, and mixing in small amounts of reagents to reinforce the binding of the fibres. The manufacture of paper involves releasing pulp onto a moving wire mesh so as to form a continuous sheet. Converted paper products are made from paper and other materials by various techniques. The paper articles may be printed (e.g. wallpaper, gift wrap etc.), as long as the printing of information is not the main purpose.

The production of pulp, paper and paperboard in bulk is included in group 17.1, while the remaining classes include the production of further-processed paper and paper products.

## **C19 Manufacture of coke and refined petroleum products**

This division includes the transformation of crude petroleum and coal into usable products. The dominant process is petroleum refining, which involves the separation of crude petroleum into component products through such techniques as cracking and distillation.

This division includes the manufacture of gases such as ethane, propane and butane as products of petroleum refineries.

This division also includes the manufacture for own account of characteristic products (e.g. coke, butane, propane, petrol, kerosene, fuel oil etc.) as well as processing services (e.g. custom refining).

Not included is the manufacture of such gases in other units (20.14), manufacture of industrial gases (20.11), extraction of natural gas (methane, ethane, butane or propane)

(06.20), and manufacture of fuel gas, other than petroleum gases (e.g. coal gas, water gas, producer gas, gasworks gas) (35.21). The manufacture of petrochemicals from refined petroleum is classified in division 20.

## **C20** Manufacture of chemicals and chemical products

This division includes the transformation of organic and inorganic raw materials by a chemical process and the formation of products. It distinguishes the production of basic chemicals that constitute the first industry group from the production of intermediate and end products produced by further processing of basic chemicals that make up the remaining industry classes.

## **C22** Manufacture of rubber and plastic products

This division includes the manufacture of rubber and plastics products.

This division is characterised by the raw materials used in the manufacturing process. However, this does not imply that the manufacture of all products made of these materials is classified here.

## **C23** Manufacture of other non-metallic mineral products

This division includes manufacturing activities related to a single substance of mineral origin. This division includes the manufacture of glass and glass products (e.g. flat glass, hollow glass, fibres, technical glassware etc.), ceramic products, tiles and baked clay products, and cement and plaster, from raw materials to finished articles. The manufacture of shaped and finished stone and other mineral products is also included in this division.

## **C24** Manufacture of basic metals

This division includes the activities of smelting and/or refining ferrous and non-ferrous metals from ore, pig or scrap, using electrometallurgical and other process metallurgic techniques.

This division also includes the manufacture of metal alloys and super-alloys by introducing other chemical elements to pure metals. The output of smelting and refining, usually in ingot form, is used in rolling, drawing and extruding operations to make products such as plates, sheets, strips, bars, rods, wire or tubes, pipes and hollow profiles, and in molten form to make castings and other basic metal products.

# VIII. Energy - Renewables Ecosystem

## Energy - Renewables Ecosystem

The Energy - Renewables Ecosystem is a crucial part of the European Industrial Strategy, focusing on the transition to clean, sustainable, and secure energy sources. It plays a vital role in achieving the EU's climate neutrality goals and reducing reliance on fossil fuels and external energy sources.

### Sectors included in the ecosystem

Renewables include wind energy, solar energy (photovoltaics, thermal and concentrated solar power), hydropower, bioenergy (including sustainable biofuels), geothermal energy, ocean energy, and heat pumps. Furthermore, sustainable energy storage solutions, smart infrastructure technologies and energy conversion technologies, including electrolyzers, are an important part of a clean energy ecosystem.

- Electricity, gas, steam and air conditioning supply D35
- Manufacture of electrical equipment C27\*

ECOSYSTEM	NACE_R2	DESCRIPTION	SHARE
Energy - Renewables	C27	Manufacture of electrical equipment	0.38
Energy - Renewables	D35	Electricity, gas, steam and air conditioning supply	0.29

SHARE

### C27 Manufacture of electrical equipment

This division includes the manufacture of products that generate, distribute and use electrical power. Also included is the manufacture of electrical lighting, signalling equipment and electric household appliances.

This division excludes the manufacture of electronic products (see division 26).

# IX. Health Ecosystem

## Health Ecosystem

The Health Ecosystem is a vital part of the European Industrial Strategy, encompassing all stakeholders involved in healthcare, pharmaceuticals, biotechnology, medical devices, and digital health solutions. It plays a crucial role in ensuring access to high-quality healthcare, fostering innovation, and strengthening the EU's health resilience.

