



Basque Cultural Observatory

Session with
International
Experts

Bilbao, 9th May 2018

REPORT



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PROGRAMME

- 9.00 – 9.30** Arrival of participants
- 9.30 – 9.50** Welcome and opening words
Joxean Muñoz Otaegi, Deputy Minister for Culture, Basque Government
- 9.50 – 10.00** Presentation of the structure and methodology
- 10.00 – 11.15** Plenary session: Cultural habits I
Chair: Mikel Etxeberria Agirresorbe, Head of the Basque Cultural Observatory
- 11.15 – 11.45** *Coffe break*
- 11.45 – 13.00** Plenary session: Cultural habits II
- 13.00 – 14.30** *Lunch break*
- 14.30 – 16.30** Plenary session: CCIs
Chair: Sabin Goitia Goienetxea, Advisor for CCIs, Basque Government's Department of Culture and Language Policy
- 16.30** Closing of the session and depart of participants



INTRODUCTION

The Basque Cultural Observatory (BCO) Session with International Experts started with the opening words by Joxean Muñoz Otaegi, Deputy Minister for Culture of the Basque Government¹. After welcoming and thanking participants with some words in Basque language, he highlighted the importance of this language to understand the specificities of the issues to be discussed during the session in the Basque context.

Joxean Muñoz Otaegi also emphasized the role of the BCO as a provider of data and information which are much needed for policymaking in the field of culture. It is the BCO's objective not only to provide data, but also to be able to share data – that is to say, to obtain data that can be shared and thus get to shared analysis with the actors in the sector, cultural agents and society in general.

For accepting and taking charge of this challenging task, the Deputy Minister thanked the work of Lourdes Aranguren Sudupe, former head of the BCO since its inception 10 years ago, of Josean Urdangarin Arrizabalaga, from the Direction of Cultural Promotion in the Basque Government's Department of Culture and Language Policy, of the consultancy ICC Consultors, a main partner of the BCO along the years, and of Mikel Etxeberria Agirresarobe, current Head of the BCO.

The observatory is a tool that needs to be always sharpened, according to a changing context, for policies to be always adjusted to the changing reality. The two topics being discussed in the session are both complex and crucial in the current cultural panorama. Cultural habits and practices, on the one hand, are undergoing major transformations, and Cultural and Creative Industries (CCIs), on the other, are a more recent topic that is being discussed at the moment across Europe and beyond. CCIs, furthermore, are very important for the Basque Government, as they represent an opportunity to expand the field of action within the smart specialization strategy.

Finally, Joxean Muñoz Otaegi stressed the importance of framing the knowledge development for policymaking in the European context and ongoing debates, and for that he thanked both local and international participants for joining the session and being willing to share their expertise and accumulated knowledge.

¹ Check the event's reader for more information on the participants' profile and professional trajectory.

PRESENTATION OF THE STRUCTURE AND METHODOLOGY

Following the opening words by Joxean Muñoz Otaegi, Deputy Minister for Culture of the Basque Government, Cristina Ortega Nuere, Scientific Coordinator of the session, presented the rationale, structure and methodology planned for the day.

As explained by Ortega Nuere, since its origin – 10 years ago – the BCO had a vocation for the promotion of collaborative work with both local and international agents and experts. In the local context, the design and implementation of all statistical operations was previously discussed with key stakeholders. Similarly, the statistical framework and qualitative research work were always issues to be discussed with other observatories.

Nowadays, the BCO is involved in two ambitious projects: a new edition of the *Statistic of Cultural Habits and Practices*, and the extension of the *Statistic of Arts and Cultural Industries* to include the creative industries. They are not totally new projects since they come from previous statistics. However, in both cases, new answers are needed before new research challenges. For example, in the first case, the statistical operation was carried out 10 years ago, but the changes arisen by the growing leisure time spent in the digital environment require a deep reflection. By way of example, 49.6% of Basque youth aged 15 to 29 enjoy digital leisure activities on a daily basis, according to the Basque Youth Observatory indicators on digital entertainment data from 2016. Along the same lines, as argued by the Digital Culture Report 2017 published by Nesta and Arts Council England – among other quantitative and qualitative studies, “Digital technology has changed the way that we engage with arts and culture, (...) From viewing museums’ collections online to buying theatre tickets via mobile phone”.

The introduction of new elements in the consultation – such as the digital dimension, but not only – poses a double challenge: how to approach “new”, complex issues, on the one hand, and how to do introduce them and yet keep the basis of the statistics so that they are comparable with previous versions. This is the main question underlying the discussion with experts from other contexts, convinced that the experience of others in quantitative research, the exchange of information and the validation of working strategies can facilitate and enrich the development of the BCO’s work, as well as re-inforce other observatories’ work.

To design each one of the two statistical operations mentioned above, there are three levels of specification, and thus three potential levels for discussion:

1. Conceptual framework
2. Thematic blocks
3. Surveys

The conceptual framework for each of these operations was designed based on a desk research work carried out to analyse different models at an international level. Participants in the session were provided with a summary of both conceptual frameworks prior to the event. The survey, on its turn, has been already designed and contrasted with local stakeholders.

Building on the above, the session aimed to discuss on the main issues that cultural observatories are nowadays facing when designing new indicators or updating their previous statistics in order to meet the requirements of any survey: *comparability, consistency, and adaptability*.

Along these lines, what follows is an example of the kind of questions that need to be answered:

Are we addressing the main issues according to the latest global changes that affect the cultural habits and practices of citizens from the Basque Country? Are we developing indicators that will allow us to compare ourselves with other local contexts at the same time that provide us with a picture of our own evolution without losing any aspect of our identity? Are we including and making the right questions regarding the digital dimension of cultural habits and practices? Are we approaching gender issues correctly?

Local and international experts were invited to reflect together and try to give an answer to these and other questions, with the hope that this would not only facilitate the work of the BCO facing its next challenges, but also that of other organisms in charge of observing the cultural evolution in other territories.

Participants were invited based on their knowledge and experience in one of these two fields (cultural habits and practices or CCIs) specifically, or in both. Notwithstanding, they may all significantly contribute to discussion in these two areas. That is why plenary sessions were proposed, so that all participants could contribute to both fields.

The session was split into two large blocks: the first one in the morning, with a discussion on the Statistic of Cultural Habits and Practices, and the second one in the afternoon being focused on CCIs for their integration into the Statistic of Arts and Cultural Industries.

STATISTIC OF CULTURAL HABITS AND PRACTICES

Mikel Etxeberria Agirresarobe, current Head of the BCO, was in charge of opening this thematic discussion block and introducing Xavier Fina Ribó, who was there when the first edition of this first statistical operation was conceived and designed 10 years ago. Xavier Fina, on his part, introduced the work done so far for the preparation of the Statistic of Cultural Habits and Practices, as well as the main issues to be discussed.

Issues to be debated - Cultural Habits and Practices

In his presentation of the main issues to be debated, Xavier Fina:

- Explained the rationale behind the approach and the design of the Statistic of Cultural Habits and Practices. While the specific questions of the survey were not presented, they are all the result of a long reflection process. However, the approaches taken are debatable and it was the aim of the session to bring them to debate.
- Posed a series of specific questions related to the most problematic issues that emerged during the design of the statistic – in the sense that they created more doubts.

It is important to know where this statistical operation comes from. A similar operation was carried out 10 years ago: the [Statistic of Habits, Practices and Cultural Consumption in Euskal Herria \(2007-2008\)](#), which was also preceded by an international debate with other observatories. As it is being done now, we then elaborated a first proposal that was later socialized with other observatories, which were by then much more experienced than the BCO. We realized that the BCO's mistakes, doubts and approaches were similar to those of those other, more experienced actors. The BCO's is still a newcomer compared to other observatories, but in any case something has been learnt in these 10 years.

While that first operation has not been repeated yet – and thus the statistical operation now being discussed will be the second edition, a [Longitudinal Panel of Habits and Cultural Consumption](#) was initiated in 2016, with a population of 204 young people. This population is not statistically significant, but those same 204 youngsters have been already asked in three different waves of the panel about their cultural habits and practices and, more interestingly, about their motivations and the explanatory reasons behind and around cultural habits and practices. This product does not replace the statistical operation, but it certainly complements it and it is providing many interesting results.

Going back to the first statistical operation on cultural habits and practices, the original idea was to repeat it every 5 years. It is going to be 10 years, and it could maybe be discussed which frequency is more appropriate (5, 10 years or something in between).

When starting to work on the new edition of this statistical operation, the BCO faced the following challenges, related namely to:

- *New elements*: cultural and social reality has changed a lot in the past 10 years, and the modes of consuming and practicing culture have also undergone profound transformations. Therefore, the type of questions and the type of indicators we will obtain need to be different. Among these new elements to be considered, the digital dimension is much more central than it was 10 years ago. The explanatory vocation

of this research is also much more relevant now, which is a result of the discussions we started to have a decade ago. Already back then, questions were posed about the explanatory potential of traditional questions: What does the fact that the respondent owns 200 books say about his/her cultural practice? How important is that, if we do not know what kind of books the respondent reads, or why he/she reads them, or how the reading impacts him/her? In this new edition, this sort of explanatory questions, which are equally or even more telling than the practices themselves but are traditionally excluded from habits surveys, have been incorporated as much as possible. Finally, more importance is given to active cultural practices.

