



# Rethinking Regional Attractiveness in Spain's **Cantabria Region**



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# Rethinking Regional Attractiveness in Spain's Cantabria Region

2023



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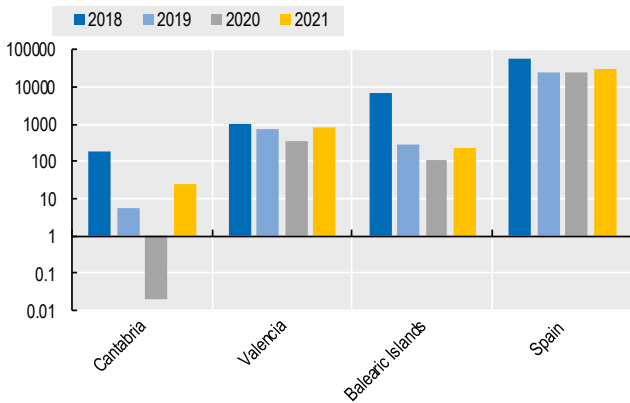
The impact of the COVID-19 crisis, compounded by the consequences of Russia's war of aggression against Ukraine and existing megatrends (e.g. climate change, globalisation, digitalisation and demographic change), continue to produce asymmetric effects within and between countries and regions, with the scope and scale depending on their unique characteristics.

The OECD's work on rethinking regional attractiveness policies in the new global environment, is undertaken with the support of the European Commission (DG REGIO) and is a priority activity of the Regional Development Policy Committee (RDPC). Working closely with 15 regions in 5 OECD member countries (Ireland, Italy, Portugal, Spain and Sweden). It aims to help regional and national policy-makers to better understand the position of regions in an evolving global context, including emerging challenges and opportunities, and identify the policy levers at their disposal to enhance the attractiveness of regions to the key international target groups of investors (including exporters), talent, and visitors. In doing so, it seeks to support regions transition towards new territorial development policies that promote inclusive, sustainable, and resilient development, while enhancing regional attractiveness.

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## 4 | A snapshot of Cantabria in the world

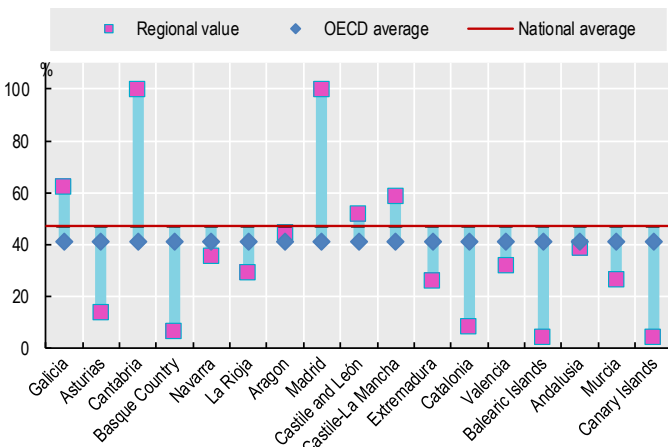
### FDI Inwards by region, expenditure in EUR millions (log scale)



Source: Ministerio de industria, comercio y turismo, 2022.

In 2018, Cantabria maintained a high level of attractiveness to foreign investors, receiving over EUR 186 million. FDI investment dropped by 97% to EUR 5.9 million in 2019 and in the impact of the COVID-19 crisis led to a complete cessation of FDI investment in the Region in 2020. FDI inflows in 2020 were negative (likely due to loans to parent companies outside of the region) and surged in 2021 to EUR 24.7 million, rising above pre-pandemic levels by roughly EUR 19 million. This performance is significantly below global trends, which dropped by about one-third in 2020, along with OECD and EU (Greenfield) FDI inflows, which fell by around 50% and 70% respectively. The rebound in FDI investment reflects that Cantabria is recovering from the effects of the pandemic. Nonetheless, the outlook remains highly uncertain, given the current geopolitical context.

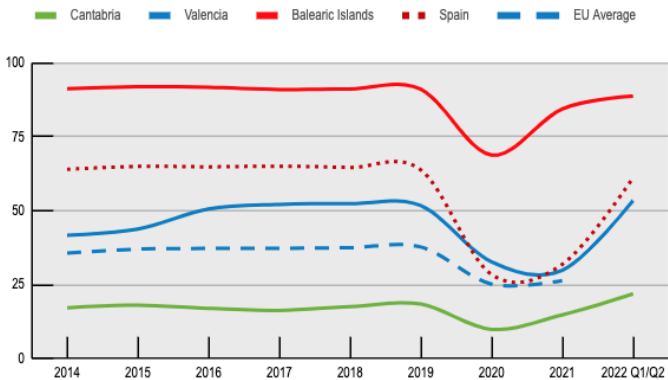
### Share of renewables in electricity generation



Note: Ceuta and Melilla regions have been excluded because of a lack of reliable data  
Source: OECD Environmental database ; 2019 ; OECD regions (TL2).

