

Perimeter of Cultural and Creative Industries in the Basque Country



STUDIES ON THE POSITIONING OF CULTURAL AND CREATIVE INDUSTRIES



Kulturaren
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de la Cultura



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ABSTRACT

This work proposes a new perimeter of the Cultural and Creative Industries (CCI) for the Basque Country. This review of the activities making up this sector of the economy, constructed collaboratively with the Department of Culture and Language Policy of the Basque Government, aims to delimit the sector in such a way that future research can be approached from the activities making it up, the associated occupations and products and services with creative and cultural content.

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| LIST OF ACRONYMS

DCMS	<i>Department of Culture, Media and Sport</i>
ESSnet-Culture	<i>European Statistical System Network on Culture</i>
ICC	Cultural and Creative Industries
KEB-OVC	Kulturaren Euskal Behatokia - Observatorio Vasco de la Cultura - Basque Observatory of Culture
RIS3	Smart Specialisation Strategy
UE	European Union
UNESCO	United Nations Educational, Scientific and Cultural Organization
WIPO	World Intellectual Property Organisation
UNCTAD	United Nations Conference on Trade and Development

EXECUTIVE SUMMARY

The Cultural and Creative Industries (CCIs) play an important role in the boosting of the economy, job creation and innovation and have been identified by the European Commission as a high-growth sector which generates an added value and capacity for recovery in times of economic crisis. CCIs help to improve the connection of Europe's cultural wealth and creative capacities with economic activities, economic performance and job creation and they have side effects on other industries and are in a position to act as catalysts of innovation in general.

Therefore, it has been shown that there is a need to research the CCI sector at the same time as the rest of the economic sectors of the Basque Country, with the aim of developing an integral strategic focus to boost their competitiveness, taking into account the specific characteristics of this sector of the economy, such as the small size of the companies, the intangible nature of their assets and the lack of visibility, which is why they face very specific challenges.

The goal of this document is to present the review of the perimeter of the CCIs for the Basque Country, with the intention that its application enables progress in placing CCIs on the same level as other economic sectors. This review, constructed collaboratively with Orkestra and The Department of Culture and Language Policy of the Basque Government, has delimited the sector in such a way that it can be useful in making future research approachable from the activities making it up, the associated occupations and products and services with cultural and creative content.

The goals when it came to carrying out said perimeter were:

- ◆ to allow homogeneous and complete value chains;
- ◆ comparability with other geographical areas;
- ◆ to be adapted to the specific characteristics of the Basque Country; and
- ◆ to have a practical perspective enabling the focussed implementation of promotion and development policies for the CCIs.

With said goals in mind, the perimeter includes 70 branches of activity according to the CNAE-2009 classification, 56 occupations in accordance with the NOC-2011 classification and 135 products and services according to the CPA-2008 classification.

This delimitation of the perimeter will be constantly evaluated and improvements will be implemented deriving from both the evolution of the sector and the development of internationally agreed methodologies.

Therefore, this perimeter review, in addition to being an analytical tool which can be used to guide research about CCIs and a framework to guide public policies and the making of decisions around CCIs, it also contributes a new framework to measure the progress of the models of competitiveness in the service of inclusive and sustainable wellbeing.

1 | INTRODUCTION

The Cultural and Creative Industries (CCIs) play a relevant role in the boosting of economic growth, job creation and innovation and have been identified by the European Commission as a high-growth sector which generates added value as well as being a resilient sector in times of economic crisis (European Commission, 2016). Also, it has been shown that CCIs have a positive effect on other industries and are capable of acting as catalysts of innovation and competitiveness in the economy in general. However, CCIs also face specific challenges due to their specific characteristics, such as the structure of the sector (for example, the small size of companies or the intangible nature of their assets) and the lack of visibility (European Commission, 2016).

For that reason, the European Union has the aim of making CCIs more visible by emphasising the change in the European economy from traditional production to services and innovation and emphasising the need to analyse the cooperation possibilities between CCIs and the economy in general, access to financing, as well as the importance of CCIs for regional development and regional innovation ecosystems.

Meanwhile, the Basque Government, for its part, is aware of the challenges faced by CCIs in the Basque Country and shares the same goal as the European Union. For that reason, there is a need to research the CCI sector at the same time as the other economic sectors of the Basque Country, with the aim of developing an integral strategic focus to boost competitiveness in our territory and the development of CCIs. In addition, this emphasises their role in the process of general innovation for all industries. Therefore, it is a case of delving deeper into the economic dimension of CCIs in the Basque Country, quantifying their dimension as an economic sector and contextualising it with regard to the remaining sectors of the Basque Country.

With the aim of making progress in this framework which helps to put the CCIs of the Basque Country on a par with the remaining economic sectors, Orkestra and the Department of Culture and Language Policy of the Basque Government have collaborated in the review of the definition of the perimeter of the CCIs, that is, which activities make it up and which are the associated occupations and products and services with creative and cultural content. The aim is to design a tool that both

the Basque Government and other regional and national governments and institution, universities, etc. can use to conduct future research related to CCIs.

The definition of the perimeter of CCI activities in accordance with the criteria established in Europe is considered from a fundamentally inclusive point of view. Although it is true that this allows us to have a global vision enabling us to make global comparisons, faced with an analysis of diversity and the establishment of policies, it is necessary to delve deeper and to divide up the different existing realities.

