Post-Covid evolution of the Cultural and Creative Industries in the Basque Country 2020-2022

POSITIONING STUDIES OF THE CULTURAL AND CREATIVE INDUSTRIES

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Post-Covid evolution of the Cultural and Creative Industries in the Basque Country 2020-2022

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EXECUTIVE SUMMARY

By January 2022, the Cultural and Creative Industries (CCI) sector in the Basque Country had managed to recover its level of employment and number of companies with regards to the pre-pandemic situation. In addition, the CCIs had slightly increased their representativeness in Basque Country employment as a whole.

During the analysed period (2022 vs. 2020) a total increase of 231 jobs has been registered, representing 0.68%. During the last year (2022 vs. 2021), employment has grown by 794 jobs representing a 2.3% increase. This reflects the acceleration of recovery in 2021.

As a consequence of this, the percentage of employment in CCI activities over total employment in the Basque Country has risen from 3.69% to 3.75% between 1 January 2020 and 1 January 2022. Said growth has arisen from **cultural** activities (2.30%, 0.07 p.p.) given that the weight of **creative** activities has remained constant (1.46%).

Employment evolution in the **cultural** and **creative** industries has been unequal. While **cultural** companies have registered a 1.83% increase in the analysed period, **creative** companies have experienced a reduction of 144 jobs (-1.07%). That is, as far as **creative** companies are concerned, pre-pandemic levels of employment have not yet been recovered.

In the case of **cultural** industries, the increase is basically due to the strong growth in **Audiovisual and multimedia** activities. However, companies in the fields of **Performing arts** and **Books and the press** have registered the loss of 169 and 163 jobs respectively.

The **creative** industries have experienced a drop of 1.07% in employment. This fall is mainly due to the negative evolution in the **Architecture** and **Language industries** sectors in line with observations in business demographics analysis.

Employment evolution during the analysed period distributed by branches of activity has behaved as follows: the **Publishing, audiovisuals, radio, television and information technology** branch of activity presents the greatest increase in percentage terms since January 2020 (625 jobs, 7.66%) followed by **Recreational and cultural activities** which have grown slightly by 202 jobs (0.62%). Apart from that, the remaining branches of activity (**Commercial activities, Manufacturing, Professional, scientific and technical activities, Educational activities**) have decreased.

In January 2020, the sector had 16,886 companies in the Basque Country. Two years on, said number has increased slightly to 16,924 companies, representing an increase of 0.2%. During 2021, the sector underwent an increase of 1.7%.

The evolution of the CCI sector has been heterogeneous with regard to the fields under consideration in line with developments in employment. On the one hand, **cultural** companies have undergone an increase of 2.3% in the analysed period, which represents an increase of 165 companies. On the other hand, **creative** companies have suffered a decrease of 127 companies, representing a decrease of 1.3% in the same period. Therefore, the **creative** field has not yet managed to recover the pre-pandemic number of companies.

The fields of **Architecture** and **Books and the press** have undergone a negative evolution during the analysed period. **Architecture** has undergone a reduction of 5.6% in the number of companies and **Books and the press** has seen a reduction of 5.1%. The reduction took place in both 2020 and 2021. It is important to point out that this negative trend took place in a context of general economic growth.

Meanwhile, the **Language industries** and **Fashion manufacturing** fields also underwent a decrease in the number of companies, although in these cases there was a slight recovery in 2021.

Apart from that, the **Visual arts**, **Audiovisual and multimedia** and **Advertising** fields have experienced strong growth in the analysed period, boosting recovery from the Covid-19 crisis. In addition, **Music**, **Design**, **Performing arts**, **Heritage**, **Museums, archives and libraries** and **Videogames** have undergone an increase in company numbers.

With regard to the ratio of CCI companies per 100,000 inhabitants, the Basque Country is behind Navarre, Madrid, Catalonia and Spain. The differences are bigger in the case of **cultural** companies. In the case of **creative** companies, the Basque Country has a slightly higher ratio than Spain as a whole, but lower than Navarre, Madrid and Catalonia.

If we analyse the percentage of CCI companies against the totality of existing companies, in overall terms, the Basque Country (11 %) has a higher percentage than Navarre (10.8%) and the rest of Spain (10.5%) and lower than the Community of Madrid (13.5 %) and Catalonia (11.3 %).

After analysing the data, we can see that recovery from the crisis in terms of number of companies has been different in the three Historical Territories. Gipuzkoa and Araba have registered growth in the number of companies in the analysed period. Bizkaia has recovered in comparison to 2021 (+0.7%) but has not reached the pre-pandemic number of CCI companies.

Previous reports clearly showed the distribution of CCI companies according to legal status held steady with some slight changes in the data of the current report. The Self-employed (68.94%) are still the most common legal status in the CCI sector in the Autonomous Community of the Basque Country, followed by Limited Companies (20.28%) and other companies (mainly Associations and Foundations) which make up 5.12%.

According to the available data[1], the total value of the demand for identified cultural and creative products and services is 7,397 million euros. Of this total, 40.1% is devoted to intermediate demand, that is, to other productive sectors, while the remaining 59.9% corresponds to final demand. Generally, approximately 24% of the production value of CCI products and services is destined to export. It is important to highlight that the Public administration sector figures among the 10 sectors with greatest intermediate demand in 10 of the 12 analysed products or services.

Therefore, it can be concluded that the **Cultural and Creative Industries** have consolidated their recovery from the crisis caused by the pandemic. **Architecture** and **Books and the press** are shown to behave differently from the general trend. Said behaviour could arise from structural changes in the sector which require in-depth study. It is worth pointing out that in the case of **Books and the press**, unlike companies with headquarters in the Basque Country, the number of companies with headquarters outside the Basque Country has increased by 18 companies in the two analysed years.

It is worth highlighting that the only CCI activities to recover vigorously and reach higher positions than those achieved pre-pandemic are those linked to information technology and communication, that is, those belonging to the **Publishing, audiovisuals, radio and television and information technology branch of activity** (increase of 7.66% in employment). The data highlights the opportunities which, with necessary adaptations to each field, can be offered by the incorporation of CCIs to a general digitisation context and its corre sponding transition and the risks of not doing so.

1 The data have been obtained from the Autonomous Community of the Basque Country (CAE) destination tables (thousands of euros) of 2020 by product, geographical origin, branch and period prepared by Eustat. The degree of available detail involves the inclusion of products and services not directly related to CCIs and the exclusion of products and services ought to be included if there were a greater degree of available detail.

1. | PRESENTATION

On 23 February 2021, the Governing Council of the Basque Government passed the Basque Science, Technology & Innovation Plan 2030 (STIP 2030) which aims to position the Basque Country among the most advanced European regions in innovation, with a high standard of living and quality employment. In said plan (Basque Government, 2021), the Cultural and Creative Industries (hereafter, CCIs) represent a clear commitment where **Euskadi Creativa** [Creative Basque Country] is defined as a Territory of Opportunity to be developed and emphasis is given to the importance of R&D&i and the need to adapt said concept given the specifics of its application to the sector. Emphasis is also given to the cross-sectional role of CCIs in progress in three large transitions: Technological-digital, Energy-environmental and Social-health. In accordance with the aforementioned document, the aim is to evolve towards the creation of a Basque District of Culture and Creativity which incorporates and gives CCIs their due within the Basque business sector and the Basque Science, Technology & Innovation Network.

Like the rest of the economy, during 2020, CCIs were seriously affected by the consequences of the economic crisis arising from the Covid-19 pandemic. On 14 March 2020, as a consequence of the state of alarm throughout the entire Spanish state, a series of measures were adopted regarding the limitation of mobility of people, which had an impact on both economic and social activities (Royal Decree Law 463/2020 of 14 March). This meant the suspension of activities such as access to museums, archives, libraries and monuments, public shows, concert halls, cinemas, sporting and leisure activities, open-air dances, parades and popular celebrations, among others.

