

Analysis of the economic dimension of Cultural and Creative Industries in the Basque Country



A catalogue record of this book is available in the catalogue of the
General Library of the Basque Government:
<https://www.katalogoak.euskadi.eus/cgi-bin/q81a/abnetclop?SUBC=VEJ/J0001>

Edition:

© Authorship: Jabier Retegi, Francisco Carrillo, Ibone Eguia,
Mercedes Oleaga, Rakel Vázquez

Publisher:
Eusko Jaularitzaren Argiltapen Zerbitzua
Servicio Central de publicaciones del Gobierno Vasco
C/ Donostia- San Sebastian 1, 01010

Coordination: Basque Cultural Observatory

Translation: Lete itzulpenak-traduccion.es, SL

Design and Layout: Eusko Printing Service, SL

ISBN: 978-84-457-3654-8

LG G 442-2022



STUDIES ON THE POSITIONING OF CULTURAL
AND CREATIVE INDUSTRIES

Analysis of the economic dimension of Cultural and Creative Industries in the Basque Country

Eusko Jaurlaritzaren Argitalpen Zerbitzu Nagusia

Servicio Central de Publicaciones del Gobierno Vasco

Vitoria-Gasteiz, 2022

| CONTENTS

1. EXECUTIVE SUMMARY	9
2. INTRODUCTION	15
3. DEFINITION AND CLASSIFICATION OF CCI's	17
Perimeter of the CNAE-09 branches of activity	18
Perimeter of Occupations CNO-11 (National Classification of Occupations)....	20
Perimeter of products/services	21
4. STUDY CARRIED OUT BY KEB-OVC-BOC	22
5. BUSINESS DEMOGRAPHY OF THE CCI's	24
6. CCI's IN THE HISTORICAL TERRITORIES	29
7. COMPARATIVE ANALYSIS OF THE BUSINESS DEMOGRAPHIC	31
8. THE LEGAL FORM OF THE CCI's	34
9. WEIGHT OF VALUE CHAINS IN CCI EMPLOYMENT IN THE BASQUE COUNTRY	37
10. RELATIONSHIP BETWEEN THE CCI's AND THE ACTIVITY BRANCHES OF THE ECONOMY	40
11. CCI ACTIVITIES AND THE EMPLOYMENT OF CCI OCCUPATIONS	55
12. CONCLUSIONS	62
13. BIBLIOGRAPHY	71

ANNEXE 1:	ACTIVITIES IN THE PERIMETER OF ANALYSIS	73
ANNEXE 2:	OCCUPATIONS INCLUDED IN THE PERIMETER OF ANALYSIS	77
ANNEXE 3:	PRODUCTS AND SERVICES INCLUDED WITHIN THE PERIMETER OF ANALYSIS	80
ANNEXE 4:	EMPLOYMENT CROSS-OVER BETWEEN CCI ACTIVITIES AND BRANCHES OF ACTIVITY	85
ANNEXE 5:	CULTURAL AND CREATIVE ACTIVITIES CLASSIFIED BY BRANCHES OF ACTIVITY	90

| LIST OF TABLES

Table 1.	Segmentation of CCI activities according to their nature (belonging to branches of activity)	11
Table 2.	Cross-over between value chains and branches of activity.....	13
Table 3.	Classifications of the occupations included in the perimeter	20
Table 4.	Classification of products and services included in the perimeter	21
Table 5.	Business demography data of CCI companies	26
Table 6.	CCI companies by Historical Territories.....	30
Table 7.	Comparison of CCI companies per 100,000 inhabitants.....	32
Table 8.	Comparison of the percentage of CCI companies with that of the totality of companies	33
Table 9.	CCI companies by type of legal entity	35
Table 10.	Percentage of employment in CCI activities of the overall Basque economy	39
Table 11.	Branches of activity analysed	41
Table 12.	Cross-over of CCIs and branches of activity according to employment.....	43
Table 13.	Cross-over of inherent CCIs and branches of activity according to employment.....	45
Table 14.	Distribution of cultural activities employment by branch of activity .	47
Table 15.	Distribution of creative activities employment by branch of activity.	49

Table 16.	Weight of each CCI field in each branch of activity (CCI activities employment)	50
Table 17.	Segmentation of CCI activities according to their nature (belonging to branches of activity)	51
Table 18.	Percentage represented by CCI activities in their branch of activity and in the Basque economy	54
Table 19.	Ranking of the 20 most widely hiring activities for CCI profiles	56
Table 20.	Number of hirings of CCI occupations carried out by companies with CCI activities.....	58
Table 21.	Percentage of contracts with CCI occupation profiles within the whole of activities in the creative and cultural fields.....	59
Table 22.	Percentage of contracts with CCI occupation profiles of activities inherent to creative and cultural fields.....	60
Table 23.	Cross-over between CCI value chains and branches of activity	63
Table 24.	The value chains of the CCIs in the Basque Country	64
Table 25.	The CCIs in the Basque Country according to the nature of their activities	65
Table 26.	Summary sheet of CCI activities of a manufacturing nature	66
Table 27.	Summary sheet of CCI activities of a commercial nature	66
Table 28.	Summary sheet of CCI activities of Publishing, audiovisuals, radio, television and information technology	67
Table 29.	Summary sheet of professional, scientific and technical CCI activities.....	68
Table 30.	Summary sheet of educational CCI activities.....	68
Table 31.	Summary sheet of recreational and cultural CCI activities.....	69

| INDEX OF FIGURES

Figure 1. Definition of CCIs according to the European Commission (2016) ... 19

Figure 2. Weight of value chains in CCI employment in the Basque Country... 38

Figure 3. Weight of value chains in inherent CCIs employment in the
Basque Country..... 38

Figure 4. Illustrative graph of the cross-over between CCIs and
branches of activities..... 42

Figure 5. Classification of CCI activities total employment (inherent
and auxiliary) by branch of activity 44

Figure 6. Classification of CCI activities total employment (inherent) by
branch of activity 46

1 | EXECUTIVE SUMMARY

This document presents the result of the project carried out by Orkestra-Basque Institute of Competitiveness whose goal is the analysis of the economic dimension of the Cultural and Creative Industries (CCIs) and their integration in the industrial fabric of the Basque Country as a source of information to help the creation of public policies to promote them. Also, the work aims to contribute context elements allowing the cross-interlocution with other Government Departments, with the aim of jointly favouring the promotion of the CCIs.

To do so, the perimeter of the CCIs has been initially defined (see bibliography), that is, which activities they comprise, the associated occupations and the products and services with cultural and creative content. Said perimeter complies with the conditions to group homogeneous activities that integrate CCI value chains in addition to allowing comparison with other geographical areas, to being adaptable to the specific characteristics of the Basque Country and to guiding the definition of policies.

As a whole, the CCIs in the Basque Country comprise 16,886 companies employing 33,983 people, which is 3.84% of total employment. The **creative industries** employ 13,433 people in 9,737 companies and account for 1.5% of employment, with Architecture being the field that generates most employment. **Cultural industries** employ 20,550 people in 7,149 companies and account for 2.34% of employment in the Basque Country.

Analysing the evolution of the CCIs over the last decade, the numbers of both the **cultural** and **creative** industries show a slight fall between 2010 and 2015 and a later recovery, exceeding the initial levels. Over the last decade, **cultural** companies have fallen -5.5% and **creative** companies have increased by 15.2%, fundamentally arising from the language and design industries, which have increased by 53.42% and 48.77% respectively.

As for the distribution of CCI activities by Historical Territory, Bizkaia represents 51.3% of companies with headquarters in the Basque Country, Gipuzkoa represents 36.4% and Araba represents 12.3%. Said distribution remains relatively stable in the different fields of CCIs with the exception of Heritage, Museums, Archives and Libraries, where Gipuzkoa presents 46%, Bizkaia 38% and Araba 16% .

The CCIs have been analysed from two complementary points of view: (i) the perspective of the value chain; and (ii) the perspective of the nature of the activities that make them up.

The value chain perspective reflects the existing relationship (economic flows, products, services, knowledge) between activities whose goal is the production of a good or service with creative and/or cultural content. This perspective is important to understand the supply and demand of creative and cultural products and the cascading economic activity it generates.

The perspective of the nature of activities (or by branches of activity) contributes an order to the cultural and creative activities based on the similarity of type of activity (manufacturing, information technology, educational, etc.) and allows the grouping of those sharing common necessities (among others, technological, organisational, associative, promotion of exports, etc.) for their development and, therefore, they can give rise to homogeneous policies.

From the value chain perspective, due to the employment generated, the **Audiovisual and multimedia** sector (5,972 workers), **Books and the press** (5,853 workers), **Performing arts** (4,077 workers) and **Architecture** (4,002 workers) stand out. As for numbers of companies, **Language industries** (4,141 companies) and **Architecture** (3,113 companies) are the most representative.

CCIs are characterised by their small average size (2.01 workers per company) and by being fundamentally made up of self-employed people (60.2% in **cultural** industries and 74% in **creative** industries).

If we look at CCIs according to their nature (belonging to branches of activity), the information analysed allows the establishment of six differentiated segments, as shown in the following table. The activities assigned to each segment identified in the table make up more than 90% of the total employment of each segment or branch of activity. In addition, the table also shows the activities that make up the remaining percentage of each branch of activity.

TABLE 1. SEGMENTATION OF CCI ACTIVITIES ACCORDING TO THEIR NATURE (BELONGING TO BRANCHES OF ACTIVITY)

	Manufacturing	Commercial	Publishing, audiovisuals, radio and television and information technology	Professional, scientific and technical activities	Education	Recreational and cultural activities
Percentage of total CCI employment	11,8%	3,9%	24,0%	33,6%	10,8%	15,8%
Employment of represented fields (>90%) of the branch of activity	"Books and the press. Graphic arts, pre- printing and printing of books Fashion manufacturing"	Books and the press. Sales.	"Audiovisual and multimedia Books and the press"	"Architecture Advertising Design Translation and interpreting Visual arts"	"Language industries Music"	"Performing arts Visual arts Heritage, museums, archives and libraries."
Rest (<10%)	Music	Music	"Music Video games Advertising/Web portals"	"Heritage, museums, archives and libraries Performing arts Books and the press Audiovisual and multimedia"		

Source. Own preparation from data from Eustat, Directory of Economic Activities.

CCI activities are highly representative in the branches of activity of the economy related to **J. Publishing, audiovisuals, radio and television and information technology (including telecommunications)** and in **R. Recreational and cultural activities** with 24% and 33.6% respectively. Approximately one in every three jobs in said branches of activity corresponds to companies who operate in creative or cultural activities.

This branch of activity perspective allows the classification of activities according to their nature (manufacture, trade, etc.). Among other things, this classification is important for the evaluation of homogeneous problems between different activities, although they belong to different value chains, for the facilitation of interlocution with other Government Departments, for the coordination of policies, identification and evaluation of performance indicators or policy evaluation or for establishing shared requirements for the incorporation of new technologies.

The following table shows the relationship between value chains and the nature of activities identified by the branch of activity. Twenty-six homogeneous sub-segments have been identified that share value chain and branch of activity.

TABLE 2. CROSS-OVER BETWEEN VALUE CHAINS AND BRANCHES OF ACTIVITY

	C. Manufacturing industry	G. Commerce	JA. Publishing, audiovisuals, radio and television	JC. Information technology	M+N. Professional, scientific and technical, administrative and auxiliary services activities	P. Education	R. Recreational and cultural activities
PERFORMING ARTS							
VISUAL ARTS							
AUDIOVISUAL AND MULTIMEDIA							
BOOKS AND THE PRESS							
MUSIC							
HERITAGE, MUSEUMS, ARCH. AND LIBRARIES							
ARCHITECTURE							
DESIGN							
LANGUAGE INDUSTRIES							
FASHION MANUFACTURE							
ADVERTISING							
VIDEO GAMES							

Source. Own preparation.

From the point of view of the contracts carried out in occupations catalogued as CCI, of the 20 activities that have generated most contracts (2019-2020) for people in occupations of this type, 9 are not activities included in the perimeter established as CCIs (4-digit CNAE). Among these, the **7860. Temporary employment agency activities and 9499. Activities of other membership organizations nec.** stand out for the number of contracts. The average duration of the contracts varies considerably according to the branch of activity. **Manufacturing** activities present a higher average contract duration than other activities (57.1 days). However, **motion picture, video and television programme production and post-production** activities produce contracts of an average duration of fewer than 7 days.

In addition, it is revealed that **cultural** activities as a whole present a percentage of contracts (69.6%) with CCI profiles greater than **creative** activities (45.9%).

As a consequence of the work carried out, it is recommended to carry out an analysis of the public policies for the promotion of CCIs both in the Basque Country and in other geographical areas and to verify the coverage of the value chains and the segments by branches of activity.

Due to the diversity of activities regarding the value chain in which they are located and their nature, it is necessary to establish the priority sub-segments identifying their relationship with other Government Departments with the goal of coordinating CCI promotion policies. In this regard, although in some cases they can be highly overlapped, it is necessary to distinguish aid to CCI companies from aid to boost the creative or cultural component of their activities.

In addition, taking into account the great number of self-employed people and the small company size, analysing the potentiality of collectivisation/sharing of development plans in the different areas is recommended. By means of the participation of the agents involved and the establishment of sectoral approaches, it is necessary to identify transformation plans which allow the sector to make progress in its positioning when facing the three transitions, as well as its relationship with Agenda 2030.

2 | INTRODUCTION

The aim of this document is to analyse the Cultural and Creative Industries (CCIs) of the Basque country in their aspect as economic activity, that is, in their capacity to generate economic flows, investment and employment. The *Priority Sector Report: Creative and Cultural Industries* prepared by Power, for the European Cluster Observatory places the Basque Country in 2009 as one of the European regions with the greatest percentage of employment in CCIs in Europe. Specifically, it establishes said percentage at higher than 4% of total employment.

This report also establishes that CCI activity is strongly influenced by the regional reality and shows a clear urban concentration. Thus, among the 15 cities with a greater percentage of employment in CCIs (with values higher than 4.11%), the following are mentioned: Stockholm (SE), Inner London (UK), Prague (CZ), Rome (IT), Oslo (NO), Helsinki (FI), Zurich (CH), Oxford (UK), Hamburg (DE), Vienna (AT), Utrecht (NL), Bratislava (SK), Amsterdam (NL), Budapest (HU) and Paris (FR).

The cited document also correlates the innovative activity of the regions with the presence of CCIs, although the relationship between their activity and the general innovative behaviour of the region cannot be considered proven.

As these data are globally significant and interesting and taking into account the variety of activities covered within the CCIs, for the establishment of policies associated to the sector, a greater degree of detail in the analysis is nevertheless necessary. At the very least, there is a requirement for a greater segregation of activities and a multivariate analysis that takes into account other aspects associated with the economic activity and which allows the comparison of the dimension and economic importance of the CCIs with regard to other sectors and, at the same time, with regard to other regional contexts.

With this goal in mind, this document delves deeper into the CCIs in the Basque Country as an economic phenomenon, attempting to visualise their complexity and dimension in such a way that it can serve as a basis for the establishment of public policies. Therefore, it is a question of quantifying the dimension of the CCIs in the Basque Country as an economic reality, understanding

the existing relationship and placing the CCI within the economic activity of the Basque Country as a whole and contributing elements of context that allow cross-interlocution with other Government Departments, with the aim of jointly favouring the promotion of the CCIs.