A fundamental aspect of the perimeter identified is that it fulfils the following requirements:

- ◆ **Grouping of homogeneous activities.** The definition of the perimeter must allow homogeneous groupings and complete groupings of differentiated value chains identifiable by the products and services offered.
- ◆ **Comparability with other geographical areas.** The defined perimeter must allow the comparison of the activity related to CCIs of other geographical areas at the level of autonomous communities, but also of other European Union states. For this reason, it is essential to take into account the activities gathered in the European standards of perimeter of CCI activities.
- ◆ **Adaptation to the specific characteristics of the Basque Country.** The defined perimeter also allows adaptation to the specific characteristics of the Basque Country and their appropriate integration with the Smart Specialisation Strategy (RIS3) where CCIs are included as one of the seven fields of specialisation with a defined catalogue of activities. In this regard, the previous work carried out by the Department of Culture and Language Policy of the Basque Government has been used as a reference and a starting point.
- ◆ **Guidance for the definition of policies.** The definition of the perimeter and the later analyses must have a practical perspective allowing the focussed implementation of promotion and development policies for the CCIs. Among other matters, it must be able to identify the existing relationship between activities classified as CCIs and public policies developed by different departments of the public bodies in their different levels.

With these goals in mind, this document presents a review of the literature about the definition of CCIs, the process followed and the results obtained in the definition of the activities, occupations, and products and services related to CCIs. It is worth mentioning that throughout the process of defining the perimeter, staff from the Department of Culture and Language Policy of the Basque Government, the Kulturaren Euskal Behatokia (KEB)- Observatorio Vasco de la Cultura (OVC) - Basque Observatory of Culture (BOC) and their technical secretariat, CCI Consultors,¹ and Orkestra - Basque Institute of Competitiveness have participated in different phases.

¹ With the aim of making this notebook easier to read, we refer to the Department of Culture and Language Policy of the Basque Government, the KEB-OVC-BOC and its technical secretariat, CCI Consultors as the Department of Culture and Language Policy, because it is the institution that includes the others.

2

BACKGROUND AND DEFINITION

CCIs have been established for several decades as an important sector within the economic structure and public policies of the European Union (EU). Several studies at European level (Boix-Domènech & Rausell-Köster, 2018; European Commission, 2010, 2016; European Union, 2012) have identified CCIs as a high-growth sector which generates considerable added value and business volume, contributing to job creation, promoting innovation and strengthening competitiveness at global level. Specifically, it is estimated that the weight of the cultural and creative sectors is around 3.3% and 4.2% of the European GDP and around 3% and 3.8% of total jobs (between 6 and 8 million people) (European Commission, 2010; EY, 2014; KEA European Affairs, 2015; TERA Consultants, 2014). Thus, the European Union considers CCIs to be in a strategic position to promote inclusive, smart and sustainable growth in all its regions, thus fully contributing to European strategies.

By definition, CCIs are divided into their cultural and creative components. On the one hand, UNESCO (United Nations Educational, Scientific and Cultural Organization) defines cultural activities, and therefore cultural industries, as those “activities, goods and services, which at the time they are considered as a specific attribute, use or purpose, embody or convey cultural expressions, irrespective of the commercial value they may have.” (2005, p. 15) On the other hand, the creative industries, a term popularised by the *Department of Culture, Media and Sport* (DCMS) of the United Kingdom at the end of the nineties, are defined as activities which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property (DCMS, 2001; European Commission, 2010). Both industries can be considered complementary because they reconcile economic objectives with the cultural and social nature of different components (European Commission, 2010). However, there is no clear agreement on the definition of CCIs. The term is commonly used to represent a set of central activities for what is

called the “creative economy”, a concept arising at the intersection between cultural, economic and technological activities. This makes comparison of one of the most dynamic areas of transnational trade difficult at international level.

In this regard, the literature highlights some classification models that have had greater influence on CCI studies (Boix-Domènech & Rausell-Köster, 2018; Orkestra, 2017; Throsby, 2008; UNCTAD, 2008). These models have been proposed by academics, agents of public administrations and intergovernmental bodies and attempt to capture those economic activities that can be considered cultural and creative with the goal of providing greater understanding of the structural characteristics of CCIs and a reference point to measure them:

- a)** The model of the United Kingdom DCMS, one of the first studies to statistically define part of the CCIs, specifically includes creative activities based on individual creative contribution and its technological components. It notes thirteen economic activity sectors that gave rise to later developments.
- b)** The symbolic texts model differentiates between “classical” culture and “popular” culture from a point of view of social classes, gender and ethnicity. It mainly analyses production, dissemination and consumption of culture through symbolic texts and messages (Throsby, 2008; UNCTAD, 2008).
- c)** The model of concentric circles prepared for the European Commission (KEA European Affairs, 2006), where the cultural value of economic activities predominates and where creative ideas originate in the arts (central circle) and disseminate towards other activities within the exterior layers or circles (circle 1: cultural industries; circle 2: creative industries; and circle 3: related industries) in relation to the centre. In this regard, the cultural content of the activities is reduced as it moves away from the centre, while the commercial content increases.
- d)** The World Intellectual Property Organisation (WIPO) model (2003), focussed on creativity within the creation of goods and services and which takes into account activities that, directly or indirectly, are involved in the process of manufacture and distribution of the same. The model distinguishes between main activities (which produce the greater part of intellectual property), partial (less use of intellectual property) and independent (which distribute goods and services).
- e)** The model of the United Nations Conference on Trade and Development (UNCTAD), (2008) proposes four main sectors and nine subsectors for the creative industries. Equally, these are based on those economic activities that make extensive use of intellectual property in the production of market goods and classify them in accordance with their closeness to the market.
- f)** The model presented by the European Commission in its document *Boosting the Competitiveness of Cultural and Creative Industries for Growth and Jobs*, presents three large sectors: the main CCIs, the fashion industry and industries considered to be top of the range.

As can be observed in Table 1, making the definitions of the CCIs operational is not an easy job. The majority of the proposed classifications have different scopes depending on each one's

suppositions regarding the structural characteristics of these industries. The classification of the CCIs poses different types of difficulties such as the integration of these activities, especially cultural activities, into market logic and the detection of interdependences between main and complementary activities.