Meanwhile, some activities corresponding to CCIs were declared essential by Royal Decree Law 10/2020 of 29 March. Among these were telecommunication and audiovisual companies and translators and interpreters. During 2020, diverse forms of aid were established for the sector to try to mitigate the effects of the pandemic in the CCI business fabric as reflected in Retegi et al. (2022b), a document assessing the effects arising from the pandemic on the CCI sector during the first year.

Despite the adopted measures, the number of companies belonging to CCIs during 2020 dropped by 1.45%, from 16,886 to 16,641, that is, a drop of 243 companies, and the employment associated said activities dropped from 33,982 jobs to 33,419 jobs, meaning a reduction of 1.66% (563 jobs). Also, there was an estimated drop in turnover of almost 29% for the cultural sector and 32% for the creative sector. 2020 was undoubtedly a tough blow for the sector, slightly higher than for Basque companies as a whole.

The effect of the crisis was unequal in the different CCI areas (Bhowmik et al, 2021). In accordance with Khlystova et al. (2022), in general, CCIs have not shown enough resilience faced with the crisis, which has been more serious for the self-employed and part-time workers with the exception of advertising, social media, information technology and communication and the software industry. Therefore, it is said that areas such as Museums and Libraries have not been able to make to most of the opportunities offered by digital technology to offer their products online.

UNESCO (2021) underlines the especially high impact of the crisis on the frequently precarious employment of professionals in the cultural and creative fields. In addition, said report concludes that the pandemic has been a trigger for the emergence of new innovative forms of digital production, distribution and consumption.

In accordance with Retegi et al. (2022b) **creative** activities in the Basque Country suffered most in that fall, totalling 2.11 %, mainly due to the drop in **Language industries** and **Architecture** companies. On the contrary, **Design** and **Advertising** activities added new companies during the pandemic.

Cultural activities underwent a fall of 1.81%, arising from the reduction of companies in the areas of **Books and the press**, **Performing arts** and **Heritage, Museums, Archives and Libraries**. However, the number of companies in the areas of **Audiovisual and multimedia** and **Music** grew.

Fortunately, since the beginning of 2021, with the widespread introduction of the vaccine and the gradual return to group activities, CCIs were able to go on regaining their normal rhythm. During 2020 and 2021 until February 2022 when Decree 5/2022 established the end of the **health emergency in the Basque Country**, the successive waves of the pandemic and the measures to combat them modulated economic activities in general and cultural and creative activities in particular towards «normality». Currently, it can be said that the possibilities of carrying out **cultural** and **creative** activities are comparable to those prior to the outbreak of the pandemic.

If prior to the pandemic crisis CCIs were immersed in macrotrends affecting society as a whole, the need to become integrated in these macrotrends has only become more pronounced afterwards. These are technological-digital, energy-climate and social-health triple transformations with the capacity to change the future of countries, businesses, industries, societies and people (Orkestra, 2021).

The **aim** of this document is, on the one hand, precisely **to evaluate the state of the CCI economic activity situation in the Basque Country** on 1 January 2022 and compare it to the situation prior to the pandemic to be able to evaluate the sector's degree of recovery from its effects. To do so, the perimeter and classification defined Retegi et al. (2022a) were used. These characterise activities due to their cultural and creative value chains and the branch of activity (manufacturing, information technology and communication, education, etc.). Also, **to research the identification of the main sectors to which cultural and creative products and services are devoted**.

Its conclusions provide information about the starting point from which the CCIs must face the definition and development of their role in the economy as a whole through their own economic activity and by contributing to the development of other sectors.

The publication begins by analysing the evolution of the business demographic of the CCIs in the Basque Country in terms of number of companies, their representativeness in the Basque economy as a whole and the ratio of companies per 100,000 inhabitants. The sector's distribution in the Historical Territories and according to the legal status of its companies is then analysed. Later, there is an in-depth look at the evolution of employment distributed in the CCI areas and the Branches of activity in which the companies of the sector are framed. There is also an analysis of the destination of products associated to CCI activities. To finish, the main conclusions arising from the obtained data are extracted.

2. BUSINESS DEMOGRAPHIC OF THE CCI SECTOR

As can be seen in Retegi et al. (2022b), the Covid-19 pandemic was a blow for the CCI sector in the Basque Country. In fact, and for the period of analysis, the number of CCI companies suffered a decline of 1.45% during 2020, going from 16,886 to 16,643, a decline of 243 companies. The ratio of number of companies per 100,000 inhabitants was thus reduced from 767.7 to 758.8, representing a fall of 1.16%.

Although the period immediately after total lockdown meant the paralysis of almost all cultural and creative activities, they began a process of gradual recovery of normality which, without reaching the previous year's levels, allowed the economic impact to be partially cushioned.

The data presented in this study enable us to evaluate the scope of the recovery during 2021 and to check whether, according to different variables, CCIs reached levels of activity similar to the situation prior to the outbreak of the pandemic.

The evolution of the CCI sector in the CAE in the period between 1 January 2020 and 1 January 2022 is presented in Table 2.1. Specifically, it assesses the number of existing companies in the CAE with headquarters inside or outside the CAE, the ratio of the number of CCI companies per 100,000 inhabitants and the ratio of the percentage of companies in comparison with the total number of companies in the CAE.

As a whole, and for the period of analysis, the **number of CCI companies** in the Basque Country has regained the level at the beginning of the pandemic. There were 16,886 companies in the Basque Country on 1 January 2020 and two years later the number of companies was 16,924, an increase of 0.2%. Analysing the evolution with regard to 1 January 2021, the increase was 1.7%.

However, evolution was inconsistent between the different CCI areas. Thus, while **cultural companies** grew 2.3% with regard to 1 January 2020 (165 companies), **creative companies** suffered a decrease of 127 companies (-1.3%) over the same period and therefore did not achieve pre-pandemic levels.

The areas that suffered the greatest negative evolution are as follows:

Architecture shrank by 174 companies (-5.6%) with regard to the beginning of 2020. It is worth mentioning that unlike in other areas, 2021 did not represent a recovery but rather the opposite, that is, an intensification of the loss in the number of companies which began the previous year.

The **Books and the press** area has experienced a similar situation. The number of companies assigned to said area is lower than at the beginning of 2022 than at the beginning of 2020 and even lower than at the beginning of 2021. Thus, the number has gone from 1,771 to 1,681 companies (90 companies) in two years, which is a reduction of 5.1%.