Cantabria's coastal position presents major opportunities for renewable energy production, including offshore energy. Cantabria is leading the green energy transition in Spain, becoming one of the only two regions that produce 100% of its electricity using renewable resources - a figure that exceeds the OECD (50.2%), EU (49.5%) national averages (40.2%). The levels of greenhouse gas emissions from electricity generated are also the lowest in Spain (3 Ktons of CO2 eq.) (OECD, 2020), indicating that Cantabria is making great progress towards the transition to net-zero greenhouse gas emissions. Exploiting opportunities for offshore and wind energy production can offer diversification opportunities for Cantabria's industrial sector while helping lead Spain in emissions reductions.

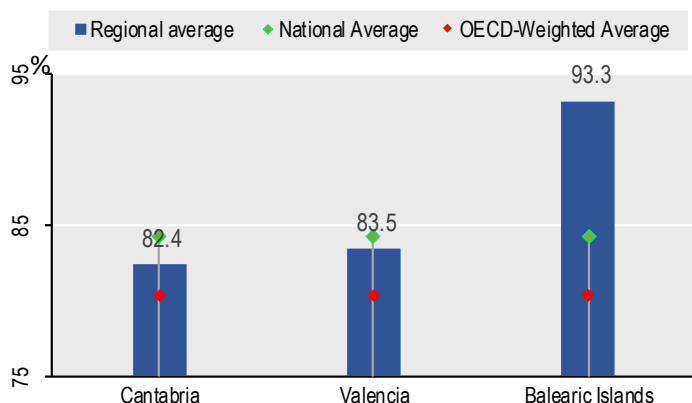
### Share of nights spent by foreign tourists in accommodation establishments



Source: OECD calculations based on Instituto Nacional de Estadística (2022); Eurostat (2021)

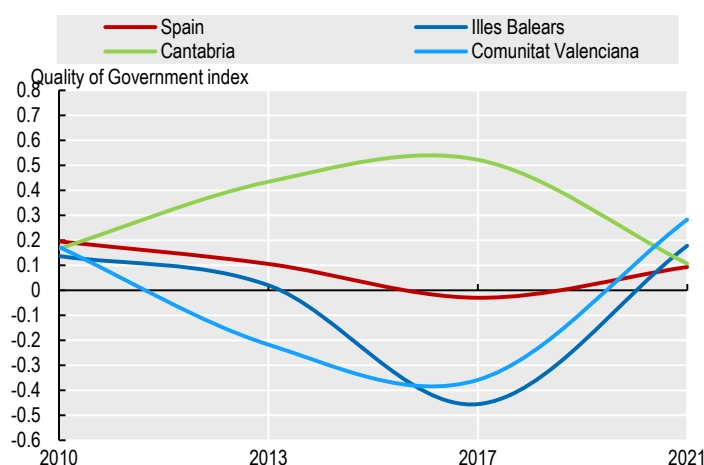
Between 2014 and 2019, the share of nights spent by foreign tourists in accommodation establishments remained relatively stable yet well below the Spanish average. Indeed, in 2019, 18.5% were foreign tourists in the Region, a figure well below the EU (37.8%) and national averages (63.9%). The halt in travel and tourism due to the COVID-19 crisis in 2020 led to a 8.5% drop in the share of foreign nights spent by foreign tourists, to 10% a figure much lower than the EU (25.3%) and national averages (28.5%). In the last two years, Cantabria has experienced a promising rebound, rose above pre-pandemic levels and indicating attractiveness as a destination for overseas tourists. Between 2020 and June 2022, the total number of nights increased by 12% in the first half of 2022, and roughly 22% were foreign tourists – an unprecedented figure in Cantabria.

### Share of population satisfied with opportunities to meet people and make friends (2016-2020)



Social interactions are a significant factor driving life satisfaction and overall well-being of residents (OECD, 2020). Indicators that capture participation in social activities can help to measure regional social capital and can illustrate an important relationship between higher levels of social well-being and regional economic growth. In Cantabria, 82.4% of the population indicated they are satisfied with opportunities to meet people and make friends, a figure that is almost on par with the national average (82.8%) and slightly over the OECD-weighted average (80.4%).