In order to frame the scope of the document, it is necessary to take into account a series of considerations.

It is evident 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, in this research project, even being aware that it is a partial vision, an attempt is being 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 with a cultural dimension are excluded.

The “Fashion commercialisation” sector is also excluded from this analysis, because the aim is to discover the economic dimension of the CCIs and to have a source of information which helps establish public policies for their promotion. In this scenario and analysing the perimeter review and that of the sectors in which the Directorate of Culture is currently directing its policy, the decision has been taken to include the fashion manufacture sector, but not the commercialisation sector. It has also demonstrated the carry-over effect that culture can generate in other sectors. However, said effect is not evaluated in the type of economic analysis carried out for this report (for example, the Guggenheim effect.) The evaluation of this impact would require a differentiated research project.

Secondly, culture generates activity in other sectors which partially make up their value chain (for example, the Book Publishing sector). It is not easy to attain a level of detail that allows the segregation of the economic activity of a sector caused by different sectors at the desired level. Therefore, being aware that it is an approximation, sectors will be assigned to the perimeter of analysis and it will be understood that due to their level of relationship they make up what we will call CCIs. On the other hand, it will be possible to distinguish other Connected Industries that can partially contribute to the development of CCIs.

Thirdly, analysing the literature, there is no unique consideration of what makes up CCIs. Within the framework of this project, in its first phase, the perimeter of analysis and the sectors that constitute the CCIs has been agreed. As a basis for analysis, the proposals of the European Cluster Observatory (Cultural and Creative Industries) and the Basque Observatory of Culture (KEB-OVC-BOC) have been used as a starting point.

Lastly, the availability of data is essential. With a first look at the perimeter of analysis, it can be seen that a level of detail of 4-digit CNAE will be necessary to efficiently segregate the economic activity of the CCIs from the remaining activities. Thus, in this work the data of the sector will be presented in those variables in which the data are available or customised exploitations can be carried out to maintain statistical confidentiality.

3

DEFINITION AND CLASSIFICATION OF CCIs

As mentioned by Power (2011), there is extensive literature about the different terms and debates regarding CCIs. Although they present differences, the terms used by different authors have a great deal in common. They share their preoccupation regarding industries which have often been marginalised in analysis and industrial and economic policies and are now however acknowledged as an important economic field in its own right. In the aforementioned publication, the author puts forward as a definition of the CCIs those industries related to the creation and supply of marketable products, services or activities dependant on creative and cultural contributions for their value.

Taking into account the considerations put forward in the introduction of this document, as first phase and to ensure positive results, it has been necessary to define the perimeter of the CCIs for which the evaluation of their economic dimension has been carried out. To do so, activities constituting CCIs, occupations associated with CCIs and products and services derived from CCIs have been identified.

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

- ♦ 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.

- ◆ Integration of the activities making up the different value chains. The identified perimeter must allow a sufficiently complete description of the different value chains associated with cultural and creative products and services.
- ◆ 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 RIS3 strategy 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 and the Basque Observatory of Culture have been used as references and starting points.
- ◆ 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.

The detail of the process followed for the definition of the perimeter and the conclusions obtained, as well as the review of the literature about the matter, are included in the Orkestra (2021) document.

Perimeter of the CNAE-09 branches of activity

In the first place, it has been necessary to establish which activities constitute CCI activities. To come up with a sufficiently precise definition, it is necessary to identify the branches of activity (CNAE) which respond to the criteria of the study at a 4-digit level of detail¹.

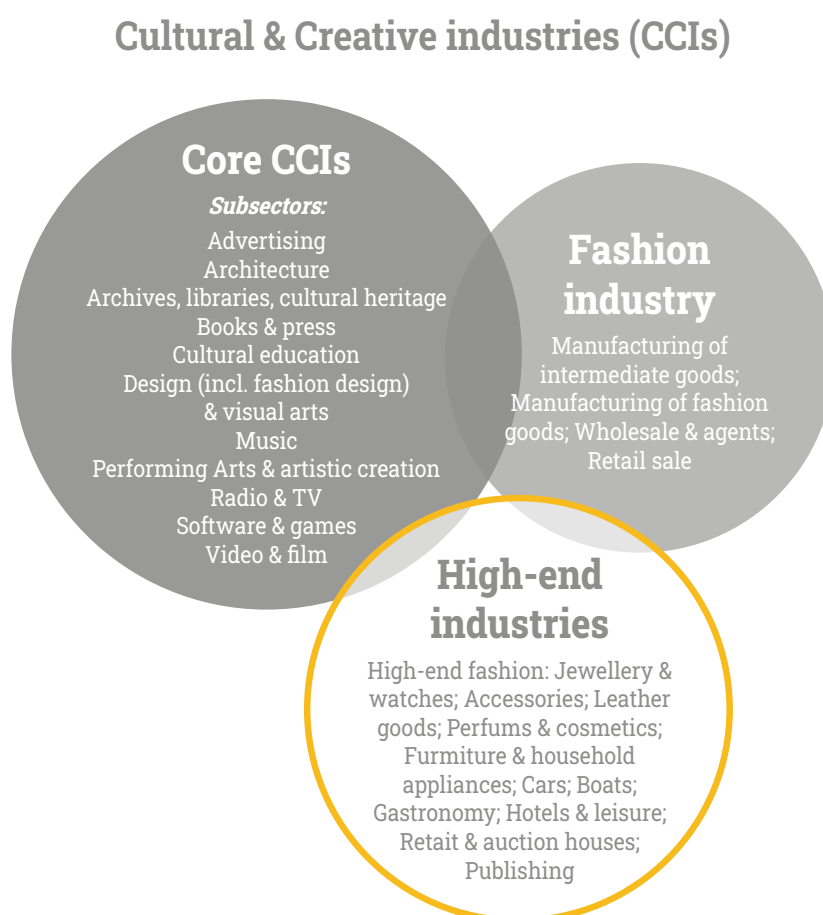
To do so, the following external references have been analysed:

- ◆ *Priority Sector Report: Creative and Cultural Industries. European Cluster Observatory. 2011*
- ◆ Conceptual delimitation of CCIs in the Basque Country. Basque Observatory of Culture. Department of linguistic policy and culture. Basque Government.
- ◆ Sectoral analysis of the potential impact and recovery from the COVID-19 crisis on Basque companies. 2020. Orkestra - Basque Institute of Competitiveness. 2020.
- ◆ Diagnosis of CCIs in the city of Vitoria-Gasteiz. Orkestra - Basque Institute of Competitiveness. 2017.
- ◆ *Boosting the competitiveness of cultural and creative industries for growth and jobs. (EASME/ COSME/2015/003). European Commission.*

¹ In some branches of activity, it has been necessary to carry out an individualised analysis of the companies.

Activities have been structured based on the document *Boosting the competitiveness of cultural and creative industries for growth and jobs*. (EASME/COSME/2015/003). European Commission with the aim of improving comparability with other environments. Said publication separates CCIs into three differentiated blocks: core CCIs (creative industries and cultural industries), the fashion industry and high end industries.

FIGURE 1. DEFINITION OF CCIs ACCORDING TO THE EUROPEAN COMMISSION (2016)



Source. European Commission (2016).

With regard to the last block mentioned, it is worth highlighting that there is a series of activities which, being included in branches of activities not related to CCIs, in its segment “high-end industries” can have a creative aspect, such as gastronomy, jewellery, cars, boats and others. From the point of view of use of statistical databases, it is not possible to segregate the data from its economic aspect and for the evaluation of its economic dimension specific ad hoc studies would be required. Therefore, it has been decided not to include it in this report.

The established perimeter must allow a clear image of the totality of the economic dimension of the CCIs, of each of the fields that make them up and must also allow comparison with other external references. In this regard, it is important to distinguish between the branches of activity that make up the core of CCIs, (activities that mostly have a creative-cultural component) and those (auxiliary) branches that partially make up part of the CCI value chain but participate in others.

The 70 branches of activity included in the perimeter of analysis are presented in Annex 1, classified into the following categories:

- ◆ Cultural activities themselves
- ◆ Auxiliary cultural activities
- ◆ Creative activities themselves
- ◆ Auxiliary creative activities

Perimeter of Occupations CNO-11 (National Classification of Occupations)

For the definition of the perimeter of the occupations related to CCIs to be included, the following documents have been analysed:

- ◆ Analysis of the Companies, Jobs and Job Market in the cultural area in the Autonomous Community of the Basque Country (CAE). 2021.
- ◆ *ESS-net Culture: European Statistical System Network on Culture. Final report.* Eurostat. 2012.

After analysing the occupations included in the CCIs in each of the publications, 56 occupations have been included, classified as follows.

TABLE 3. CLASSIFICATIONS OF THE OCCUPATIONS INCLUDED IN THE PERIMETER

Cultural	Creative
◆ Recreational, cultural and sporting activities	◆ Analysts and designers of software and multimedia
◆ Archivists, librarians and similar	◆ Architects and urban planners
◆ Craftspeople	◆ Designers
◆ Creative and interpretive artists	◆ Language industries
◆ Writers and journalists	◆ Publicists
◆ Graphic arts officials and operatives	◆ Video games
◆ Audiovisual recording and broadcasting technicians	◆ Fashion manufacture
	◆ Fashion commercialisation

Source. Own preparation based on BCO (2021) and ESS-net Culture (2012).

The list of occupations analysed in accordance with the CNO11 classification is included in Annex 2.

Perimeter of products/services

For the definition of the perimeter of the products and services related to CCIs to be included, the following documents have been used as reference: *ESS-net Culture: European Statistical System Network on Culture. Final report. Eurostat. 2012*

In Annex 3, the included products and services are presented classified into the following categories:

TABLE 4. CLASSIFICATION OF PRODUCTS AND SERVICES INCLUDED IN THE PERIMETER

◆ Architecture	◆ Books and the press (partially)
◆ Performing arts	◆ Heritage, archives and libraries
◆ Performing arts (partially)	◆ Heritage, archives and libraries (partially)
◆ Visual Arts	◆ Multidisciplinary products for several fields
◆ Audiovisual and multimedia	◆ Multidisciplinary products for several fields (partially)
◆ Audiovisual and multimedia (partially)	◆ Advertising
◆ Languages	
◆ Books and the press	

Source. Own preparation based on ESS-net Culture (2012).

4

STUDY CARRIED OUT BY KEB-OVC-BOC

In 2021, KEB-OVC-BOC published a study entitled "Analysis of the companies, jobs and job market in the cultural and creative area in the CAE (2019)" (BOC, 2021) which presented data from the last 10 years (the 2009-2019 period).

Said study mentioned that *"observing the evolution of the data, from 2009 to 2014 creative business network fell by 16.2%, from 6,350 cultural companies in 2009 to 5,322 in 2014. From that year, a turning point was noticed and there was a change in trend with a slight variation in 2017. The overall business fabric of the Autonomous Community of the Basque Country (CAE) followed a different evolution, with a fall until 2018, when there was an upturn. In terms of representation in relation to economic activities overall, the weight of the cultural sector remained between 3.0% and 4.0%, and 2010 figures were regained (3,7% in 2019) (p. 7)".*

It adds that *"by widening the radius of action of the overall cultural and creative sectors, the weight of the sector in relation to the overall business network of the CAE was 10% in the period 2015-2019."*

As for the most representative areas, the study mentions that *"the sectors with the greatest volume of companies are those activities of translation and language training (4,094), architecture (3,157) and creation, artistic and show business activities (2,191) (p. 10)."*

With regard to the size of the company, KEB-OVC-BOC (2021) shows that *"the CCI sector is made up in the majority by establishments of between 0 and 2 employees (84%). This trend is maintained over time, like micro-companies (with 3 to 9 employees) which remain at 11%, small companies (10-49 employees) at around 4% and finally medium and large companies which represent a mere 0.5% of sector establishments" (p. 11).*

Meanwhile, *"In 2019, the cultural and creative industries sector registered a total of 68,798 contracts, of which 43.5% were registered in recreational, cultural and sporting activities and 29.8% in creative*

or interpretive artistic occupations. Audiovisual recording and broadcasting technical jobs are at an intermediate level (9.2%), as are those linked to language industries (7.4%) (p. 15)."

The report offers more detailed information with regard to hirings in the CCIs with a look at the permanence or temporary nature of the contracts, the gender perspective, the ages of the people hired and their experience.

It is a detailed study offering an outline and analysis of the situation of the CCIs in the Basque Country. Also, it shows a comparative analysis of the ratios of companies and employment in the CAE with regard to Spain as a whole and other reference Autonomous Communities.

Meanwhile, in this document, taking KEB-OVC-BOC (2021) as a reference, a more in-depth look is taken at the sector's economic aspects and at the relationship that exists between the CCIs and the branches of activity of the economy in accordance with their CNAE-09 classification.

5

BUSINESS DEMOGRAPHY OF THE CCIs

This section presents data about business demography, that is, about the evolution of the number of companies and their main characteristics. The following table shows the main data of CCI companies classified by area of work. Specifically, it shows the number of companies² in the years 2010, 2015 and 2020, the variations during those years, the percentage of the total number of companies in the Basque Country, the number of companies per 100,000 inhabitants and their average size for each area of the CCIs.

From the use of DIRAE company data (companies with headquarters in the Basque Country and in the rest of Spain), the conclusion is reached that with the established perimeter, there were, at the end of 2019, 16,886 companies³ operating in activities catalogued as CCIs. Of these, 42.33% (7,149 companies) are from the cultural field and 57.66% (9,737 companies) are from the creative field. It is worth highlighting the inclusion of 4,141 companies related to **language industries**⁴.

In addition to those mentioned before, the fields of **Architecture** (3,113 companies) **Books and the press** (1,771 companies), **Audiovisual and multimedia** (1,513 companies), **Visual arts** (1,421

2 Data obtained from the DIRAE (Directory of Economic Activities) database corresponding to the CCI companies with establishments in the Basque Country or with their business headquarters in the Basque Country and the rest of Spain are shown.

3 The following types of organisation are included within the category of companies: public limited companies, cooperatives, limited companies, self-employed, joint ownership, local governments, religious organisations and other organisations such as foundations and associations.

4 Due to the precision of the 4-digit CNAE classification, the language industries field may include companies not necessarily related to the same.

companies) **Performing arts** (1,414 companies) and **Advertising** (1,147 companies) are the most widely represented.

These fields are followed by companies devoted to **Design** (790 companies), companies from the field of **Music** (592 companies), **Fashion manufacturing** (537 companies) **Heritage, museums, archives and libraries** (438 companies) and **Video games** (9 companies).

As can be seen, the overall number of CCI companies in the Basque Country underwent a slight fall between 2010 and 2015 and then began a period of recovery. Consistent with the data presented by KEB-OVC-BOC (2021), both **Cultural** and **Creative** industries show growth with regard to 2015. In the case of creative industries, they exceeded the 2010 levels.