TABLE 2.1 EVOLUTION OF CCI COMPANIES IN THE CAE (PERIOD 01.01.2020 TO 01.01.2022)

	No. of companies on 1.1.2020	No. of companies on 1.1.2021	No. of companies on 1.1.2022	Variation in no. companies 2022 vs. 2020	Variation in no. of companies (%) 2022 vs. 2021	Variation in no. of companies (%) 2022 vs. 2020	No. of companies per 100,000 inhab. (2020)	No. of companies per 100,000 inhab. (2021)	No. of companies per 100,000 inhab. (2022)	Variation in no. of companies per 100,000 inhab. (%) (2022 vs. 2020)	No. of companies / Total no. of companies Basque Country (2020)	No. of companies / Total no. of companies Basque Country (2021)	No. of companies / Total no. of companies Basque Country (2022)	Variation no. of companies / Total no. of companies Basque Country (p.p.) (2022 vs. 2020)
1. CULTURAL	**7.149**	**7.109**	**7.314**	**165**	**2,9%**	**2,3%**	**325,0**	**324,1**	**334,5**	**2,9%**	**4,64%**	**4,7%**	**4,8%**	**0,20**
PERFORMING ARTS	**1.414**	**1.398**	**1.441**	**27**	**3,1%**	**1,9%**	**64,3**	**63,7**	**65,9**	**2,5%**	**0,9%**	**0,9%**	**1,0%**	**0,04**
1.- OWN	833	848	888	55	4,7%	6,6%	37,9	38,7	40,6	7,2%	0,5%	0,6%	0,6%	0,05
2.- AUXILIARY	581	550	553	-28	0,5%	-4,8%	26,4	25,1	25,3	-4,2%	0,4%	0,4%	0,4%	-0,01
VISUAL ARTS	**1.421**	**1.426**	**1.506**	**85**	**5,6%**	**6,0%**	**64,6**	**65,0**	**68,9**	**6,6%**	**0,9%**	**0,9%**	**1,0%**	**0,07**
1.- OWN	1.421	1.426	1.506	85	5,6%	6,0%	64,6	65,0	68,9	6,6%	0,9%	0,9%	1,0%	0,07
AUDIOVISUAL AND MULTIMEDIA	**1.513**	**1.540**	**1.606**	**93**	**4,3%**	**6,1%**	**68,8**	**70,2**	**73,5**	**6,8%**	**1,0%**	**1,0%**	**1,1%**	**0,08**
1.- OWN	641	639	666	25	4,2%	3,9%	29,1	29,1	30,5	4,5%	0,4%	0,4%	0,4%	0,02
2.- AUXILIARY	872	901	940	68	4,3%	7,8%	39,6	41,1	43,0	8,4%	0,6%	0,6%	0,6%	0,06
BOOKS AND THE PRESS	**1.771**	**1.714**	**1.681**	**-90**	**-1,9%**	**-5,1%**	**80,5**	**78,2**	**76,9**	**-4,5%**	**1,2%**	**1,1%**	**1,1%**	**-0,04**
1.- OWN	1.010	969	943	-67	-2,7%	-6,6%	45,9	44,2	43,1	-6,1%	0,7%	0,6%	0,6%	-0,03
2.- AUXILIARY	761	745	738	-23	-0,9%	-3,0%	34,6	34,0	33,8	-2,4%	0,5%	0,5%	0,5%	-0,01
MUSIC	**592**	**603**	**626**	**34**	**3,8%**	**5,7%**	**26,9**	**27,5**	**28,6**	**6,4%**	**0,4%**	**0,4%**	**0,4%**	**0,03**
1.- OWN	546	556	575	29	3,4%	5,3%	24,8	25,4	26,3	5,9%	0,4%	0,4%	0,4%	0,03
2.- AUXILIARY	46	47	51	5	8,5%	10,9%	2,1	2,1	2,3	11,5%	0,0%	0,0%	0,0%	0,00
HERITAGE, MUSEUMS, ARCHIVES AND LIBRARIES	**438**	**428**	**454**	**16**	**6,1%**	**3,7%**	**19,9**	**19,5**	**20,8**	**4,3%**	**0,3%**	**0,3%**	**0,3%**	**0,02**
1.- OWN	118	121	129	11	6,6%	9,3%	5,4	5,5	5,9	10,0%	0,1%	0,1%	0,1%	0,01
2.- AUXILIARY	320	307	325	5	5,9%	1,6%	14,5	14,0	14,9	2,2%	0,2%	0,2%	0,2%	0,01

	No. of companies on 1.1.2020	No. of companies on 1.1.2021	No. of companies on 1.1.2022	Variation in no. companies 2022 vs. 2020	Variation in no. of companies (%) 2022 vs. 2021	Variation in no. of companies (%) 2022 vs. 2020	No. of companies per 100,000 inhab. (2020)	No. of companies per 100,000 inhab. (2021)	No. of companies per 100,000 inhab. (2022)	Variation in no. of companies per 100,000 inhab. (%) (2022 vs. 2020)	No. of companies / Total no. of companies Basque Country (2020)	No. of companies / Total no. of companies Basque Country (2021)	No. of companies / Total no. of companies Basque Country (2022)	Variation no. of companies / Total no. of companies Basque Country (p.p.) (2022 vs. 2020)
2. CREATIVE	**9.737**	**9.534**	**9.610**	**-127**	**0,8%**	**-1,3%**	**442,6**	**434,7**	**439,5**	**-0,7%**	**6,3%**	**6,2%**	**6,4%**	**0,04**
ARCHITECTURE	**3.113**	**3.028**	**2.939**	**-174**	**-2,9%**	**-5,6%**	**141,5**	**138,1**	**134,4**	**-5,0%**	**2,0%**	**2,0%**	**1,9%**	**-0,08**
1.- OWN	3.113	3.028	2.939	-174	-2,9%	-5,6%	141,5	138,1	134,4	-5,0%	2,0%	2,0%	1,9%	-0,08
DESIGN	**790**	**801**	**836**	**46**	**4,4%**	**5,8%**	**35,9**	**36,5**	**38,2**	**6,5%**	**0,5%**	**0,5%**	**0,6%**	**0,04**
1.- OWN	790	801	836	46	4,4%	5,8%	35,9	36,5	38,2	6,5%	0,5%	0,5%	0,6%	0,04
LANGUAGE INDUSTRIES	**4.141**	**4.020**	**4.082**	**-59**	**1,5%**	**-1,4%**	**188,3**	**183,3**	**186,7**	**-0,8%**	**2,7%**	**2,6%**	**2,7%**	**0,01**
1.- OWN	4.141	4.020	4.082	-59	1,5%	-1,4%	188,3	183,3	186,7	-0,8%	2,7%	2,6%	2,7%	0,01
FASHION MANUFACTURE	**537**	**518**	**533**	**-4**	**2,9%**	**-0,7%**	**24,4**	**23,6**	**24,4**	**-0,1%**	**0,3%**	**0,3%**	**0,4%**	**0,00**
1.- OWN	537	518	533	-4	2,9%	-0,7%	24,4	23,6	24,4	-0,1%	0,3%	0,3%	0,4%	0,00
ADVERTISING	**1.147**	**1.157**	**1.207**	**60**	**4,3%**	**5,2%**	**52,1**	**52,8**	**55,2**	**5,9%**	**0,7%**	**0,8%**	**0,8%**	**0,05**
1.- OWN	1.107	1.115	1.169	62	4,8%	5,6%	50,3	50,8	53,5	6,2%	0,7%	0,7%	0,8%	0,05
2.- AUXILIARY	40	42	38	-2	-9,5%	-5,0%	1,8	1,9	1,7	-4,4%	0,0%	0,0%	0,0%	-0,00
VIDEO GAMES	**9**	**10**	**13**	**4**	**30,0%**	**44,4%**	**0,4**	**0,5**	**0,6**	**45,3%**	**0,0%**	**0,0%**	**0,0%**	**0,00**
1.- OWN	9	10	13	4	30,0%	44,4%	0,4	0,5	0,6	45,3%	0,0%	0,0%	0,0%	0,00
TOTAL	**16.886**	**16.643**	**16.924**	**38**	**1,7%**	**0,2%**	**767,6**	**758,8**	**774,0**	**0,8%**	**11,0%**	**10,9%**	**11,2%**	**0,23**

Source: Own preparation based on DIRAE data

Taking into account that these two evolutions have taken place in a context of general economic growth, it could be envisaged that there are underlying structural causes that would need a closer look.

It is also worth pointing out the case of **Language industries** which has experience a drop of 59 companies during the analysed years (-1.4%), although during 2021 it recovered some of the companies lost during 2020.

