Analysis of the innovation ecosystem of the cultural and creative industries in the Basque Country

EXECUTIVE SUMMARY

POSITIONING STUDIES OF THE CULTURAL AND CREATIVE INDUSTRIES

A bibliographic record of this work can be consulted in the catalogue of the General Library of the Basque Country https://www.katalogoak.euskadi.eus/katalogobateratua

Edition: 1st, April 2026

© **Authorship:** Ibone Eguia, Mercedes Oleaga, Imanol Aizpuru

Published by: Eusko Jaularitzaren Argiltapen Zerbitzua
Central Publications Service of the Basque Government
C/ Donostia- San Sebastian 1, 01010

Coordination: Basque Observatory of Culture

Translation: SMG Languages Srl – headquarters

Design and layout: EPS Comunicación

ISBN:

EXECUTIVE SUMMARY

In recent decades, the Cultural and Creative Industries (CCIs) have acquired an increasingly important role in innovation and territorial development strategies in Europe, positioning themselves as a key area for generating sustainable growth, social cohesion and competitiveness. In the case of the Basque Country, this sector has undergone a profound transformation, shifting from a conception centred on its symbolic dimension to becoming an economic and social driver of strategic innovation. This evolution has not been linear, but rather reflects a progressive process that can be understood in three main stages:

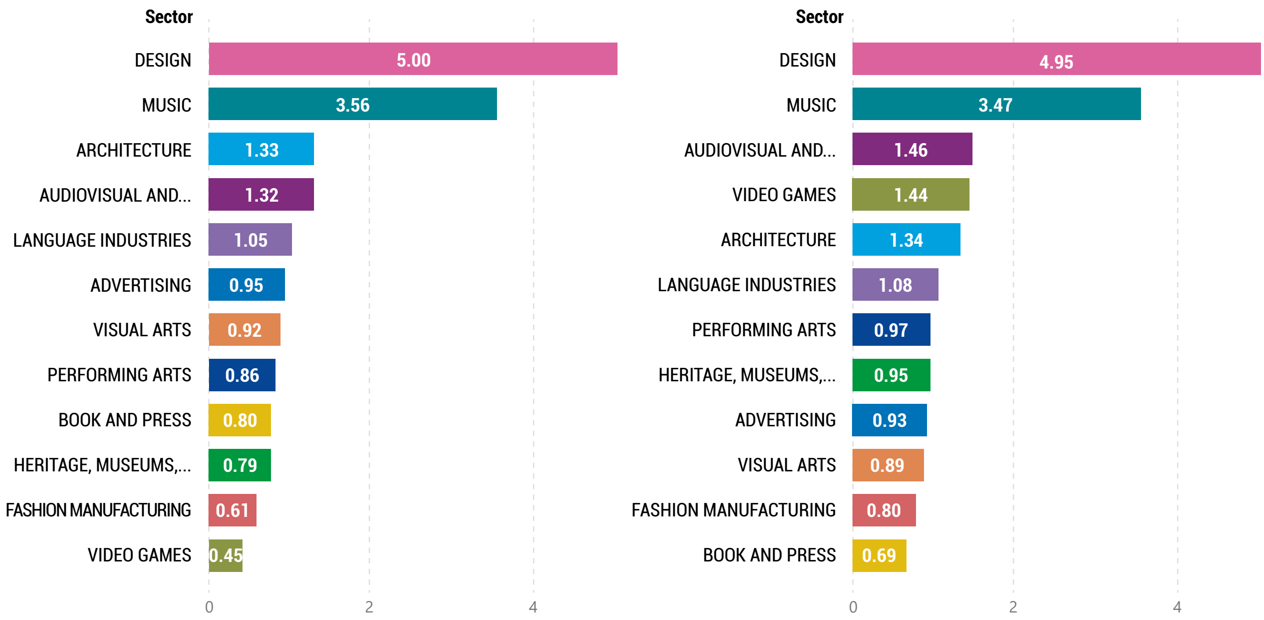
- **Strategic Phase (up to 2012):** Influenced by European frameworks, the sector was recognised as strategic, and the first support instruments emerged.
- **Consolidation Phase (2012–2018):** Marked by the inclusion of CCIs in the Smart Specialisation Strategy (RIS3) and the promotion of innovation and internationalisation.
- **Transformation Phase (2019–present):** Full integration into the regional innovation strategy through initiatives such as the BDCC or KSIgune, with an emphasis on digitalisation and international outreach.

This historical overview crystallises into a concrete picture of the present through an analysis of the specialisation of the various CCI sub-sectors in the Basque Country, enabling the identification of where the main strengths are concentrated, which areas are growing, and where structural weaknesses persist. To this end, the study uses specialisation indices, a tool that allows the relative weight of each CCI subsector in the Basque Country to be compared with that of the same subsector in a reference economy, primarily Spain.