- *Continuity elements*: as new elements are being incorporated, the possibility to compare with previous editions (diachronic comparison) and with other contexts diminishes.

A first tension emerges here, between the maintenance of a series of indicators that allows, on the one hand, the temporal comparison and the comparison with other territories – when conducting habits and practices surveys, most observatories end up using traditional variables, questions and indicators ; and the integration of these new elements, on the other. The first solution to this first tension is “I want it all”, but that is not pragmatically feasible.

With regard to this, the first questions could be formulated as follows: How can we balance both approaches? Which should be given priority? How can we move past “traditional” questions while maintaining certain dose of comparability?

Following with the logics behind the design of the statistical operation, three types of practices are distinguished:

- *Receptive participation* (block 2 in the survey), where the consumer or practitioner is not the principal actor of the cultural practice. It is understood that readers or the audience of a concert or a theater play, for instance, – insofar they read, listen to, watch, etc. – are active. Receptive practice is not thus to be considered as passive, but there is a leading role played by the “emitter” (versus the “recipient”).
- *Creative participation* (block 3), both from the perspective of cultural democracy – which argues that we are all potential creators of culture, and from the perspective of semi-professional or amateur practice.
- *Digital participation* (block 4), where it is even more difficult to draw the line between the receptive and the creative practice.
- *Participation in Basque language* (cross-cutting issue, not a specific block in the survey), which is particularly relevant in this context, as the existence of an own language determines certain, specific cultural habits, practices and policies.

A new question emerges in relation to this: Does this approach, based on participation types, respond to current practices?

Concerning the objective of not only describing, but also interpreting and explaining cultural practices, some *explanatory dimensions* (block 1) have been introduced, trying to find a balance between what would be desirable and what is feasible. Adding up to traditional, sociological variables, the survey asks about issues that have to do with:

- The *causes*, that is to say, the conditions enabling cultural participation: conditions determining the availability of leisure time, according to the traditional lifecycle; the cultural environment during childhood; the barriers and incentives for cultural activities in Basque language; social influence; cultural information, and the attitudes and values towards culture. With regard to the latter, it must be highlighted that relating culture with one's life might be sometimes problematic. When asked about culture, for instance, one may respond that it is boring or completely out of his/her life, but then reply that he/she does listen to music all day (and yet not consider him/herself as a cultural consumer or practitioner).
- The *impact* of cultural practices on people's life in terms of values, on the one hand, that is, the extent to which culture generates cohesion, diversity, tolerance, etc., and, on the other, the extent to which cultural experiences are satisfactory (which also relates to repetition rates).

Questions are clear here: Do these new elements provide valuable information to understand and explain cultural practices today? Should any other important factors be considered?

Regarding the sociological dimension, the survey is pretty conservative. The survey applies to all Euskal Herria, that is, the Basque cultural and social territory, which includes the Basque Country but also the French Basque Country and Navarre. Sample is representative in terms of the historical territory and the size of the population where the respondent is from, gender, age and knowledge of the Basque language. The profile of the respondent is completed with information about the origin, family situation, educational level and socioeconomic profile. The personal profile will be crossed with the practices. These sociological dimensions were already included in the survey designed 10 years ago – the explanatory variables are the ones essentially new. Should any other sociological dimensions be taken into account?

Finally, there are some cross-cutting issues that raise generic questions. For instance, it is clear that there are some gender elements that need to be incorporated, but how do we do it in practice? By way of example, is it too simplifying the question about how the fact that something has been created by a woman has an impact on cultural consumption/practice? Regarding the digital dimension, how do we go deeper into it? As a last generic question, should we keep questions about factors hindering or promoting participation (which were removed)?

The box below presents a summary of the main questions posed, and which were the basis for the discussion.

How can we move past "traditional" questions and maintain comparability?

Does the approach based on participation types respond to current practices?

Do the new, added elements provide valuable information to understand and explain cultural practices today?

Should any other sociodemographic variable be considered that help to explain today's cultural habits and practices?

How do we operationalize complex issues, such as the gender issue?

How we can go further in depth in knowledge of digital participation?

Should we keep questions about factors hindering or promoting participation (which were removed)?

Discussion - Cultural Habits and Practices²

After Xavier Fina's presentation, the floor was opened for participants to express their views. Rather than a chronological reproduction of their interventions, what follows is a re-structured presentation of the main ideas raised during the debate, clustered according to the main questions posed. It must be considered that participants, in their interventions, referred both to the specific questions posed and to the general framework.

Introducing new elements and maintaining comparability

- Rather than traditional questions, there are *traditional practices*. But, even if practices are traditional, they need to be questioned again according to modern times.
- To ensure comparability, there needs to be a series of *anchor questions*, which stay more or less the same, while adding new elements according to the new developments of life and society. Traditional questions are the backbone of comparability. New questions are coming on top of this, and in 10 years they might become traditional questions as well.
- Traditional questions might still be relevant, and yet be less and less useful to understand and interpret reality as whole. There has been a *paradigm shift* – in the sense described by Kuhn, and that leave us with a path full of ruins that cannot be ignored. But we need to change our behaviour, new ways of doing need to be developed. One of the problems is that all new forms of participation (in the arts, within the digital environment, etc.) are very difficult to categorise and label, because they overlap, and result in new, distinct cultural habits. The categories and labels used in the 20th century are no longer useful.
- New forms of participation cannot be possibly analysed in quantitative terms only, as it was traditionally done, when we worked with more traditional modes of participation. It needs to be acknowledged that labelling practices can prevent us from understanding them, as well as that quantitative data do not provide us with the full picture. Instead, *a more anthropological perspective* is being adopted at the Osservatorio del Piemonte, focusing on people. Habits are being described in narrative terms, as part of life stories. Actually, for the 20th anniversary of the Osservatorio, a theatre group has been commissioned to build narratives that show how people behave. This representation of how people culturally behave may help us extract indicators that we can then be applied to a wider population. Both quantitative and qualitative, anthropological approaches need to be put together, so that we are not only narrative, but we start from a deep comprehension.

² Check the latest EU Statistics on cultural habits at Eurostat (2015).

- New cultural use and habits show us a new narrative and point at the need of matching quantitative and qualitative approaches, as well as at a natural link with innovation (link with the Smart Specialisation Strategy/RIS3) and the public area. At the EU level this narrative is transversal and a priority in line with the Juncker Agenda. The *regional dimension* is key in this narrative and the Basque Government is leading this message in alliance with the Regional Initiative of Culture and Creativity/RICC network. The Basque Government is co-leading the network.
- Along the same lines, on the *complementarity of quantitative and qualitative or narrative approaches*, a lot can be learnt about people's habits by looking at their consumption or at the use they do of social media, and the information we can obtain from social media. By ways of example, the Boekman Foundation tells about a research project in the area of Eindhoven, a very creative city in the Netherlands, on how culture is consumed in the small towns around the city, and, in order to get this information, social media data were gathered and analysed. These data are not narrative, they are partial, but they still provide us with a lot of information. The focus on people is needed to give meaning to a growing amount of data.
- *Comparison with other Spanish regions*: the BCO has always checked surveys developed in other regions, and variables have been incorporated in favour of comparability, particularly the survey developed by the Spanish Culture Ministry, which will launch an operation of this kind probably very soon.
- In the UK, where the survey on participation is quite long – over 1.000 questions, as it includes sports practices, the introduction of new questions is also a challenge. This is addressed by *discarding questions that are no longer relevant/used, or which refer to practices that are carried out only by a few people*. These are replaced by new questions – for instance, about new art forms or the digital dimensions.
- In the Netherlands, the introduction of new questions is preceded by *focus groups*. Fieldwork is needed to go beyond select, homogeneous groups – of white, middle-upper class people – and approach what one may call “non-users of traditional culture”. Before launching new questions and variables, we need to analyse if those are the adequate variables to explain what we want explain, and going to the field, testing our questions and variables with small groups, is extremely useful for this.
- There is a clear tradeoff currently at both the EU and national levels between providing an *as much accurate as possible representation of the complexity and specificity of the cultural ecosystem* (an ecosystem rather than a sector or group of sectors due to the highly intertwined feedback mechanisms linking the various areas of cultural and creative production), and becoming relevant enough for the policy agenda (and not just for the cultural policy agenda itself). From the research point of view, tackling the complexity and specificities to the highest level of detail is fine and desirable. However, in terms of cultural statistics and indicators, rather than providing a blurred, over-problematic picture that basically discourages non-cultural policy makers to deal with them seriously, it would be better to arrive at a *reasonably manageable and simplified toolkit* that can be usefully understood and used as widely as possible.