TABLE 5. BUSINESS DEMOGRAPHY DATA OF CCI COMPANIES

	No. companies (2010)	No. companies (2015)	No. companies (01.01.2020)	Var. vs. 2010 (%)	Var. vs. 2010 (%)	% of the total of companies CAE (01.01.2021)	No. companies/100,000 inhab. CAE	Average company size CAE
1. CULTURAL	7.568	6.711	7.149	6,5	-5,5	4,6	325,0	2,87
1.- INHERENT	4.918	4.263	4.569	7,2	-7,1	3,0	207,7	2,67
2.- AUXILIARY	2.650	2.448	2.580	5,4	-2,6	1,7	117,3	3,24
PERFORMING ARTS	1.194	1.118	1.414	26,5	18,4	0,9	64,3	2,88
1.- INHERENT	712	680	833	22,5	17,0	0,5	37,9	2,21
2.- AUXILIARY	482	438	581	32,6	20,5	0,4	26,4	3,85
VISUAL ARTS	1.138	1.159	1.421	22,6	24,9	0,9	64,6	1,25
1.- INHERENT	1.138	1.159	1.421	22,6	24,9	0,9	64,6	1,25
AUDIOVISUAL AND MULTIMEDIA	1.102	1.362	1.513	11,1	37,3	1,0	68,8	3,95
1.- INHERENT	728	603	641	6,3	-12,0	0,4	29,1	5,00
2.- AUXILIARY	374	759	872	14,9	133,2	0,6	39,6	3,17
BOOKS AND THE PRESS	2.712	2.079	1.771	-14,8	-34,7	1,2	80,5	3,30
1.- INHERENT	1.619	1.213	1.010	-16,7	-37,6	0,7	45,9	3,04
2.- AUXILIARY	1.093	866	761	-12,1	-30,4	0,5	34,6	3,66
MUSIC	645	576	592	2,8	-8,2	0,4	26,9	2,70
1.- INHERENT	594	503	546	8,5	-8,1	0,4	24,8	2,79
2.- AUXILIARY	51	73	46	-37,0	-9,8	0,0	2,1	1,67
HERITAGE, MUSEUMS, ARCHIVES AND LIBRARIES	777	417	438	5,0	-43,6	0,3	19,9	2,92

	No. companies (2010)	No. companies (2015)	No. companies (01.01.2020)	Var. vs. 2010 (%)	Var. vs. 2010 (%)	% of the total of companies CAE (01.01.2021)	No. companies/100,000 inhab. CAE	Average company size CAE
1.- INHERENT	127	105	118	12,4	-7,1	0,1	5,4	6,71
2.- AUXILIARY	650	312	320	2,6	-50,8	0,2	14,5	1,52
2. CREATIVE	8.452	8.842	9.737	10,1	15,2	6,3	442,6	1,38
1.- INHERENT	8.437	8.803	9.697	10,2	14,9	6,3	440,8	1,36
2.- AUXILIARY	15	39	40	2,6	166,7	0,0	1,8	4,90
ARCHITECTURE	3.461	3.198	3.113	-2,7	-10,1	2,0	141,5	1,29
DESIGN	531	612	790	29,1	48,8	0,5	35,9	1,47
LANGUAGE INDUSTRIES	2.699	3.361	4.141	23,2	53,4	2,7	188,3	0,81
FASHION MANUFACTURE	631	512	537	4,9	-14,9	0,3	24,4	2,42
ADVERTISING	1.125	1.158	1.147	-0,9	2,0	0,7	52,1	3,12
1.- INHERENT	1.110	1.119	1.107	-1,1	-0,3	0,7	50,3	3,06
2.- AUXILIARY	15	39	40	2,6	166,7	0,0	1,8	4,90
VIDEO GAMES	5	1	9	800,0	80,0	0,0	0,4	3,00
Grand total	16.020	15.553	16.886	8,6	5,4	11,0	767,6	2,01

Source. Own preparation from data from Eustat, Directory of Economic Activities.

Among the **Cultural** fields, there has been outstanding positive percentage growth over the last decade for **Audiovisual and multimedia**, **Visual arts** and **Performing arts**. On the contrary, **Heritage, museums, archives and libraries** (due to a change in classification of activities)⁵, **Books and the press** and **Music** have greatly reduced their number of companies.

With regard to the **creative** industries and due to their quantitative importance, companies belonging to the **Language industries** and **Design** sector reflect a growth of 53.4% and 48.8% respectively between 2020 and 2010. Said growth has been progressive over time, reaching an intermediate value between the extreme values in 2015.

With a quantitative importance with regard to the number of companies, the **Video games** sector has increased said number from 5 companies to 9 companies between 2010 and 2020 after suffering the collapse of a company in 2015.

Fashion manufacturing suffered a drop of 14.9% between 2010 and 2020 with regard to the number of companies, while **Architecture** fell 10.1%. **Advertising** has remained practically stable during the decade, presenting a slight increase of 2% in 2020 compared to 2010.

CCI companies represent 10.7% of companies in the CAE. The ratio of companies per 100,000 inhabitants reaches the figure of 767.6.

The average size of companies is 2.87 workers in the case of the **Cultural** industries and 1.38 workers in the case of the **Creative** industries.

5 The CNAE regarding "Research and experimental development on social sciences and humanities" (722) included in the field of Heritage, museums, archives and libraries, suffered a sudden fall because self-employed psychologists were classified as carrying out research and experimental development on social sciences and humanities (code 7220 of the CNAE-2009). DIRCE [General Business Directory] began to correct this classification error in 2011 and continues to do so today, thus clarifying this matter.

6

CCIs IN THE HISTORICAL TERRITORIES

The following table presents the distribution of the number of companies per CCI sector according to the location of the headquarters in the Historical Territories (HTs) and the rest of Spain.

As for the distribution of CCI activities by HTs, Bizkaia represents 51% of companies with headquarters in the CAE, Gipuzkoa represents 37% and Araba represents 12%.

Said distribution remains relatively stable throughout the different areas of CCIs with the exception of **Heritage, Museums, Archives and Libraries**, where Gipuzkoa presents 46%, Bizkaia 38% and Araba 16%.

Meanwhile, although they represent few companies in quantitative terms (9 companies), 78% of activities related to **Video games** with headquarters in the Basque Country are located in Bizkaia and 22% in Gipuzkoa. There are no companies of this type registered in Araba.

TABLE 6. CCI COMPANIES BY HISTORICAL TERRITORIES

	Historical territories				Historical territories (% of total CAE)		
	Araba	Bizkaia	Gipuzkoa	Rest of Spain	Araba	Bizkaia	Gipuzkoa
1. CULTURAL	901	3.574	2.561	113	12,8 %	50,8 %	36,4 %
1.- INHERENT	571	2.297	1.640	61	12,7 %	51,0 %	36,4 %
2.- AUXILIARY	330	1.277	921	52	13,1 %	50,5 %	36,4 %
PERFORMING ARTS	183	671	547	13	13,1 %	47,9 %	39,0 %
1.- INHERENT	103	380	347	3	12,4 %	45,8 %	41,8 %
2.- AUXILIARY	80	291	200	10	14,0 %	51,0 %	35,0 %
VISUAL ARTS	196	769	452	4	13,8 %	54,3 %	31,9 %
1.- INHERENT	196	769	452	4	13,8 %	54,3 %	31,9 %
AUDIOVISUAL AND MULTIMEDIA	161	789	521	42	10,9 %	53,6 %	35,4 %
1.- INHERENT	73	329	221	18	11,7 %	52,8 %	35,5 %
2.- AUXILIARY	88	460	300	24	10,4 %	54,2 %	35,4 %
BOOKS AND THE PRESS	209	880	643	39	12,1 %	50,8 %	37,1 %
1.- INHERENT	115	495	372	28	11,7 %	50,4 %	37,9 %
2.- AUXILIARY	94	385	271	11	12,5 %	51,3 %	36,1 %
MUSIC	84	303	200	5	14,3 %	51,6 %	34,1 %
1.- INHERENT	74	288	181	3	13,6 %	53,0 %	33,3 %
2.- AUXILIARY	10	15	19	2	22,7 %	34,1 %	43,2 %
HERITAGE, MUSEUMS, ARCHIVES AND LIBRARIES	68	162	198	10	15,9 %	37,9 %	46,3 %
1.- INHERENT	10	36	67	5	8,8 %	31,9 %	59,3 %
2.- AUXILIARY	58	126	131	5	18,4 %	40,0 %	41,6 %
2. CREATIVE	1.150	4.979	3.508	100	11,9 %	51,7 %	36,4 %
1.- INHERENT	1.149	4.951	3.497	100	12,0 %	51,6 %	36,4 %
2.- AUXILIARY	1	28	11	0	2,5 %	70,0 %	27,5 %
ARCHITECTURE	418	1.524	1.161	10	13,5 %	49,1 %	37,4 %
DESIGN	79	433	274	4	10,1 %	55,1 %	34,9 %
LANGUAGE INDUSTRIES	458	2.115	1.515	53	11,2 %	51,7 %	37,1 %
FASHION MANUFACTURE	51	304	174	8	9,6 %	57,5 %	32,9 %
ADVERTISING	144	596	382	25	12,8 %	53,1 %	34,0 %
1.- INHERENT	143	568	371	25	13,2 %	52,5 %	34,3 %
2.- AUXILIARY	1	28	11		2,5 %	70,0 %	27,5 %
VIDEO GAMES		7	2		0,0 %	77,8 %	22,2 %
Grand total	2.051	8.553	6.069	213	12,3 %	51,3 %	36,4 %

Source. Own preparation from data from Eustat, Directory of Economic Activities.

CCI activities with headquarters in the rest of Spain with activities in the Basque Country make up 2.5% of companies.

7

COMPARATIVE ANALYSIS OF THE BUSINESS DEMOGRAPHIC

In this section, a comparison is made of the business demographic of cultural and creative companies in the Basque Country with that of other Autonomous Communities and with those data from Spain as a whole. Specifically, a comparison is made of the ratio of CCI companies per 100,000 inhabitants and the percentage of CCI companies out of the totality of companies.

With regard to the ratio of companies per 100,000 inhabitants, the Basque Country is placed lower than Madrid, Catalonia and the rest of Spain, but has higher figures than Navarre. In the case of cultural companies, the Basque Country is below Navarre but this is basically due to **Performing arts** companies. In the case of companies associated to **Music**, The Basque Country has higher figures than Madrid, Catalonia, Navarre and the rest of Spain.

TABLE 7. COMPARISON OF CCI COMPANIES PER 100,000 INHABITANTS

Companies/100,000 inhab.	BASQUE COUNTRY	NAVARRRE	CATALONIA	COMMUNITY OF MADRID	TOTAL SPAIN
1. CULTURAL	308	314	434	538	355
PERFORMING ARTS	59	82	77	95	73
VISUAL ARTS	64	62	108	129	85
AUDIOVISUAL AND MULTIMEDIA	62	47	68	99	51
BOOKS AND THE PRESS	85	85	136	170	115
MUSIC	23	10	9	11	8
HERITAGE, MUSEUMS, ARCH. AND LIBRARIES	16	28	36	34	24
2. CREATIVE	393	382	467	575	388
ARCHITECTURE	135	159	122	136	108
DESIGN	20	10	11	10	8
LANGUAGE INDUSTRIES	167	152	208	263	178
FASHION MANUFACTURE	23	19	47	30	37
ADVERTISING	47	43	79	136	57
VIDEO GAMES	0,5	0	0	1	0
Grand total	701	697	901	1.113	743

Source. Own preparation based on data from the INE, Directory of Central Business.

In the case of creative companies, the Basque Country has a higher ratio than Navarre and Spain as a whole, but lower than Madrid and Catalonia. The cases of **Architecture**, where the Basque Country exceeds Catalonia and almost equals the Community of Madrid, and **Design**, where the Basque Country exceeds all other references, stand out.

If we analyse the percentage of CCI companies against the totality of existing companies, in overall terms, the Basque Country (10.9%) has a higher percentage than Navarre (10.4%) and the rest of Spain (10.4%) and lower than the Community of Madrid (15.4%) and Catalonia (11.1%). Taking only Creative Industries into account, the Basque Country is placed above Navarre, Catalonia and the rest of Spain, and just one percentage point below Madrid. However, in the Cultural Industries, the Basque Country is placed below Catalonia, Madrid and the Spain average.

It is worth mentioning **Music**, where the Basque Country (0.4%) presents data clearly above the other references.

TABLE 8. COMPARISON OF THE PERCENTAGE OF CCI COMPANIES WITH THAT OF THE TOTALITY OF COMPANIES

Percentage of CCI companies of total companies	BASQUE COUNTRY	NAVARRRE	CATALONIA	COMMUNITY OF MADRID	TOTAL SPAIN
1. CULTURAL	4,8%	4,7%	5,4%	6,6%	5,0%
PERFORMING ARTS	0,9%	1,2%	1,0%	1,2%	1,0%
VISUAL ARTS	1,0%	0,9%	1,3%	1,6%	1,2%
AUDIOVISUAL AND MULTIMEDIA	1,0%	0,7%	0,8%	1,2%	0,7%
BOOKS AND THE PRESS	1,3%	1,3%	1,7%	2,1%	1,6%
MUSIC	0,4%	0,1%	0,1%	0,1%	0,1%
HERITAGE, MUSEUMS, ARCH. AND LIBRARIES	0,3%	0,4%	0,4%	0,4%	0,3%
2. CREATIVE	6,1%	5,7%	5,8%	7,1%	5,4%
ARCHITECTURE	2,1%	2,4%	1,5%	1,7%	1,5%
DESIGN	0,3%	0,1%	0,1%	0,1%	0,1%
LANGUAGE INDUSTRIES	2,6%	2,3%	2,6%	3,2%	2,5%
FASHION COMMERCIALISATION	0,4%	0,3%	0,6%	0,4%	0,5%
ADVERTISING	0,7%	0,6%	1,0%	1,7%	0,8%
VIDEO GAMES	0,0%	0,0%	0,0%	0,0%	0,0%
Grand total	10,9%	10,4%	11,1%	13,7%	10,4%

Source. Own preparation from data from Eustat, Directory of Economic Activities.

In the case of creative companies related to **Architecture** and **Design**, the Basque Country presents percentages higher than the other references, except in comparison with Navarre in the case of **Architecture**.

8

THE LEGAL FORM OF THE CCIs

If we analyse the CCI sector from the perspective of legal form, we observe that it is fundamentally made up of self-employed people (60.2% in cultural industries and 74% in creative industries). The percentage of this type of legal entity is greater in activities inherently classified than in auxiliary activities and especially in **Visual arts**. Secondly, limited companies represent 24.4% in cultural industries and 18.3% in creative industries.