TABLE 1. MAIN MODELS OF CCI CLASSIFICATION.

DCMS	MODEL OF SYMBOLIC TEXTS	MODEL OF CONCENTRIC CIRCLES	WIPO	UNCTAD	EUROPEAN COMMISSION
Architecture	Main cultural industries Film	Core creative arts Performing Arts	Main industries Graphic and visual arts	Arts Performing Arts	Main CCIs Advertising
Art and antiques					
Performing Arts	Internet Music	Literature	Film and video	Functional creations Design	Archives, libraries, cultural heritage
Crafts	Publishing industry Advertising	Music	Collective management bodies		Books and the press
Film and video	Television and radio Video games	Other main cultural industries Film	Publishing industry	New media (digital) Creative services	Cultural education
Design	Peripheral cultural industries Creative arts		Museums and libraries		Music Advertising
Publishing industry		Borderline cultural industries Electronic equipment	Extended cultural industries Audio recording	Software	Media Audiovisual material
Fashion	Publishing industry			Television and radio	
Advertising	Sport	Cultural heritage services	Partial industries Architecture	Heritage Traditional and cultural expressions	Radio and television
Software	Fashion	Television and radio	Design		Software and games
Television and radio	Fashion	Video games	Toys	Cultural sites	Video and film
Video games	Software	Related industries Architecture	Fashion		Interdependent industries Recording studios
			Design	Clothes and footwear	
		Fashion	Domestic utensils	Top of the range industries Top of the range fashion, jewellery and watches, accessories, leather goods, perfumes and cosmetics, furniture and white goods, cars, boats, gastronomy, hotels and leisure, auction houses.	
		Advertising	Paper industry		
			Electronic consumer products		

Source. Own preparation based on Thorsby (2008) and UNCTAD (2008).

At regional level, the Department of Culture and Language Policy of the Basque Government, through the KEB-OVC-BOC, prepared its own classification for the organisation of RIS3 which aims to promote CCIs in the Basque Country (Basque Observatory of Culture, 2018). The model presented by the KEB-OVC-BOC starts from a definition of CCIs as “those which use culture as material and have a cultural dimension, although their production is mainly functional” (2018, p. 17) and is based on three criteria.

First, comparability with the European frameworks, especially the statistical framework for the measurement of CCIs presented by the *European Statistical System Network* on Culture or *ESSnet-Culture* (2012). This is a framework for the definition and classification of CCIs in terms of the statistical classification of economic activities of the European Union, the *CNAE Rev. 2*, which has enabled improved coverage and a more reliable estimation of their contribution to the economy.

Secondly, the consistency of the model, whose objective focusses on the contribution of the CCIs to economic development and employment, for which it clearly establishes the sectors included in its definition of CCIs and its scope (based on the economic activities classification (*CNAE-2009*) and current occupations (*National Classification of Occupations, NOC-2011*). Lastly, the adaptability of the model to the Basque context, considering some sectors as “language industries” and “gastronomy” which are of special interest within the economy and in the development of policies. Table 2 describes the KEB-OVC-BOC model.

TABLE 2. KEB-OVC-BOC CLASSIFICATION MODEL OF CCIS.

CULTURAL SECTORS	CREATIVE SECTORS
Visual Arts	Architecture
Performing Arts	Design
Crafts	Advertising
Audiovisual and multimedia (film, television and radio)	Video games
Music	Language Industries
Books and the press	Fashion
Material and immaterial heritage, museums, archives and libraries	Gastronomy

Source. Own preparation from the KEB-OVC-BOC (2018).

The model focuses on a cultural core which is then extended to other activities considered to be creative. The inclusion and exclusion of economic activities within this framework mainly took into account their functions in the value chain (based on the functions described in the *ESSnet-Culture* model) that is, creation, production-publishing, distribution, trade and dissemination, preservation, education, management and regulation. Also, the inclusion of auxiliary activities and services are defined which, despite not properly belonging to CCIs, are necessary to carry out activities defined as such. These can also be added and removed without affecting truly cultural and creative activities themselves.