Approach based on participation modes

- Explaining change requires explaining the context in which change happens. The organization of the four modes of participation (receptive, creative, digital and in Basque language) seems to be an ex-post *clusterization* of some changes in cultural habits. If the objective is to see how change happens, that can be

synthetized in what, when, how and why cultural practice is taking place, and that would allow us to analyse both production and consumption sides. The proposed participation modes overlap, and this does not help to understand how change happens. For instance, digital participation impacts the how and when of the practice. But still it implies receptive and/or creative modes. Thus, a *context and process analysis* should be incorporated. Emphasis would be then placed on studying change in itself, and not so much on the participation modes, which would result from this analysis of change, as a clusterization of habits and practices.

- Another, growing participation mode – which is not included in receptive or creative participation, but rather is a “supportive” participation – has to do with *volunteering*, that is to say, participation in culture as volunteers. This participation mode has been recently included in studies in the Netherlands.
- *Different degrees of participation* might be considered, and not only a qualitative distinction between recipients and creators. This relates also to the digital dimension, where, as further explained below, levels of engagement can vary from reproduction of traditional modes of participation in the digital environment to radically new forms of participation.
- Have we agreed on giving the *same value to all types of participation*, and thus we are not interested in questions such as the means of access, whether participation is a route to market, a socialization form, etc.? From a cultural policy perspective, do we have a neutral look over the different types of participation?
- Not all participation has the same value but there is a political problem: cultural policies are structured and built in the last century and they are consolidated. But our task is to *understand what we have to face in the years to come*, without judging beforehand if it is relevant or not – we need to understand the landscape before us. So, is it possible to have data for Bilbao only, for instance? These data could be integrated in the next edition of [The Cultural and Creative Cities Monitor \(CCCM\)](#) where there are two related indicators of this kind: museums visitors and number of cinema tickets sold.
- Yes, correct, participation modes overlap and there is some ambiguity in the definition. But since there is a growing consensus that *cultural participation is a key source of spillovers and crossovers in many non-cultural sectors*, over-problematizing such ambiguities ends up de-emphasizing the possibility that cultural participation becomes a key policy indicator in a wider policy context. So better to adopt a standard that suitably refines the concept but clearly distinguishes between receptive vs. creative participation.

Sociodemographic variables

- It might be interesting to integrate the city perspective, considering the role that cities are playing in cultural strategies. The *Cultural and Creative Cities Monitor (CCCM)*, for instance, focuses on the city perspective : it is a new monitoring and benchmarking tool measuring the performance of 168 cities in Europe using 29 indicators, including some cultural participation indicators (i.e. number of museum visitors and number of cinema tickets sold). In order to make meaningful comparisons, the CCCM distinguishes between different types of cities based on similar population size, income and employment rate. However, the rural-urban relation is complicated in the Basque Country because rural areas are mostly integrated in urban areas, since the territory is small.

- The territorial or regional dimension can offer us integral answers. The cities dimension alone might not be enough to show us the real picture, being less strategic and not sustainable. The EU needs to open the dimension, and the EU Monitor can help us, as well as projects such as CREADIS₃, led by the Basque Government, or the European Capitals of Cultures with a more territorial dimension.
- Beyond sociodemographic variables, others might be included that refer to a *broader spectrum of leisure consumption*, since culture seems to be competing with these other forms of consumption. Even in economically difficult times, people might invest in other, non-cultural forms of leisure. There is a belief that, within the same cultural sector, the different agents compete among them, or that there is a competition between different cultural sectors, while the competitions takes place rather between the cultural and other sectors.
- *Cultural participation is reductively inscribed in the spectrum of leisure*. It has more and more to do with the fabric of everyday life as we seamlessly produce and distribute our own content, e.g. through the social media. This is important to note when reasoning about cultural “crossovers” with fields such as health, social cohesion or innovation.
- Variables related to *health or disabilities* (in relation to access to culture) might be included. Issues that affect accessibility, such as *ownership of a vehicle*, could also be included. The reference to health was also intended in relation to the potential impact of cultural participation to health conditions. Health could in fact be considered as an accessibility factor but also a factor benefitting from cultural access and participation, especially mental well-being, as [Cultural Access and Mental Health: an Exploratory Study](#) portrays.
- The mentioned “ownership of vehicle”, for instance, may be considered a *smart indicator*” While it is not as structural as, for example, the income level, it provides us with a possible profiling that is explanatory of certain consumptions or lack of them. Smart indicators could be further explored and developed.
- While maybe not in this survey, which is focused on participation, it would be interesting to further look into *the “non-user” sphere*, particularly regarding people with different ethnic backgrounds. In the Netherlands, as in France, the focus of cultural policy is to provide cultural opportunities for all Dutch, not only for those born and raised in the Netherlands, but also for those who are Dutch citizens now, as well as for both highly trained people culture-wise and people who are not interested. Demography of the respondents might consider these aspects too.

The gender dimension

- The gender dimension, and link with gender quality, should be checked both quantitatively and qualitatively. Issues to be checked could be the *presence of women in the direction spaces* of cultural structures in the Basque territory, or their *representation* in cultural or artistic terms, rather than simply obtaining the male/female participation rates.

- The BCO's approach so far has been rather traditional: measuring the presence of women in quantitative terms (e.g. participation rates). The challenge now is to go beyond this traditional approach and introduce variables that help explain *what this presence means or represents*. The information which will be extracted from the Statistic of Cultural Habits and Practices will need to be qualitatively contrasted. The BCO is now in the phase of building a model for this, which will be more consolidated in a few years.
- *Studies further developing the gender dimension* (for instance, of access to culture or on gender equality in some specific sectors) have been carried out at the European level, and they are very interesting to complement the contextual analysis, but they are complementary, different from population surveys like the one being discussed in this session.
- Even more interesting than participation, there are *gender equality issues*: what is the position of women, particularly compared to the position of men. And, beyond that, not only the positions they occupy, but also the money they get – which relates to the salary gender gap. Those are quantitative issues that help us understand the position of women and start tackling the gender dimension in specific terms. For instance, concerning creative participation, the question could be posed: when a woman makes a film, as a director, how much money does she get? This has been done wonderfully at the European level in the film sector³, but this information is missing in other industries and the Basque Country could be pioneer in this sense.
- Women are always first in *cultural consumption* (theatre, museums, etc.), and this is maybe something to be explained. As an exception, the number of male participants is higher in jazz activities. This, at least in Italy, is probably related to cultural factors (women are educated to be more participative), but in any case this is something to be studied, not only the male/female (un)balance in participation rates, but also the factors behind that.
- In the UK, participation is quite gender balanced in some areas, for example visiting museums and galleries. This probably reflects the fact that participation is often done as part of a group – e.g. people visiting as a couple or as a family, and that such participation will, by definition, be more gender balanced. In terms of formulating policy to influence participation, the determinants of group participation are likely to be different from individual participation.
- The fact that women are distinctively more interested in cultural participation than men should be more systematically addressed with surveys tackling the *motivational dimension of cultural participation and experience*. This could provide key insights in terms of the gender dimension of participation.

Digital participation

- Continuing with the idea mentioned above of overlapping between the different participation modes, within block 2 (receptive participation), some practices include the digital dimension (e.g. video-games, books, libraries with the catalogue online, or the media). This is thus a cross-cutting issue, and *having a separated block for the digital participation might not be the most appropriate* thing to do. As an example, in a recent analysis of data of an Italian survey on daily life, to study the relation between cultural participation

³ The work by Raveney (2017) on "Changes in the film (and the audiovisual) sector(s) re. gender equality from 2012 to date and their possible impact on greater inclusion of gender equality within the Compendium on Cultural Policies" can be checked for an example from the film subsector.

and civic engagement, the hypothesis was that the more engaging participation in arts and culture, the more people would be engaged. The problem is that there were difficulties to really identify “more” engaging activities as participation is not qualified (for instance, the survey asks whether people have visited museums and, then, more generally, whether they have used the Internet for cultural purposes). It would be much more interesting to ask about the mode of consumption for different fields (arts, theatre, films, etc.). This would also allow researchers and policy makers to make more in-depth analysis between different forms of cultural participation and other socioeconomic variables (civic engagement, well-being, etc.).

- Along the same lines, distinguishing digital participation as a separate category may be inappropriate. *Digital access is simply a channel*, but does not entail in his view a specific mode of participation that is opposed to receptive and creative.
- Electronic and mobile devices have fundamentally *changed cultural habits, use and access*: a good example is the case of consumption on demand (through subscriptions – e.g. to watch several series episodes). Books and libraries can also be accessed online, “on the go”, as well as press and online media more generally.
- It is very important to know if electronic devices are used in music, video-games, etc., as this comes across both consumption and creation. But it is also interesting to learn about general use of the Internet in two specific areas: the *sociological dimension of the Internet use*, on the one hand, and how people learn about different cultural practices through the Internet, what may be called “*the route to market*”, on the other.
- Digitalisation is changing all cultural practices. However, in some specific cultural subsectors, such as heritage, digital tools are still used to *translate traditional formats, rather than as an opportunity to invent something radically different*. The latter will most likely happen in the near future, and it will change the scenario of cultural goods and products.
- The digital shift modifies and develops *new forms of receptive and creative participation*. These new forms of participation need to be understood – what is the impact of the digital dimension on the creative participation, for instance? People’s interaction on social media, for instance, brings something new into creative participation.
- From an epistemological point of view, are we already at a point of *full integration between physical and digital participation*. For example, when asking someone “Have you recently been to a museum?”, would he/she reply “yes, I visited the Louvre”, if he/she did not go to Paris but visited the website of the museum? While there is certainly a trend towards this integration, are we there yet? How to deal, in practice, with both trend and reality? However, it might not be so much a matter of being ready or not. It might be rather a matter of knowing what people do and how they do access to culture. Only then, we will be able to understand and maybe qualify what is happening and the impacts that it is having on people and society.
- With regard to digitalization, the virtual reality developments will be very important for the cultural sector, but we are not there yet, quality is not good enough at this moment. Following the example about the Louvre, in the future you will probably be able to visit the Louvre without traveling to Paris – it will be *more about the experience of consumers and participants, rather than interaction with artifacts*.