### Sectors included in the ecosystem

Manufacturing of pharmaceuticals and their key inputs, medical devices and equipment and personal protective equipment; Healthcare services (medical and residential care); Health tech and related services. Companies are often part of global and complex supply chains. EU-based production for the goods segment has been declining partially due to re-location or subcontracting of production extra EU. The biggest part of this ecosystem's contribution to the EU added value is generated by health services provided through health workers and health care facilities.

- Human health activities Q86
- Residential care activities and social work activities without accommodation Q87-Q88
- Manufacture of basic pharmaceutical products and pharmaceutical preparations C21
- Other manufacturing C32

ECOSYSTEM	NACE_R2	DESCRIPTION	SHARE
Health	C21	Manufacture of basic pharmaceutical products and pharmaceutical preparations	1
Health	C32	Other manufacturing	1
Health	Q86	Human health activities	1
Health	Q87_Q88	Residential care activities and social work activities without accommodation	1

### **C21** Manufacture of basic pharmaceutical products and pharmaceutical preparations

This division includes the manufacture of basic pharmaceutical products and pharmaceutical preparations. This also includes the manufacture of medicinal chemical and botanical products.

### **C32** Other manufacturing

This division includes the manufacture of a variety of goods not covered in other parts of the classification. Since this is a residual division, production processes, input materials

and use of the produced goods can vary widely and usual criteria for grouping classes into divisions have not been applied here.

### **Q86 Human health activities**

This section includes the provision of health and social work activities. Activities include a wide range of activities, starting from health care provided by trained medical professionals in hospitals and other facilities, over residential care activities that still involve a degree of health care activities to social work activities without any involvement of health care professionals.

### **Q87 Residential care activities**

This division includes the provision of residential care combined with either nursing, supervisory or other types of care as required by the residents. Facilities are a significant part of the production process and the care provided is a mix of health and social services with the health services being largely some level of nursing services.

### **Q88 Social work activities without accommodation**

This division includes the provision of a variety of social assistance services directly to clients. The activities in this division do not include accommodation services, except on a temporary basis.



# **X. Mobility - Transport - Automotive Ecosystem**

## Mobility - Transport - Automotive Ecosystem

The Mobility, Transport, and Automotive Ecosystem is a crucial industrial ecosystem under the European Industrial Strategy, covering all sectors involved in the movement of people and goods. This includes road, rail, air, and maritime transport, as well as automotive manufacturing and mobility services. The ecosystem is vital for the EU's economic growth, competitiveness, and sustainability goals.

### Sectors included in the ecosystem

The **Mobility - Transport - Automotive Ecosystem** covers automotive, rail and waterborne. It is characterised by long and complex supply chain. The ecosystem is dominated by a few players that became global players.

- Manufacture of motor vehicles, trailers and semi-trailers C29
- Wholesale & retail trade and repair of motor vehicles & motorcycles G45
- Land transport and transport via pipelines H49\*
- Manufacture of fabricated metal products, except machinery and equipment & Manufacture of machinery and equipment n.e.c. C25\*; C28\*
- Warehousing and support activities for transportation H52\*
- Manufacture of electrical equipment & Manufacture of other transport equipment C27\*; C30\*
- Water transport H50\*

ECOSYSTEM	NACE_R2	DESCRIPTION	SHARE
Mobility - Transport - Automotive	C27	Manufacture of electrical equipment	0.03
Mobility - Transport - Automotive	C29	Manufacture of motor vehicles, trailers and semi-trailers	1
Mobility - Transport - Automotive	C30	Manufacture of other transport equipment	0.32
Mobility - Transport - Automotive	G45	Wholesale and retail trade and repair of motor vehicles and motorcycles	1
Mobility - Transport - Automotive	H49	Land transport and transport via pipelines	0.52
Mobility - Transport - Automotive	H50	Water transport	0.78
Mobility - Transport - Automotive	H52	Warehousing and support activities for transportation	0.39

## **C25 Manufacture of fabricated metal products, except machinery and equipment**

This division includes the manufacture of “pure” metal products (such as parts, containers and structures), usually with a static, immovable function, as opposed to the following divisions 26-30, which cover the manufacture of combinations or assemblies of such metal products (sometimes with other materials) into more complex units that, unless they are purely electrical, electronic or optical, work with moving parts.

The manufacture of weapons and ammunition is also included in this division.