3

DEFINITION AND CLASSIFICATION OF CCIS

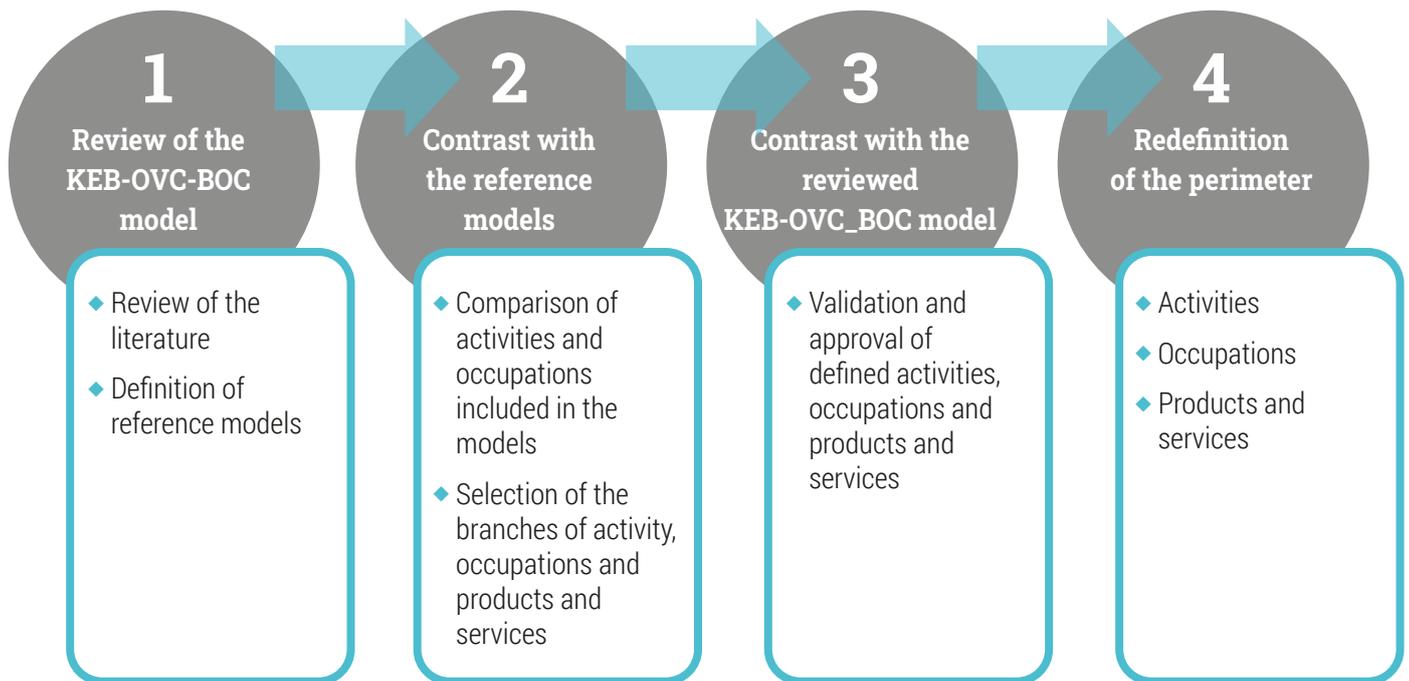
On the one hand, it is understood that the effects of the “society of culture” and the associated activities outweigh their mere economic consideration and contribute to other essential aspects, such as social cohesion, wellbeing, the promotion of critical spirit, quality of life and others. However, even being aware that it is a partial vision, an attempt has been made to delve deeper into the CCIs from their economic consideration, that is, as a sector generating economic activity, aiming to give the analysis comparative elements with the other sectors making up the economy. In this regard, for example, amateur activities, that is, unpaid activities carried out in cultural fields, are not taken into account.

On the other hand, CCIs also generate activity in other sectors which partially make up their value chain. It is not easy to reach a level of detail allowing the segregation of the economic activity of a sector caused by the different sectors of interest, that is, those included within the definition of the perimeter of CCIs. Therefore, being aware that it is an approximation, it was decided to assign sectors within the perimeter of analysis on the understanding that their level of relationship with the main CCIs are also part of what we call Cultural and Creative Industries in this project. In this way, other connected industries which partially contribute to the development of the main CCIs can be distinguished.

In addition to using classifications which are shared between these models, that is, CNAE-2009 for the identification of economic activities and NOC-2011 for occupations, it was decided that the *ESSnet-Culture* methodology would be followed and the statistical classification of products by activity (CPA-2008) of the European Union would be used to analyse the trade in products and services within the CCIs in the Basque Country. This classification locates the origin of the production of the products and services in accordance with the corresponding CNAE-2009 activity. It also has a 6-digit numerical code, which is more detailed than the CNAE-09 structure, meaning its segregation of activities is greater and enables a more precise analysis.

In broad strokes, Figure 1 describes the steps in the review of the KEB-OVC-BOC and the activities that have been included to establish a new perimeter.

FIGURE 1. KEB-OVC-BOC MODEL REVIEW PROCESS OF CCIS.



Source. Own preparation

A. DELIMITATION OF THE CNAE-09 BRANCHES OF ACTIVITY

With the aim that the definition of the perimeter enables us to have a clear image of the totality of the economic dimension of the CCIs of each of the fields that make them up and that will facilitate comparison with external references in other geographical areas, the KEB-OVC-BOC model was contrasted with models proposed by Europe Innova (2011), European Commission (2016) and Orkestra-Basque Institute of Competitiveness (2017).

At first, a proposal was made to approach the conceptual definition of the perimeter using the model presented by the European Commission (2016) (see Table 1). In this way, it would be possible to analyse the branches of activity in three large categories: cultural, creative and the fashion industries. It is worth highlighting that certain other categories were considered without being held to be within the definition of the perimeter of CCIs, with the possibility of having a creative variant especially in the top of the range segments, such as, for example, gastronomy, jewellery or the automotive

industry. However, upon encountering the difficulty to effectively segregate the economic data that really reflected this creative aspect, the decision was taken not to include them in the proposed model and to delve deeper into the segmentation previously proposed by the KEB-OVC-BOC. Finally, it was decided to keep the activities referring to fashion within the creative industries, both in their manufacturing aspect and in marketing, to increase comparability with statistics at European level.

In this way, like the model originally presented by the KEB-OVC-BOC, the proposed model covers activities in two branches in accordance with their cultural and creative components. Also, a distinction is made between branches of activity making up the core of CCIs, that is, activities that have a high degree of creative-cultural component, and those auxiliary branches, that is, those that partially make up part of the CCI value chain but participate in others. In this regard, as is shown in detail in Table 3, the branches of activity included in this analysis, segregated into Cultural and Creative Activities, are framed in two categories: own activities and auxiliary activities.

TABLE 3. CLASSIFICATION OF CNAE-2009 ACTIVITIES DEFINED AS CCIS.