On a positive note, the areas that experienced greater growth and recovery are as follows:

The areas of **Visual arts** and **Audiovisual and multimedia** experienced a strong recovery in 2021. They grew by 5.6% and 4.3%, that is, 80 and 66 companies, respectively. These data have greatly boosted recovery from the Covid-19 crisis. In fact, in **Visual arts**, the number of companies is 6.0% greater than on 1 January 2020 and in **Audiovisual and multimedia,** the figure is 6.1%. The area of **Music** grew by 5.7%.

Meanwhile, from the beginning of the pandemic in creative industries, the area of **Advertising** has grown by 60 companies (5.2%) and **Design** has grown by 46 companies (5.8%).

Although in absolute terms this does not represent a large number of companies, the area of **Videogames** has evolved strongly by 44.4%, increasing from 9 to 13 companies.

With regard to the number of companies in the remaining areas, during the two analysed years, **Performing arts** grew by 1.9%, **Heritage, museums, archives and libraries** grew by 3.7% and **Fashion manufacturing** shrank by 0.7% despite the 2021 increase of 2.9%.

These evolutions are reflected in the number of companies per 100,000 inhabitants in the **Basque Country**. Taking into account that the number of inhabitants has reduced by 0.6% in two years, the ratio of the number of CCI companies per 100,000 inhabitants has increased by 0.8% from 767.6 to 774.

The percentage of CCI companies with regard to the total number of companies in the **Basque Country** has gone from 11.0% on 1 January 2020 to 11.2% at the beginning of 2022. This means that, as mentioned in Retegi et al. (2022b), the effects of the crisis in the CCI sector have been slightly lower than those in Basque companies as a whole.

2. COMPARATIVE ANALYSIS WITH OTHER GEOGRAPHICAL AREAS

In this section, a comparison is made of the business demographic[2] 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 total number of companies.

With regard to the ratio of CCI companies per 100,000 inhabitants, the Basque Country is behind Navarre, Madrid, Catalonia and the Spanish average. The differences are largest in the case of **cultural** companies where the Basque Country is clearly below the rest of Autonomous Communities. The areas where the differences are most significant in comparison with Madrid, Catalonia and the Spanish average are **Books and the press**, **Visual arts** and **Heritage, museums, archives and libraries**.

On the contrary, in the area of **Music**, the Basque Country presents more favourable data than the other comparative environments. Thus, the Basque Country has 24 companies in the area of Music per 100,000 inhabitants, while Navarre, Catalonia, Madrid and Spain have 10, 10, 12 and 9 companies per 100,000 inhabitants, respectively.

2 In the light of some existing differences in the demographic data depending on the data source, the comparison of the Basque Country data with the remaining geographic surroundings is made with data obtained from the same source, the National Statistics Institute.

The difference in the Basque Country data with regard to **cultural** companies was similar in 2020 although, on the positive side, the growth rate of the number of companies per 100,000 inhabitants (+0.03%) is higher than Madrid, Catalonia and the Spanish average. Navarre leads in terms of growth rate with +0.06%.

In the case of **creative** companies, the Basque Country has a slightly higher ratio than Spain as a whole, but lower than Navarre, Madrid and Catalonia. In comparison with Spain as a whole, the Basque Country has more companies per 100,000 inhabitants in the areas of **Architecture** (+27 companies), **Design** (+12 companies) and **Videogames** (+1 company) and fewer companies in the areas of **Language industries** (-13 companies), **Fashion manufacturing** (-12 companies) or **Advertising** (-13 companies).

TABLE 3.1 COMPARISON OF CCI COMPANIES PER 100,000 INHABITANTS

	Companies / 100,000 inhab. 2022					Var. No. of companies 2022 vs. 2020 (%)				
	Basque Country	Navarre	Catalonia	Madrid	Spain	Basque Country (%)	Navarre (%)	Catalonia (%)	Madrid (%)	Spain (%)
1. CULTURAL	**318**	**332**	**444**	**547**	**363**	**0,03**	**0,06**	**0,02**	**0,02**	**0,02**
PERFORMING ARTS	62	84	74	94	72	0,05	0,03	-0,04	-0,01	-0,02
VISUAL ARTS	69	68	108	128	86	0,09	0,09	0,00	-0,01	0,01
AUDIOVISUAL AND MULTIMEDIA	67	53	75	106	56	0,08	0,13	0,11	0,07	0,10
BOOKS AND THE PRESS	80	86	141	172	118	-0,05	0,01	0,03	0,01	0,02
MUSIC	24	10	10	12	9	0,06	0,06	0,10	0,11	0,10
HERITAGE, MUSEUMS, ARCHIVES AND LIBRARIES	16	29	36	33	24	-0,02	0,08	0,00	0,02	0,01
2. CREATIVE	**395**	**410**	**474**	**574**	**394**	**0,01**	**0,07**	**0,02**	**-0,00**	**0,02**
ARCHITECTURE	132	161	118	131	105	-0,02	0,01	-0,03	-0,04	-0,03
DESIGN	20	12	13	11	8	0,02	0,24	0,13	0,11	0,10
LANGUAGE INDUSTRIES	170	167	209	260	183	0,02	0,10	0,01	-0,01	0,03
FASHION MANUFACTURE	23	18	46	28	35	0,01	-0,04	-0,02	-0,06	-0,03
ADVERTISING	49	53	88	143	62	0,03	0,22	0,12	0,05	0,10
VIDEO GAMES	1	0	1	1	0	0,19	-0,00	0,47	0,19	0,19
GRAND TOTAL	**714**	**743**	**918**	**1121**	**757**	**0,02**	**0,07**	**0,02**	**0,01**	**0,02**

Source: Own preparation based on INE data

If we analyse the growth rate over the last two analysed years, this value has grown by 0.01% in the Creative industries in the Basque Country, a higher figure than Madrid but lower than Navarre, Catalonia and Spain as a whole.

The areas where growth has been negative during the last two years are **Books and the press** (-0.05%), **Heritage, museums, archives and libraries** (-0.02%) and **Architecture** (-0.02%).

If we analyse the percentage of CCI companies against the totality of existing companies, in overall terms, the Basque Country (11 %) has a higher percentage than Navarre (10.8%) and the rest of Spain (10.5%) and lower than the Community of Madrid (13.5 %) and Catalonia (11.3 %).

Taking only **creative** industries into account, the Basque Country is placed above Navarre, Catalonia and Spain, and just -0.8 percentage points below Madrid. When compared with the Spanish average, the Basque Country has greater representation in **Architecture**, **Design** and **Language industries** and lesser representation in **Fashion manufacturing** and **Advertising**.

It is worth mentioning that **Architecture** has reduced its representativeness in all the analysed geographic environments.