This division excludes: - specialised repair and maintenance activities, see 33.1 - specialised installation of manufactured goods produced in this division in buildings, such as central heating boilers, see 43.22

## **C27 Manufacture of electrical equipment**

This division includes the manufacture of products that generate, distribute and use electrical power. Also included is the manufacture of electrical lighting, signalling equipment and electric household appliances.

This division excludes the manufacture of electronic products (see division 26).

## **C28 Manufacture of machinery and equipment n.e.c.**

This division includes the manufacture of machinery and equipment that act independently on materials either mechanically or thermally or perform operations on materials (such as handling, spraying, weighing or packing), including their mechanical components that produce and apply force, and any specially manufactured primary parts. This includes the manufacture of fixed and mobile or hand-held devices, regardless of whether they are designed for industrial, building and civil engineering, agricultural or home use. The manufacture of special equipment for passenger or freight transport within demarcated premises also belongs within this division.

This division distinguishes between the manufacture of special-purpose machinery, i.e. machinery for exclusive use in a NACE industry or a small cluster of NACE industries, and general-purpose machinery, i.e. machinery that is being used in a wide range of NACE industries.

This division also includes the manufacture of other special-purpose machinery, not covered elsewhere in the classification, whether or not used in a manufacturing process, such as fairground amusement equipment, automatic bowling alley equipment, etc.

This division excludes the manufacture of metal products for general use (division 25), associated control devices, computer equipment, measurement and testing equipment, electricity distribution and control apparatus (divisions 26 and 27) and general-purpose motor vehicles (divisions 29 and 30).

## **C29 Manufacture of motor vehicles, trailers and semi-trailers**

This division includes the manufacture of motor vehicles for transporting passengers or freight. The manufacture of various parts and accessories, as well as the manufacture of trailers and semi-trailers, is included here. The maintenance and repair of vehicles produced in this division are classified in 45.20.

## **C30 Manufacture of other transport equipment**

This division includes the manufacture of transportation equipment such as ship building and boat manufacturing, the manufacture of railroad rolling stock and locomotives, air and spacecraft and the manufacture of parts thereof.

## **G45 Wholesale & retail trade and repair of motor vehicles & motorcycles**

This division includes all activities (except manufacture and renting) related to motor vehicles and motorcycles, including lorries and trucks, such as the wholesale and retail sale of new and second-hand vehicles, the repair and maintenance of vehicles and the wholesale and retail sale of parts and accessories for motor vehicles and motorcycles. Also included are activities of commission agents involved in wholesale or retail sale of vehicles.

This division also includes activities such as washing, polishing of vehicles etc.

This division **does not include** the retail sale of automotive fuel and lubricating or cooling products or the renting of motor vehicles or motorcycles.

## **H49 Land transport and transport via pipelines**

This division includes the transport of passengers and freight via road and rail, as well as freight transport via pipelines.

## **H50 Water transport**

This division includes the transport of passengers or freight over water, whether scheduled or not. Also included are the operation of towing or pushing boats, excursion, cruise or sightseeing boats, ferries, water taxis etc. Although the location is an indicator for the separation between sea and inland water transport, the deciding factor is the type of vessel used. Transport on sea-going vessels is classified in groups 50.1 and 50.2, while transport

using other vessels is classified in groups 50.3 and 50.4. This division excludes restaurant and bar activities on board ships (see 56.10, 56.30), if carried out by separate units.

## **H52 Warehousing and support activities for transportation**

This division includes warehousing and support activities for transportation, such as operating of transport infrastructure (e.g. airports, harbours, tunnels, bridges, etc.), the activities of transport agencies and cargo handling.

# **XI. Promixity, Social Economy and Civil Security Ecosystem**

## Proximity, Social Economy and Civil Security Ecosystem

The Proximity, Social Economy, and Civil Security Ecosystem is a broad and diverse sector within the European Industrial Strategy, covering businesses and organizations that provide essential services to local communities, promote social inclusion, and ensure civil security. It includes cooperatives, social enterprises, local businesses, NGOs, and civil protection services.

### Sectors included in the ecosystem

The ‘social economy’ encompasses a variety of businesses, organisations and legal forms, including non-profit associations, cooperatives, mutual societies, foundations and social enterprises. They share the objective of systematically putting people first and producing a positive impact on local communities. The social economy business model aims at reinvesting most of the profits back into the organisation and/or a social cause, and having a participatory/democratic form of governance<sup>346</sup>. Social economy is known to be anchored at local level and to foster socio-economic cohesion by promoting values such as solidarity, participation and cooperation. Social economy organisations operate in a large variety of economic sectors and are therefore linked with other industrial ecosystems.