CULTURAL ACTIVITIES		CREATIVE ACTIVITIES	
<i>Own cultural activities</i>	<i>Auxiliary cultural activities</i>	<i>Own creative activities</i>	<i>Auxiliary creative activities</i>
<p>Performing Arts 9001.- Performing arts 9002.- Support activities to performing arts 9004.- Operation of arts facilities</p> <p>Visual Arts 7420.- Photographic activities 9003.- Artistic creation</p> <p>Audiovisual and multimedia 5912.- Motion picture, video and television programme post-production activities 5914.- Motion picture projection activities 5915.- Motion picture and video production activities 5916.- Television programme production activities 5917.- Film and video distribution activities 5918.- Television programme distribution activities 6010.- Radio broadcasting 6020.- Television programming and broadcasting activities 7722.- Renting of video tapes and disks</p>	<p>Performing Arts 7990.- Other reservation service and related activities 9329.- Other amusement and recreation activities</p> <p>Audiovisual and multimedia 5829.- Other software publishing 6201.- Computer programming activities</p> <p>Books and the press 1811.- Printing of newspapers 1812.- Other printing 1813.- Pre-press and pre-media services 1814.- Binding and related services 6399.- Other information service activities not specified elsewhere 7312.- Media representation</p>	<p>Architecture 7111.- Architectural activities</p> <p>Language Industries 7430.- Translation and interpretation activities 8559.- Other education not elsewhere specified</p> <p>Fashion manufacture 1320.- Weaving of textiles 1330.- Finishing of textiles 1411.- Manufacture of leather clothes 1412.- Manufacture of workwear 1413.- Manufacture of other outerwear 1414.- Manufacture of underwear 1419.- Manufacture of other wearing apparel and accessories 1420.- Manufacture of articles of fur 1431.- Manufacture of knitted and crocheted hosiery 1439.- Manufacture of other knitted and crocheted apparel 1511.- Tanning and dressing of leather; dressing and dyeing of fur 1512.- Manufacture of luggage, handbags and the like, saddlery and harness 1520.- Manufacture of footwear 3212.- Manufacture of jewellery and related articles 3213.- Manufacture of imitation jewellery and related articles</p>	<p>Advertising 6312.- Web portals</p>

CULTURAL ACTIVITIES		CREATIVE ACTIVITIES	
<i>Own cultural activities</i>	<i>Auxiliary cultural activities</i>	<i>Own creative activities</i>	<i>Auxiliary creative activities</i>
<p>Books and the press 4761.- Retail sale of books in specialised stores 4762.- Retail sale of newspapers and stationery in specialised stores 5811.- Book publishing 5813.- Publishing of newspapers 5814.- Publishing of journals and periodicals 5819.- Other publishing activities 6391.- News agency activities</p> <p>Music 4763.- Retail sale of music and video recordings in specialised stores 5920.- Sound recording and music publishing activities 8552.- Cultural education</p> <p>Heritage, museums, archives and libraries 9102.- Museum activities 9103.- Operation of historical sites and buildings and similar visitor attractions 9105.- Library activities 9106.- Archive activities</p>	<p>Music 1820.- Reproduction of recorded media 3220.- Manufacture of musical instruments</p> <p>Heritage, museums, archives and libraries 7219.- Other research and experimental development on natural sciences and engineering 7220.- Research and experimental development on social sciences and humanities</p>	<p>Fashion marketing 4616.- Agents involved in the sale of textiles, clothing, fur, footwear and leather goods 4642.- Wholesale of clothing and footwear 4648.- Wholesale of watches and jewellery 4771.- Retail sale of clothing in specialised stores 4772.- Retail sale of footwear and leather goods in specialised stores 4777.- Retail sale of watches and jewellery in specialised stores</p> <p>Advertising 7311.- Advertising agencies</p> <p>Video games 5821.- Publishing of computer games</p> <p>Design 7410.- Specialised design activities</p>	

Source. Own preparation

A comparison was made between the different economic activities included in the reference frameworks using the 4-digit CNAE-2009 codes, because they have an appropriate level to capture relevant statistical data about economic activity. As a result, 88 branches of activity were detected with the potential to be included within the CCI model. Of these activities, 36 are considered in all the contrasted reference frameworks. With regard to the remaining activities that were not shared among the reference frameworks, work has been carried out with the Department of Culture and Language Policy to evaluate their pertinence in the context of the region. Consequently, the incorporation of 70 branches of activity from the 88 possible was determined.

B. PERIMETER OF OCCUPATIONS NOC-11

The analysis presented in this section provides a description of the occupations associated with CCIs. As in the delimitation of the branches of activity, the methodology followed for the delimitation of occupations was the analysis of some frameworks reviewed in the literature and the later contrast with the Department of Culture and Language Policy of the Basque Government.

The main frameworks on which we have based our analysis are as follows:

- ◆ *ESS-net Culture: Final report.* Eurostat.
- ◆ Analysis of the Companies, Jobs and Job Market in the cultural area in the CAE. KEB-OVC-BOC

With the aim of improving the methodology and production data on CCIs, as well as satisfying the needs of greater comparability at European level, *ESSnet-Culture* has defined the conceptual framework on cultural employment. This methodology offers the chance to compare CCI employment data with other sectors (mainly within services) and with general employment in Europe.

ESSnet-Culture defines the occupations associated with CCIs as occupations involved in the creative and artistic economic cycle, that is, creation, production-publishing, distribution, trade and dissemination, preservation, education, management and regulation, as well as the collection and preservation of heritage (*ESSnet-Culture*, 2012).

This conceptual framework considers all jobs in cultural activities, as well as cultural jobs in organisations whose main activity is not cultural, as occupations associated with CCIs. To do so, it uses the results of the Labour Force Survey (LFS) of the EU. Therefore, the occupations included in *ESSnet-Culture* based on the 4-digit classification International Standard Classification of Occupations (ISCO-08) make a total of 43.