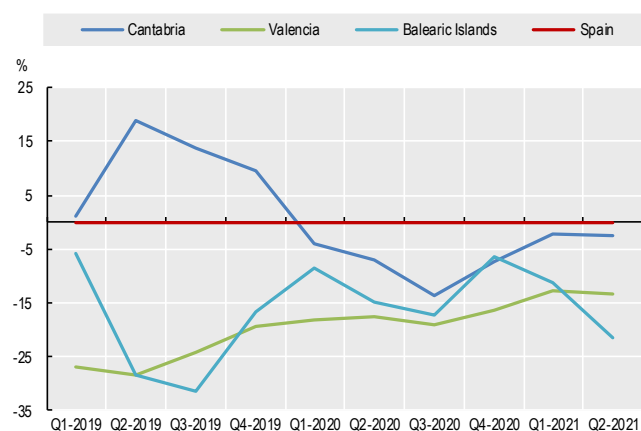
### European Quality of Government Index



Source: University of Gothenburg

The European Quality of Government Index (EQI) captures, at the regional level, citizens' perceptions, and experiences in relation to corruption, quality, and impartiality of three essential public services – health, education, and policing. Between 2013 and 2017, the EQI for Cantabria increased considerably, surpassing EU and Spanish averages. Data from 2021 indicates that the EQI for Cantabria has dropped considerably, still the Region continues to perform above both the EU and Spanish averages. Perceived quality of government can have serious implications for trust in government, as well as the attractiveness of territories. It can influence behavioural responses including compliance with public health responses or the tax system, the decisions of potential investors and talent when choosing a preferred destination to set up a business or raise a family.

### Download speed at the regional level



Source: OECD calculations based on Ookla database ; 2021 ; OECD TL2 regions

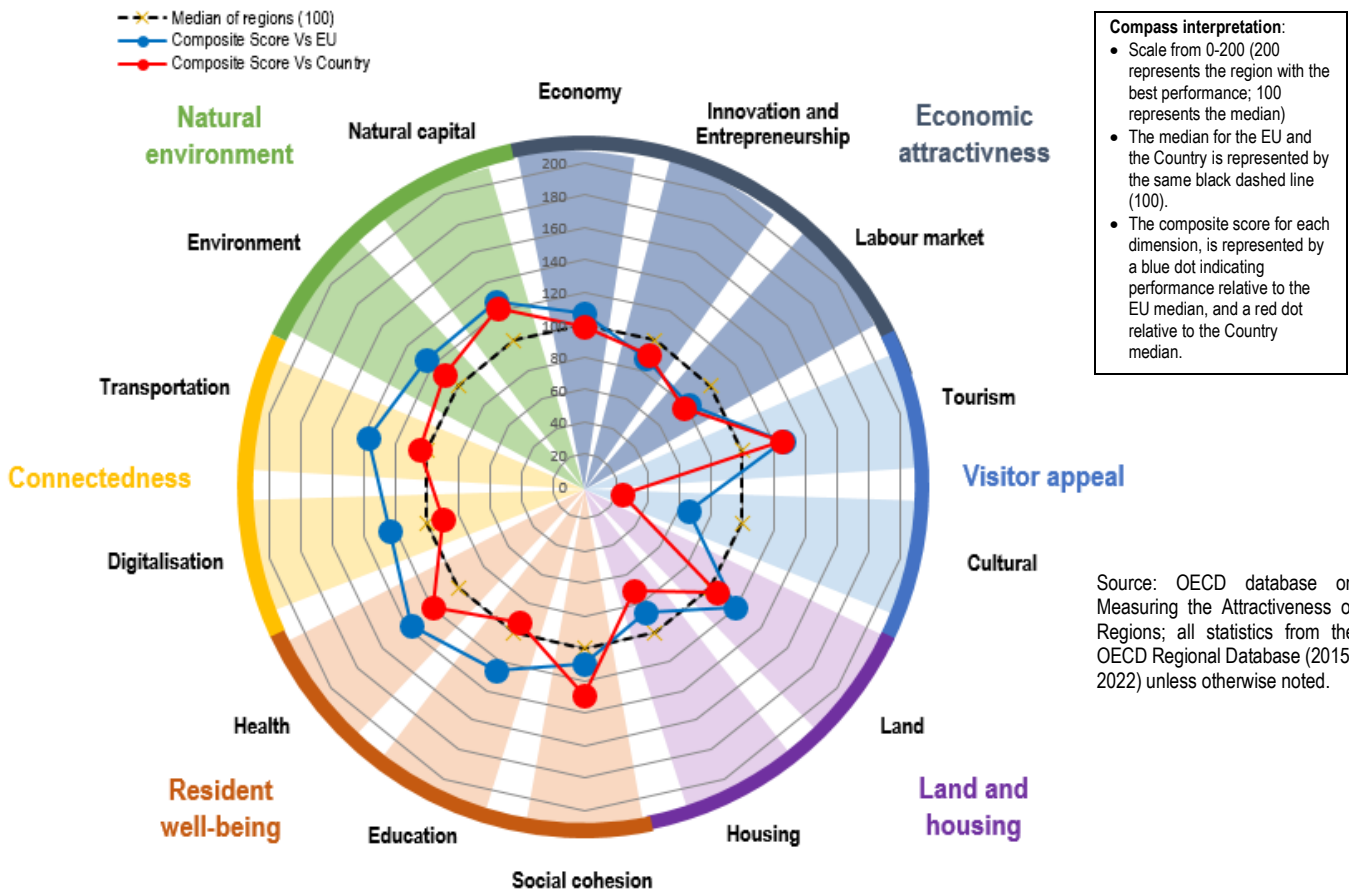
Access to fast and reliable internet connections are a key factor in attracting talent – remote workers in particular – investors and visitors. In Cantabria, download speeds are relatively close to the national average. Despite a roughly 18% improvement relative to the national average between Q1 2019 (1.1%) and Q2 2020 (19%), this figure has decreased over the past two years, with the average download speed in the Region now around 2.5% slower than the national average.