- As researchers, we need to discuss on the importance of digitalization, see where it goes. While today it is only a part of consumption, the digital dimension's importance is certainly growing. Studies need to engage with this shortly, and consumption in digital environments should be considered as something *as serious as physical participation*.
- *Artificial intelligence* is also emerging in the field of art creation, and this also brings about issues of authorship, copyright, etc.
- Thanks to the digital component, people can have an idea of what they will find in a given museum before going there, for instance. This is *changing the market*, and the issue of reputation (i.e. one visits the Louvre because he/she knows that a series of masterpieces can be found there and it is a "must") becomes less central.
- From the point of view of participation, *interactivity* would not be understood as a relationship between user and producer. This would be crucial for the digital economy and for the new opportunities and the creation of new products and services, including cultural ones. In this sense, the closest future perspective points at a re-organization of the work for the production of cultural products, and the automatization or even robotization will end up impacting on the interaction ways, whether it is on the producers' or the users' side.
- *Access to infrastructures* is very important, as not everyone has access to a broadband connection to the internet.
- There is a *relation between basic knowledge of English and the use of the internet*. A sociodemographic variable about the level of English could be included.
- It would be interesting to check if *language use and language gap change across the different digital devices*.

The explanatory dimension and barriers/incentives for participation

- Questions about the *accessibility of cultural facilities* – e.g. traveling time – should be introduced/kept. Accessibility is not only to be understood in terms of distance, but rather of time. Policies have been made, particularly in the Spanish state context, aiming to bring cultural facilities physically closer, while it might be more interesting to reduce traveling time via public transport policies. Mobility data (or proxies) information could be extracted from public sources containing data on public transports or from satellite data? These could be more precise than survey data and their elimination help reduce the length of the survey.
- *Financial issues* that may be affecting participation should also be maintained in the survey. Pricing is very important for some. There might be other factors, such as lack of interest. This is important since interest is what makes people spend money on something (just think of the price of a football match). Of course, the lack of interest requires complementary qualitative research and strategies to be fully understood and faced.

- With regard to *distance to cultural infrastructures*, is it true that everything is near and accessible for everyone in the Basque territory? This should be maybe double-checked, since it is often an important aspect affecting participation.
- We share a curious attitude, since we are always looking outside, at economy, society, etc., where we look for explanations about cultural issues. We love to learn about the cultural and social impact of culture, but we know very little about the cultural impact of cultural activities. Along these lines, we analyse issues of cultural accessibility to cultural goods and cultural consumption, but not so much what are the *cultural barriers to cultural consumption*, which can affect the rich or people at different sociodemographic levels. These barriers have an influence in the choices we make as cultural agents, and they are very important to explain our cultural habits. We should focus on cultural barriers, cultural tools and cultural accessibility, which are key to explain why some types of consumption are raising, some other types are decreasing, etc.
- *Some spaces are linked in the imagery with the cultural class, while some others are seen as spaces for everyone*. That explains why, in some towns or villages, masses attended operetta representations, for instance, in the squares, but are not entering theatres. This is about space and content (the offer in the first spaces was more popular), and it is an interesting aspect to study, even if not possible to do it in this survey.
- The point above poses fundamental questions in terms of cultural policies. In the policies of democratization of access, it has been considered that barriers were mainly price and distance. However, the people who do not feel invited to participate will not participate even if they live next to a cultural infrastructure and participation is free. Therefore, which other variables can be taken into account? This is what the BCO wants to introduce in the survey with the new, *explanatory dimension*. There are some intuitions (childhood cultural environment, education, etc.), but what other issues could be considered?
- We now tend to have a *broader, non-judging look over cultural participation and consumption*. This "generosity" in the concept may be hiding some inequalities: we may be accepting that people like to participate/consume in a certain way without critically questioning that they might have not had the chance to do it in a different way. This questioning needs to be made and cultural policies may have to react to this too.
- The last EC survey on cultural participation, [*Culture statistics - frequency and obstacles in participation*](#), highlighted *lack of interest* as the main barrier to cultural participation, before lack of money. It is important to know the reasons for this lack of interest, as well as in which other activities people are interested.

Financial reasons were not preponderant as they were pointed to by less than a fifth of those not going to the cinema and a live performance, and by less than a sixth of those who did not visit cultural sites. Most non-participants indicated a lack of interest and 'other reasons' as the main obstacles to their taking part in cultural activities. 'Other reasons' can include for example a lack of time, family responsibilities or alternative channels of access to cultural content (TV, DVD, streaming, etc.) (Eurostat, 2017).

- The focus on people who do not participate in culture because they do not feel they belong is key. This is a very much overlooked aspects in current surveys about culture. The point is that very little is known about the *causes of lack of participation*. "Lack of interest" is more the symptom than the cause. There could even be space for a specific survey entirely dedicated to non-participating people. If this barrier is not broken, social support for cultural policies in the future is at increasing risk. At the same time, it is not really an issue of audience development – which is a paternalistic concept that presumes that we know better about what

should be good for these people than they themselves do. It is much more about empowerment – providing people with the skills and experience to make an informed choice, to gain a better understanding of what they like and what they could be interested in pursuing further, also in terms of active, creative engagement.

- We need to understand better how creative participation works in *building long-term motivation to access cultural opportunities*. But creative participation is much more difficult to categorize than responsive one, and in lack of clear protocols, it is difficult to gather really usable statistical evidence. This is again a topic that calls for substantial experimentation and research. There is also a strong, well-known interaction between the creative and the social dimension of participation. How good we are at distinguishing the contributions of each dimension in terms of appreciation, commitment, wellbeing, etc? Not much, so far.
- In Italy there are a lot of studies of the *cultural level of the population*. From the Italian Ministry of Culture, it is maintained that 75% of Italian people are not able to understand a page of a newspaper (they can read it, but not fully understand it, even less make a summary of it). If it is so, are we sure the problem is one of audience development? Because participation is growing and part of that 75% is actually participating. But basic tools to access some cultural expressions are lacking.
- In Italy, scientific studies (by Antonucci, for instance) asked visitors out of museums about their experience, and showed that many of them referred to pieces that were actually in other museums. What you see interacts with the network of knowledge that each of us has, which is the result of our past experience. Beyond the anecdote, this shows that we know very little about the mechanisms through which knowledge works, and which are *the barriers and the basic cognitive tools in play*. This is why the city of Turin has decided to contribute to the EYCH 2018 by launching a reflection about access to heritage: how do citizens access heritage? What are the barriers – cultural, physical, social, educational, etc.?
- Among accessibility issues, *cognitive costs of cultural experiences* should be considered, and not only physical accessibility, travel distance or financial barriers. Cognitive barriers also clearly interact with motivational dimensions (see above). There could even be some tradeoff between cognitive and financial costs to some extent. And of course, this also deeply related to the issue of lack of sense of belonging of certain social categories. What are the basic sources of deprivation that make cultural experience much more cognitively costly for such categories than for the usual cultural participants? This is a dimension that surveys about habits should address much more systematically.
- In the Basque Country, previous studies have shown that an increase in cultural offer does not always correlate with an increase in the use. In some areas, there is even a problem of over-programming and lack of coordination. This is somewhat in line with the CCCM. An abundant cultural offer is often associated with higher number of visitors but not always. With regard to formal *cultural education*, there is certain delay but we are progressing – the appreciation for culture is growing and that is probably creating new generations of consumers and practitioners. But, in addition to that, smaller studies have shown that activities that involve a *more creative participation* are those actually building the consumer/participants of the future. Activities with workshops segmented according to the population, for instance, allow people to distinguish what they like/don't like, what they can/can't practice. In terms of cultural policy, therefore, rather than having an offer in all areas for everyone (which is good, as soon as it can be managed and coordinated), it is interesting to distinguish between what creates habits and what does not create habits.

And what studies are showing is that habits are more often created if access and creative participation are enabled (this is one of the results of the panel with the youth).

- A further emphasis should be placed in the survey on cultural education. To study the effect of educational variables on cultural participation, the [Programme for International Student Assessment](#) (PISA) could be checked and used to complement the information coming from the Basque survey.