TABLE 3.2 COMPARISON OF THE PERCENTAGE OF CCI COMPANIES WITH THAT OF THE TOTALITY OF COMPANIES

	% CCI companies / total number of companies 2022					Var. No. of companies 2022 vs. 2020 (%)				
	Basque Country	Navarre	Catalonia	Madrid	Spain	Basque Country (%)	Navarre (%)	Catalonia (%)	Madrid (%)	Spain (%)
1. CULTURAL	**4,9 %**	**4,8 %**	**5,5 %**	**6,6 %**	**5,0 %**	**0,13**	**0,15**	**0,09**	**0,00**	**0,07**
PERFORMING ARTS	1,0 %	1,2 %	0,9 %	1,1 %	1,0 %	0,04	0,00	-0,04	-0,03	-0,03
VISUAL ARTS	1,1 %	1,0 %	1,3 %	1,6 %	1,2 %	0,09	0,06	0,00	-0,03	0,01
AUDIOVISUAL AND MULTIMEDIA	1,0 %	0,8 %	0,9 %	1,3 %	0,8 %	0,07	0,07	0,08	0,07	0,06
BOOKS AND THE PRESS	1,2 %	1,3 %	1,7 %	2,1 %	1,6 %	-0,08	-0,01	0,05	-0,01	0,02
MUSIC	0,4 %	0,1 %	0,1 %	0,1 %	0,1 %	0,02	0,00	0,01	0,01	0,01
HERITAGE, MUSEUMS, ARCHIVES AND LIBRARIES	0,2 %	0,4 %	0,4 %	0,4 %	0,3 %	-0,01	0,02	0,00	0,00	0,00
2. CREATIVE	**6,1 %**	**6,0 %**	**5,8 %**	**6,9 %**	**5,5 %**	**0,00**	**0,27**	**0,06**	**-0,13**	**0,06**
ARCHITECTURE	2,0 %	2,3 %	1,4 %	1,6 %	1,4 %	-0,06	-0,03	-0,06	-0,09	-0,06
DESIGN	0,3 %	0,2 %	0,2 %	0,1 %	0,1 %	0,00	0,03	0,02	0,01	0,01
LANGUAGE INDUSTRIES	2,6 %	2,4 %	2,6 %	3,1 %	2,5 %	0,03	0,16	0,01	-0,09	0,05
FASHION MANUFACTURE	0,4 %	0,3 %	0,6 %	0,3 %	0,5 %	0,00	-0,02	-0,01	-0,03	-0,02
ADVERTISING	0,8 %	0,8 %	1,1 %	1,7 %	0,9 %	0,02	0,12	0,11	0,06	0,07
VIDEO GAMES	0,0 %	0,0 %	0,0 %	0,0 %	0,0 %	0,00	0,00	0,00	0,00	0,00
GRAND TOTAL	**11,0 %**	**10,8 %**	**11,3 %**	**13,5 %**	**10,5 %**	**0,14**	**0,41**	**0,16**	**-0,13**	**0,13**

Source: Own preparation based on INE data

However, in the **cultural** industries, the Basque Country is placed below Catalonia, Madrid and the Spain average and slightly above Navarre. As mentioned above, the area of **Music** (0.4%) presents clearly favourable data with regard to the other analysed references, with higher growth during the last two years. Albeit with small differences, **Audiovisual and multimedia** in the Basque Country also has data higher than Navarre, Catalonia and Spain, although lower than Madrid. **Books and the press** in the Basque Country also presents representativeness levels lower than the other analysed references.

Generally, as a whole, the Basque Country presents data lower than the other references in the case of **cultural** companies but recovers its position in the case of **creative** companies.

4. CCIS IN THE HISTORICAL TERRITORIES

The following table presents the analysis and data regarding the evolution of the distribution of companies for each CCI sector according to the location of the headquarters in the Historical Territories (HT). Analysis of the data shows different behaviour in recovery from the crisis in the three Historical Territories. **Bizkaia**, in spite of the recovery with regard to 2021, has not yet reached the number of CCI companies it had before the beginning of the pandemic and registers a reduction of 112 companies, representing 1.3%. However, **Gipuzkoa** and **Araba** present growth in terms of the number of companies with regard to 01.01.2020 of 116 and 17 companies respectively. Also, in said period, the number of companies which have their headquarters outside the **Basque Country** but which have establishments in the **Basque Country** increased by 18 companies.

Analysing the detail of the data referring to **Bizkaia**, the fall is basically caused by the reduction in **creative** companies (-163 companies), mainly arising from the fall in **Architecture** companies (-119 companies) and **Language industries** (-52 companies). In addition, the number of companies operating in the **Advertising** sector has also fallen (-19 companies). In the case of **Design** companies, there has been a growth of 31 companies. As for **cultural** companies, they have undergone an increase of 51 companies with regard to 2020, fundamentally boosted by the areas of **Visual arts** (+49 companies), **Audiovisual and multimedia** (+29 companies) and **Music** (+17 companies). It is worth highlighting the reduction in the number of companies in the area of **Books and the press** (-49 companies).

The growth in the number of companies in **Gipuzkoa** with regard to 1 January 2020 occurs in both **cultural** companies (+89 companies) and **creative** companies (+27 companies). The areas with most growth are as follows: **Advertising** (+59 companies), **Audiovisual and multimedia** (+45 companies), **Visual arts** (+39 companies) and **Heritage, museums, archives and libraries** (+25 companies). However, with a similar trend to **Bizkaia**, the areas of **Architecture** and **Books and the press** have a reduction of -53 (-4.6%) and -40 (-6.2%) in the number of companies, respectively.

In the case of **Araba**, the number of CCI companies grew by 17 in two years, thus recovering pre-pandemic levels. Said growth has been boosted by the areas of **Audiovisual and multimedia** (21 companies) and **Advertising** (16 companies). In addition, **Performing arts**, **Music** and **Design** have grown by 8, 7 and 5 companies respectively. However, the areas that have not yet managed to recover pre-pandemic levels with regard to the number of companies are as follows: **Books and the press** (-12 companies), **Language industries** (-11 companies), **Visual arts** (-7 companies), **Heritage, museums, archives and libraries** (-6 companies), **Architecture** (-4 companies) and **Fashion manufacturing** (-1 company).

The number of companies with headquarters outside the Basque Country has grown by 18 companies in the two analysed years. The area of **Books and the press** shows the largest growth (+11 companies, 28.2%), in sharp contrast with the behaviour of companies of the same area with headquarters in the Basque Country.

It is worth highlighting that the area of **Architecture** has not managed to recover pre-pandemic levels in any of the Historical Territories.

TABLE 4.1 EVOLUTION OF CCI COMPANIES BY HT

	No. of companies on 1.1.2020				No. of companies on 1.1.2021				No. of companies on 1.1.2022				Var. No. of companies 2022 vs. 2020			
	Araba	Bizkaia	Gipuzkoa	Rest of Spain	Araba	Bizkaia	Gipuzkoa	Rest of Spain	Araba	Bizkaia	Gipuzkoa	Rest of Spain	Araba	Bizkaia	Gipuzkoa	Rest of Spain
1. CULTURAL	**901**	**3.574**	**2.561**	**113**	**895**	**3.546**	**2.554**	**114**	**912**	**3.625**	**2.650**	**127**	**11**	**51**	**89**	**14**
PERFORMING ARTS	**183**	**671**	**547**	**13**	**178**	**664**	**541**	**15**	**191**	**678**	**555**	**17**	**8**	**7**	**8**	**4**
1.- OWN	103	380	347	3	98	391	356	3	113	397	375	3	**10**	**17**	**28**	**-**
2.- AUXILIARY	80	291	200	10	80	273	185	12	78	281	180	14	**-2**	**-10**	**-20**	**4**
VISUAL ARTS	**196**	**769**	**452**	**4**	**193**	**767**	**461**	**5**	**189**	**818**	**491**	**8**	**-7**	**49**	**39**	**4**
1.- OWN	196	769	452	4	193	767	461	5	189	818	491	8	**-7**	**49**	**39**	**4**
AUDIOVISUAL AND MULTIMEDIA	**161**	**789**	**521**	**42**	**171**	**791**	**538**	**40**	**182**	**818**	**566**	**40**	**21**	**29**	**45**	**-2**
1.- OWN	73	329	221	18	68	326	229	16	78	336	238	14	**5**	**7**	**17**	**-4**
2.- AUXILIARY	88	460	300	24	103	465	309	24	104	482	328	26	**16**	**22**	**28**	**2**
BOOKS AND THE PRESS	**209**	**880**	**643**	**39**	**200**	**855**	**617**	**42**	**197**	**831**	**603**	**50**	**-12**	**-49**	**-40**	**11**
1.- OWN	115	495	372	28	109	480	350	30	105	462	341	35	**-10**	**-33**	**-31**	**7**
2.- AUXILIARY	94	385	271	11	91	375	267	12	92	369	262	15	**-2**	**-16**	**-9**	**4**
MUSIC	**84**	**303**	**200**	**5**	**88**	**311**	**199**	**5**	**91**	**320**	**212**	**3**	**7**	**17**	**12**	**-2**
1.- OWN	74	288	181	3	78	296	179	3	81	305	187	2	**7**	**17**	**6**	**-1**
2.- AUXILIARY	10	15	19	2	10	15	20	2	10	15	25	1	**-**	**-**	**6**	**-1**
HERITAGE, MUSEUMS, ARCH. & LIBR.	**68**	**162**	**198**	**10**	**65**	**158**	**198**	**7**	**62**	**160**	**223**	**9**	**-6**	**-2**	**25**	**-1**
1.- OWN	10	36	67	5	13	35	69	4	13	36	76	4	**3**	**-**	**9**	**-1**
2.- AUXILIARY	58	126	131	5	52	123	129	3	49	124	147	5	**-9**	**-2**	**16**	**-**