TABLE 9. CCI COMPANIES BY TYPE OF LEGAL ENTITY

	Type of company (% total 2020)							
	Public Limited Company	Cooperative	Limited Company	Self-employed	Co-ownership	Local government	Other company	Aut. Relig. Org.
1. CULTURAL	2,1	2,2	24,4	60,2	3,0	0,2	7,7	0,3
1.- INHERENT	1,7	1,9	18,3	66,6	3,0	0,4	7,8	0,4
2.- AUXILIARY	2,7	2,7	35,3	48,9	2,9	0,0	7,4	0,1
PERFORMING ARTS	1,3	1,7	23,5	59,1	2,1	0,0	12,4	0,0
1.- INHERENT	1,0	1,3	19,2	66,1	1,9	0,0	10,4	0,0
2.- AUXILIARY	1,7	2,2	29,6	48,9	2,4	0,0	15,1	0,0
VISUAL ARTS	0,3	0,6	4,7	90,5	2,0	0,0	1,9	0,0
1.- INHERENT	0,3	0,6	4,7	90,5	2,0	0,0	1,9	0,0
AUDIOVISUAL AND MULTIMEDIA	3,0	2,6	39,8	48,2	2,0	0,0	4,3	0,1
1.- INHERENT	4,5	3,7	40,6	41,5	1,9	0,0	7,6	0,2
2.- AUXILIARY	1,9	1,8	39,2	53,1	2,1	0,0	1,8	0,0
BOOKS AND THE PRESS	3,7	2,3	30,0	53,8	6,0	0,0	3,7	0,5
1.- INHERENT	3,2	1,9	21,9	61,2	6,2	0,0	4,9	0,8
2.- AUXILIARY	4,5	2,8	40,7	44,0	5,8	0,0	2,1	0,1
MUSIC	0,7	2,9	18,2	57,9	2,9	2,4	14,2	0,8
1.- INHERENT	0,4	2,9	18,5	56,2	3,1	2,6	15,4	0,9
2.- AUXILIARY	4,3	2,2	15,2	78,3	0,0	0,0	0,0	0,0
HERITAGE, MUSEUMS, ARCHIVES AND LIBRARIES	2,1	5,9	24,0	36,1	0,0	0,5	29,9	1,6
1.- INHERENT	1,7	5,9	22,0	12,7	0,0	1,7	50,8	5,1

	Type of company (% total 2020)							
	Public Limited Company	Cooperative	Limited Company	Self-employed	Co-ownership	Local government	Other company	Aut. Relig. Org.
2.- AUXILIARY	2,2	5,9	24,7	44,7	0,0	0,0	22,2	0,3
2. CREATIVE	0,7	1,4	18,3	74,0	2,4	0,1	2,9	0,1
1.- INHERENT	0,7	1,4	18,1	74,2	2,5	0,1	2,9	0,1
2.- AUXILIARY	5,0	0,0	60,0	35,0	0,0	0,0	0,0	0,0
ARCHITECTURE	0,3	1,0	15,7	79,6	1,6	0,0	1,8	0,0
DESIGN	0,0	1,8	15,8	78,5	2,7	0,0	1,3	0,0
LANGUAGE INDUSTRIES	0,5	1,4	14,0	76,3	3,0	0,2	4,5	0,1
FASHION MANUFACTURE	3,0	1,5	18,8	70,8	5,2	0,0	0,7	0,0
ADVERTISING	2,6	2,4	41,6	49,9	1,2	0,0	2,3	0,0
1.- INHERENT	2,5	2,5	40,9	50,4	1,3	0,0	2,3	0,0
2.- AUXILIARY	5,0	0,0	60,0	35,0	0,0	0,0	0,0	0,0
VIDEO GAMES	0,0	11,1	66,7	22,2	0,0	0,0	0,0	0,0

Source. Own preparation from data from Eustat, Directory of Economic Activities.

Thirdly, the category of other companies (basically foundations and associations) makes up 7.7% of cultural industries and 9.2% of creative industries. The high percentage of companies with the legal entity of self-employed people makes the size of the companies small (2.01 workers per company).

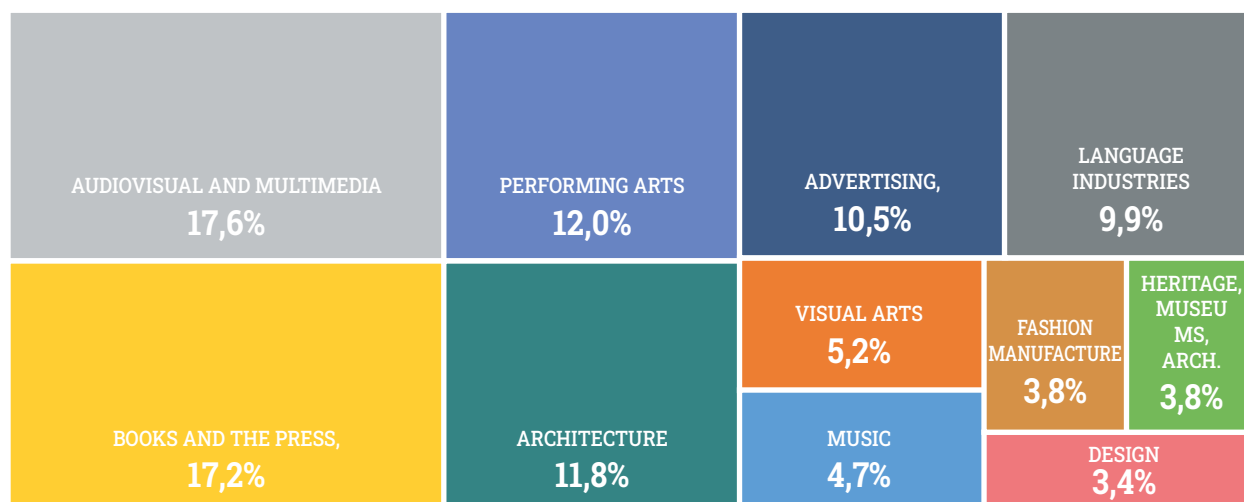
The confirmation of the high presence of companies legally constituted as self-employed people leads to the need to analyse the opportunities offered by sharing or association to collectively face the challenges encountered by the sectors making up the CCIs.

9

WEIGHT OF VALUE CHAINS IN CCI EMPLOYMENT IN THE BASQUE COUNTRY

The following figure shows the weight represented by the employment of value chains associated to CCIs over the total of CCI employment. The value chains of **Audiovisual and Multimedia** and **Books and the press** are the most highly represented, with 17.6% and 17.2% respectively, followed by **Performing arts** with 12% and **Architecture** with 11.8%. Other value chains have a **lower weight** in CCI employment in the Basque Country.

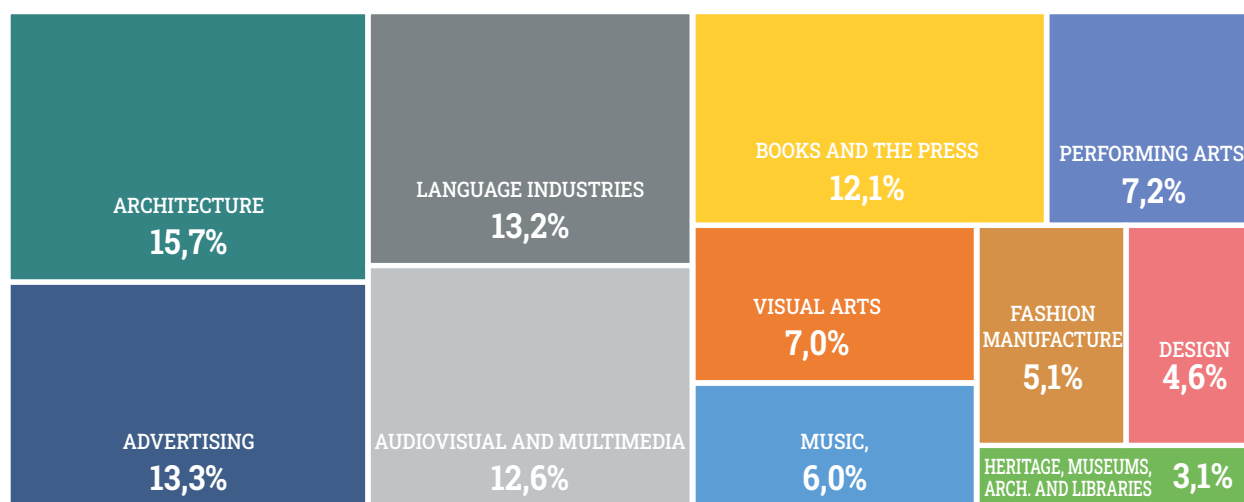
FIGURE 2. WEIGHT OF VALUE CHAINS IN CCI EMPLOYMENT IN THE BASQUE COUNTRY



Source. Own preparation from data from Eustat, Directory of Economic Activities.

If we exclusively analyse activities considered inherent, as can be seen in the following figure, the value chain of **Architecture** has a weight of 15.7%, followed by **Advertising** with 13.3%, **Language industries** with 13.2%, **Audiovisual, multimedia, radio and television** with 12.6% and **Books and the press** with 12.1%. The other value chains have lesser weight, oscillating between 7.2% and 0.1%.

FIGURE 3. WEIGHT OF VALUE CHAINS IN INHERENT CCIs EMPLOYMENT IN THE BASQUE COUNTRY



Source. Own preparation from data from Eustat, Directory of Economic Activities.

The following figure shows the weight represented by the employment of value chains associated to CCIs over the total of employment in Basque economy. In the case of cultural industries, the **Audiovisual and multimedia** and **Books and the press** sectors represent 0.7% of employment in the Basque Country. **Performing arts** represent 0.5% of employment and **Visual arts, Music and Heritage, museums, archives and libraries** 0.2%, 0.2% and 0,1% respectively.

TABLE 10. PERCENTAGE OF EMPLOYMENT IN CCI ACTIVITIES OF THE OVERALL BASQUE ECONOMY

	No. of companies	Employment	Percentage of total employment in the Basque Country
1. CULTURAL	7.149	20.550	2,34%
PERFORMING ARTS	1.414	4.077	0,46%
VISUAL ARTS	1.421	1.772	0,20%
AUDIOVISUAL AND MULTIMEDIA	1.513	5.972	0,68%
BOOKS AND THE PRESS	1.771	5.853	0,67%
MUSIC	592	1.599	0,18%
HERIT., MUSEUMS, ARCHIVES AND LIBRARIES	438	1.277	0,15%
2. CREATIVE	9.737	13.433	1,50%
ARCHITECTURE	3.113	4.002	0,45%
DESIGN	790	1.165	0,13%
LANGUAGE INDUSTRIES	4.141	3.354	0,38%
FASHION MANUFACTURE	537	1.304	0,15%
ADVERTISING	1.147	3.581	0,40%
VIDEO GAMES	9	27	0,00%
Grand total	16.886	33.983	3,84%

Source. Own preparation from data from Eustat, Directory of Economic Activities.

Regarding creative industries, **Architecture** and the **Language industries** and **Advertising** employ 0,5%, 0,4% y 0,4% of the total of employed people in the Basque Country. Also, the **Design (0.1%)**, **Fashion manufacture (0.1%)** and **Video games (0.003%)** activities complete the picture.

10

RELATIONSHIP BETWEEN THE CCIs AND THE ACTIVITY BRANCHES OF THE ECONOMY

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 of interest enabling us to make 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.

This section analyses the relationship between CCI activities and the activity branches of the economy. To do so, different creative and cultural fields have been crossed-over with classification A21 of the CNAE-09⁶. Taking into account the objective of this study, we found it convenient to differentiate within the activity field **“J. Information and communication”** the different sub-branches such as **“JA. Activities of publishing, audiovisuals and radio and television programming and broadcasting”**, **“JB. Telecommunications”** and **“JC. Programming, consultancy and other activities related to information technology and information services.”** Also, **“M. Professional,**

6 According to the reference classification that can be consulted in Annex 5.

scientific and technical activities” and “N. Administrative activities and auxiliary services” have been grouped into the same branch of activity, named **“M+N. Professional, scientific and technical, administrative and auxiliary services activities.”**

Therefore, the aim is to identify the nature of cultural and creative activities according to the following branches of activity:

TABLE 11. BRANCHES OF ACTIVITY ANALYSED

Code	Title	Division
A	Agriculture, livestock, silviculture and fishing	01-03
B	Extractive industries	05-09
C	Manufacturing industry	10-33
D	Electricity, gas, steam and air conditioning supply	35
E	Water supply; sanitation activities, waste management and decontamination	36-39
F	Construction	41-43
G	Wholesale and retail; motor vehicle and motorcycle repair	45-47
H	Transport and storage	49-53
I	Hospitality industry	55-56
JA	Publishing activities, audiovisuals and radio and television broadcasting	58-60
JB	Telecommunications	61
JC	Publishing, consultancy and other IT-related activities; Inf. serv.	62-63
K	Financial and insurance activities	64-66
L	Real-estate activities	68
M+N	Professional, scientific and technical, administrative and auxiliary services activities	69-82
O	Public administration and defence; compulsory social security	84
P	Education	85
Q	Health and social services activities	86-88
R	Artistic, recreational and entertainment activities	90-93
S	Other services	94-96
T	Household activities	97-98

Source. Own preparation based on CNAE-2009.

To carry out the abovementioned cross-over, the existing employment variable on 1 January 2020 has been used, obtained from the use of the DIRAE database and the actual employment of each unit of activity.

This analysis allows us to know the nature of the CCI activities within their different fields, levels or inherent or auxiliary aspect. Also, it shows the importance of each branch of activity in the CCI activities and vice versa. This makes easier the segmentation of aid policies based on which branch

of activity the activity belongs to and allows the verification of which CCI's are already taken into account by policies aimed at promoting the R&D&i, exportation, digitisation, etc.

FIGURE 4. ILLUSTRATIVE GRAPH OF THE CROSS-OVER BETWEEN CCI's AND BRANCHES OF ACTIVITIES

	A21 SECTORS																
	A	B	C	D	E	F	G	I	JA	JB	JC	L	N	P	Q	R	S
1. CULTURAL																	
1.- INHERENT																	
2.- AUXILIARY																	
PERFORMING ARTS																	
1.- INHERENT																	
2.- AUXILIARY																	
VISUAL ARTS																	
1.- INHERENT																	
AUDIOVISUAL AND MULTIMEDIA																	
1.- INHERENT																	
2.- AUXILIARY																	
BOOKS AND THE PRESS																	
1.- INHERENT																	
2.- AUXILIARY																	
MUSIC																	
1.- INHERENT																	
2.- AUXILIARY																	
HERITAGE, MUSEUMS, ARCHIVES AND LIBRARIES																	
1.- INHERENT																	
2.- AUXILIARY																	
2. CREATIVE																	
1.- INHERENT																	
2.- AUXILIARY																	
ARCHITECTURE																	
DESIGN																	
LANGUAGE INDUSTRIES																	
FASHION MANUFACTURE																	
ADVERTISING																	
1.- INHERENT																	
2.- AUXILIARY																	
VIDEO GAMES																	
Grand total																	

Source. Own preparation.

The following table shows the result of said cross-over. Particularly, it represents the total employment of activities⁷ which have been included in the CCI perimeter classified per field and the corresponding branch of activity.

⁷ In some cases, the classification of the 4-digit CNAEs does not offer the necessary accuracy to distinguish clearly the CCI activities included in it and their associated employment of other type of activities that do not necessarily have a strong creative or cultural component. We are assuming that in any case we can never be sure that 100% of the activities included in the CNAE correspond precisely to cultural and creative entities, but at least, there must be an important representation or must be gathered in the European standard perimeters. In this case, a detailed individualised study of some activities was necessary to segregate them according to their typology, thus allowing a better evaluation of the employment. The following CNAEs were analysed: 5829. Publishing of other computer programmes and 6201. Computer programming activities (totally retained because they are included in the European perimeter), 7219. Other research and experimental development on natural sciences and engineering (186 employments retained due to invoicing associated to CCI's), 8552. Cultural education (61% of employment retained) and 8559. Other education nec (21% of employment retained).