Others

- It is a specificity of the Basque context the way we interact with our heritage and our public cultural agenda. We are *moving between the more open, traditional fora, from collective interactions in the city, and a more quotidian use of culture*, at home. The study of cultural participation should also include social and collective activities, and not only be limited to the private sphere and traditional cultural practices (cinema, theatre, etc.).
- In the French Basque country, some big and small events are organized which are attended by non-Basque-speaking people. The *social dimension of these events* is to be emphasized.
- Another variable to be observed is the *international dimension of the cultural offer*: how much of what is offered comes or is created in the Basque Country, and how much is "imported" from outside, at the national or international level, and even the origin of participants in the cultural activities.
- Cultural diplomacy is a key strategic aspect for the Basque Country, in line with the EU Agenda. This topic is a key and emerging point concerning the EU External Cultural Cooperation Strategy and the regional dimension.
- Regarding the *presence of the Basque language in the cultural consumption and practice*, the indicators were introduced 10 years ago, and some information can now be extracted about the fields where this presence is higher, particularly thanks to the habits panel mentioned above. It provides information about how the young people make their choices among the offer at their hand, including the leisure offer. The idea is to build on this data to develop a more focused, probably qualitative study – contrasted with focus groups – on the balancing or unbalancing of habits with regard to the presence of the Basque language. This would be a later job, after the Statistic of Cultural Habits and Practices.
- The *influence or role of multilingualism in cultural habits and CCIs* is key (e.g. is poetry read in Basque languages?, are short films watched mostly in Spanish or Basque? If there was more Netflix offer in Basque language, would it be a business opportunity for the film industry?). In other words, contents should be included on how the chosen language impacts out cultural consumption.
- An important change, which happened 40 years ago, before digitalization, is the *diversification of cultural practices*. People's cultural interests are now wider as well as the entertainment offer available nowadays. Audience is not as "loyal" as it used to be, and that led to many cultural infrastructures losing part of their audience. This is a question that needs to be taken into account, and it is not that much a question of barriers/incentives, but rather a contextual issue, a framework for the survey.

- Other *behavioural and processual issues* could be added to the survey, about if participation is planned beforehand (e.g. tickets are bought some time in advance), if consumption is carried out as a group, if there is a clear leadership in the group, or if the group usually transit different spaces in the city, among others. This could be linked to the socio-demographic profiling, but also to the content, and would allow us to analyse the content from the point of view of the context and the process. These are integrated in the panel study with the youth. It is more difficult to include it in the survey.
- We should place much more emphasis on the *behavioral effects of cultural participation* in terms of both cognitive and emotional responses to cultural stimuli, and how this changes people's attitudes and behaviors in other, non-cultural spheres. This is by far the most important and promising form of impact we can imagine for culture.

As a wrap up of the discussion, Xavier Fina highlighted that the reality of cultural consumption and practice is so complex that it is always simplifying to try to reduce it to a survey. It is unavoidable to navigate between the dissatisfaction for the survey always being uncomplete and the ambition of wanting to know it all. We need to be operational but without renouncing to broader reflections that can help us pose better questions to explain reality.

A few conclusions can be drawn from the discussion presented above:

- There is always room for improvement, and this survey is obviously not an exception.
- Other, existing studies can help us complete our approach, and we should not aspire for our study to be auto-explanatory.
- Qualitative elements would help complete this work.
- There is a need to interpret data and that needs both the knowledge of the territory and the local context, and the external, expert knowledge. Process does not end with data collection and exploitation but more reflection is needed before, during and after that.

Finally, there is another relevant challenge: our research path goes parallel to cultural policies, in the sense that they do not meet. While we cannot be constrained by cultural policies and need to go beyond them, a balance needs to be found. Ultimately, we should always have a vocation of informing or influencing policymaking. While we are discussing about multiple, complex participation, cultural policies are still much linked to funding big, consolidated cultural groups and infrastructures. What can be done to translate this knowledge into public policies?



CULTURAL AND CREATIVE INDUSTRIES

Sabin Goitia Goienetxea, Advisor for CCIs of the Basque Government's Department of Culture and Language Policy, was in charge of chairing the afternoon's session, devoted to the Cultural and Creative Industries (CCIs) and, more specifically, to the expansion of the Statistic of Arts and Cultural Industries to cover the Creative Industries too. He presented Aintzane Larrabeiti San Román, partner-consultant at ICC Consultors and who acted as coordinator of technical assistance at the BCO from 2006 to 2010.

Issues to be debated - Cultural and Creative Industries

In her presentation of the main issues to be debated, Aintzane Larrabeiti introduced the elements that guided the design of the new Statistic of the Arts and CCIs, not detailing the whole conceptual and reflection process that support this design, but focusing on the issues that generated more doubts during the process.

Two major works by the BCO form the background to this new research⁴.

- On the one hand, the [Statistics of the Arts and Cultural Industries](#), a major statistical operation which has been conducted every two years starting in 2009 (with data from 2007), and which in the first place analysed the production and exhibition of the performing arts, the visual arts, the audio-visual production and the recording production. This statistical operation was progressively expanded, and books and records trade were introduced in more recent editions, as well as the publishing sector. This is the framework where creatives industries will be now introduced.
- On the other hand, the BCO also takes advantage of other data sources which provide information about the [enterprises, employment and the job market](#). Thus, since 2010 the BCO has analysed data obtained by Eustat (the Basque Institute of Statistics), which provides the directory of economic activities of the Basque Autonomous Community, from which information about those activities linked to the cultural industries is extracted and, since 2013-2014, also about the creative industries (architecture, design, etc.). In the field of employment, data by Lanbide (the Basque Employment Service) are analysed, which provide information about the job demand, as well as on the contracts registered every year. In the last report we saw that, since 2014, there has been an increase both in terms of employment and number of enterprises in the CCIs sector.

A conceptual framework was built not only to be used as the basis for the construction of the Statistic of the Arts and CCIs, but also to have a broad and critical understanding of the incorporation of CCIs to the traditional cultural and cultural policies fields. In order to do so, the main international reference models were analysed, to favour comparability, while the singularities of the Basque context are also taken into account. With regard to the latter, the language industry will also be included, as it is particularly relevant in this context and there is a rich and inter-connected fabric in this subsector. Another singularity is found in the weight of gastronomy in the Basque cultural and creative panorama.

⁴ For more information on the cultural and creative sectors in the Basque Country, see Sinnergiak Social Innovation (2013 and 2014), Echeverría (2017) and previous works by the BCO.

The BCO's approach to CCIs is namely cultural. Three criteria have been identified as common to all CCIs: they produce cultural expressions, they have a symbolic component, and they generate intellectual property rights. In accordance to this, traditional sectors of cultural policies are included: heritage, the arts and cultural industries. In the creative field, architecture, videogames, design, advertising, fashion, language industry and gastronomy are also incorporated. The bigger doubt was what to do and how to deal with *digital contents*. From the contents perspective, digitalization is present all subsectors with varying degrees – it is very clear in the video-games sector, but also in music or the audio-visual sector, resulting in almost a de-materialization in many of the traditional sectors. Therefore, considering the digital a separated sector by focusing on content would mean extracting from other sectors many contents which are essential to them. From a more operational point of view, the digital sector often includes software development, digital applications, etc., that is to say, the ICT sector as a whole. Then the doubt emerged: why should the digital sector – thus understood, from a more operational point of view – be included, if some others which are also crucially complementary to the CCIs (e.g. tele-communications) are not? Finally, it was decided not to consider digital contents as a separated subsector.

The central question to be discussed here is: How should digital contents be handled in the framework of CCIs?

Once the working framework for CCIs are defined, what are the *inclusion and exclusion criteria*?

- Firstly, regarding the *value chain*, a distinction is made between the arts and cultural industries, on the one hand, and the creative industries, on the other. In the first case, the ensemble of roles of the value chain is considered: creation, production-edition, distribution, trade and exhibition, preservation, education, management and regulation. However, as far as creative industries are concerned, the focus has been placed on creation only.
- Secondly, regarding the *application of subjective criteria*, value judgements are not applied to the cultural industries. This means that when analysing the publishing subsector, for instance, we will not consider the kind of contents they publish, all contents are included. On the contrary, value judgements need to be applied to the creative industries in some cases. For example, if we are talking about gastronomy, we are referring to the so-called "haute cuisine", so some subjective elements certainly apply. Notwithstanding, there is an effort to build an inter-subjectivity, by reaching consensus with stakeholders, via internal discussion or looking at what other actors are doing.

Regarding inclusion and exclusion criteria, is this a reasonable approach? Is it feasible?

The approach described above – with regard to the value chain and the application of subjective criteria, is problematic in the specific case of some subsectors. In practice, in the case of fashion, it is hardly impossible to separate creation from production, distribution or trade. It is hard to separate the essentially creative part of their activity. Similarly, in the case of design, for instance, of furniture, most companies are also manufacturers, and it is therefore very difficult to detach the creation part from the rest of the value chain. In relation to this, the following questions were posed to the participants in the session: How can these specificities be resolved? What solutions do you provide in your environments for these specific sectors, or for others which can be also considered exceptions? Or, more generally, what can be done with what does not fit into the designed model?