## Attractiveness profile: Cantabria Region

Before considering the policy levers available to enhance the attractiveness of a region to international target groups (investors, talent, visitors), it is important to first understand the region’s position in the world. To do so, the OECD considers four families of international connections: business (e.g. FDI projects, trade, employment in foreign-controlled business, etc.), human (employment, migration, and visitors), knowledge (international students, R&D, patents) and infrastructure (broadband, ports, airports, stations). In the case of Cantabria, on the **Business** front, the share of **regional gross value added (GVA) from tradable sectors** is low (32.55%) – performing just below the EU average (34.7%) and slightly higher than national average (30.8%). In terms of **Infrastructure**, Cantabria could strengthen its **air transport performance**; on average, people in the region can access 130 unique passenger daily flights within 90 minutes by car, a score below the EU (320 passenger flights) and national averages (233 passenger flights). When it comes to **Human** connections, and in particular visitor presence, the Region lags behind with less nights spent per sq. km (579) than most EU regions (1,126). Finally, in terms of **Knowledge** connections, the number of **international scientific co-publications** (over 1,492) is higher than the average of EU (1,126) and Spanish regions (1,146) in 2021.

The OECD’s innovative and multidimensional approach to assessing **regional attractiveness** considers global engagement beyond international connections and financial drivers alone. In total, the methodology considers more than 50 indicators to develop regional attractiveness profiles, covering 14 dimensions of attractiveness, across six domains (Economic attraction, Connectedness, Visitor appeal, Resident Well-being, Land-use and Housing).

### Attractiveness Compass: Cantabria Region



**Economic Attractiveness:** Cantabria's overall economic performance – as measured by GDP per capita and GVA per worker is slightly above EU average yet somewhat lower than the Spanish average. In the economic diversification dimension, the Region scores below the Spanish average, indicating opportunities to reinforce policy responses that can foster more resilient growth over the long-term. In the labour market dimension, Cantabria performs below the EU and Spanish averages. Although employment prospects for migrants are strong - indicating that the region is an attractive place to work and live for migrants - Cantabria faces gaps in the share of youth employment (72.7%), performing below the EU average (80%).

**Visitor Appeal:** In Cantabria, the tourism sector has been growing over the last decade. The Region benefits from the third highest number of tourist accommodation beds per capita in Spain (133 per 1000 inhabitants) - above the EU (89 beds) and Spanish averages (84 beds) - and the number of overnight stays per capita (9.6 per 1000 inhabitants) also outstands the EU score (8.7 per 1000 inhabitants). While there is progress to be made to diversify the tourism offer, leveraging the potential of the tourism sector in less travelled regions, such as natural reserves or natural spaces located in the interior of the Cantabria region, can increase economic growth and employment opportunities for different experience and skills levels.

In terms of cultural capital, the relatively low employment rates in culture and creative industries (less than 1%), reflects the lower score on this dimension and represents an area where the Region could improve. Cultural and creative sector businesses are widely acknowledged to contribute to regional development significantly. On average, workers in these sectors are highly skilled, and their jobs have a low risk of automation (OECD, 2022).