Meanwhile, the KEB-OVC-BOC uses the definition established by the Ministry of Culture and Sport and defines the Occupations of CCIs as:

“(the) set of employed people of 16 years old and above who carry out a cultural occupation in the whole of the economy or any job in cultural sectors. Those professional activities with a cultural dimension have been considered cultural occupations, such as writers, artists, archivists, librarians, etc. All these occupations are taken into account regardless of the main activity of the employer. Similarly, cultural activities include publishing, library, archive, museum and other cultural institution activities, cinematographic, video, radio and television activities, as well as artistic and show activities, among others. In all these activities, all employment is considered regardless of the occupation (artistic, technical, administrative or management) given that they are all necessary for the correct functioning of the cited activities ” (Basque Observatory of Culture, 2021, p. 78).

Therefore, the total number of occupations analysed by the KEB-OVC-BOC in accordance with the NOC-2011 is 48. After analysing the occupations included within the CCIs in each of the frameworks, it was jointly determined to include for analysis all those cases in which both studies coincided in including a certain occupation within the CCIs, that is, a total of 32 occupations.

For the remaining occupations in which both frameworks do not coincide, it was decided to analyse each case together to determine whether to include it in this study. In this analysis, jointly carried out by the Department of Culture and Language Policy and Orkestra, it was determined to include 24 occupations. Therefore, from a total of 61 occupations analysed, it was decided to include 56, presented in table 4.

TABLE 4. OCCUPATIONS INCLUDED.

CULTURAL	CREATIVE
<p>Recreational, cultural and sporting activities 1501.- Directors and managers of leisure, cultural and sporting activities companies 3724.- Leisure and entertainment activity monitors 3731.- Photographers 3733.- Technicians in art galleries, museums and libraries 3739.- Other technicians and support professionals for other cultural and artistic activities</p>	<p>Analysts and designers of software and multimedia 2713.- Analysts, programmers and web and multimedia designers</p>

CULTURAL

Archivists, librarians and similar

2821.- Sociologists, geographers, anthropologists, archaeologists and similar
2911.- Archivists and museum curators
2912.- Librarians, documentalists and similar
4210.- Library and archive employees
5823.- Tourist escorts

Craftspeople

7612.- Musical instruments repairers and tuners
7613.- Jewellers, goldsmiths and silversmiths
7614.- Ceramics workers, potters and similar
7615.- Glass blowers, modellers, lamination workers, glass cutters and polishers
7616.- Sign painters, glass engravers, decorative painters of diverse articles
7617.- Artisans in wood and similar materials; basket weavers, brush makers and similar workers
7618.- Artisans in fabrics, leather and similar materials, fibre-preparation workers and craft weavers, knitters or similar
7619.- Artisans not classified under other sections
7820.- Cabinetmakers and similar jobs

Creative and interpretive artists

2323.- Unregulated music and dance teachers
2931.- Plastic and visual works artists
2932.- Composers, musicians and singers
2933.- Choreographers and dancers
2934.- Film, theatre and similar directors
2935.- Actors
2936.- Radio, television and other presenters
2937.- Bullfighting show professionals
2939.- Creative and interpretive artists not classified under any other section

CREATIVE

Architects and urban planners

1329.- Directors of other professional service companies not classified under other sections
2451.- Architects (except landscape architects and town planners)
2452.- Landscape architects
2453.- Urban planners and traffic engineers
2481.- Technical architects and town planning technicians

Designers

2482.- Product and garment designers
2484.- Graphic and multimedia designers
3732.- Interior designers and decorators

Language Industries

2322.- Unregulated language education teachers
2923.- Philologists, interpreters and translators

CULTURAL	CREATIVE
<p>Writers and journalists 2921.- Writers 2922.- Journalists</p>	<p>Fashion 7831.- Dressmakers, couturiers, furriers and milliners 7832.- Patternmakers for textile and leather products 7833.- Fabric, leather, fur and other product cutters 7834.- Hand-sewers, embroiderers and similar 7836.- Tanners and leather preparation workers 7837.- Shoemakers and similar</p>
<p>Graphic arts officials and operatives 7621.- Pre-printing process workers 7622.- Printing process workers 7623.- Bookbinding process workers</p>	<p>Publicists 1222.- Advertising and public relations managers 2651.- Advertising and commercialisation professionals 3535.- Spokespersons and public relations agents</p>
<p>Audiovisual recording and broadcasting technicians 3831.- Audiovisual recording technicians 3832.- Broadcasting technicians</p>	<p>Video games 2719.- Analysts and designers of software and multimedia not classified under other sections</p>

Source. Own preparation

C. PERIMETER OF PRODUCTS/SERVICES

This section presents the process of determination of the perimeter carried out for products and services related to CCIs. As in the previous section, work carried out by *ESSnet-Culture* (2012) has been taken as a reference point. Specifically, it starts out from the list of cultural products identified in the Classification of Products by Activity (CPA). Also, although Language School Services are not included at European level, it was jointly decided with the Department of Culture and Language Policy to include them due to the specific case of the Basque Country. Table 5 presents the products and services included.

TABLE 5. PRODUCTS AND SERVICES INCLUDED WITHIN THE PERIMETER OF ANALYSIS.