	No. of companies on 1.1.2020				No. of companies on 1.1.2021				No. of companies on 1.1.2022				Var. No. of companies 2022 vs. 2020			
	Araba	Bizkaia	Gipuzkoa	Rest of Spain	Araba	Bizkaia	Gipuzkoa	Rest of Spain	Araba	Bizkaia	Gipuzkoa	Rest of Spain	Araba	Bizkaia	Gipuzkoa	Rest of Spain
2. CREATIVE	**1.150**	**4.979**	**3.508**	**100**	**1.138**	**4.837**	**3.464**	**93**	**1.156**	**4.816**	**3.535**	**104**	**6**	**-163**	**27**	**4**
ARCHITECTURE	**418**	**1.524**	**1.161**	**10**	**415**	**1.477**	**1.126**	**10**	**414**	**1.405**	**1.108**	**13**	**-4**	**-119**	**-53**	**3**
1.- OWN	418	1.524	1.161	10	415	1.477	1.126	10	414	1.405	1.108	13	**-4**	**-119**	**-53**	**3**
DESIGN	**79**	**433**	**274**	**4**	**80**	**441**	**276**	**4**	**84**	**464**	**284**	**4**	**5**	**31**	**10**	**-**
1.- OWN	79	433	274	4	80	441	276	4	84	464	284	4	**5**	**31**	**10**	**-**
LANGUAGE INDUSTRIES	**458**	**2.115**	**1.515**	**53**	**442**	**2.032**	**1.497**	**47**	**447**	**2.063**	**1.523**	**49**	**-11**	**-52**	**8**	**-4**
1.- OWN	458	2.115	1.515	53	442	2.032	1.497	47	447	2.063	1.523	49	**-11**	**-52**	**8**	**-4**
FASHION MANUFACTURE	**51**	**304**	**174**	**8**	**49**	**294**	**167**	**8**	**50**	**299**	**176**	**8**	**-1**	**-5**	**2**	**-**
1.- OWN	51	304	174	8	49	294	167	8	50	299	176	8	**-1**	**-5**	**2**	**-**
ADVERTISING	**144**	**596**	**382**	**25**	**152**	**585**	**396**	**24**	**160**	**577**	**441**	**29**	**16**	**-19**	**59**	**4**
1.- OWN	143	568	371	25	149	556	387	23	157	552	432	28	**14**	**-16**	**61**	**3**
2.- AUXILIARY	1	28	11	-	3	29	9	1	3	25	9	1	**2**	**-3**	**-2**	**1**
VIDEO GAMES	**-**	**7**	**2**	**-**	**-**	**8**	**2**	**-**	**1**	**8**	**3**	**1**	**1**	**1**	**1**	**1**
1.- OWN	-	7	2	-	-	8	2	-	1	8	3	1	**1**	**1**	**1**	**1**
GRAND TOTAL	**2.051**	**8.553**	**6.069**	**213**	**2.033**	**8.383**	**6.018**	**207**	**2.068**	**8.441**	**6.185**	**231**	**17**	**-112**	**116**	**18**

Source: Own preparation based on DIRAE data

The distribution of CCIs by HT as percentage of the totality of CCI companies in the CAE shows some variations during the two analysed years in this study. Thus, as shown in Table 6.2, in general, the representativeness of Gipuzkoan companies has increased by 0.6 p.p. from 36.4% to 37% and that of Alavan companies has grown by 0.1 p.p. from 12.3% to 12.4%. In this way, the CCI companies of Bizkaia have reduced their representativeness to 50.6%, that is, a drop of -0.7 p.p.

TABLE 4.2 DISTRIBUTION OF CCIS BY HT AND AREA (% OF THE TOTALITY OF CCI COMPANIES IN THE CAE)

	No. of companies/Total companies CCIs CAE (01.01.2020) (%)			No. of companies/Total companies CCIs CAE (01.01.2022) (%)			Var. 2022 vs. 2020 (p.p.)		
	Araba	Bizkaia	Gipuzkoa	Araba	Bizkaia	Gipuzkoa	Araba	Bizkaia	Gipuzkoa
1. CULTURAL	**12,8**	**50,8**	**36,4**	**12,7**	**50,4**	**36,9**	**-0,1**	**-0,4**	**0,5**
PERFORMING ARTS	**13,1**	**47,9**	**39,0**	**13,4**	**47,6**	**39,0**	**0,4**	**-0,3**	**-0,1**
1.- OWN	12,4	45,8	41,8	12,8	44,9	42,4	**0,4**	**-0,9**	**0,6**
2.- AUXILIARY	14,0	51,0	35,0	14,5	52,1	33,4	**0,5**	**1,2**	**-1,6**
VISUAL ARTS	**13,8**	**54,3**	**31,9**	**12,6**	**54,6**	**32,8**	**-1,2**	**0,3**	**0,9**
1.- OWN	13,8	54,3	31,9	12,6	54,6	32,8	**-1,2**	**0,3**	**0,9**
AUDIOVISUAL AND MULTIMEDIA	**10,9**	**53,6**	**35,4**	**11,6**	**52,2**	**36,1**	**0,7**	**-1,4**	**0,7**
1.- OWN	11,7	52,8	35,5	12,0	51,5	36,5	**0,2**	**-1,3**	**1,0**
2.- AUXILIARY	10,4	54,2	35,4	11,4	52,7	35,9	**1,0**	**-1,5**	**0,5**
BOOKS AND THE PRESS	**12,1**	**50,8**	**37,1**	**12,1**	**51,0**	**37,0**	**0,0**	**0,1**	**-0,2**
1.- OWN	11,7	50,4	37,9	11,6	50,9	37,6	**-0,1**	**0,5**	**-0,3**
2.- AUXILIARY	12,5	51,3	36,1	12,7	51,0	36,2	**0,2**	**-0,3**	**0,1**
MUSIC	**14,3**	**51,6**	**34,1**	**14,6**	**51,4**	**34,0**	**0,3**	**-0,3**	**-0,0**
1.- OWN	13,6	53,0	33,3	14,1	53,2	32,6	**0,5**	**0,2**	**-0,7**
2.- AUXILIARY	22,7	34,1	43,2	20,0	30,0	50,0	**-2,7**	**-4,1**	**6,8**
HERITAGE, MUSEUMS, ARCHIVES AND LIBRARIES	**15,9**	**37,9**	**46,3**	**13,9**	**36,0**	**50,1**	**-2,0**	**-1,9**	**3,9**
1.- OWN	8,8	31,9	59,3	10,4	28,8	60,8	**1,6**	**-3,1**	**1,5**
2.- AUXILIARY	18,4	40,0	41,6	15,3	38,8	45,9	**-3,1**	**-1,3**	**4,4**
2. CREATIVE	**11,9**	**51,7**	**36,4**	**12,2**	**50,7**	**37,2**	**0,2**	**-1,0**	**0,8**
ARCHITECTURE	**13,5**	**49,1**	**37,4**	**14,1**	**48,0**	**37,9**	**0,7**	**-1,1**	**0,4**
1.- OWN	13,5	49,1	37,4	14,1	48,0	37,9	**0,7**	**-1,1**	**0,4**
DESIGN	**10,1**	**55,1**	**34,9**	**10,1**	**55,8**	**34,1**	**0,0**	**0,7**	**-0,7**
1.- OWN	10,1	55,1	34,9	10,1	55,8	34,1	**0,0**	**0,7**	**-0,7**
LANGUAGE INDUSTRIES	**11,2**	**51,7**	**37,1**	**11,1**	**51,2**	**37,8**	**-0,1**	**-0,6**	**0,7**
1.- OWN	11,2	51,7	37,1	11,1	51,2	37,8	**-0,1**	**-0,6**	**0,7**
FASHION MANUFACTURE	**9,6**	**57,5**	**32,9**	**9,5**	**57,0**	**33,5**	**-0,1**	**-0,5**	**0,6**
1.- OWN	9,6	57,5	32,9	9,5	57,0	33,5	**-0,1**	**-0,5**	**0,6**
ADVERTISING	**12,8**	**53,1**	**34,0**	**13,6**	**49,0**	**37,4**	**0,7**	**-4,1**	**3,4**
1.- OWN	13,2	52,5	34,3	13,8	48,4	37,9	**0,5**	**-4,1**	**3,6**
2.- AUXILIARY	2,5	70,0	27,5	8,1	67,6	24,3	**5,6**	**-2,4**	**-3,2**
VIDEO GAMES		**77,8**	**22,2**	**8,3**	**66,7**	**25,0**	**8,3**	**-11,1**	**2,8**
1.- OWN		77,8	22,2	8,3	66,7	25,0	**8,3**	**-11,1**	**2,8**
GRAND TOTAL	**12,3**	**51,3**	**36,4**	**12,4**	**50,6**	**37,0**	**0,1**	**-0,7**	**0,6**