**Connectedness:** On the digitalisation front, approximately 94% of households in Cantabria benefit from high-speed broadband access, surpassing EU regions (85%). On road performance, a measure of road accessibility and proximity, Cantabria outperforms EU and Spanish averages. In parallel, 8% of the population can access train stations within 90 minutes by car, a score above the EU average (4.07%) still somewhat below the Spanish average (8.4%).

**Land and Housing:** The share of land converted to artificial surfaces between 2004-2019 (0.85%) is below the EU (0.64%) average - suggesting the region has focused on repurposing existing infrastructure or relied more on brownfield rather than greenfield sites for projects and investments. The share of built-up areas (2.33%) is also considerably lower than the EU (6%) and Spanish averages (8.24%). While a low score may indeed illustrate an unexplored economic opportunity and/or a high-quality natural environment, this dimension requires further statistical and qualitative analysis to be understood in its local context.

In Cantabria, only a relatively small share of the population (1.44%) does not have enough money for housing. Regardless, residents spend more of their disposable income on housing (31.3%) than the EU average (25%) and only 37% of the population is satisfied with housing affordability – the third lowest score in Spain.

**Resident Well-being:** In terms of education, Cantabria illustrates a score above the EU median in this dimension. Roughly 43.6% of the population has completed tertiary education – exceeding both EU (32%) and Spanish scores (39.6%). Nonetheless, the share of international students (3.9%) is lower than EU (7%) and Spanish averages (4.34%) - implying that more could be done to attract international talent. Reliable access to health services and the relatively high number of doctors per capita (5.15 per 1000 inhabitants) - somewhat higher than the EU average (4 per 1000 inhabitants) – is indicative of the higher score on health, an essential public service.

People in Cantabria are also more satisfied with their lives than other Spanish regions. They also feel safer walking alone at night (86%) than other EU (74%) and Spanish regions (83%) and the number of homicides per capita (0.7 per 100,000 inhabitants) is lower than the EU average (1 per 100,000 inhabitants). The poverty rate after taxes and transfers (18%), however, is slightly higher than the EU average (17%) yet still below the national average (21.6%).

**Natural Environment:** On the environmental front, Cantabria holds a total of 29 protected areas - ranking on par with other EU regions - and the tree cover share (51.4%) is significantly higher than other EU (34%) regions, suggesting regional attitudes for environmental preservation.

## From recovery to resilience

The COVID-19 crisis has brought both opportunities and challenges to Cantabria. On the one hand, it has initiated policy reflections towards emerging sectors and the creation of skilled jobs. On the other hand, it has highlighted the importance of addressing lingering regional challenges such as rural depopulation and attracting and retaining talent. Under the Cantabria Region's Smart Specialisation Strategy (S3) (*Estrategia de Especialización Inteligente (RIS3) de Cantabria*), the regional government has identified opportunities to reinforce business and human connections, which is key to tackling demographic pressures and to boost job creation and innovation in the region. The S3 strategy is well aligned with the EU Multiannual Financial Framework 2021-2027 and the State Strategy for Science and Technology 2021-2027 (*Estrategia Estatal de Ciencia y tecnología 2021 - 2027*) and aims to benefit from the potential of five innovation ecosystems to create a more inclusive and resilient region.

Moreover, Russia's war of aggression against Ukraine has triggered a humanitarian and economic crisis that requires coordinated policy responses to manage these shocks. Cantabria has mobilised quickly to provide basic services to Ukrainian refugees. The region has facilitated access to education to children and access to healthcare to all refugee families. Further public responses in key sectors such as employment and housing have been put in place to meet refugees' needs and foster a smooth integration into the community, should they wish to stay. Furthermore, shortages and price spikes have disrupted a variety of sectors, such as the export, transport, agri-food industries. To face these challenges, the regional government has recently authorised a cash contribution of EUR 11,800,000 to the Cantabria Development Society (*SODERCAN*<sup>1</sup>) to help ensure these strategic sectors get adequate support.