ARCHITECTURE

- 71.11.10. Plans and drawings for architectural purposes
- 71.11.21. Architectural services for residential building projects
- 71.11.22. Architectural services for non-residential building projects
- 71.11.23. Historical restoration architectural services
- 71.11.24. Building project architectural advisory services
- 71.11.31. Urban planning services
- 71.11.32. Rural land planning services
- 71.11.33. Project site master planning services
- 71.11.41. Landscape architectural services
- 71.11.42. Landscape architecture consultancy services

PERFORMING ARTS

- 85.52.11. Dancing schools and dance instructors services
- 85.52.12. Music schools and music instructors services
- 90.01.10. Services of performing artists
- 90.02.11. Performing arts event production and presentation services
- 90.02.12. Performing arts event promotion and organisation services
- 90.02.19. Other performing arts support services
- 90.04.10. Arts facility operation services

PERFORMING ARTS (Partially)

- 79.90.39. Reservation services for event tickets, entertainment and recreational services and other reservation services not specified elsewhere
- 93.29.21. Firework and “light and sound” shows services

VISUAL ARTS

- 74.10.11. Interior design services
- 74.10.12. Industrial design services
- 74.10.19. Other specialised design services
- 74.10.20. Design originals
- 74.20.21. Portrait photography services
- 74.20.22. Advertising and related photography services

- 74.20.23. Event photography and event videography services
- 74.20.24. Aerial photography services
- 74.20.29. Other specialised photography services
- 74.20.32. Restoration and retouching services of photography
- 85.52.13. Fine arts schools and arts instruction services
- 90.03.11. Services provided by authors, composers, sculptors and other artists, except performing artists
- 90.03.12. Original works of authors, composers and other artists, except performing artists, painters, graphical artists and sculptors
- 90.03.13. Original works of painters, graphical artists and sculptors

AUDIOVISUAL AND MULTIMEDIA

- 47.00.64. Retail trade services of music and video recordings
- 58.21.10. Computer games, packaged
- 58.21.20. Computer games downloads
- 58.21.30. On-line games
- 58.21.40. Licensing services for the right to use computer game
- 59.11.11. Motion picture production services
- 59.11.12. Promotional or advertisement motion picture and video production services
- 59.11.13. Other television programme production services
- 59.11.21. Motion picture, video and television programme originals
- 59.11.22. Cinematographic film
- 59.11.23. Films and other video content on disk, tape or other physical media
- 59.11.24. Films and other video downloads
- 59.11.30. Sale of advertising space or time in motion picture, video and television products
- 59.12.11. Audio-visual editing services
- 59.12.12. Transfers and duplication of masters services
- 59.12.13. Colour correction and digital restoration services
- 59.12.14. Visual effects services
- 59.12.15. Animation services
- 59.12.16. Captioning, titling and subtitling services
- 59.12.17. Sound editing and design services
- 59.12.19. Other motion picture, video and television programme post-production services
- 59.13.11. Licensing services for film rights and their revenues

- 59.13.12. Other motion picture, video and television programme distribution services
- 59.14.10. Motion picture projection services
- 59.20.11. Sound recording services
- 59.20.12. Live recording services
- 59.20.13. Sound recording originals
- 59.20.21. Radio programme production services
- 59.20.22. Radio programme originals
- 59.20.31. Printed music
- 59.20.32. Electronic scores
- 59.20.33. Musical audio disks, tapes or other physical media
- 59.20.34. Other audio disks and tapes
- 59.20.35. Music downloads
- 59.20.40. Licensing services for the right to use acoustic originals
- 60.10.11. Radio programming and broadcasting services
- 60.10.12. Radio broadcasting originals
- 60.10.20. Radio channel programmes
- 60.10.30. Radio advertising time
- 60.20.11. Linear television programming and broadcasting services
- 60.20.12. On-line video-on-demand services
- 60.20.13. Other video-on-demand services
- 60.20.20. Television broadcasting originals
- 60.20.30. Television advertising time
- 63.91.12. News agency services to audio-visual media
- 77.22.10. Rental services of video tapes and disks

AUDIOVISUAL AND MULTIMEDIA (Partially)

- 62.01.21. Computer games software originals

LANGUAGES

- 85.59.11. Language school services

BOOKS AND THE PRESS

- 47.00.61. Retail trade services of books
- 47.00.62. Retail trade services of newspapers and magazines
- 58.11.11. Printed educational textbooks

- 58.11.12. Printed professional, technical and scholarly books
- 58.11.13. Printed children's books
- 58.11.14. Printed dictionaries and encyclopaedias
- 58.11.15. Printed atlases and other books with maps
- 58.11.16. Printed maps and hydrographic or similar charts, other than in book form
- 58.11.19. Other printed books, brochures, leaflets and the like
- 58.11.20. Books on disk, tape or other physical media
- 58.11.30. On-line books
- 58.11.41. Advertising space in books, printed
- 58.11.42. Advertising space in books, electronic
- 58.11.50. Publishing of books on a fee or contract basis
- 58.11.60. Licensing services for books
- 58.13.10. Printed newspapers
- 58.13.20. On-line newspapers
- 58.14.11. Printed general interest journals and periodicals
- 58.14.12. Printed business, professional and academic journals and periodicals
- 58.14.19. Other printed journals and periodicals
- 58.14.20. On-line journals and periodicals
- 58.14.31. Advertising space in journals and periodicals, printed
- 58.14.32. Advertising space in journals and periodicals, electronic
- 58.14.40. Licensing services for journals and periodicals
- 63.91.11. News agency services to newspapers and periodicals
- 74.30.11. Translation services

BOOKS AND THE PRESS (Partially)

- 18.14.10. Binding and related services
- 47.00.92. Retail trade services of second-hand books

HERITAGE, ARCHIVES AND LIBRARIES

- 47.00.68. Retail trade services of stamps and coins
- 47.00.69. Retail trade services of souvenirs and arts
- 91.01.11. Library services
- 91.01.12. Archive services
- 91.02.10. Museum operation services

91.02.20. Museum collections

91.03.10. Operation services of historical sites and buildings and similar visitor attractions

HERITAGE, ARCHIVES AND LIBRARIES (Partially)

47.00.91. Retail trade services of antiques

71.20.19. Other technical testing and analysis services

72.19.13. Experimental development services in physical sciences

MULTIDISCIPLINARY PRODUCTS FOR SEVERAL FIELDS

74.30.12. Interpretation services

85.52.19. Other cultural education services

MULTIDISCIPLINARY PRODUCTS FOR SEVERAL FIELDS (Partially)