TABLE 12. CROSS-OVER OF CCIs AND BRANCHES OF ACTIVITY ACCORDING TO EMPLOYMENT

	C. Manufacturing industry	G. Commerce	JA. Publishing, audiovisuals, radio and television	JC. Information technology	M+N. Professional, scientific and technical, administrative and auxiliary services activities	P. Education	R. Recreational and cultural activities	Grand total
1. CULTURAL	2.718	1.341	5.115	2.823	1.848	1.352	5.353	20.550
PERFORMING ARTS					435		3.642	4.077
VISUAL ARTS					853		919	1.772
AUDIOVISUAL AND MULTIMEDIA			3.454	2.465	53			5.972
BOOKS AND THE PRESS	2.641	1.319	1.513	358	22			5.853
MUSIC	77	22	148			1.352		1.599
HERIT., MUSEUMS, ARCHIVES AND LIBRARIES					485		792	1.277
2. CREATIVE	1.304		27	196	9.579	2.327		13.433
ARCHITECTURE					4.002			4.002
DESIGN					1.165			1.165
LANGUAGE INDUSTRIES					1.027	2.327		3.354
FASHION MANUFACTURE	1.304							1.304
ADVERTISING				196	3.385			3.581
VIDEO GAMES			27					27
Grand total	4.022	1.341	5.142	3.019	11.427	3.679	5.353	33.983

Source. Own preparation from data from Eustat, Directory of Economic Activities.

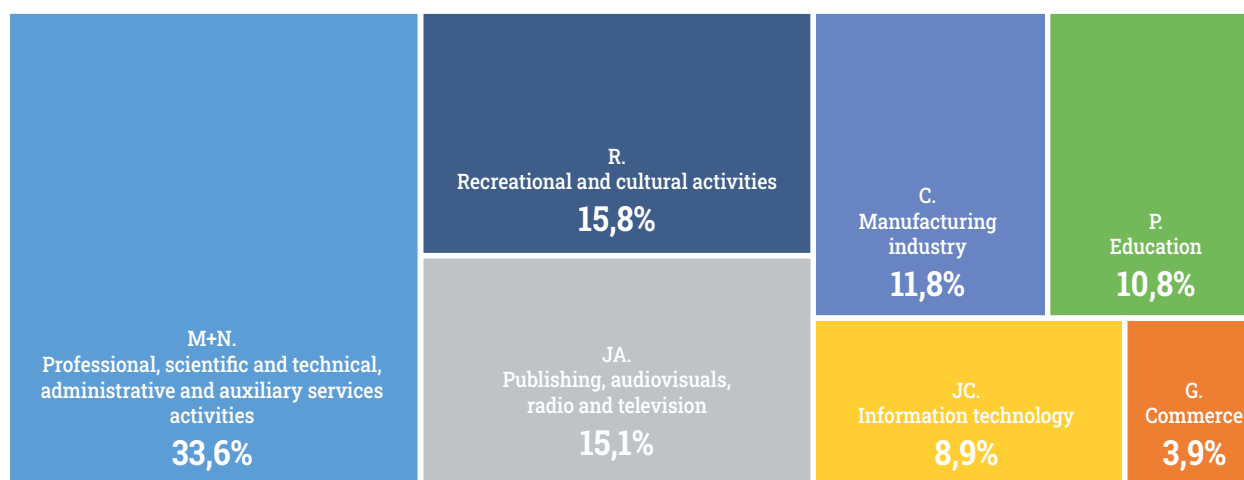
As can be seen in the table, of all branches of activity proposed for inclusion (22 branches of activity), the CCI activities can be divided as follows: “**C. Manufacturing industry**”, “**G. Commerce**”, “**JA. Publishing, audiovisuals, radio and television**”, “**JC. Information technology**”, “**M+N. Professional, scientific and technical, administrative and auxiliary services activities**”, “**P. Education**” and “**R. Recreational and cultural activities**”. Thus, it is confirmed that CCIs are made up of very different nature activities, from purely manufacturing activities and commercial activities to teaching activities.

The total of the cultural and creative activities represents in the Basque Country 33,893 jobs, of which 13,433 jobs are related to the creative industries and 20,550 with the cultural industries. Regarding the cultural activities, the **Audiovisual and multimedia (5,972 jobs)**, **Books and the press (5,853 jobs)** and **Performing arts (4,077 jobs)** are the ones that most contribute to employment. Also, **Visual arts, Music, Heritage, museums, archives and libraries** contribute with 1,772 jobs, 1,599 jobs and 1,277 jobs respectively.

Among the creative activities, jobs related to **Architecture (4,002 jobs)**, **Advertising (3,581 jobs)**, **Language industry (3,354 jobs)**, **Fashion manufacturing (1,304 jobs)** and **Design (1,165 jobs)** stand out. The total number of activities is completed with **Video games (27 jobs)**.

The following graph shows the classification of CCI activities total employment (both inherent and auxiliary) by branch of activity. As can be seen, **Professional, scientific and technical, administrative and auxiliary services activities** represent 33.6% of employment, based on **Architecture technical services (11.78%)** and **Advertising agencies (9.96%)**. Also, within this category, employment from the **Language industries (3.02%)** and **Visual arts (Photography activities, 2.51%)** is included.

FIGURE 5. CLASSIFICATION OF CCI ACTIVITIES TOTAL EMPLOYMENT (INHERENT AND AUXILIARY) BY BRANCH OF ACTIVITY



Source. Own preparation from data from Eustat, Directory of Economic Activities.

Recreational and cultural activities and **Publishing, audiovisuals, radio and television** represent 15.8% and 15.1% of total employment respectively. 11.8% of CCI activities have some sort of **Manufacturing industry** character and the **Education** activities make up 10.8% of employment, based mainly on the **Language industries (6.85%)** and **Musical education (3.98%)**. On the other hand, 8.9% operated in **Computer**-related activities.

The following table shows data from the cross-over of CCI activities and branches of activity taking into account exclusively those activities considered inherent.

TABLE 13. CROSS-OVER OF INHERENT CCIs AND BRANCHES OF ACTIVITY ACCORDING TO EMPLOYMENT

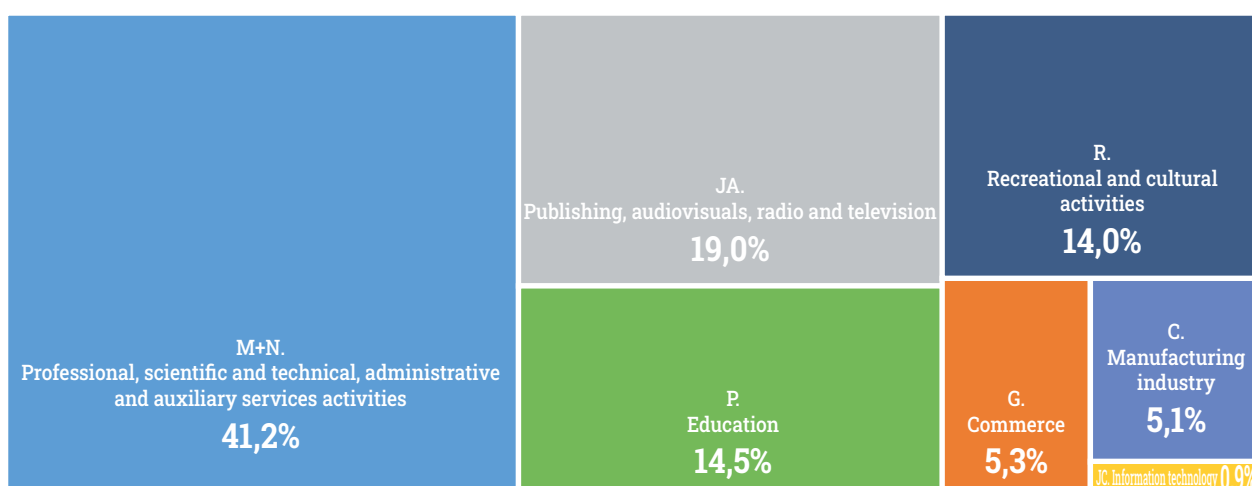
	C.- Manufacturing industry	G. Commerce	JA. Publishing, audiovisuals, radio and television	JC. Information technology	M+N. Professional, scientific and technical, administrative and auxiliary services activities	P. Education	R. Recreational and cultural activities	Grand total
1. CULTURAL		1.341	4.816	237	906	1.352	3.551	12.203
PERFORMING ARTS							1.840	1.840
VISUAL ARTS					853		919	1.772
AUDIOVISUAL AND MULTIMEDIA			3.155		53			3.208
BOOKS AND THE PRESS		1.319	1.513	237				3.069
MUSIC		22	148			1.352		1.522
HERITAGE, MUSEUMS, ARCH. AND LIBRARIES							792	792
2. CREATIVE	1.304		27		9.579	2.327		13.237
ARCHITECTURE					4.002			4.002
DESIGN					1.165			1.165
LANGUAGE INDUSTRIES					1.027	2.327		3.354
FASHION MANUFACTURE	1.304							1.304
ADVERTISING					3.385			3.385
VIDEO GAMES			27					27
Grand total	1.304	1.341	4.843	237	10.485	3.679	3.551	25.440

Source. Own preparation from data from Eustat, Directory of Economic Activities.

Taking into account exclusively those inherent activities, the dimension of the CCIs makes up 25,440 jobs. The main reduction in comparison with the global figure of CCI employment comes from the consideration of the **Books and the press (2,641 jobs)** sector as an auxiliary industry and the activities of computer programming related to the **Audiovisual and multimedia (2,465 jobs)** sector.

The following figure shows the distribution by branches of activity of the inherent cultural and creative activities.

FIGURE 6. CLASSIFICATION OF CCI ACTIVITIES TOTAL EMPLOYMENT (INHERENT) BY BRANCH OF ACTIVITY



Source. Own preparation from data from Eustat, Directory of Economic Activities.

It can be observed that **Professional, scientific and technical, administrative and auxiliary services activities (41.2%)** represent the greatest percentage of employment of inherent CCI activities. These are followed by the **Publishing, audiovisuals, radio and television (19%)**, **Education (14.5%)** and the **Recreational and cultural activities (14%)**, **Commerce (5.3%)** and the **Manufacturing industry (5.1%)**, which virtually make up the total of employment. Lastly and marginally, **Information technology** represents 0.9% of employment of CCI activities considered inherent.

The following table shows in detail the distribution of the nature of **cultural activities** based on employment. **Cultural activities** as a whole have great branches of activity dispersion, from 26.0% in **Recreational and cultural activities**, 24.9% in **Publishing, audiovisuals, radio and television**, 13.7% in **Information technology** companies or 13.2% in **Manufacturing** companies. Also, 9.0% of employment belongs to **Professional, scientific and technical, administrative and auxiliary services** activities, 6.6% to **Education** and 6.5% to **Commercial activities**.

TABLE 14. DISTRIBUTION OF CULTURAL ACTIVITIES EMPLOYMENT BY BRANCH OF ACTIVITY

	C. Manufacturing industry	G. Commerce	JA. Publishing, audiovisuals, radio and television	JC. Information technology	M+N. Professional, scientific and technical, administrative and auxiliary services activities	P. Education	R. Recreational and cultural activities
1. CULTURAL	13,2 %	6,5 %	24,9 %	13,7 %	9,0 %	6,6 %	26,0 %
PERFORMING ARTS					10,7 %		89,3 %
1.- INHERENT							100,0 %
2.- AUXILIARY					19,4 %		80,6 %
VISUAL ARTS					48,1 %		51,9 %
1.- INHERENT					48,1 %		51,9 %
AUDIOVISUAL AND MULTIMEDIA			57,8 %	41,3 %	0,9 %		
1.- INHERENT			98,3 %		1,7 %		
2.- AUXILIARY			10,8 %	89,2 %			
BOOKS AND THE PRESS	45,1 %	22,5 %	25,8 %	6,1 %	0,4 %		
1.- INHERENT		43,0 %	49,3 %	7,7 %			
2.- AUXILIARY	94,9 %			4,3 %	0,8 %		
MUSIC	4,8 %	1,4 %	9,3 %			84,6 %	
1.- INHERENT		1,4 %	9,7 %			88,8 %	
2.- AUXILIARY	100,0 %						
HERITAGE, MUSEUMS, ARCHIVES AND LIBRARIES					38,0 %		62,0 %
1.- INHERENT							100,0 %
2.- AUXILIARY					100,0 %		

Source. Own preparation from data from Eustat, Directory of Economic Activities.

The field of **Performing arts** is basically carried out by people who work in **Recreational and cultural activities**, except for 10.7% of people who work in the **Booking service** auxiliary activity. 51.9% of employment in the **Visual arts** field is occupied by people who work in **Recreational and cultural activities** and 48.1% in **Photography** activities within the branch of activity of **Professional, scientific and technical, administrative and auxiliary services activities**.

On the other hand, the **Audiovisual and multimedia** field is distributed in almost the total (98.3%) of its inherent activities in the **Publishing, audiovisuals, radio, television** branch of activity and 89.2% of its auxiliary activities in the **Information technology** branch of activity, in programming activities. In the **Books and the press** field, 45.1% of employment belongs to **Manufacturing** activities, 25.8% to **Publishing, audiovisuals, radio, television** and 22.5% to **Commercial** activities. The remaining 6.5% is distributed mainly in **Information technology** activities and marginally in **Media representation services**.

The **Music** field activity is mainly focused on the **Cultural education** world, according to the established perimeter. Also, 6.0% of employment belongs to **Sound recording and music publishing activities**. The **Heritage, museums, archives and libraries** field as inherent activity is mainly carried out by people from **Recreational and cultural activities** and with the support of auxiliary activities such as **Other research and experimental development on natural sciences and engineering**.

Below the distribution of the nature of creative activities based on employment is shown in detail. 71.3% of employment in **Creative Industries** is found in activities classified as **Professional, scientific and technical, administrative and auxiliary services activities**, 17.3% in **Education activities** (basically belonging to **Education activities nec**) and 9.7% belonging to the **Manufacturing industry**.

TABLE 15. DISTRIBUTION OF CREATIVE ACTIVITIES EMPLOYMENT BY BRANCH OF ACTIVITY

	C. Manufacturing industry	G. Commerce	JA. Publishing, audiovisuals, radio and television	JC. Information technology	M+N. Professional, scientific and technical, administrative and auxiliary services activities	P. Education	R. Recreational and cultural activities
2. CREATIVE	9,7 %		0,2 %	1,5 %	71,3 %	17,3 %	0,0 %
ARCHITECTURE					100,0 %		
1.- INHERENT					100,0 %		
DESIGN					100,0 %		
1.- INHERENT					100,0 %		
LANGUAGE INDUSTRIES					30,6 %	69,4 %	
1.- INHERENT					30,6 %	69,4 %	
FASHION MANUFACTURE	100,0 %						
1.- INHERENT	100,0 %						
ADVERTISING				5,5 %	94,5 %		
1.- INHERENT					100,0 %		
2.- AUXILIARY				100,0 %			
VIDEO GAMES			100,0 %				
1.- INHERENT			100,0 %				

Source. Own preparation from data from Eustat, Directory of Economic Activities.

As can be seen, **Creative activities** as a whole have a low degree of dispersion in the branches of activity and if we consider each one individually, they are also quite homogeneous activities from the employment point of view. Thus, **Fashion manufacturing** is a **Manufacturing** activity, the **Video games** industry corresponds to a **Publishing, audiovisuals, radio, television** activity, the **Architecture, Design and Advertising** activities correspond to employment in the branch of activity of **Professional, scientific and technical, administrative and auxiliary services activities** (architects, designer and publicists respectively) and the **Language industries** correspond to **Education and Translation and interpretation activities**.

Below is the weight of each CCI field in comparison with the total CCI activities employment for each branch of activity. This exercise allows us to segment the CCI activities based on their nature.