The Government of Cantabria has analysed, through the S3 strategy, several priority areas for long-term investment. One key priority is to generate synergies in the field of biotechnology for the development of future sectors based in already consolidated sectors (agri-food, chemistry, maritime, healthcare.) One means of achieving this is by transforming the agri-food sector into an innovative ecosystem. This regional initiative is geared towards accelerating investment in sustainable and ecological production, improving its quality and brand image, and exploring the possibilities of commercial expansion through the creation of cooperatives and other social economy enterprises. That said, due to the relatively low number of FDI projects in the region (as outlined in the above 'Snapshot'), policy responses to attract FDI could play an important role by both increasing the employment of high-skilled workers and providing capital and technology with potential multiplier effects on the local industrial system. Cantabria could learn from the example of Ireland's South-East Region, which created an FDI strategy specifically for a small region and which markets its assets from talent to natural capital (OECD, 2023)

In parallel, the lack of critical railway infrastructure and high-speed trains can hinder new growth and investment opportunities in the region. This issue concerns both the need for well-connected passenger and for freight services with Madrid. Improved connections with neighbour (north) Spanish regions could also help developing shared attractiveness strategies. Finally, to improve the availability of broadband access in rural and remote communities, the regional government launched in April 2020 the Connect Cantabria Strategy (*Estrategia "Conecta Cantabria"*). Further investing on digital infrastructure in rural areas can contribute to enhancing their attractiveness profile to all international targets groups as well as provide access to digital services (e.g. telemedicine and remote learning) to local communities.

In Cantabria, policy approaches to support knowledge co-creation and innovation have been limited. The elaboration of the S3 Strategy and the Cantabria 2030 Strategy present an opportunity to build stronger collaboration between research institutes and universities and to foster emerging sectors (e.g. renewable energy, agri-food, blue economy) that can boost the development of new technologies and reinforce innovation. Recent partnerships between higher education institutions and research centres, such as the Valdecilla Health Research Institute, can work towards improving knowledge transfer and attracting talent. Targeting areas of comparative advantage and emerging potential under the S3 Strategy is a strong place to start, but the strategy would benefit from an analysis of the relevant stakeholders needed to effectively deliver results.

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<sup>1</sup> The Cantabria Development Society (*SODERCAN*) seeks to promote and actively contribute to the creation of a favourable socio-economic environment that promotes investment for industrial development, innovation and competitiveness benefiting companies, public institutions and society as a whole within the Region. For more information, please see: [https://www.sodercan.es/en/home\\_en](https://www.sodercan.es/en/home_en)



There are also widespread concerns about the emigration of skilled professionals and how to attract them back from abroad. As such, aimed efforts have been taken by the regional government and higher education institutions to attract and retain talent. For instance, the University of Cantabria has launched several programs, such as the Margarita Salas or Maria Zambrano grants, that seek to attract foreign talent and encourage the return of doctorate students. Cantabria could learn from Norrbotten's (Sweden) T-25 strategy (Box 1), a good example of a regional initiative that aims to take advantage of recent graduates and the active population in the region, while offering housing solutions for those interested in the initiative.

### Box 1. Attracting talent: Norrbotten's (Sweden) T-25 project

In 2019, regions in Northern Sweden launched an attractiveness pilot project to respond to major industrial investments and the resulting need for coordination among multiple actors, including: the Regions of Norrbotten and Västerbotten, the Luleå University of Technology, the Norrbotten County Board, the Swedish Lapland Visitors Board and many others. A total of SEK 112.5 million (EUR 10.6 million) has been allocated for the project, of which 54% is allocated to the Norrbotten Region and 46% to Västerbotten Region. The Swedish Government funds half of Norrbotten's budget through regional 1:1 financing while Västerbotten receives around 40% of funding from the Skellefteå Municipality and roughly 12% through the Swedish Government and the remainder from the European Regional Development Fund.

The project aims to attract and retain talent by simultaneously carrying out territorial marketing efforts with capacity building initiatives in the host territories. Thus, local actors and municipalities must be able to plan and manage what the industry demands, notably in terms of access to skills, energy and infrastructure. Although the majority of the establishments are technology-oriented, the initiative is looking to retain a wide range of expertise, taking advantage of both national and international talent. As such, the project supports emerging collaborative initiatives in marketing and capacity building. These include:

- International talent spotting through the use of AI-technology: employing methods to collect data from the country's destination management organisations.
- Testing municipalities' attractiveness messages: students from Luleå University of Technology come to Norrbotten municipalities to listen and rate their attractiveness narrative.

Finally, the strategy also introduces measures to secure access to housing, school and employment for the accompanying family members.

Source: Luleå University of Technology (3 March 2021), "Record investments in the north and the University's important role in the supply of skills", The Vice-Chancellor's blog, <https://www.ltu.se/ltu/Organisation/Rektor/blogg/Om-miljardinvesteringarna-i-norr-och-universitetets-viktiga-roll-for-kompetensforsorjningen-1.206765?l=en>, (accessed November 15, 2022).