Source: Own preparation based on DIRAE data

The increase in representativeness of Gipuzkoan companies is shown in both **cultural** (+0.5 p.p.) and **creative** (+0.8 p.p.) companies. In this case, the areas with most growth are **Heritage, museums, archives and libraries** (+3.9 p.p.), **Advertising** (+3.4 p.p.) and **Videogames** (+2.8 p.p.). On the contrary, the representativeness of Gipuzkoan companies in the area of **Design** has dropped by 0.7 p.p., a percentage that has been recovered by the Historical Territory of Bizkaia.

In the case of the companies of Araba, the areas that have most increased their representativeness with regard to the number of companies are **Videogames** (+8.3 p.p.) although in absolute terms the number of companies in this area is small, **Architecture** (+0.7 p.p.), **Advertising** (+0.7 p.p.) and **Audiovisual and multimedia** (+0.7 p.p.). Representativeness in the totality of companies in the Basque Country has shrunk in the areas of **Heritage, museums, archives and libraries** (-2.0 p.p.) and **Visual arts** (-1.2 p.p.).

Araba has reduced its representativeness in the case of number of **cultural** companies (-0.1 p.p.). However, the number of **creative** companies has increased (+0.2 p.p.).

In **Bizkaia**, the reduction in representativeness has arisen mainly in the areas of **Videogames** (-11.1 p.p.), **Advertising** (-4.1 p.p.), **Heritage, museums, archives and libraries** (-1.9 p.p.), **Audiovisual and multimedia** (-1.4 p.p.) and **Architecture** (-1.1 p.p.).

Bizkaia has reduced in representativeness in both **cultural** (-0.4 p.p.) and **creative** (-1.0 p.p.) industries.

5. THE LEGAL STATUS OF CCIS

In previous reports, the composition of CCIs with regard to their legal status was clearly shown. Said distribution is maintained in the current report with some slight alterations. In fact, Self-employed persons (11,668 self-employed persons representing 68.94% of the totality of companies) are the most common legal status in the CAE in the CCI sector, even after the Covid-19 pandemic (1 January 2022). Next, Limited companies represent 20.28%& of companies (3,432 companies) and Other companies (basically Associations and Foundations) make up 5.12% (867 companies). The remaining companies are made up, in this order, by Joint ownership companies, Cooperative societies, Public limited companies, Autonomous religious organisations and Local governments.

The variations in the percentage of representativeness of the legal statuses used are slight. Thus, the percentage of autonomous companies has increased by 0.76 p.p. and the percentage of Limited companies has dropped by -0.57 p.p. In no case has the variation been greater than 0.8 p.p.

TABLE 5.1 LEGAL STATUS OF COMPANIES IN THE CCI SECTOR IN THE CAE AND AVERAGE SIZE.

	Public Limited Company		Cooperative		Limited Company		Self-employed		Co-ownership		Local government		Other company		Aut. Religious Org.	
	% / total 2020	% / total 2022	% / total 2020	% / total 2022	% / total 2020	% / total 2022	% / total 2020	% / total 2022	% / total 2020	% / total 2022	% / total 2020	% / total 2022	% / total 2020	% / total 2022	% / total 2020	% / total 2022
1. CULTURAL	**2,06%**	**1,90%**	**2,17%**	**2,20%**	**24,41%**	**22,90%**	**60,20%**	**62,22%**	**2,98%**	**2,64%**	**0,22%**	**0,19%**	**7,65%**	**7,63%**	**0,31%**	**0,31%**
PERFORMING ARTS	1,27%	1,11%	1,70%	2,22%	23,48%	22,76%	59,05%	60,58%	2,12%	2,01%	0,00%	0,00%	12,38%	11,24%	0,00%	0,07%
1.- OWN	0,96%	0,90%	1,32%	1,91%	19,21%	17,57%	66,15%	68,13%	1,92%	1,58%	0,00%	0,00%	10,44%	9,91%	0,00%	0,00%
2.- AUXILIARY	1,72%	1,45%	2,24%	2,71%	29,60%	31,10%	48,88%	48,46%	2,41%	2,71%	0,00%	0,00%	15,15%	13,38%	0,00%	0,18%
VISUAL ARTS	0,28%	0,27%	0,56%	0,53%	4,72%	3,72%	90,49%	92,16%	2,04%	1,46%	0,00%	0,00%	1,90%	1,86%	0,00%	0,00%
1.- OWN	0,28%	0,27%	0,56%	0,53%	4,72%	3,72%	90,49%	92,16%	2,04%	1,46%	0,00%	0,00%	1,90%	1,86%	0,00%	0,00%
AUDIOVISUAL AND MULTIMEDIA	3,04%	2,55%	2,64%	2,30%	39,79%	37,05%	48,18%	51,62%	1,98%	1,74%	0,00%	0,00%	4,30%	4,67%	0,07%	0,06%
1.- OWN	4,52%	3,75%	3,74%	3,90%	40,56%	37,09%	41,50%	45,80%	1,87%	1,65%	0,00%	0,00%	7,64%	7,66%	0,16%	0,15%
2.- AUXILIARY	1,95%	1,70%	1,83%	1,17%	39,22%	37,02%	53,10%	55,74%	2,06%	1,81%	0,00%	0,00%	1,83%	2,55%	0,00%	0,00%
BOOKS AND THE PRESS	3,73%	3,99%	2,26%	2,38%	29,98%	29,92%	53,81%	53,54%	6,04%	5,59%	0,00%	0,00%	3,67%	4,05%	0,51%	0,54%
1.- OWN	3,17%	3,82%	1,88%	2,12%	21,88%	20,89%	61,19%	61,29%	6,24%	5,73%	0,00%	0,00%	4,85%	5,30%	0,79%	0,85%
2.- AUXILIARY	4,47%	4,20%	2,76%	2,71%	40,74%	41,46%	44,02%	43,63%	5,78%	5,42%	0,00%	0,00%	2,10%	2,44%	0,13%	0,14%
MUSIC	0,68%	0,48%	2,87%	3,35%	18,24%	15,97%	57,94%	61,18%	2,87%	3,04%	2,36%	1,92%	14,19%	13,42%	0,84%	0,64%
1.- OWN	0,37%	0,35%	2,93%	3,30%	18,50%	16,17%	56,23%	59,48%	3,11%	3,30%	2,56%	2,09%	15,38%	14,61%	0,92%	0,70%
2.- AUXILIARY	4,35%	1,96%	2,17%	3,92%	15,22%	13,73%	78,26%	80,39%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%
HERITAGE, MUSEUMS, ARCHIVES AND LIBRARIES	2,05%	1,76%	5,94%	5,07%	23,97%	20,48%	36,07%	39,21%	0,00%	0,22%	0,46%	0,44%	29,91%	31,06%	1,60%	1,76%
1.- OWN	1,69%	1,55%	5,93%	5,43%	22,03%	17,05%	12,71%	14,73%	0,00%	0,78%	1,69%	1,55%	50,85%	54,26%	5,08%	4,65%
2.- AUXILIARY	2,19%	1,85%	5,94%	4,92%	24,69%	21,85%	44,69%	48,92%	0,00%	0,00%	0,00%	0,00%	22,19%	21,85%	0,31%	0,62%