- Social economy - Residential care activities and social work activities without accommodation. Q87 - Q88
- Social economy - other aggregated. G47\*; I\*; N81\*; N82\*
- Proximity economy - Aggregated. S95; S96; T  
Social housing - Real estate activities. L\*

ECOSYSTEM	NACE_R2	DESCRIPTION	SHARE
Proximity, Social Economy and Civil Security	G47	Retail trade, except of motor vehicles and motorcycles	0.16
Proximity, Social Economy and Civil Security	I	Accommodation and food service activities	0.14
Proximity, Social Economy and Civil Security	L	Real estate activities	0.08
Proximity, Social Economy and Civil Security	N81	Services to buildings and landscape activities	0.28
Proximity, Social Economy and Civil Security	N82	Office administrative, office support and other business support activities	0.11
Proximity, Social Economy and Civil Security	Q87_Q88	Residential care activities and social work activities without accommodation	1
Proximity, Social Economy and Civil Security	S95	Repair of computers and personal and household goods	1
Proximity, Social Economy and Civil Security	S96	Other personal service activities	1
Proximity, Social Economy and Civil Security	T	Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use	1

### G47 Retail trade, except for motor vehicles and motorcycles

This division includes the resale (sale without transformation) of new and used goods mainly to the general public for personal or household consumption or utilisation, by shops, department stores, stalls, mail-order houses, door-to-door sales persons, hawkers, consumer cooperatives etc.

Retail trade is classified first by type of sale outlet (retail trade in stores: groups 47.1 to 47.7; retail trade not in stores: groups 47.8 and 47.9). Retail trade in stores includes the retail sale of used goods (class 47.79). For retail sale in stores, there exists a further distinction between specialised retail sale (groups 47.2 to 47.7) and non-specialised retail sale (group 47.1). The above groups are further subdivided by the range of products sold. Sale not via stores is subdivided according to the forms of trade, such as retail sale via stalls and markets (group 47.8) and other non-store retail sale, e.g. mail order, door-to-door, by vending machines etc. (group 47.9).

The goods sold in this division are limited to goods usually referred to as consumer goods or retail goods. Therefore goods not normally entering the retail trade, such as cereal grains, ores, industrial machinery etc. are excluded.

This division also includes units engaged primarily in selling to the general public, from displayed merchandise, products such as personal computers, stationery, paint or timber, although these products may not be for personal or household use. Handling that is customary in trade does not affect the basic character of the merchandise and may include, for example, sorting, separating, mixing and packaging.

This division also includes the retail sale by commission agents and activities of retail auctioning houses.

## **I Accommodation and food service activities**

This section includes the provision of short-stay accommodation for visitors and other travellers and the provision of complete meals and drinks fit for immediate consumption. The amount and type of supplementary services provided within this section can vary widely.

This section excludes the provision of long-term accommodation as primary residences, which is classified in real estate activities (section L). Also excluded is the preparation of food or drinks that are either not fit for immediate consumption or that are sold through independent distribution channels, i.e. through wholesale or retail trade activities. The preparation of these foods is classified in manufacturing (section C).

## **L Real estate activities**

This section includes acting as lessors, agents and/or brokers in one or more of the following: selling or buying real estate, renting real estate, providing other real estate services such as appraising real estate or acting as real estate escrow agents.

Activities in this section may be carried out on own or leased property and may be done on a fee or contract basis. Also included is the building of structures, combined with maintaining ownership or leasing of such structures.



This section includes real estate property managers.

### **N81 Services to buildings and landscape activities.**

This division includes the provision of a number of general support services, such as the provision of a combination of support services within a client's facilities, the interior and exterior cleaning of buildings of all types, cleaning of industrial machinery, cleaning of trains, buses, planes, etc., cleaning of the inside of road and sea tankers, disinfecting and exterminating activities for buildings, ships, trains, etc., bottle cleaning, street sweeping, snow and ice removal, provision of landscape care and maintenance services and provision of these services along with the design of landscape plans and/or the construction (i.e. installation) of walkways, retaining walls, decks, fences, ponds, and similar structures.