TABLE 16. WEIGHT OF EACH CCI FIELD IN EACH BRANCH OF ACTIVITY (CCI ACTIVITIES EMPLOYMENT)

	C. Manufacturing industry	G. Commerce	JA. Publishing, audiovisuals, radio and television	JC. Information technology	M+N. Professional, scientific and technical, administrative and auxiliary services activities	P. Education	R. Recreational and cultural activities
1. CULTURAL	67,6 %	100,0 %	99,5 %	93,5 %	16,2 %	36,7 %	100,0 %
PERFORMING ARTS					3,8 %		68,0 %
VISUAL ARTS					7,5 %		17,2 %
AUDIOVISUAL AND MULTIMEDIA			67,2 %	81,6 %	0,5 %		
BOOKS AND THE PRESS	65,7 %	98,4 %	29,4 %	11,9 %	0,2 %		
MUSIC	1,9 %	1,6 %	2,9 %			36,7 %	
HERITAGE, MUSEUMS, ARCHIVES AND LIBRARIES					4,2 %		14,8 %
2. CREATIVE	32,4 %		0,5 %	6,5 %	83,8 %	63,3 %	
ARCHITECTURE					35,0 %		
DESIGN					10,2 %		
LANGUAGE INDUSTRIES					9,0 %	63,3 %	
FASHION MANUFACTURE	32,4 %						
ADVERTISING				6,5 %	29,6 %		
VIDEO GAMES			0,5 %				

Source. Own preparation from data from Eustat, Directory of Economic Activities.

This shows that **Cultural activities** have greater weight in the branches of activity of **Commerce, Recreational and cultural activities, Publishing, audiovisuals, radio, television, Information technology** and the **Manufacturing industry**. However, **Creative activities** have greater weight in the branches of **Professional, scientific and technical, administrative and auxiliary services activities** and **Education**.

The information analysed in this chapter allows us to establish a segmentation⁸ of the CCI activities based on their belonging to a certain branch of activity, which makes it possible to establish the policies to promote them more accurately. Thus the resulting segments are reflected in the following table:

TABLE 17. SEGMENTATION OF CCI ACTIVITIES ACCORDING TO THEIR NATURE (BELONGING TO BRANCHES OF ACTIVITY)

	Manufacturing	Commercial	Publishing, audiovisuals, radio and television and information technology	Professional, scientific and technical activities	Education	Recreational and cultural activities
Percentage of total CCI employment	11,8%	3,9%	24,0%	33,6%	10,8%	15,8%
Employment of represented fields (>90%) of the branch of activity	Books and the press. Graphic arts, pre-printing and printing of books Fashion manufacturing	Books and the press. Sales.	Audiovisual and multimedia Books and the press	Architecture Advertising Design Translation and interpreting Visual arts	Language industries Music	Performing arts Visual arts Heritage, museums, archives and libraries.
Rest (<10%)	Music	Music	Music Video games Advertising/Web portals	Heritage, museums, archives and libraries Performing arts Books and the press Audiovisual and multimedia		

Source. Own preparation from data from Eustat, Directory of Economic Activities.

⁸ The description of the segments identified in the table allows the inclusion of over 90% employment of the total employment of the branch of activity.

As it can be seen in the table, the CCI activities can be classified in the following sections according to their relationship with the branches of activity:

Manufacturing activities. These activities make up 11.8% of CCI employment.

They are auxiliary manufacturing activities within the field of **Books and the press** (1811.- **Printing of newspapers**, 1812.- **Other printing**, 1813.- **Pre-press and pre-media services**) or activities of **Fashion manufacturing** (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**, 1512.- **Manufacture of luggage, handbags and the like, saddlery and harness**, 1520.- **Manufacture of footwear**, 3212.- **Manufacture of jewellery and related articles** y 3213.- **Manufacture of imitation jewellery and related articles**).

Additionally, although of lesser volume, this chapter includes auxiliary manufacturing activities of **Music** such as 1820.- **Reproduction of recorded media** and 3220.- **Manufacture of musical instruments**.

Commercial activities. These activities make up 3.9% of CCI activities employment.

Consisting of **Books and the press** (98.4% of this group) and **Music** (1.6% of this group) commerce.

These are activities related to **Books and the press**, activities of 4761.- **Retail sale of books in specialised stores** and 4762.- **Retail sale of newspapers and stationery in specialised stores** are included, and in relation to **Music**, activities of 4763.- **Retail sale of music and video recordings in specialised stores** are included.

Activities of Publishing, audiovisuals, radio and television and information technology. These activities make up 24% of CCI employment.

Regarding the field of **Audiovisual and multimedia**, this category consists of activities of 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**, 6010.- **Radio broadcasting** 6020.- **Television programming and broadcasting activities**, 6312.- **Web portals** and 5829.- **Other software publishing**⁹.

Regarding the field of **Books and the press**, the activities included are the following: 5811.- **Book publishing**, 5813.- **Publishing of newspapers**, 5814.- **Publishing of journals and periodicals**, 5819.- **Other publishing activities** and 6399.- **Other information service activities nec**.

⁹ CNAE 5829.- Other software publishing belongs to CNAE 58 Publishing.

Professional, scientific and technical activities. These activities make up 33.6% of CCI activities employment.

This category covers activities carried out by professionals from different fields, such as **7420.- Photographic activities, 7111.- Architectural activities, 7410.- Specialised design activities, 7430.- Translation and interpretation activities, 7311.- Advertising agencies, 7219.- Other research and experimental development on natural sciences and engineering and 7220.- Research and experimental development on social sciences and humanities** as well as other auxiliary services such as **7990.- Other reservation service and related activities, 7722.- Renting of video tapes and disks and 7312.- Media representation.**

Education activities. These activities make up 10.8% of CCI activities employment.

This is employment in activities of **8552.- Cultural education and 8559.- Other education nec.**

Recreational and cultural activities. These activities make up 15.8% of CCI activities employment.

This category consists of activities of **9001.- Performing arts, 9002.- Support activities to performing arts, 9004.- Operation of arts facilities, 9329.- Other amusement and recreation activities, 9003.- Artistic creation, 9102.- Museum activities, 9103.- Operation of historical sites and buildings and similar visitor attractions, 9105.- Library activities and 9106.- Archive activities.**

The following table shows the percentage represented by CCI activities within the Basque economy as a whole regarding its branch of activity.

CCI activities are highly representative in the branches of activity of the economy related to **J. Publishing, audiovisuals, radio and television and information technology** (including telecommunications) and in **R. Recreational and cultural activities** with 35.8% and 32.5% respectively. Approximately one in every three jobs in said branches of activity corresponds to companies who operate in creative or cultural activities.

TABLE 18. PERCENTAGE REPRESENTED BY CCI ACTIVITIES IN THEIR BRANCH OF
ACTIVITY AND IN THE BASQUE ECONOMY

Branch of activity	Percentage of CCI activities of the whole branch of activity of the economy	Percentage CCI activities of the whole Basque economy
C.- Manufacturing	2,3 %	0,5 %
G.- Commercial	1,1 %	0,2 %
J.- Publishing, audiovisuals, radio and television and information technology	35,8 %	0,9 %
M+N.- Professional, scientific and technical activities	9,4 %	1,3 %
P.- Education	8,3 %	0,4 %
R.- Recreational and cultural activities	32,5 %	0,6 %

Source. Own preparation from data from Eustat, Directory of Economic Activities.

On the other hand, 9.4% of jobs in **Professional, scientific and technical activities** in the Basque Country correspond to CCI activities and 8.3% of jobs in **educational** companies are located in creative or cultural education companies. 2.3% of employment in all Basque **manufacturing** corresponds to CCI companies, and finally, 1.1% of **commercial** employment in the Basque Country corresponds to CCI companies.

As a whole, companies with creative or cultural activity represent employment equivalent to 3.84% of total employment in the Basque economy. **Educational** activities, **Manufacturing** activities, **Recreational and cultural activities**, **Publishing, audiovisuals, radio, television and information technology** and **Professional, scientific and technical activities** related to CCIs represent 0.4%, 0.5%, 0.6 %, 0.9% and 1.3% respectively.

For the establishment of policies for the promotion of CCIs, each of these segments will require a detailed specific analysis verifying the relationship of CCI companies with other Government Departments.

CCI ACTIVITIES AND THE EMPLOYMENT OF CCI OCCUPATIONS

As a complement to the information on employment presented in a previous section, this section analyses the cultural and creative industries of the Basque Country as a job-creating activity in occupations considered CCIs. Specifically, (i) the hires made from January 1, 2019 to December 31, 2020 by the companies included in the CNAEs identified as CCI activities and (ii) the hires made in profiles identified as CCI occupations are analysed (see Annex 2). By means of encoding the data obtained from Lanbide to anonymise them, the 4-digit CNAE codes have been crossed with the occupations of the contracts. The purpose of this analysis is to discover the relationship between CCI activities and CCI occupations.

The following table presents the ranking of the 20 activities with the highest number of CCI occupation contracts carried out during the reference period. In addition, the number of contracts carried out in said period and their inclusion or not in the established CCI perimeter of activities is presented.

TABLE 19. RANKING OF THE 20 MOST WIDELY HIRING ACTIVITIES FOR CCI PROFILES

4-digit CNAE activity	CNAE CCI	No. of contracts	Average duration of contracts (days)
8559. Other education nec	SI	13.221	26,6
7820. Temporary employment agency activities	NO	8.199	2,7
5915. Motion picture and video production activities	SI	8.109	4,7
5916. Television programme production activities	SI	7.937	2,9
5912. Motion picture, video and television programme post-production activities	SI	6.890	0,2
9329. Other amusement and recreational activities	SI	5.712	11,7
9499. Activities of other membership organizations nec	NO	5.560	15,6
5629. Other food services	NO	5.269	31,3
9001. Performing Arts	SI	4.713	3,7
6020. Television programming and broadcasting activities	SI	3.303	16,2
9311. Operation of sports facilities	NO	2.523	21,1
8899. Other social work activities without accommodation nec	NO	1.861	14,3
8552. Cultural education	SI	1.643	66,7
9319. Other sports activities	NO	1.574	10,7
8411. General public administration activities	NO	1.473	63,0
9004. Operation of arts facilities	SI	1.462	1,0
9002. Support activities to performing arts	SI	1.434	2,7
6010. Radio broadcasting	SI	1.226	37,2
8551. Sports and recreation education	NO	1.178	19,8
8812. Social service activities without accommodation for people with disabilities	NO	1.116	15,1
TOTAL		103.760	

Source. Own preparation from Lanbide data.

As can be seen, of the 20 selected activities, 11 are within the defined perimeter of CCI activities and 9 are activities not specifically considered CCI activities. Among the latter are the **Temporary employment agency activities** as intermediary entities with other business activities, **Activities of other membership organizations nec**, **Other food services**¹⁰, **Operation of sports facilities**, **Other social work activities without accommodation nec**, **Other sports activities**, **General public administration activities**, **Sports and recreation education** and **Social work activities without accommodation for people with disabilities**.

¹⁰ After detailed analysis, it is found that the contracts associated with this activity are concentrated in a company whose relationship with the type of contract collected has been confirmed.

Among the activities identified as CCI, **Other education nec, Motion picture and video production activities, Television programme production activities, Motion picture, video and television programme post-production activities, Other recreational and entertainment activities, Activities of other membership organizations nec, Other food services, Performing arts, Television programming and broadcasting activities, Operation of sports facilities, Other social work activities without accommodation nec, Cultural education, Other sports activities, General public administration activities, Operation of arts facilities, Support activities to performing arts and Radio broadcasting** are the ones that have generated the highest number of contracts.

The average duration varies considerably depending on the branch of activity. The **educational** activities have a higher average duration of their contracts than the rest of the activities. On the contrary, **motion picture, video and television programme production and post-production** activities produce contracts of an average duration of fewer than 5 days.

To analyse hiring according to the nature of the CCI activities¹¹, the following table shows the hiring of occupations with a CCI profile and the hiring that does not correspond to said profiles, arranged in descending order in relation with the percentage of CCI profile contracts over the total. Likewise, the percentage represented by each of these categories of the total number of contracts is indicated.

As can be seen, **Publishing, audiovisuals, radio and television** activities are represented both in the absolute value of the number of contracts and in the percentage of CCI profiles, the segment of greatest relevance. The percentage of CCI profile contracts in this segment is 91% in the reference years, amounting to 28,828 contracts.

¹¹ According to the reference classification that can be consulted in Annex 5.

TABLE 20. NUMBER OF HIRINGS OF CCI OCCUPATIONS CARRIED OUT BY COMPANIES WITH CCI ACTIVITIES

Segment	No. of CCI occupation contracts	% of CCI occupation contracts	No. of non-CCI occupation contracts	% of non-CCI occupation contracts	Total contracts	Average duration of CCI occupation contracts
Publishing, audiovisuals radio and TV	28.828	91 %	3.013	9,5 %	31.841	6,5
Artistic, recreational and entertainment activities	14.417	60,1 %	9.584	39,9 %	24.001	8,1
Education	14.864	57,6 %	10.963	42,4 %	25.827	31,1
Manufacturing industry	785	39,6 %	1.198	60,4 %	1.983	57,1
Information technology	341	24,9 %	1.027	75,1 %	1.368	41,9
Prof., scientific technical, admin. and aux. serv. activities	2.678	18,7 %	11.659	81,3 %	14.337	33,2
Commerce	12	1,3 %	881	98,7 %	893	1,9
TOTAL	61.925	61,8 %	38.325	38,2 %	100.250	14,7

Source. Own preparation from Lanbide data.

The **Artistic, recreational and entertainment activities** carried out 24,001 contracts, of which 60.1% has a CCI profile. In the reference period, CCI activities of an **Educational** nature carried out 57.6% of their contracts with an CCI profile.

If we analyse the cultural and creative activities of a **Manufacturing** nature, they carried out 1,983 contracts, of which 39.6% consisted of CCI occupations. The **Information technology** activities and **Professional, scientific and technical, administrative and auxiliary services activities** carried out 24.9% and 18.7% of contracts with CCI occupations respectively. Finally, **Commercial activities** represent the lowest number of CCI contracts with 1.3%.

The activities related to **Publishing, audiovisuals, radio and television** and **Artistic, recreational and entertainment activities** register contracts with an average duration of 6.5 days and 8.1 days respectively, while **Manufacturing** activity presents a slightly lower average duration of contracts with CCI profiles at two months (57.1 days).

Analysing the contracts for each creative and cultural field, the following table shows the percentage of CCI and non-CCI contracts. It can be seen that according to the defined perimeter of activities and occupations, cultural activities as a whole have a higher percentage of contracts (69.6%) with CCI profiles than creative activities (45.9%).

The **Audiovisual and multimedia** field hires 89.3% of people for CCI occupations. It is the field with the highest percentage of CCI contracts. On the contrary, only 3% of the contracts in the field of **Videogames** have a CCI profile.