The calculation of these indices is based on comparing the weight of each subsector within the Basque economic structure with its weight within the Spanish economy, using company and employment data at the four-digit CNAE level. In this way, the analysis does not merely examine how many companies exist in each sector, but their relative importance within the economic system as a whole. Interpreting the index is straightforward: values above 1 indicate that the Basque Country is more specialised than the national average in that subsector, suggesting the existence of a comparative advantage; values close to 1 reflect a position in line with the average; and values below 1 indicate lower relative specialisation.

Furthermore, the analysis is not limited to a static snapshot, but incorporates developments between 2015 and 2024, allowing us to observe trends and changes over time.

Figure 1. BUSINESS SPECIALISATION INDICES OF THE BASQUE COUNTRY'S ICCS RELATIVE TO SPAIN IN 2015 AND 2024



Source: Own compilation based on EUSTAT data

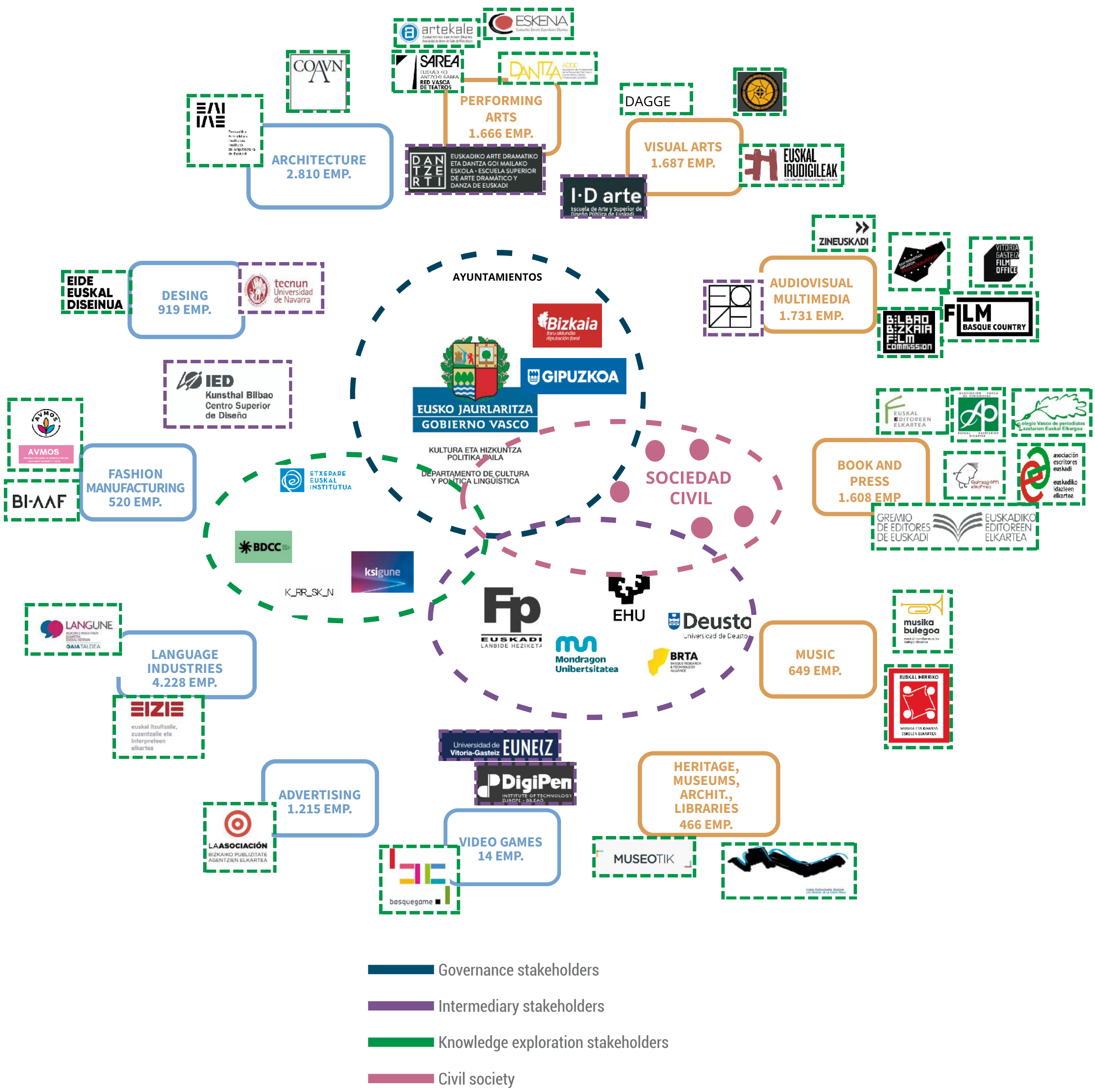
Taking the data in the graph into account, three distinct trends can be observed across the different sub-sectors:

- **Established Sectors:** Design and Music remain the strongest and most specialised pillars of the ecosystem. These are joined by Architecture and the Audiovisual and Multimedia sector, which have strengthened their competitive advantage in recent years.
- **Emerging and Growing Sectors:** In particular, there is the emergence of Video Games, which has gone from a minimal presence to gaining significant weight within the ecosystem. Likewise, the Performing Arts and Heritage, museums, archives and libraries show a positive trend, progressively improving their positioning.
- **Weakened sectors:** The Books and Press sector, together with the Visual Arts, show a relative decline in importance, highlighting structural weaknesses and difficulties in adapting to changes in the current environment.

The regional analysis reveals an ecosystem with distinct profiles: Araba has a concentrated structure with strengths in Music, Design and Architecture, but with a structural weakness in employment; Bizkaia stands out for its dynamism in Design, Music and Audiovisual, although it shows shortcomings in Heritage; and Gipuzkoa offers the most balanced and homogeneous profile, with leadership in Heritage and the Performing Arts, despite a slight decline in the audiovisual sector.

Having established the statistical picture of the sector, the analysis shifts towards the relational dynamics of the ecosystem. Given that innovation lies not only in companies but also in the quality of their interactions, the study maps the agents in the Basque Country using the Quadruple Helix model. The ecosystem is structured through collaboration between Governance (public strategy), Knowledge (training and transfer), the Business sector (economic driver) and Civil Society (dynamization and audiences). As a cross-cutting element, intermediary actors (clusters and agencies) act as catalysts for innovation by connecting the different spheres and facilitating collaboration among all actors in the system.

Mapping of ecosystem stakeholders



Source: Own compilation

Through 18 in-depth interviews with key stakeholders, the analysis provides an 'in-depth analysis' of the ecosystem. This qualitative exercise defines the sector's priorities and challenges based on the direct experiences of its key players:

Perception and Cohesion of the Ecosystem

- **Strategic Value:** There is a consensus on the potential of CCIs as an economic and territorial driver, although their social visibility remains limited.
- **Collective Identity:** Stakeholders recognise themselves as part of a common project but face the challenge of managing internal diversity (from traditional sectors to new industries) to avoid fragmentation.
- **Industrial Identity:** There remains a degree of wariness in certain quarters towards the concept of industry and its innovation logic, which requires a balance in the construction of the ecosystem.

Cross-cutting Challenges for Competitiveness

- **Internationalisation:** External reach is limited due to the small size of businesses and the lack of aligned strategies. The **Basque language** is identified as a unique opportunity for global positioning.
- **Scale and Structure:** High fragmentation and the predominance of micro-enterprises hinder the scaling of projects and the stability of teams.
- **Shortage of Technical Skills:** There is a critical shortage of skills in management, marketing and technology, which limits professionalisation despite the high level of creative talent.
- **Technological Transformation:** Training and flexible policies are required that adapt to the specific characteristics of each sub-sector, with the support of intermediary agents.
- **Cross-Sectoral Hybridisation:** There is a significant opportunity to contribute creative value to sectors such as industry, health or sustainability, although connecting structures are lacking.

Support Levers and Governance

- **Tax Incentives:** These are viewed positively for their ability to attract investment (particularly in the audiovisual sector), but there is a call for their success to be measured by long-term structural impact and complemented by infrastructure and training.
- **Governance and Alignment**: There is a call for greater coordination between institutions and administrative levels to build shared strategies that steer the system in a single direction.

Overall, this analysis highlights that the ecosystem's main challenges should not be seen as obstacles, but as a roadmap for its evolution. All of them point towards the same central idea: the need to strengthen coordination, collaboration and alignment among the various stakeholders.

EUSKO JAURLARITZA
GOBIERNO VASCO
KULTURA ETA HIZKUNTZA POLITIKA SAILA
DEPARTAMENTO DE CULTURA Y POLÍTICA LINGÜÍSTICA

Kulturaren Euskal Behatokia
Observatorio Vasco de la Cultura

Orkestra
INSTITUTO VASCO DE COMPETITIVIDAD
FUNDACIÓN DEUSTO

Eusko Jaurlaritzaren Argitalpen Zerbitzu Nagusia
Servicio Central de Publicaciones del Gobierno Vasco