### **N82 Office administrative, office support and other business support activities**

This division includes the provision of a range of day-to-day office administrative services, as well as ongoing routine business support functions for others, on a contract or fee basis. This division also includes all support service activities typically provided to businesses not elsewhere classified. Units classified in this division do not provide operating staff to carry out the complete operations of a business.

### **Q87 Residential care activities**

This division includes the provision of residential care combined with either nursing, supervisory or other types of care as required by the residents. Facilities are a significant part of the production process and the care provided is a mix of health and social services with the health services being largely some level of nursing services.

### **Q88 Social work activities without accommodation**

This division includes the provision of a variety of social assistance services directly to clients. The activities in this division do not include accommodation services, except on a temporary basis.

### **S95 Repair of computers and personal and household goods**

This division includes the repair and maintenance of computers peripheral equipment such as desktops, laptops, computer terminals, storage devices and printers.

It also includes the repair of communications equipment such as fax machines, two-way radios and consumer electronics such as radios and TVs, home and garden equipment such as lawn-mowers and blowers, footwear and leather goods, furniture and home furnishings, clothing and clothing accessories, sporting goods, musical instruments, hobby articles and other personal and household goods.

Excluded from this division is the repair of medical and diagnostic imaging equipment, measuring and surveying instruments, laboratory instruments, radar and sonar equipment, see 33.13.

## **S96** Other personal service activities

This division includes all service activities not mentioned elsewhere in the classification. Notably, it includes types of services such as washing and (dry-)cleaning of textiles and fur products, hairdressing and other beauty treatments, funerals and related activities.

## **XII. Retail Ecosystem**

## Retail Ecosystem

The Retail Ecosystem is a key part of the European Industrial Strategy, covering businesses involved in the sale of goods and services to consumers. This includes small shops, supermarkets, e-commerce platforms, and wholesale distributors. Retail is one of the largest employers in the EU and plays a vital role in economic growth, consumer well-being, and digital transformation.

### Sectors included in the ecosystem

Retail (large companies, SMEs, online and offline), relevant wholesale, and online platforms.<sup>371</sup> E-commerce represents 10-15% of total retail sales (much less for grocery retail)<sup>372</sup>. Market concentration differs across the EU. The largest are mainly grocery chains, cosmetics, textiles and furniture sellers. Most important e-commerce players come from outside the EU. The performance of the ecosystem is key for household budgets and suppliers.

- Wholesale trade, except of motor vehicles and motorcycles. G46
- Retail trade, except of motor vehicles and motorcycles. G47
- Postal and courier activities. H53

ECOSYSTEM	NACE_R2	DESCRIPTION	SHARE
Retail	G46	Wholesale trade, except of motor vehicles and motorcycles	1
Retail	G47	Retail trade, except of motor vehicles and motorcycles	1
Retail	H53	Postal and courier activities	1

### **G46** Wholesale trade, except of motor vehicles and motorcycles

This division includes wholesale trade on own account or on a fee or contract basis (commission trade) related to domestic wholesale trade as well as international wholesale trade (import/export).

#### This division excludes:

- wholesale of motor vehicles, caravans and motorcycles, see 45.1, 45.4
- wholesale of motor vehicle accessories, see 45.31, 45.40
- renting and leasing of goods, see division 77
- packing of solid goods and bottling of liquid or gaseous goods, including blending and filtering for third parties, see 82.92

### **G47** Retail trade, except for motor vehicles and motorcycles

This division includes the resale (sale without transformation) of new and used goods mainly to the general public for personal or household consumption or utilisation, by shops,

department stores, stalls, mail-order houses, door-to-door sales persons, hawkers, consumer cooperatives etc.

Retail trade is classified first by type of sale outlet (retail trade in stores: groups 47.1 to 47.7; retail trade not in stores: groups 47.8 and 47.9). Retail trade in stores includes the retail sale of used goods (class 47.79). For retail sale in stores, there exists a further distinction between specialised retail sale (groups 47.2 to 47.7) and non-specialised retail sale (group 47.1). The above groups are further subdivided by the range of products sold. Sale not via stores is subdivided according to the forms of trade, such as retail sale via stalls and markets (group 47.8) and other non-store retail sale, e.g. mail order, door-to-door, by vending machines etc. (group 47.9).

The goods sold in this division are limited to goods usually referred to as consumer goods or retail goods. Therefore goods not normally entering the retail trade, such as cereal grains, ores, industrial machinery etc. are excluded.