TABLE 21. PERCENTAGE OF CONTRACTS WITH CCI OCCUPATION PROFILES WITHIN THE WHOLE OF ACTIVITIES IN THE CREATIVE AND CULTURAL FIELDS

	YES	No	Average duration of CCI occupation contracts
1. CULTURAL	69,6%	30,4%	10,1
PERFORMING ARTS	59,0%	41,0%	6,5
VISUAL ARTS	68,5%	31,5%	17,4
AUDIOVISUAL AND MULTIMEDIA	89,3%	10,7%	6,2
BOOKS AND THE PRESS	35,9%	64,1%	50,0
MUSIC	58,7%	41,3%	47,3
HERITAGE, MUSEUMS, ARCHIVES AND LIBRARIES	17,2%	82,8%	33,1
2. CREATIVE	45,9%	54,1%	29,3
ARCHITECTURE	39,4%	60,6%	97,5
DESIGN	45,7%	54,3%	78,9
LANGUAGE INDUSTRIES	53,9%	46,1%	26,6
FASHION MANUFACTURE	29,8%	70,2%	64,8
ADVERTISING	15,4%	84,6%	34,5
VIDEO GAMES	3,0%	97,0%	1,0
Grand total	61,8%	38,2%	14,8

Source. Own preparation from Lanbide data.

Within the cultural fields, **Heritage, museums, archives and libraries** hires 17.2% of people with a CCI occupation profile and in the creative fields, the **Language industries** are the ones that hire people with said profile in a higher percentage.

In general, the average duration of contracts in the **creative** fields (29.3 days) is higher than that in the **cultural** fields (10.1 days). In general, the average duration of contracts with CCI occupations of CCI activities is 14.8 days. The fields of **Videogames¹², Performing arts, Audiovisual and multimedia** have an average duration of less than one week. On the contrary, the fields of **Architecture, Design and Manufacturing** have average durations of more than two months.

The following table shows the percentages of hiring with a CCI occupation profile for the areas analysed, exclusively including the inherent activities, that is, excluding those activities that have been considered auxiliary to the different fields.

TABLE 22. PERCENTAGE OF CONTRACTS WITH CCI OCCUPATION PROFILES OF ACTIVITIES INHERENT TO CREATIVE AND CULTURAL FIELDS

	YES	No	Average duration of CCI occupation contracts
1. CULTURAL	76,3%	23,7%	8,9
PERFORMING ARTS	54,6%	45,4%	3,0
VISUAL ARTS	68,5%	31,5%	17,4
AUDIOVISUAL AND MULTIMEDIA	92,0%	8,0%	5,9
BOOKS AND THE PRESS	32,2%	67,8%	39,3
MUSIC	59,3%	40,7%	49,1
HERITAGE, MUSEUMS, ARCHIVES AND LIBRARIES	69,7%	30,3%	29,0
2. CREATIVE	31,6%	68,4%	29,5
ARCHITECTURE	39,4%	60,6%	97,5
DESIGN	45,7%	54,3%	78,9
LANGUAGE INDUSTRIES	53,9%	46,1%	26,6
FASHION MANUFACTURE	29,8%	70,2%	64,8
ADVERTISING	14,7%	85,3%	35,4
VIDEO GAMES	3,0%	97,0%	1,0
Grand total	64,5%	35,5%	14,3

Source. Own preparation from Lanbide data.

12 Due to the low number of CCI contracts in this area, it cannot be considered a significant figure.

It can be seen that once the activities considered as auxiliary to the CCI fields have been excluded, the percentage of contracts with CCI profiles increases slightly as a whole (64.5%). This increase is mainly due to **Cultural** activities in which the percentage of hiring with a CCI profile rises from 69.6% to 76.3%. Significantly, the area of **Heritage, museums, archives and libraries** sees the percentage of CCI contracts increase from 17.2% to 69.7%¹³.

Likewise, the duration of the contracts is reduced in the case of cultural activities from 10.1 to 8.9 days.

13 As mentioned above, activity **7219. Other research and experimental development on natural sciences and engineering**, auxiliary to **Heritage, museums, archives and libraries** has been analysed in detail to determine its dimension. The analysis of CCI contracts of inherent activities reflects the behaviour of the sector in a more real way.

12 | CONCLUSIONS

This document presents the result of the project carried out by Orkestra-Basque Institute of Competitiveness whose goal is the analysis of the economic dimension of the Cultural and Creative Industries (CCIs) and their integration in the industrial fabric of the Basque Country as a source of information to help the creation of public policies to promote them.

According to the *European Commission* (2012), the cultural and creative industries are constituted by a diversity of activities that cover in particular architecture, crafts, audiovisuals (including cinema, television, video games and multimedia), cultural heritage, design (including fashion design), festivals, music, performing arts, performing, visual arts, advertising, and radio. In the context of this paper, the language industry has been added for analysis.

This set of activities can be analysed from at least two complementary, although differentiated, points of view: (i) the perspective of the value chain; and (ii) the perspective of the nature of the activities that make them up.

The value chain perspective reflects the existing relationship (economic flows, products, services, knowledge) between activities whose goal is the production of a good or service with creative and/or cultural content. This perspective is important to understand the supply and demand of creative and cultural products and the cascading economic activity it generates.

The branch of activity perspective allows the classification of activities according to their nature (manufacture, trade, etc.). Among other things, this classification is important for: The evaluation of homogeneous problems between different activities, although they belong to different value chains, for the facilitation of interlocution with other Government Departments, for the coordination of policies, identification and evaluation of performance indicators or policy evaluation or for establishing shared requirements for the incorporation of new technologies.

This perspective is essential for the establishment of public policies for the promotion of CCI and in particular for an adequate coordination of the policies developed by Government Departments. Indeed, industry development policies are frequently oriented towards companies according to the nature of their activities.

The following table shows the relationship between value chains and the nature of activities identified by the branch of activity.

TABLE 23. CROSS-OVER BETWEEN CCI VALUE CHAINS AND BRANCHES OF ACTIVITY

	C. Manufacturing industry	G. Commerce	JA. Publishing, audiovisuals, radio and television	JC. Information technology	M+N.- Professional, scientific and technical, administrative and auxiliary services activities	P. Education	R. Recreational and cultural activities
PERFORMING ARTS							
VISUAL ARTS							
AUDIOVISUAL AND MULTIMEDIA							
BOOKS AND THE PRESS							
MUSIC							
HERITAGE, MUSEUMS, ARCH. AND LIBRARIES							
ARCHITECTURE							
DESIGN							
LANGUAGE INDUSTRIES							
FASHION MANUFACTURE							
ADVERTISING							
VIDEO GAMES							

Source. Own preparation.

To understand the complexity of CCI, it is necessary to approach their analysis from this double perspective. In this document, both have been approached by means of a cross-over that allows the obtaining of a map of the interrelation between them from a qualitative and quantitative perspective.

Initially, it was necessary to define the perimeter of the CCI, that is, what are the activities that compose it, the associated occupations and the products and services with creative and cultural content.

Said perimeter must comply with the conditions of comparability with other geographical fields, adaptation to the specific characteristics of the Basque Country and orientation towards the definition of policies. Through an iterative and participatory process, the perimeters to be used in this work have been defined and can be found in the annexes to this document.

As a consequence of this definition of the perimeter, 70 activities (4-digit CNAE-09), 56 occupations (CNO-11) and 131 products or services associated with the CCI have been identified. The list of all of them can be found in the annexes of this document.

From a value chain perspective, the Basque cultural and creative industries present the following distribution:

TABLE 24. THE VALUE CHAINS OF THE CCIs IN THE BASQUE COUNTRY

	No. of companies	Employment	Percentage of total employment in the Basque Country
1. CULTURAL	7.149	20.550	2,34%
PERFORMING ARTS	1.414	4.077	0,46%
VISUAL ARTS	1.421	1.772	0,20%
AUDIOVISUAL AND MULTIMEDIA	1.513	5.972	0,68%
BOOKS AND THE PRESS	1.771	5.853	0,67%
MUSIC	592	1.599	0,18%
HERIT., MUSEUMS, ARCHIVES AND LIBRARIES	438	1.277	0,15%
2. CREATIVE	9.737	13.433	1,50%
ARCHITECTURE	3.113	4.002	0,45%
DESIGN	790	1.165	0,13%
LANGUAGE INDUSTRIES	4.141	3.354	0,38%
FASHION MANUFACTURE	537	1.304	0,15%
ADVERTISING	1.147	3.581	0,40%
VIDEO GAMES	9	27	0,00%
Grand total	16.886	33.983	3,84%

Source. Own preparation from data from Eustat, Directory of Economic Activities.

As a whole, the cultural and creative industries are made up of 16,886 companies that employ 33,983 people, which represents 3.84% of employment in the Basque Country.

The **creative industries** represent an employment of 13,433 jobs in 9,737 companies and account for 1.50% of employment, with **Architecture, Advertising** and the **Language industries** being the fields that generate the most employment. **Cultural industries** represent 20,550 jobs in 7,149 companies and account for 2.34% of employment in the Basque Country.

From the perspective of a classification according to the nature of the activities, the CCIs present the data indicated in the following table:

TABLE 25. THE CCIs IN THE BASQUE COUNTRY ACCORDING TO THE NATURE OF THEIR ACTIVITIES

	No. of companies	Employment	Percentage of total employment in the Basque Country	Percentage of total employment of the branch of activity (manufacturing, etc.)
Manufacturing	1.244	4.022	0,46 %	2,30 %
Commercial	709	1.341	0,15 %	1,15 %
Publishing, audiovisuals, radio and television and information technology	2.053	8.161	0,93 %	35,80 %
Professional, scientific and technical activities	6.750	11.427	1,30 %	9,37 %
Education	3.987	3.679	0,42 %	8,25 %
Recreational and cultural activities	2.143	5.353	0,61 %	32,48 %
Grand total	16.886	33.983	3,87 %	

Source. Own preparation from data from Eustat, Directory of Economic Activities.

According to the data obtained, it is verified that the **Professional, scientific and technical activities (Architecture, Advertising, Design, Translation and interpretation, Visual Arts)** that represent 11,427 workers and the **Publishing, audiovisuals, radio, television and information technology** activities that represent 8,161 workers are the fields that generate the most employment.

The representativeness of **cultural and creative activities** within the set of activities of the Basque economy of the same nature is once again greater in the areas of **Publishing, audiovisuals, radio, television and information technology** and **Cultural and Creative activities**.

Taking into account the importance of the cultural and creative industries perspective in the establishment of policies to promote them, the following table presents the main variables related to each of the identified segments.

TABLE 26. SUMMARY SHEET OF CCI ACTIVITIES OF A MANUFACTURING NATURE

MANUFACTURING CCIs (11.8% of CCI employment)					
Branches of activity (4-digit CNAE-09)	<p>Book and the press 1811.- Printing of newspapers, 1812.- Other printing, 1813.- Pre-press and pre-media services, 1814.- Bookbinding and related services.</p> <p>Fashion manufacturing 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, 1512.- Manufacture of luggage, handbags and the like, saddlery and harness, 1520.- Manufacture of footwear, 3212.- Manufacture of jewellery and related articles y 3213.- Manufacture of imitation jewellery and related articles.</p> <p>Music 1820.- Reproduction of recorded media and 3220.- Manufacture of musical instruments.</p>				
Main variables	Employment	Companies	% of total employment in the Basque Country	% of CCI occupation contracts	Av. duration occ. contract CCI (days)
	4.022	1.244	0,46%	39,6%	57,1
Relationship with RIS3 ¹⁴	<p>Related to the following priorities and niches:</p> <ul style="list-style-type: none"> ◆ Advanced manufacturing ◆ Leisure, entertainment and culture 				

Source. Own preparation.

TABLE 27. SUMMARY SHEET OF CCI ACTIVITIES OF A COMMERCIAL NATURE

COMMERCIAL CCIs (3.9% of CCI employment)					
Branches of activity (4-digit CNAE-09)	<p>Books and the press, 4761.- Retail sale of books in specialised stores and 4762.- Retail sale of newspapers and stationery in specialised stores.</p> <p>Music 4763.- Retail sale of music and video recordings in specialised stores</p>				
Main variables	Employment	Companies	% of total employment in the Basque Country	% of CCI occupation contracts	Av. duration occ. contract CCI (days)
	1,341	709	0.15 %	1.3%	1.9
Relationship with RIS3	No potential relationships have been identified				

Source. Own preparation.

14 The sector allocation include in the document Eusko Jaurilaritza (2019), PCTI2030, has been taken as a reference.

TABLE 28. SUMMARY SHEET OF CCI ACTIVITIES OF PUBLISHING, AUDIOVISUALS, RADIO, TELEVISION AND INFORMATION TECHNOLOGY

PUBLISHING, AUDIOVISUALS, RADIO, TELEVISION, INFORMATION TECHNOLOGY CCI's (24% of CCI employment)					
Branches of activity (4-digit CNAE-09)	<p>Audiovisual and multimedia, 5912.- Motion picture, video and television programme post-production activities, 5914.- Motion picture projection activities</p> <p>5915.- Motion picture and video production activities, 5916.- Television programme production activities, 5917.- Film and video distribution activities, 6010.- Radio broadcasting 6020.- Television programming and broadcasting activities, 5829.- Web portals and 6201.- Other software publishing</p> <p>Advertising, 6312.- Web portals</p> <p>Books and the press, 5811.- Book publishing, 5813.- Publishing of newspapers, 5814.- Publishing of journals and periodicals, 5819.- Other publishing activities, 6391.- News agency activities and 6399.- Other information service activities nec</p> <p>Music, 5920.- Sound recording and music publishing activities</p> <p>Video games, 5821.- Publishing of computer games</p>				
Main variables	Employment	Companies	% of total employment in the Basque Country	% of CCI occupation contracts	Av. duration occ. contract CCI (days)
	8,161	2,053	0.93%	60.1%	8.1
Relationship with RIS3	<p>Related to the following priorities and niches:</p> <p>◆ Cultural and creative industries</p>				

Source. Own preparation.

TABLE 29. SUMMARY SHEET OF PROFESSIONAL, SCIENTIFIC AND TECHNICAL CCI ACTIVITIES

PROFESSIONAL, SCIENTIFIC AND TECHNICAL CCI ACTIVITIES (33.6% of CCI employment)					
Branches of activity (4-digit CNAE-09)	7990.- Other reservation service and related activities 7420.- Photographic activities 7111.- Architectural activities 7410.- Specialised design activities 7430.- Translation and interpretation activities 7311.- Advertising agencies 7219.- Other research and experimental development on natural sciences and engineering and 7220.- Research and experimental development on social sciences and humanities as well as other auxiliary services such as 7722.- Renting of video tapes and disks 7312.- Media representation.				
Main variables	Employment	Companies	% of total employment in the Basque Country	% of CCI occupation contracts	Av. duration occ. contract CCI (days)
	11,427	6,750	1.30 %	18.7%	33.2
Relationship with RIS3	Related to the following priorities and niches: ♦ Cultural and creative industries ♦ Urban habitat				

Source. Own preparation.

TABLE 30. SUMMARY SHEET OF EDUCATIONAL CCI ACTIVITIES

EDUCATIONAL CCIs (10.8% of CCI employment)					
Branches of activity (4-digit CNAE-09)	8552.- Cultural education and 8559.- Other education nec				
Main variables	Employment	Companies	% of total employment in the Basque Country	% of CCI occupation contracts	Av. duration occ. contract CCI (days)
	3,679 ¹⁵	3,987	0.42 %	57.6%	31.1
Relationship with RIS3	Related to the following priorities and niches:				

Source. Own preparation.

¹⁵ All the companies corresponding to the CNAEs have been considered for the purposes of comparison with other geographical settings. In the employment assessment, a detailed analysis has been carried out for the Basque Country, including those Tax ID codes that are associated with the creative and cultural field. Taking exclusively the companies for which employment has been considered, there would be 229 companies.