To improve the attractiveness of Cantabria, the regional government aims to establish a cultural hub that will attract and increase the number of international tourists by increasing support for cultural events, promoting cultural tourism and encouraging public-private partnerships. In recent years, significant development has been made in cultural sites and creative economies to attract visitors as well as talent and investors. One key example is the *Espacio Pereda* project, a culture centre which will be inaugurated in 2024 and will benefit from over 85 million euros of investment and more than 1,000 private art pieces from the Santander Bank Foundation. Another example would be the project for the construction of the new Prehistory Art Museum (MUPAC), that would be co-financed by ERDF funds. The OECD acknowledges that cultural participation is tied to a variety of areas of social and economic impact (e.g. social inclusion) and can help address societal challenges favouring resilience and skills creation. Cultural and creative sectors can also provide economic and social benefits and contribute to making cities and regions more attractive places to settle and visit, which also plays a part in investment and talent attraction (OECD, 2022). Taking further advantage of the Cantabria Brand (*Marca Cantabria*) could build international recognition of the region as a tourist destination. The brand could also enhance local products and

contribute to the visibility of cultural heritage thus strengthening the attractiveness of Cantabria and accelerating convergence among stakeholders' initiatives. Engaging and strengthening ties with the Cantabrian diaspora abroad (Box 2) is another example of successful regional approaches conducive to visitor and talent attractiveness.

Rural and eco-tourism can also be important drivers for the development of remote areas, especially hinterland communities facing population decline. During the COVID-19 pandemic, national parks and protected areas, such as the *Picos de Europa National Park* and the *Cabarceno Natural Park*, experienced an increase in domestic visits that required a broader approach to optimise tourist flows and ensure sustainable tourism in those areas. This new offer, extended to international tourists, can increase the rationale for infrastructure improvements, enable economic growth and job creation for the local communities in less populated areas.

### Box 2. Promoting the region through Casas de Cantabria

The Casas de Cantabria (Houses of Cantabria) are a great example of successful regionalised approaches to disseminating Cantabrian culture abroad. The first Casa de Cantabria was inaugurated more than a century ago in La Havana, Cuba. Although there are a number of Casas scattered around different regions in Spain, there are also Casas located in the United States and Latin America, destinations where immigrants from Cantabria settled at the beginning of the 20<sup>th</sup> century. These multipurpose cultural spaces also organise exhibitions, concerts, film screenings, recreational activities and attend to any inquiries relating to the region.

The Casas de Cantabria serve as a space to showcase the region and as a meeting point for the Cantabrian diaspora and other foreign cultures to exchange. Moreover, the Cases de Cantabria play a unique role as enablers of talent mobility while promoting Cantabrian culture and heritage. Investing in cultural institutions such as this one is one way Cantabria is situating itself in the global competition for attracting more foreign visitors and talent.

Source: Casas de Cantabria (2022), "[Sobre Casas de Cantabria](#)" [About Houses of Cantabria] (accessed 2 August 2022).

## Towards better co-ordination for attractiveness policies

A co-ordinated and integrated approach across all levels of government is key to attracting international target groups – investors, talent and visitors. That said, it also calls for engagement between public and private stakeholders to develop policies and initiatives that address the challenges that arise in the region and contribute to enhancing its attractiveness and internationalisation profiles. Due to the high degree of decentralisation in Spain, the importance of regional governments, the *Autonomous Communities (ACs)*, and the local lens of Spanish municipalities, taking a multi-level governance approach is fundamental to develop effective attractiveness policies and long-term resilience.

Cantabria is a uni-provincial autonomous community comprising a total of 102 municipalities, many of which are located in remote and depopulated areas. The region's geography, low population density and outlying communities, has made managing public service delivery difficult. Enhancing cooperation among municipalities and local public service providers can create synergies between policy fields and upscaling of public services delivery. In fact, Access to sound public services (including health and education) is a key driver to well-being and thus, to regional attractiveness, in particular for talent (OECD, 2022). One way the regional government is trying to reinforce horizontal coordination at regional level is through the creation of a second-level of local administration (inter-municipal bodies called *comarcas*). This reform plans to create a total of ten *comarcas*, associating several municipalities with the purpose of delivering adequate and cost-effective public service delivery in the region (Government of Cantabria, 2022).