This division also includes units engaged primarily in selling to the general public, from displayed merchandise, products such as personal computers, stationery, paint or timber, although these products may not be for personal or household use. Handling that is customary in trade does not affect the basic character of the merchandise and may include, for example, sorting, separating, mixing and packaging.

This division also includes the retail sale by commission agents and activities of retail auctioning houses.

**This division excludes:**

- sale of farmers' products by farmers, see division 01
- manufacture and sale of goods, which is generally classified as manufacturing in divisions 10-32
- sale of motor vehicles, motorcycles and their parts, see division 45
- trade in cereal grains, ores, crude petroleum, industrial chemicals, iron and steel and industrial machinery and equipment, see division 46
- sale of food and drinks for consumption on the premises and sale of takeaway food, see division 56
- renting of personal and household goods to the general public, see group 77.2

**H53 Postal and courier activities**

This division includes postal and courier activities, such as pickup, transport and delivery of letters and parcels under various arrangements.

Local delivery and messenger services are also included.

# XIII. Textil Ecosystem

## Textil Ecosystem

The Textile Ecosystem is a key part of the European Industrial Strategy, encompassing the entire textile and fashion value chain, from raw material production to manufacturing, distribution, and recycling. It plays a crucial role in employment, innovation, and sustainability within the EU.

### Sectors included in the ecosystem

The textile ecosystem includes transformation of natural (e.g. cotton, flax, wool), man-made and artificial (synthetic polyester and viscose) fibres into yarns and fabrics, production of yarns, home textiles, industrial filters, technical textiles, carpets and clothing. The ecosystem also includes production of footwear and leather. The ecosystem is particularly competitive in high-end clothing and technical textile for automotive applications, medical textile, agro textile and protective clothing. Most companies operate in complex value chains, making them dependent on external supplies, which can easily be disrupted.

- Manufacture of textiles, wearing apparel leather and related products. C13 - C15

ECOSYSTEM	NACE_R2	DESCRIPTION	SHARE
Textile	C13	Manufacture of textiles	1
Textile	C14	Manufacture of wearing apparel	1
Textile	C15	Manufacture of leather and related products	1

### C13 Manufacture of textiles

This division includes preparation and spinning of textile fibres as well as textile weaving, finishing of textiles and wearing apparel, manufacture of made-up textile articles, except apparel (e.g. household linen, blankets, rugs, cordage etc.). Growing of natural fibres is covered under division 01, while manufacture of synthetic fibres is a chemical process classified in class 20.60. Manufacture of wearing apparel is covered in division 14.

### C14 Manufacture of wearing apparel

This division includes all tailoring (ready-to-wear or made-to-measure), in all materials (e.g. leather, fabric, knitted and crocheted fabrics etc.), of all items of clothing (e.g. outerwear, underwear for men, women or children; work, city or casual clothing etc.) and accessories. There is no distinction made between clothing for adults and clothing for children, or between modern and traditional clothing.

Division 14 also includes the fur industry (fur skins and wearing apparel).

## **C15** Manufacture of leather and related products

This division includes dressing and dyeing of fur and the transformation of hides into leather by tanning or curing and fabricating the leather into products for final consumption.

It also includes the manufacture of similar products from other materials (imitation leathers or leather substitutes), such as rubber footwear, textile luggage etc. The products made from leather substitutes are included here, since they are made in ways similar to those in which leather products are made (e.g. luggage) and are often produced in the same unit.



# XIV. Tourism Ecosystem

## Tourism Ecosystem

The Tourism Ecosystem is one of the most significant sectors within the European Industrial Strategy, contributing heavily to employment, economic growth, and cultural exchange. It includes a wide range of stakeholders, from travel agencies and hospitality businesses to cultural and natural heritage sites.

### Sectors included in the ecosystem

Destination-level service providers (hospitality, attractions) in the EU are mostly small local owners. Some of them are franchisees of several multinational companies providing branding, marketing, management and sales services. Accommodation and food service activities.