TABLE 31. SUMMARY SHEET OF RECREATIONAL AND CULTURAL CCI ACTIVITIES

RECREATIONAL AND CULTURAL CCI ACTIVITIES (15.8% of CCI employment)					
Branches of activity (4-digit CNAE-09)	9001.- Performing arts, 9002.- Support activities to performing arts 9004.- Operation of arts facilities 9329.- Other amusement and recreation activities 9003.- Artistic creation 9102.- Museum activities, 9103.- Operation of historical sites and buildings and similar visitor attractions 9105.- Library activities and 9106.- Archive activities.				
Main variables	Employment	Companies	% of total employment in the Basque Country	% of CCI occupation contracts	Av. duration occ. contract CCI (days)
	5,353	2,143	0.61 %	60.1%	8.1
Relationship with RIS3	Related to the following priorities and niches: ♦ Cultural and creative industries				

Source. Own preparation.

With regard to the definition of public policies for the promotion of Cultural and Creative Industries, some ideas are mentioned below for the development of policies for the promotion of CCIs in the Basque Country and advance in their positioning in the face of the three transitions, as well as their relation to the Agenda 2030:

1. Analysis of the public policies for the promotion of CCIs both in the Basque Country and in other geographical areas and to verify the coverage of the value chains and the segments by branches of activity.
2. Analysis of the relationship between programs of other Government Departments and the segments of the CCIs identified in this document.
3. Establishment of priority subsegments among the 27 identified subsegments.
4. Proposal of new programs to distinguish between aid for the operations of companies and aid for the empowerment of the creative and/or cultural component of companies (if any).
5. Taking into account the great number of self-employed people and the small company sizes, analysing the potentiality of collectivisation/sharing of development plans in the different areas.
6. Establishment of sector tables in a collaborative way with the agents of each of the priority areas of analysis to strengthen the priority subsegments.
7. Identification of potential synergies between the subsegments or between the appropriate policies for each of them.

8. Establishment of policies aimed at favouring the sectoral plans of the priority analysis subsegments.

All this should contribute to identifying transformation plans which allow the sector to make progress in its positioning when facing the three transitions, as well as its relationship with Agenda 2030.

13 | BIBLIOGRAPHY

ESSnet-Culture (2012). *European Statistical System Network on Culture*. Final report. Project profiting from the financial support of the European commission. EUROSTAT GRANT AGREEMENT no. 10401.2008.002 2009.352

European Cluster Observatory (2011). Priority Sector Report. Europa Innova Paper no. 16. ISBN 978-92-79-18470-3, doi:10.2769/95687

European Commission (2012). Communication from the commission to the European Parliament, The Council, The European Economic and Social Committee and The Committee of the Regions. Promoting cultural and creative sectors for growth and jobs in the EU. Brussels, 26.9.2012. COM(2012) 537 final

European Commission (2016). Boosting the competitiveness of cultural and creative industries for growth and Jobs. (EASME/COSME/2015/003). ISBN: 978-92-9202-203-7. doi: 10.2826/526239

Eusko Jaurlaritza-Gobierno Vasco (2019). Basque Science, Technology & Innovation Plan 2030.

Kulturaren Euskal Behatokia (2018). Conceptual delimitation of CCI in the Basque Country. Kulturaren Euskal Behatokia. Basque Observatory of Culture. Department of linguistic policy and culture. Basque Government.

Kulturaren Euskal Behatokia (2021). Analysis of the Companies, Jobs and Job Market in the cultural area in the CAE.

Orkestra (2017). Diagnosis of CCI in the city of Vitoria-Gasteiz. Orkestra - Basque Institute of Competitiveness.

Orkestra (2021). "Definition of the perimeter of analysis of CCI"

Power, D., (2011). *Priority Sector Report: Creative and Cultural Industries*. European Cluster Observatory.

Retegi, J., Carrillo, F., Gil de San Vicente, I., Salado, J.P. (2020) Sectoral analysis of the potential impact and recovery from the COVID-19 crisis on Basque companies.

ANNEXE 1:

ACTIVITIES IN THE PERIMETER OF ANALYSIS

Inherently cultural activities

1. CULTURAL

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

- 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

MUSIC

- 4763.- Retail sale of music and video recordings in specialised stores
- 5920.- Sound recording and music publishing activities
- 8552.- Cultural education

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

Auxiliary cultural activities

1. CULTURAL

PERFORMING ARTS

- 7990.- Other reservation service and related activities
- 9329.- Other amusement and recreation activities

AUDIOVISUAL AND MULTIMEDIA

- 5829.- Other software publishing
- 6201.- Computer programming activities

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

MUSIC

1820.- Reproduction of recorded media

3220.- Manufacture of musical instruments

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

Inherently creative activities

2. CREATIVE

ARCHITECTURE

7111.- Architectural activities

LANGUAGE INDUSTRIES

7430.- Translation and interpretation activities

8559.- Other education not elsewhere specified

ADVERTISING

7311.- Advertising agencies

VIDEO GAMES

5821.- Publishing of computer games

DESIGN

7410.- Specialised design activities

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 COMMERCIALISATION

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

Auxiliary creative activities

2. CREATIVE

ADVERTISING

6312.- Web portals

ANNEXE 2:

OCCUPATIONS INCLUDED IN THE PERIMETER OF ANALYSIS

CULTURAL

RECREATIONAL AND CULTURAL ACTIVITIES

- 1501.-Directors and managers of recreational, cultural and sports activities companies
- 3724.-Monitors of recreational and cultural activities
- 3731.-Photographers
- 3733.-Art gallery, museum and library technicians
- 3739.-Other supporting technicians and professionals of cultural and artistic activities

ARCHIVISTS, LIBRARIANS AND SIMILAR

- 2821.-Sociologists, geographers, anthropologists, archaeologists and similar
- 2911.-Museum archivists and curators
- 2912.-Librarians, documentalists and similar
- 4210.-Library and archives employees
- 5823.-Tourist guide

ARTISANS

- 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 workers

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

WRITERS AND JOURNALISTS

- 2921.- Writers
- 2922.- Journalists

GRAPHIC ARTS OFFICIALS AND OPERATIVES

- 7621.- Pre-printing process workers
- 7622.- Printing process workers
- 7623.- Bookbinding process workers

AUDIOVISUAL RECORDING AND BROADCASTING TECHNICIANS

- 3831.- Audiovisual recording technicians
- 3832.- Broadcasting technicians

CREATIVE

ANALYSTS AND DESIGNERS OF SOFTWARE AND MULTIMEDIA

- 2713.- Analysts, programmers and web and multimedia designers

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

PUBLICISTS

- 1222.- Advertising and public relations managers
- 2651.- Advertising and commercialisation professionals
- 3535.- Spokespersons and public relations agents

VIDEO GAMES

- 2719.- Analysts and designers of software and multimedia not classified under other sections

FASHION

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

ANNEXE 3:

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. Fireworks 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

ANNEXE 4:

EMPLOYMENT CROSS-OVER
BETWEEN CCI ACTIVITIES AND
BRANCHES OF ACTIVITY

	C.- Manufacturing industry	G. Commerce	JA. Publishing, audiovisuals, radio and television	JC. Information technology	M+N. Professional, scientific and technical, administrative and auxiliary services activities	P. Education	R. Recreational and cultural activities	Grand total
1. CULTURAL	2.718	1.341	5.115	2.823	1.848	1.352	5.353	20.550
PERFORMING ARTS					435		3.642	4.077
1.- INHERENT							1.840	1.840
9001.- Performing arts							1.235	1.235
9002.-Support activities to performing arts							474	474
9004.-Operation of arts facilities							131	131
2.- AUXILIARY					435		1.802	2.237

	C.- Manufacturing industry	G. Commerce	JA. Publishing, audiovisuals, radio and television	JC. Information technology	M+N. Professional, scientific and technical, administrative and auxiliary services activities	P. Education	R. Recreational and cultural activities	Grand total
7990.- Other reservation service and related activities					435			435
9329.-Other amusement and recreational activities							1.802	1.802
VISUAL ARTS					853		919	1.772
1.- INHERENT					853		919	1.772
7420.- Photographic activities					853			853
9003.- Artistic creation							919	919
AUDIOVISUAL AND MULTIMEDIA			3.454	2.465	53			5.972
1.- INHERENT			3.155		53			3.208
5912.- Motion picture, video and television programme post-production act.			87					87
5914.- Motion picture projection activities			314					314
5915.- Motion picture and video production activities			854					854
5916.- Television programme production activities			416					416
5917.- Film and video distribution activities			29					29
6010.- Radio broadcasting			644					644
6020.- Television programming and broadcasting activities			811					811
7722.- Renting of video tapes and disks					53			53
2.- AUXILIARY			299	2.465				2.764
5829.- Other software publishing			299					299
6201.- Computer programming activities				2.465				2.465
BOOKS AND THE PRESS	2.641	1.319	1.513	358	22			5.853
1.- INHERENT		1.319	1.513	237				3.069
4761.- Retail sale of books in specialised stores		593						593
4762.- Retail sale of newspapers and stationery in specialised stores		726						726

	C.- Manufacturing industry	G. Commerce	JA. Publishing, audiovisuals, radio and television	JC. Information technology	M+N. Professional, scientific and technical, administrative and auxiliary services activities	P. Education	R. Recreational and cultural activities	Grand total
5811.- Book publishing			460					460
5813.- Publishing of newspapers			656					656
5814.- Publishing of journals and periodicals			296					296
5819.- Other publishing activities			101					101
6391.- News agency activities				237				237
2.- AUXILIARY	2.641			121	22			2.784
1811.- Printing of newspapers	114							114
1812.- Other printing	1.977							1.977
1813.- Pre-press and pre-media services	414							414
1814.- Binding and related services	136							136
6399.- Other information service activities not specified elsewhere				121				121
7312.- Media representation					22			22
MUSIC	77	22	148			1.352		1.599
1.- INHERENT		22	148			1.352		1.522
4763.- Retail sale of music and video recordings in specialised stores		22						22
5920.- Sound recording and music publishing activities			148					148
8552.- Cultural education						1.352		1.352
2.- AUXILIARY	77							77
1820.- Reproduction of recorded media	58							58
3220.- Manufacture of musical instruments	19							19
HERITAGE, MUSEUMS, ARCHIVES AND LIBRARIES					485		792	1.277
1.- INHERENT							792	792
9102.- Museum activities							421	421

	C.- Manufacturing industry	G. Commerce	JA. Publishing, audiovisuals, radio and television	JC. Information technology	M+N. Professional, scientific and technical, administrative and auxiliary services activities	P. Education	R. Recreational and cultural activities	Grand total
9103.- Operation of historical sites and buildings and similar visitor attractions							119	119
9105.- Library activities							130	130
9106.- Archive activities							122	122
2.- AUXILIARY					485			485
7219.- Other research and experimental development on natural sciences and engineering					187			187
7220.- Research and experimental development on social sciences and humanities					298			298
2. CREATIVE	1.304		27	196	9.579	2.327		13.433
ARCHITECTURE					4.002			4.002
1.- INHERENT					4.002			4.002
7111.- Architectural activities					4.002			4.002
DESIGN					1.165			1.165
1.- INHERENT					1.165			1.165
7410.- Specialised design activities					1.165			1.165
LANGUAGE INDUSTRIES					1.027	2.327		3.354
1.- INHERENT					1.027	2.327		3.354
7430.- Translation and interpretation activities					1.027			1.027
8559.- Other education not elsewhere specified						2.327		2.327
FASHION MANUFACTURE	1.304							1.304
1.- INHERENT	1.304							1.304
1320.- Weaving of textiles	16							16

	C.- Manufacturing industry	G. Commerce	JA. Publishing, audiovisuals, radio and television	JC. Information technology	M+N. Professional, scientific and technical, administrative and auxiliary services activities	P. Education	R. Recreational and cultural activities	Grand total
1330.- Finishing of textiles	98							98
1411.- Manufacture of leather clothes	14							14
1412.- Manufacture of workwear	33							33
1413.- Manufacture of other outerwear	425							425
1414.- Manufacture of underwear	13							13
1419.- Manufacture of other wearing apparel and accessories	364							364
1420.- Manufacture of articles of fur	5							5
1431.- Manufacture of knitted and crocheted hosiery	2							2
1439.- Manufacture of other knitted and crocheted apparel	1							1
1512.- Manufacture of luggage, handbags and the like, saddlery and harness	54							54
1520.- Manufacture of footwear	49							49
3212.- Manufacture of jewellery and related articles	154							154
3213.- Manufacture of imitation jewellery and related articles	76							76
ADVERTISING				196	3.385			3.581
1.- INHERENT					3.385			3.385
7311.- Advertising agencies					3.385			3.385
2.- AUXILIARY				196				196
6312.- Web portals				196				196
VIDEO GAMES			27					27
1.- INHERENT			27					27
5821.- Publishing of computer games			27					27
Grand total	4.022	1.341	5.142	3.019	11.427	3.679	5.353	33.983

ANNEXE 5:

CULTURAL AND CREATIVE ACTIVITIES CLASSIFIED BY BRANCHES OF ACTIVITY

Professional, scientific, and technical, administrative and auxiliary activities

- 7111.- Architectural activities
- 7219.- Other research and experimental development on natural sciences and engineering
- 7220.- Research and experimental development on social sciences and humanities
- 7311.- Advertising agencies
- 7312.- Media representation
- 7410.- Specialised design activities
- 7420.- Photographic activities
- 7430.- Translation and interpretation activities
- 7722.- Renting of video tapes and disks
- 7990.- Other reservation service and related activities

Artistic, recreational and entertainment activities

- 9001.- Performing arts
- 9002.- Support activities to performing arts
- 9003.- Artistic creation

- 9004.-Operation of arts facilities
- 9102.- Museum activities
- 9103.- Operation of historical sites and buildings and similar visitor attractions
- 9105.- Library activities
- 9106.- Archive activities
- 9329.-Other amusement and recreational activities

Commerce

- 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
- 4761.- Retail sale of books in specialised stores
- 4762.- Retail sale of newspapers and stationery in specialised stores
- 4763.- Retail sale of music and video recordings in specialised stores
- 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

Publishing, audiovisuals radio and TV

- 5811.- Book publishing
- 5813.- Publishing of newspapers
- 5814.- Publishing of journals and periodicals
- 5819.- Other publishing activities
- 5821.- Publishing of computer games
- 5829.- Other software publishing
- 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
- 5920.- Sound recording and music publishing activities
- 6010.- Radio broadcasting
- 6020.- Television programming and broadcasting activities

Education

8552.- Cultural education

8559.- Other education not elsewhere specified

Manufacturing industry

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

1811.- Printing of newspapers

1812.- Other printing

1813.- Pre-press and pre-media services

1814.- Binding and related services

1820.- Reproduction of recorded media

3212.- Manufacture of jewellery and related articles

3213.- Manufacture of imitation jewellery and related articles

3220.- Manufacture of musical instruments

Information technology

6201.- Computer programming activities

6312.- Web portals

6391.- News agency activities

6399.- Other information service activities nec

Grand total



Kulturaren
Euskal Behatokia
Observatorio Vasco
de la Cultura



Eusko Jaurlaritzaren Argitalpen Zerbitzu Nagusia

Servicio Central de Publicaciones del Gobierno Vasco