There is also room for improvement in terms of cross-sectoral co-ordination and in particular, vertical co-ordination. At the regional level, the *Government Delegate (Delegado del Gobierno)*, appointed by the Prime Minister, is the permanent representative of central government in the AC, in charge of directing and co-ordinating the State administration in the region in certain areas (e.g. unemployment and social security benefits, policy and armed forces, etc.). Decentralisation is a cornerstone of the Spanish constitutional democracy, (based on the

1978 Constitution) however, opportunities remain to enhance cross-sectoral and vertical co-ordination and implementation of policies and service delivery. The Law n° 27/2013, aims to address this issue by establishing precise mechanisms for local governments to exercise powers under the principles of budgetary stability and financial sustainability. In the last few decades a number of vertical cooperation mechanisms have also been introduced to enhance cooperation and collaboration between different levels of government (e.g. “Bilateral Cooperation Commissions”, “Sectorial Conferences” (Conferencias sectoriales), “Conference of Presidents” (Conferencia de Presidentes), and “Collaboration contracts” (Convenios de colaboración) (OECD, 2014), (Charbit & Romano, "Governing together: An international review of contracts across levels of government for regional development", OECD Regional Development Working Papers, No. 2017/04, 2017). However, despite this evolution, duplication of competences that can affect the ability to provide effective public services remain (OECD/European Union, 2021) (OECD, 2014). Indeed, good governance and multi-level co-ordination are important factors guiding the choice for investors, talent and visitors alike. Moreover, monitoring performance and evaluating results during and after these mechanisms are in place could also prove beneficial for actors at all levels of government - that could utilise the information generated to achieve policy learning about which initiatives work to attract international target groups.

Strategies to develop a more sustainable and resilient region, with the support of the European Structural Funds, present a wide array of opportunities to enhance attractiveness policies by focusing on emerging sectors (e.g. blue economy, agri-food). Under the 2021-2027 European Regional Development Fund (ERDF) and European Social Fund (ESF), a total of EUR 34.693 billion will be distributed by the Ministry of Finance amongst the 17 autonomous communities and the 2 autonomous cities in Spain. These funds are divided into i) the multi-regional programmes coordinated and implemented at the national level, and ii) the regional programmes according to autonomous communities' allocations, responding to the level of development, which are managed by each territory. Cantabria will be allocated EUR 186.5 million (ERDF and ESF+) Transition Regions, the regions whose GDP per capita falls between 75 and 90 percent of the EU average, have received an allocation for 2021-2027 period which means an 8,1% increase from the 2014-2020 programming period. However, certain projects which could be funded with the help of EU funds fall within the competence of the national government, which can lead to inconsistencies between national and regional priorities in practice.

## Policy considerations

The following policy considerations are intended to help policy makers to enhance the impact of attractiveness strategies of the Cantabria Region vis-à-vis investors, talent, and visitors, and provide guidance to improve multi-level governance frameworks and coordination mechanisms.

- **Investing in a competitive railway infrastructure** able to link Cantabria with the capital city of Madrid and improve connections with Atlantic regions could enhance the region's accessibility and then improve its international and attractiveness profiles to all target groups.
- **Creating targeted policy responses to attract FDI** (e.g. making use of promotion and investment incentives as well as better marketing through the Casas de Cantabria) can help attract and retain foreign investors and better exploit their presence for knowledge transfers to local enterprises and institutions, raising regional competitiveness and contributing to long-term development. This could have a wider effect on the employment of high-skilled workers and local jobs attractiveness to foreign talent and provide capital and contributions to technology transfer.
- **Assessing regional skill gaps while increasing co-ordination** between higher education institutions and industry sector employers could help address labour market mismatches and tackle issues related to brain drain. In parallel, coordinating a talent attraction and retention strategy along with higher education institutions and regional enterprises, could both on international and regional talent could be envisioned,
- **Designing a regional tourism plan** aligned with national tourism strategies and developed in the context of wider regional economic development plans to promote diverse and resilient regional economic growth. The plan could also envision opportunities for small-scale businesses to deliver tourism services to meet the demands of travellers and include measurable targets to monitor tourism developments in the region.
- **Strengthening vertical and horizontal co-operation mechanisms** across levels of government by including regional internationalisation and attractiveness in the priorities of the central government and ACs. For instance, converging the objectives of public decision-makers in terms of attractiveness and

internationalisation could help develop public investment synergies to promote a more territorially balanced strategy in Spain, which will prove beneficial for Cantabria.

## Notes

The data on which these graphs are based comes from several different sources. Most of it is extracted from the OECD database and EUROSTAT ensuring the same source is used for as many countries and regions as possible. Where and when data is missing, it is extracted from databases available through national statistical offices. For some dimensions, the data comes from specific databases, such as the Ookla database for indicators linked to digitalisation. The data are selected using the most robust, available, and frequently collected data at the adequate geographic level (TL2 or TL3). With certain indicators, calculations are done in order to present the indicator at the most relevant and comparable unit of analysis.

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