- Creative, arts and entertainment activities; libraries, archives, museums and other cultural activities; Gambling and betting activities & Sports activities and amusement and recreation activities R90 - R92\*; R93
- Land transport and transport via pipelines H49\*
- Office administrative, office support and other business support activities N82\*
- Water, transport & Air transport H50\*; H51\*
- Travel agency, tour operator and other reservation services and related activities N79

ECOSYSTEM	NACE_R2	DESCRIPTION	SHARE
Tourism	H49	Land transport and transport via pipelines	0.45
Tourism	H50	Water transport	0.22
Tourism	H51	Air transport	0.91
Tourism	I	Accommodation and food service activities	1
Tourism	N79	Travel agency, tour operator and other reservation service and related activities	1
Tourism	N82	Office administrative, office support and other business support activities	1
Tourism	R90-R92	Creative, arts and entertainment activities; libraries, archives, museums and other cultural activities; gambling and betting activities	0.66
Tourism	R93	Sports activities and amusement and recreation activities	1

## **H49 Land transport and transport via pipelines**

This division includes the transport of passengers and freight via road and rail, as well as freight transport via pipelines.

## **H50 Water transport**

This division includes the transport of passengers or freight over water, whether scheduled or not. Also included are the operation of towing or pushing boats, excursion, cruise or sightseeing boats, ferries, water taxis etc. Although the location is an indicator for the separation between sea and inland water transport, the deciding factor is the type of vessel used. Transport on sea-going vessels is classified in groups 50.1 and 50.2, while transport using other vessels is classified in groups 50.3 and 50.4. This division excludes restaurant and bar activities on board ships (see 56.10, 56.30), if carried out by separate units.

## **H51 Air transport**

This division includes the transport of passengers or freight by air or via space.

This division excludes: - crop spraying, see 01.61 - overhaul of aircraft or aircraft engines, see 33.16 - operation of airports, see 52.23 - aerial advertising (sky-writing), see 73.11 - aerial photography, see 74.20

## **I Accommodation and food service activities**

This section includes the provision of short-stay accommodation for visitors and other travellers and the provision of complete meals and drinks fit for immediate consumption. The amount and type of supplementary services provided within this section can vary widely.

This section excludes the provision of long-term accommodation as primary residences, which is classified in real estate activities (section L). Also excluded is the preparation of food or drinks that are either not fit for immediate consumption or that are sold through independent distribution channels, i.e. through wholesale or retail trade activities. The preparation of these foods is classified in manufacturing (section C).

## **N79 Travel agency, tour operator and other reservation service and related activities**

This division includes the activity of agencies, primarily engaged in selling travel, tour, transportation and accommodation services to the general public and commercial clients and the activity of arranging and assembling tours that are sold through travel agencies or directly by agents such as tour operators; and other travel-related services including

reservation services. The activities of tourist guides and tourism promotion activities are also included.

## **N82 Office administrative, office support and other business support activities**

This division includes the provision of a range of day-to-day office administrative services, as well as ongoing routine business support functions for others, on a contract or fee basis. This division also includes all support service activities typically provided to businesses not elsewhere classified. Units classified in this division do not provide operating staff to carry out the complete operations of a business.

## **R90 Creative, arts and entertainment gambling and betting activities**

This division includes the operation of facilities and provision of services to meet the cultural and entertainment interests of their customers. This includes the production and promotion of, and participation in, live performances, events or exhibits intended for public viewing; the provision of artistic, creative or technical skills for the production of artistic products and live performances. This division excludes: - the operation of museums of all kinds, botanical and zoological gardens; the preservation of historical sites; and nature reserves activities, see division 91 - gambling and betting activities, see division 92 - sports and amusement and recreation activities, see division 93. Some units that provide cultural, entertainment or recreational facilities and services are classified in other divisions, such as: - motion picture and video production and distribution, see 59.11, 59.12, 59.13 - motion picture projection, see 59.14 - radio and television broadcasting, see 60.1, 60.2

## **R91 Libraries, archives, museums and other cultural activities**

This division includes the activities of libraries and archives; the operation of museums of all kinds, botanical and zoological gardens; the operation of historical sites and nature reserves activities.

It also includes the preservation and exhibition of objects, sites and natural wonders of historical, cultural or educational interest (e.g. world heritage sites, etc.).

This division excludes:

- sports and amusement and recreation activities such as the operation of bathing beaches and recreation parks, see division 93

## R92 Gambling and betting activities

This division includes the operation of gambling facilities such as casinos, bingo halls and video gaming terminals and the provision of gambling services, such as lotteries and off-track betting.

## R93 Sports activities and amusement and recreation activities

This division includes the provision of recreational, amusement and sports activities (except museums activities, preservation of historical sites, botanical and zoological gardens and nature reserves activities; and gambling and betting activities).

Excluded from this division are dramatic arts, music and other arts and entertainment such as the production of live theatrical presentations, concerts and opera or dance productions and other stage productions, see division 90.