On a separate issue, the target of the study is companies. However – particularly within the creative industries and also in the cultural industries, although a bit less – there is a very high number of *self-*

employed workers. Thus, it is impossible, from an operational point of view, to try to approach all the agents registered in the census. Actually, in the original census built for this statistical operation, only a 30% are companies. In some cases, the rate of self-employment is particularly high: an 80% in architecture, a 65% in design, and an 85% in translation and interpreting (included in the language industry).

Concerning the *contents* included in the operation, the objective is that the information to be collected can be assimilated to the information that is already being collected since the year 2009. In accordance to this, information about employment, disaggregated by gender and professional profile, will be collected. Besides, economic activity data (invoicing, incomes, expenses, etc.) are also planned to be collected. We try to ask for as less information as possible – that is to say, information that allows us to make a rich analysis, while keeping it to the minimum because we learnt from experience that it is very difficult to get companies to reply. The BCO has also worked with representatives of associations and key stakeholders in each of the subsectors to find out what kind of information they would like to have, and it is now in the process of getting feedback from them and get to a consensus on what is the minimum information to be collected to provide a good portray of what each of them does. As a result of this dialogue, data about subcontracting, the markets they work for, and the profile of their main clients (institutions, private sectors, etc.), among other issues, are also included, adapting the questionnaire for each specific subsector.

Two main questions emerge here: how to deal with companies made up of self-employed people?, and what types of content should be included in the operation?

Finally, some general questions are:

- How to approach distribution in the cultural and creative industries? It is very different in the distinct subsectors. For instance, in the performing arts, there are companies distributing Basque plays outside or bringing international plays to be performed by Basque companies. In the publishing sector, on its part, distribution is rather link to logistics between the publishers and the book shops. Besides being different for each subsector, distribution is undergoing a relevant process of concentration in a few hands. Therefore, in some subsectors, there are very few companies to ask about distribution.
- How to analyse handicrafts? How can we approach them if we cannot build a census based on the economic activities' directory? In the Basque Country, each county council has a register of artisans. This might be the starting point to build upon, but it is certainly a sector which has important specificities.
- How to approach sectors to which subjective criteria apply, such as the haute cuisine? What criteria may be followed to include/exclude companies in the gastronomy sector? What kind of activities, within gastronomy, should be included?

Is the approach based on the value chain and the application of different criteria to the cultural and the creative industries reasonable ad feasible?

What to do with digital contents?

How can the specificities of the fashion and design sectors be approached?

How to deal with companies made up of self-employed people?

What kind of contents should be included in the analysis?

How to approach distribution in the CCIs?

How to analyse handicrafts?

How to approach sectors to which subjective criteria apply, such as the haute cuisine?

Discussion - Cultural and Creative Industries

The main ideas raised during the debate are presented here below, organized around the main questions posed by Aintzane Larrabeiti in her presentation. As she explained, creative subsectors were not included 10 years ago. While BCO has already, thanks to the study of other data sources, a panoramic view of these subsectors, the aim now is to zoom into these domains to better understand them in terms of employment, their relation to the cultural subsectors, etc. It is in the definition of this zooming in that some doubts arise. However, the debate on the operational aspects tends to take us back to the big, conceptual debates. This is visible in the summary presented here, where the contributions on the definition and delimitation of the subsectors and its relation to policymaking take most of the space. Some of the ideas touched various issues, so the ideas' organization below must be understood as just one among the multiple possible ones.

Identification of CCIs: the value chain and criteria applied

- Orkestra (Deusto University) has conducted research on CCIs focusing on *economic competitiveness*, not so much from a cultural point of view. More specifically, a study has been carried out in the city of Vitoria-Gasteiz to characterize CCIs in terms of employment and number of establishments in the city, comparing to the other two Basque capitals and the Basque Country as a whole. A hypothesis has been also tested in an exploratory way: the idea that CCIs, and particularly the design subsector, beyond their own particular value chain, influence other, "hard", manufacturer industries in the territory. In order to do so, a study has been developed to explore how to check the economic impact of CCIs beyond their value chain.
- There is a general *problem of definition and of lack of common references and frameworks of understanding* across Europe when it comes to the CCIs⁵. Depending on the perspective from which studies are designed, the definition might change. For example, studies emphasizing the economic impact tend to be more inclusive in their definition, because it is also a way of showing the strength of the sector before others.
- In the UK, a *definition of creative industries based on occupations* in the labour market has been adopted, with certain occupations being deemed creative and creative industries being those that employ a high proportion of creative workers. A labour market based approach reflects the central role of human talent in creative activity. This approach may also be applied to digital and cultural sectors. The job-based occupation methodology has been developed by [Nesta](#) and the international standards for sectors by [NACE](#)

⁵ For more information on the measurement of the value of cultural and creative sectors in Europe, see Soendermann (2014). Relevant reports by the European Commission on the cultural creative sectors can be found at European Commission (2017 and 2018), and Austrian Institute for SME Research and VVA Europe (2016).

and occupations by [ISCO](#). A content-oriented approach to definition would be challenging given the range and complexity of products and services generated by creative activity and the absence of standardised measures of these. However, from a conceptual and methodological viewpoint, this approach is more robust than the one based on sectors. In order to implement it, it is necessary to check whether the regional data are sufficiently detailed to cross jobs with sectors.

- In the UK the functions of cultural and digital policy are combined in a single department. This colocation relates to the central role of the digital revolution in large parts of the supply chain of cultural activity, for example visual effects in films and electronic music. This colocation is one of the things that enables a broad definition of CCIs.
- In EKE there has been a *cultural tourism* project involving the tourism office and also digital contents. Cultural tourism has not been included in this statistical operation as a sector in itself because, among other things, it is managed by other institutions and with other policies, and furthermore, other indicators related to hotels, restaurants, etc. should be included. It is certainly very much related to the CCIs, but a line needs to be drawn somewhere. Cultural tourism is usually not considered as a separated sector, but as a cross-cutting one, which is impacted by some of the activities that are tackled in this statistical operation (the audio-visual [considering festivals in the Basque territory], heritage, etc.).
- Similar discussions are going on in the Netherlands. Sports, tourism, recreation and nature, among others, are left out because they are already worked by other policy departments. The definition of CCIs is really focused on culture, but a very complex debate was held anyway on what should be included. It was decided to follow the *ESSNet methodology/guidelines*, although excluding the translation and interpreting subsector, which is left out.
- In the Netherlands there was the same issue with *production and distribution*. It was decided to include manufacturing of cultural products such as musical instruments, but some other material products such as photos or photo cameras are not included, since they can also be used for other, non-cultural purposes. The same applies to, for instance, the paint you need to make an art piece is considered – but, once the piece is created, all related activities (trade, distribution, etc.) are included under the CCIs. However, this is indeed a grey area, and it is very complex, since you can always find an exception to whatever decision you make. On the same topic, the [Fondazione Symbola](#) in Italy is also doing a very in depth research work on definitions for the Italian Ministry of Culture.
- All countries in Europe are facing the same problems when designing this sort of studies, and different solutions are being adopted in each case. This makes international comparability in the CCIs field very difficult, unless it is decided to adopt a *modular structure* with the relevant codes in each case (e.g. a country could decide to include gastronomy or not, or tourism, as Austria did because for them it is important, but it is included as a separated module that can be removed for a comparative review). A common, European definition should be reached. The EU and Eurostat are still working on that and a modular solution could be really helpful to ensure both comparability and that national/regional particularities can be included. If we would be able to produce results that are fully comparable with Eurostat's and then show the results based on our own definition, we could set an interesting benchmark for other countries and regions.
- A modular approach is best for surveying cultural habits, with a nucleus of anchor questions (possibly evolving over time, but relatively slowly) and some context-specific modules. And new computational social

science approaches to content analysis of social media content may be tremendously effective in this regard, as it is already happening in other fields.

- There is an added problem for comparability, which has to do with the fact that *each country's statistical tradition* is difficult to change.
- One may wonder what the reason is to put all these things together under CCIs. MEP Silvia Costa, for example, very honestly explained that it is a question of policy or rather a political question, in the sense that it is a way to *weight culture in economic terms* and that it is not overshadowed by other, more priority areas such as the economy. If this is the objective, then we need to get to a common definition to have an acceptable rhetoric.
- If there are other objectives, then several problems need to be faced. On the one hand, there is *not a single policy for the sector*. It is a sector where you can have many different policies (e.g. policies targeting libraries are very different from those addressing the design subsector), and each subsector needs to be fully understood.
- Another reason to bring together the cultural and the creative sectors is that they share cognitive processes, and that creativity is the means to bring *innovation into the cultural sector*. The latter is much needed in the Basque context, where the cultural sector is highly subsidized.
- We should ask ourselves if we really have the competence or the *capacity to influence policies*, because definitions may change depending on that. There was an interesting field experience, introduced by the [European Cooperation: the Open Method of Coordination](#) (OMC), which worked with the CCIs' sector, but the person in charge of culture was not the one responsible of implementing the results, so the experience ends up being dysfunctional. It is important to establish a direct link between experts and people in charge of policies so to make sure that decision makers truly endorse the results of the research for policy purposes.
- *A sector is not needed to make a policy*. If we look at the industrial sectors, it can be observed that policies do not always follow definitions, sometimes they do, and sometimes they do not.
- In the Basque context, policies are made on creation and on culture. But creative industries are often dispersed in terms of policies. The Basque Government's approach is not a purely cultural one, but one of culture and economic promotion at the same time. Within RIS3 [Research and Innovation Smart Specialisation Strategy], a *common policy for culture and economic development* with different lines is being developed. Some creative subsectors are closer to culture, some others are closer to economic development, but the aim is to give a response to these subsectors being dispersed in policy terms. The cultural sector already has its policies and resources, and it is not the idea to take those resources and re-distribute them including now also the creative sector. The objective, on the contrary, is to have an integrated policy with economic development and develop a policy for which competences are already defined. This organization of the sectors is even more relevant in the Basque context, where cultural competences are highly distributed among the different levels of governance.
- Along the same lines, *insofar policies exist, there is a sector*. Policymaking is certainly delimiting a field of action. It is not that sectors exist in a natural and permanent way, but there is an important component of the existence of sectors that has to do with the lens through which they are looked. Similarly, a sector's self-awareness constructs the sector, and this happens not only for the cultural and creative sectors, but for

all economic sectors. To sum up, sectors are relative, but that does not imply a lack of consistency – there is logic behind and this logic is linked to policies.