74.90.20. Other professional, technical and business services not specified elsewhere

84.11.11. Executive and legislative services

84.11.12. Financial and fiscal services

84.11.13. Overall economic and social planning and statistical services

84.11.14. Government services to fundamental research

84.11.19. Other general (overall) public services

84.12.14. Administrative recreational, cultural and religious services

94.99.16. Services provided by cultural and recreational associations

ADVERTISING

73.11.11. Full service advertising services

73.11.13. Advertising concept development services *Source: Own preparation*

4

CONCLUSIONS AND FINAL REMARKS

With the aim of developing new lines of research and economic analysis on the CCI sector, Orkestra, alongside the Department of Culture and Language Policy of the Basque Government, has redefined the perimeter of activities, occupations, products and services of this sector, with the aim of having geographical comparability, adapting the perimeter to the specific characteristics of the Basque Country and, lastly, that its use enables the guidance of different policies in the territory to improve its competitiveness.

CCIs are a sector of the Basque economy that up until now has not been considered equal to the other sectors in the economy in economic analysis of competitiveness. However, the review of the directionality of competitiveness towards inclusive and sustainable wellbeing services makes it necessary to work on new analytical frameworks. These new frameworks are sustained on the necessity of measuring development beyond economic progress.

The definition of this perimeter allows that, within these analytical frameworks, CCIs are included as a sector of the economy in the analysis of economic progress, but also as a key activity for the associated wellbeing, for example, the framework provided by Agenda 2030.

On the other hand, and alongside three large transitions, it underlines the importance of governments and public policy to confront great social challenges. For this reason, it is necessary to measure the progress of competitiveness models at the service of wellbeing, a measurement to which the perimeter presented in this document contributes a shared framework.

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ANNEX 1

TABLE 6. ACTIVITIES IN THE PERIMETER OF ANALYSIS.

CULTURAL ACTIVITIES	
<i>OWN</i>	
Performing Arts	9001.- Performing arts
	9002.- Support activities to performing arts
	9004.- Operation of arts facilities
Visual Arts	7420.- Photographic activities
	9003.- Artistic creation
Audiovisual and multimedia	5912.- Motion picture, video and television programme post-production activities
	5914.- Motion picture projection activities
	5915.- Motion picture and video production activities
	5916.- Television programme production activities
	5917.- Film and video distribution activities
	5918.- Television programme distribution activities
	6010.- Radio broadcasting
6020.- Television programming and broadcasting activities	
	7722.- Renting of video tapes and disks

Books and the press	<p>4761.- Retail sale of books in specialised stores</p> <p>4762.- Retail sale of newspapers and stationery in specialised stores</p> <p>5811.- Book publishing</p> <p>5813.- Publishing of newspapers</p> <p>5814.- Publishing of journals and periodicals</p> <p>5819.- Other publishing activities</p> <p>6391.- News agency activities</p>
Music	<p>4763.- Retail sale of music and video recordings in specialised stores</p> <p>5920.- Sound recording and music publishing activities</p> <p>8552.- Cultural education</p>
Heritage, museums, archives and libraries	<p>9102.- Museum activities</p> <p>9103.- Operation of historical sites and buildings and similar visitor attractions</p> <p>9105.- Library activities</p> <p>9106.- Archive activities</p>
AUXILIARIES	
Performing Arts	<p>7990.- Other reservation service and related activities</p> <p>9329.- Other amusement and recreation activities</p>
Audiovisual and multimedia	<p>5829.- Other software publishing</p> <p>6201.- Computer programming activities</p>
Books and the press	<p>1811.- Printing of newspapers</p> <p>1812.- Other printing</p> <p>1813.- Pre-press and pre-media services</p> <p>1814.- Binding and related services</p> <p>6399.- Other information service activities not specified elsewhere</p> <p>7312.- Media representation</p>
Music	<p>1820.- Reproduction of recorded media</p> <p>3220.- Manufacture of musical instruments</p>
Heritage, museums, archives and libraries	<p>7219.- Other research and experimental development on natural sciences and engineering</p> <p>7220.- Research and experimental development on social sciences and humanities</p>

CREATIVE ACTIVITIES

OWN

Architecture	7111.- Architectural activities
Language Industries	7430.- Translation and interpretation activities 8559.- Other education not elsewhere specified
Fashion manufacture	1320.- Weaving of textiles 1330.- Finishing of textiles 1411.- Manufacture of leather clothes 1412.- Manufacture of workwear 1413.-Manufacture of other outerwear 1414.- Manufacture of underwear 1419.- Manufacture of other wearing apparel and accessories 1420.- Manufacture of articles of fur 1431.- Manufacture of knitted and crocheted hosiery 1439.- Manufacture of other knitted and crocheted apparel 1511.- Tanning and dressing of leather; dressing and dyeing of fur 1512.- Manufacture of luggage, handbags and the like, saddlery and harness 1520.- Manufacture of footwear 3212.- Manufacture of jewellery and related articles 3213.- Manufacture of imitation jewellery and related articles
Fashion marketing	4616.- Agents involved in the sale of textiles, clothing, fur, footwear and leather goods 4642.- Wholesale of clothing and footwear 4648.- Wholesale of watches and jewellery 4771.- Retail sale of clothing in specialised stores 4772.- Retail sale of footwear and leather goods in specialised stores 4777.- Retail sale of watches and jewellery in specialised stores
Advertising	7311.- Advertising agencies
Video games	5821.- Publishing of computer games
Design	7410.- Specialised design activities

AUXILIARIES

Advertising	6312.- Web portals
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