- The statistical operation is planned to be repeated every two years. The inclusion of the different *creative subsectors might be progressively included* and, in any case, their approach will for sure be improved in every new edition.
- Also at the European level, *culture is now considered also as an economic sector*. But, while there is still much to be done in terms of policy, there is much more awareness today with regard to culture as an economic sector and, as a consequence, of artists as workers, and not only as people driven by their passion for the arts and culture.
- The *impact of policies for the cultural and creative sectors* should be further assessed. The OECD would like this impact to be further measured, as it seems that it is highly questionable and that money is not always well invested, and it is public money in the end.
- There is a *risk* that, if everything is included in a sector, politicians may ask, for instance, why a library is not a company, why its business model is not working? Not all cultural and creative activities are based on business or company models. And this is a bit scary, but this is how it is. There are elements in common and more synergies could be found and nurtured between different subsectors to make sure that culture contributes to our economy and society. Differences and complementarities between the various subsectors are explained in various papers, for instance, [Smart endogenous growth: cultural capital and the creative use of skills](#). In particular:

Following Cunningham et al. (2008) consider four models of the possible relationship between the cultural and the economic dimension. They can be labelled as follows: the welfare model, the competitive model, the growth model, and the innovation model. Traditionally, as already emphasized, the study of the cultural economy has been dominated by the welfare model, based on a market failure argument which claims that it is in general impossible for a private firm to earn enough from cultural activities to cover costs, let alone to make profits. The only exception are the cultural industries, characterized by large and industrial-scale production, often controlled or directly managed by multinational enterprises. In this situation, the reasoning goes on to say, a market for cultural value exists, and the behaviour of profit maximizing firms would be similar to that of any other profit maximizing firm (the competitive model then applies to themovies, music and broadcasting sectors, and to some part of the publishing and print sector). Models (3) and (4) introduce in the analysis the role of creative industries, giving particular emphasis to the impact that they may have on the general level of economic activity. In the growth model, the turnover dynamics of creative industries is regarded as an important growth driver, because of the numerous spillovers which originate from the creative sectors into other productive sectors, such as from games to simulation and virtual reality training in aerospace, from cutting-edge design to quality manufacturing, and so on. More generally, the innovation model suggests that the economic value of the creative industries stems from their contribution to the production of new ideas or technologies, independently of whether cultural industries are a proper industrial sector or not, in that, irrespectively of this, they provide a stream of symbols and meanings that stimulates innovation and technological progress (Bucci, A. et al., 2014:36).

- CCIs include very different actors, some publicly subsidized actors to more commercial ones. Sectors are very diverse, and it indeed difficult to make policies to include them all. But, one possible example of a case where sectors are coming together would be a blockbuster film based on a novel which portrays historic

sites of a city and employs a lot of visual effects. There are also some cross-cutting issues like some specific competences that can be applied to different domains (such as design, architecture, etc.), or intellectual property issues. Thus, given the diversity within the CCI, an option would be to focus on *promoting the different subsectors' coming together and on the cross-cutting issues*.

- In Italy, a general framework was designed and then several half-a-day *panels with experts with each of the subsectors* have been promoted along the year. The main problems are identified, summarized, discussed, further debated, etc. This is sometimes difficult to match with the timing of policymaking, which often requires fast reactions. The decision to proceed this way was based mainly on the lack of time and funding but, in any case, this proved to be a useful way of proceeding and it is also a way of building bridges between policymakers, experts and the sectors.
- At the EU level there is a common and clear view that the CCI have a potential for innovation (both technological and social), creativity, regional development, external affairs and cultural diplomacy, as well as to be build a new narrative and EU values. But a balance between creativity, cultural cooperation, CCI, and economy and culture as public/territorial agendas is needed. The CCI's link to the Smart Specialisation is clear – this can be an answer within a mature ecosystem. Several EU regions are in this line.

Digital contents

- Orkestra took the subsectors corresponding to the CCI in the Basque smart specialization strategy, and matched them with the *CNAE codes*. As their approach is industrial, rather than only cultural, they kept digital contents but limiting it to the ICT subsectors, and more specifically to applications and content software, because it was understood that digital contents are indeed present in all subsectors. These two specific activities correspond to two CNAE codes: 6201 (activities of informatics programming) and 6202 (activities of informatics consultancy). This provided a small sample of companies that, while belonging to the industry sector, have a creative component too. But is that a creativity linked to arts and culture? This is the question that we should try to answer. Otherwise, any sector can be creative. The process was almost an eliminatory one: the CNAE codes which referred to other CCI's subsectors were left in those subsectors, while only those codes linked to digital contents and not referring to other CCI's subsectors were left as digital contents' subsectors.
- A question needs to be posed about *what we understand by digital contents*. Without a shared reference at the European level, the approach proposed by Orkestra seems reasonable, but the question remains about if we are leaving something outside.
- Also from the perspective of economic promotion, an internal work was done in Beaz crossing some CNAE codes in some specific sectors. In the specific case of the creative industries, there was a separation of digital contents, not based on the CNAE codes, but analyzing the company. They at Beaz consider that digital content companies are those *creating content for a digital format*. In KEA's [Economy of Culture in Europe](#) study, ICT and communication would be included in what KEA calls "connected companies", which can add value to their services or even create new ones through the digital contents created by others.

Exceptions: specificities of the fashion and design sectors

- The design subsector is crucially important because it is very close to what is happening in the cultural sector and the paradigm of sustainability. Design as a process is very much linked to cultural policies, as it has to do with the changes in the cultural habits of the people who use the designed products in their daily life. Thus, *design has currently an impact on social design*, and on issues related to social conditions, diversity, etc.
- In the study carried out by Orkestra in Vitoria, the *fashion sector was limited to production*, and a stronger focus was placed on design, because the aim was to explore the conception of actors in the design subsector in the city of Vitoria.
- In the UK, those working as designers are considered as *creative workers*, and industries employing a large number of those (and other creative) workers would be considered creative industries. The creative economy is measured as those working in creative industries plus creative occupations in other sectors.
- In Beaz, both for fashion and design, *what is prioritized is the existence of design, as in ESSnet*. Some fashion companies are also manufacturers and they have a large production, but they are not the majority. In design, Beaz focuses on industrial design and they look – among the candidate projects to receive support – for projects for the establishment of new design studios, and for projects that allow existing studios to generate new, own products. That is how the distinction is made, and projects are analysed on a case per case basis. We find another example in the KEA [Feasibility study on data collection in the CCS in the EU](#), specifically in the design section (p. 52).

Accessing self-employed people

- Self-employed people should not be ignored, since they are the ones who *most need policy support*. They are not strong actors; they do not count with the support of big lobby groups.
- While self-employed people are included in policymaking, it is *statistically difficult to include* them in the operations.
- What can we do to approach the *70% of companies made of self-employed people* in the creative sectors? Even if a big investment is made, they will probably not reply. The BCO's idea is to carry out a qualitative study, understanding that their needs and ways of doing – both in the cultural and creative sectors – are very different from those of larger companies. The aim is to find out how they get to develop as companies, and how they relate to other actors.
- Here again, to approach self-employed people, the *occupational perspective* might be useful, to go beyond traditional measurements. Occupations can be quite directly linked to the organization of work, that is, the working conditions. This perspective connects with the atomization in these sectors, but also with the dualities technological/non-technological innovation, product-process, etc.
- Looking at occupations, we can get a very clear picture of what are these people's occupational profiles, their skills and competences, and their ways of working.

- The Netherlands faces the same problem of reaching self-employed people. Official statistics (e.g. Chamber of Commerce) cover how many organizations there are, but nothing beyond that, because these actors do not reply to statistical consultations. This is not easily solved unless you opt for *focus groups*; it is very complex to quantitatively approach all these people. In the Netherlands they try to reach out to them through cultural organizations (such as the Boekman Foundation), but response rate is still very low. They actually have no time to reply to your queries.

The shockingly high 70% of self-employed in the creative sector suggests that working conditions are probably not good in the sector, and brings to the fore the need to promote a *creative labour agenda*. In the Netherlands, some signals have been sent to politicians already, and while much remains to be done, some funding has been granted to develop this agenda. This is still at a very early phase, but significant progress has been made in terms of awareness-raising (e.g. to make museums pay a fair amount of money to artists when their works of arts are in an exhibition – whereas, in the old days, the museums’ point of view was that the artists should be grateful with the “free publicity” for his/her work). Another experience to look at is [SMart](#), an agency that has developed a novel model to pay artists based on mutual support. It exists in eight countries. In Italy, some professors are looking at it as a potential solution to improve the working conditions of free lancers in general.

- You need to give these people *incentives to respond*. There must be something on the table, in terms of policy, for them to engage/respond. Something like the mentioned creative labour agenda could be a good incentive for self-employed people to participate. Maintaining good relations with associations and networks is also positive.
- *Listening should precede asking for data*. The latter is suspicious, while the first expresses interest in learning about what happens in the sector. Thus, people are more willing to tell about their experiences. This also entails a change in terms of the analytic tool to be employed.
- In the UK, approaching self-employed people is also a challenge, but measures of this activity are typically obtained through official surveys. The UK creative industries trade association (The Creative Industries Federation) has undertaken specific work on freelancers. With regard to *small companies*, Nesta has carried out, work in the video-games sector, to obtain information about the companies in this sector, from sector related websites e.g. those that document past games. This information is then contrasted and matched with the companies’ registration details, allowing a more precise accountancy of the companies in the video-games sector. This process is not necessarily easy to scale up for the CCI as a whole. However, along the same lines, text on company websites can be analysed to determine the nature of their activities and this then used to assess the activities it is involved in.

Analysing distribution, handicrafts and the haute cuisine

- Distribution is a general issue, not only in the Basque country. Big companies are taking all the distribution. Take this at the statistical level is a problem in itself. We need to go to a broader, more trans-sectoral concept of distribution.

- With regard to handicrafts, the good thing in the Basque context is that county councils have their administrative registers and all the information (in the cultural department in one case, and the economic promotion department in the two other cases). The BCO is thus doubtful if handicrafts should be included in the statistical operation or the existing data should be used.
- Some people are registered as craftsmen/women since a long time ago and, if they would try to register today, they will not meet the requirements. In Biscay, Beaz could maybe help with the filtering.
- Each country has a very different definition and way of dealing with handicrafts. There are some programmes in Europe which cross the definition of handicrafts and provide funding for handicrafts projects. But the problem is to define what is interesting in a specific place, because handicrafts are one of the most relevant representations of a place and its identity (see di Matteo, 2018).
- About added value gastronomy, the BCO is working with the Basque Culinary Center.

Contents and others

- In the Statistic of Arts and Cultural Industries already conducted by the BCO, cultural heritage (museums, libraries, etc.) is already included, but there is an added problem in this subsector: it is difficult to identify the supporting industries. For instance, who are the providers for libraries, or archives, for instance? It is a network of companies that work for the public sector and which are difficult to track, because you need to go sector by sector. With regard to this, Orkestra made an analysis of the inputs-outputs, to analyse which the suppliers and which the final users for each subsector are.
- Basque CCI's and their *European dimension and internationalization*: a) including the European dimension to know if they belong to any European association/network/platform/forum, take part in European projects (with or without direct funding), and if they cooperate with other European CCI's; b) if they are present at the European level or have any interest in European and international projection, and c) consider that the EU includes CCI's and culture in the so-called external cultural cooperation or cultural diplomacy.
- The BCO could play a role in *providing a picture of the participation of the Basque cultural and creative sectors in the European sphere* (i.e. number of H2020, Creative Europe, INTERreg Europe projects, and European initiatives led or with involvement of Basque partners). That global picture is missing. This information is of great value for the Delegation of the Basque Government, the Desk Euskadi Creative Europe, Etxepare Institute, and the County and City Councils to keep supporting CCI's, and know more about the sector's functioning. By way of example, INNOBASQUE collects the information of all Basque innovation projects funded by H2020 Programme. Those informations are key in order to have a more informed public policy with concrete answers and challenges for the CCI's.
- In other words, *questions about internationalization and the European dimension of CCI's* should always be included in CCI's surveys, since it is a good way to measure if these dimensions are key, and it provides insights for public policy to be informed on CCI's needs and challenges. Furthermore, it helps complete the picture of the scope of the service and work of the Basque Government's services involved in those areas.

- It is important, when conducting studies, to *ensure efficacy and efficiency in the implementation of expenditure*. Efficacy refers to the operation having an objective, which would be key to then determine which kind of information needs to be extracted. With regard to the difficulty to get data, companies are willing to participate if they see their contribution is useful – this is linked again to efficacy. If the objective is to obtain data for public institutions to align their policies, a commitment is needed from the side of institutions, so that this is not only a discourse but the companies' participation really translates into specific actions which are beneficial for them. Concerning efficiency, a "learning by doing" is preferable than an "analysis paralysis", the latter consisting in not engaging in a task because we miss too many data. Thus, it is suggested to devote less time to debate and reflection, and more to action, revision, correction, and growth. Efficiency also refers to building on what other actors are already doing (e.g. in the case of handicrafts, using the very detailed information already available at Beaz).
- *Subcontracting details* would be an interesting question to be asked to companies – who do they subcontract and what are the criteria for subcontracting. The employment market seems to be polarised, with some workers very integrated, with good working conditions, and some others being rather outside. Subcontracting and the high numbers of self-employed people may be hiding this high polarization of the sectors. Are companies subcontracting very specialized services, or does subcontracting respond to the general trend of self-employment among workers in the sector? Subcontracting data could be obtained via other sources, but also by asking the companies, and this would be very explanatory with regard to composition of the sector, the quality of the work and the opportunities.
- *Linking CClIs with the Basque RIS3*: other 80 regions have CClIs in their RIS3, including the 24 regions that form the Regional Initiative for Culture and Creativity Network/RICC network.

Concluding remarks

- The choice of including the arts in the CClIs spectrum might not be adequate. The arts are core sectors where technological reproducibility plays a very limited role, and as a consequence they cannot adopt full-fledged industrial organization models and still very much need to rely on a patronage logic (including a public patronage one). Mixing them up with CClIs entails that *inappropriate comparisons between the arts and the CClIs* are made all the time, to the clear disadvantage and de-legitimization of the former, that simply rely on a totally different logic of economic sustainability. This does not imply of course that they are not deeply related: they are, and this is why we speak of a *cultural and creative ecology*. But distinguishing from core sectors and CClIs is in his opinion key.
- Any definitional approach to the CClIs is bound to fail, also because there are now *distinctive CCI components in non CCI sectors* (think e.g. of sonorization of cars, to make a mere example among dozens and dozens). Also this toggling between judgmental and non-judgmental criteria for inclusion is messy and hard to defend. Probably, the only way out is to adopt a bottom up approach in terms of reconstructing the multilayer network structure of cultural and creative production and drawing boundaries in terms of the actual frequency and consistency of interaction among certain players. This means going for a computational social science approach (also using scraping social media data) that can help us track also one-person businesses. It might also help us overcome the idiosyncrasies of national statistical criteria.

- This *structural interaction approach* could also help us explain the specificities of different sectors in terms of production and distribution modes.
- If we fail to arrive at an *operationally manageable approach*, the risk is again that we fail to build a real evidence-based approach to CCI policy design, and a suitable modulation of such policy to sector specificities.



INVITED EXPERTS

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Lurdes Aranguren Sudupe. Cultural Planning Technician and former head of the Basque Cultural Observatory, Basque Government.

Luca Dal Pozzolo. Director, Osservatorio Culturale del Piemonte.

John Davies. Economics Research Fellow, Nesta.

Camila de Epalza Azqueta. EU Policy Officer, Basque Government Delegation to the EU, and Regional Initiative for Culture and Creativity/RICC network co-leader..

Pantxo Etchegoin. Director, Euskal Kultur Erakundea (Basque Cultural Institute).

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Marielle Hendriks. Director, Boekman Foundation.

Aintzane Larrabeiti. Partner-consultant, ICC Consultors.

Valentina Montalto. Research Fellow and Policy Analyst, Joint Research Center, EC.

Joxean Muñoz Otaegi. Deputy Minister for Culture, Basque Government.

Mercedes Oleaga. Research Facilitator, Orkestra Basque Institute of Competitiveness, Deusto Foundation.

Cristina Ortega Nuere. Scientific Coordinator of the session. Professor, University Oberta of Catalunya.

Ignacio Otalora. Executive Director, DigiPen Institute of Technology Europe-Bilbao.

Egoitz Pomares. Researcher and Project Manager, Sinergiak Social Innovation, University of the Basque Country.

Pier Luigi Sacco. Special Adviser, European Commissioner for Culture and Education.

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Josean Urdangarín Arrizabalaga. Head of Cultural Planning, Basque Government.

Andreas Johannes Wiesand. Executive Director, European Institute for Comparative Cultural Research (ERICarts).

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General links to:

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