	Public Limited Company		Cooperative		Limited Company		Self-employed		Co-ownership		Local government		Other company		Aut. Religious Org.	
	% / total 2020	% / total 2022	% / total 2020	% / total 2022	% / total 2020	% / total 2022	% / total 2020	% / total 2022	% / total 2020	% / total 2022	% / total 2020	% / total 2022	% / total 2020	% / total 2022	% / total 2020	% / total 2022
2. CREATIVE	**0,75%**	**0,62%**	**1,42%**	**1,54%**	**18,26%**	**18,28%**	**74,04%**	**74,06%**	**2,44%**	**2,12%**	**0,10%**	**0,10%**	**2,91%**	**3,22%**	**0,07%**	**0,05%**
ARCHITECTURE	0,26%	0,27%	1,00%	1,09%	15,75%	16,54%	79,56%	78,90%	1,57%	1,50%	0,00%	0,00%	1,83%	1,70%	0,03%	0,00%
1.- OWN	0,26%	0,27%	1,00%	1,09%	15,75%	16,54%	79,56%	78,90%	1,57%	1,50%	0,00%	0,00%	1,83%	1,70%	0,03%	0,00%
DESIGN	0,00%	0,12%	1,77%	1,91%	15,82%	16,15%	78,48%	78,59%	2,66%	2,03%	0,00%	0,00%	1,27%	1,20%	0,00%	0,00%
1.- OWN	0,00%	0,12%	1,77%	1,91%	15,82%	16,15%	78,48%	78,59%	2,66%	2,03%	0,00%	0,00%	1,27%	1,20%	0,00%	0,00%
LANGUAGE INDUSTRIES	0,46%	0,42%	1,35%	1,42%	13,98%	14,09%	76,29%	76,16%	3,04%	2,69%	0,24%	0,24%	4,49%	4,85%	0,14%	0,12%
1.- OWN	0,46%	0,42%	1,35%	1,42%	13,98%	14,09%	76,29%	76,16%	3,04%	2,69%	0,24%	0,24%	4,49%	4,85%	0,14%	0,12%
FASHION MANUFACTURE	2,98%	2,06%	1,49%	2,06%	18,81%	17,45%	70,76%	72,98%	5,21%	4,13%	0,00%	0,00%	0,74%	1,31%	0,00%	0,00%
1.- OWN	2,98%	2,06%	1,49%	2,06%	18,81%	17,45%	70,76%	72,98%	5,21%	4,13%	0,00%	0,00%	0,74%	1,31%	0,00%	0,00%
ADVERTISING	2,62%	1,91%	2,44%	2,57%	41,59%	37,95%	49,87%	53,02%	1,22%	0,91%	0,00%	0,00%	2,27%	3,65%	0,00%	0,00%
1.- OWN	2,53%	1,88%	2,53%	2,57%	40,92%	37,13%	50,41%	53,72%	1,26%	0,94%	0,00%	0,00%	2,35%	3,76%	0,00%	0,00%
2.- AUXILIARY	5,00%	2,63%	0,00%	2,63%	60,00%	63,16%	35,00%	31,58%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%
VIDEO GAMES	0,00%	0,00%	11,11%	0,00%	66,67%	76,92%	22,22%	23,08%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%
1.- OWN	0,00%	0,00%	11,11%	0,00%	66,67%	76,92%	22,22%	23,08%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%
GRAND TOTAL	**1,30%**	**1,18%**	**1,74%**	**1,83%**	**20,87%**	**20,28%**	**68,18%**	**68,94%**	**2,67%**	**2,35%**	**0,15%**	**0,14%**	**4,92%**	**5,12%**	**0,17%**	**0,17%**

Source: Own preparation based on DIRAE data

If we analyse by areas, the trends are maintained with some variations. Whereas in the case of cultural industries, the percentage of Self-employed persons represents 62.22% of the total, in the creative industries they represent 74.06%. On the contrary, Limited companies make up 22.90 % in cultural companies and 18.28 % in creative companies.

Standing out due to its different behaviour from the general average, is the area of **Heritage, museums, archives and libraries** where the percentage of Self-employed persons is only 39.21%. In this case, during the two years analysed in this study, there has been an increase of 3.13 p.p. in the percentage of Self-employed persons in detriment to the number of Limited companies, which has reduced by -3.49 p.p.

With the exception of the **Books and the press** sector, this phenomenon of the increase in percentage of Self-employed persons to the detriment of Limited companies has occurred almost throughout cultural companies and in its areas of **Performing arts** (+1.53 p.p.), **Visual arts** (+1.67 p.p.), **Audiovisual and Multimedia** (+3.44 p.p.) and **Music** (+3.24 p.p.).

In the case of creative companies, the increase in representativeness of Self-employed persons has occurred in the areas of **Advertising** (+3.15 p.p.) and **Fashion manufacturing** (+2.22 p.p.). Meanwhile, although its representativeness is low in absolute terms, the percentage of Self-employed persons in **Videogames** is 23.08%.

6. THE EMPLOYMENT OF VALUE CHAINS IN CCIS

This section makes a comparison of the evolution of employment in the different value chains in the Cultural and Creative Industries during the period between 1 January 2020 and 1 January 2022. Some data are also incorporated pertaining to the intermediate evolution of 2021. The data used in this analysis have been obtained from Eustat.

As can be seen in Table 6.1, during this period (2022 vs. 2020) a total increase of 231 jobs in CCI employment has been registered, representing 0.68%. During the last year (2022 vs. 2021), employment has grown by 794 jobs representing a 2.3% increase.

As with the evolution of the number of companies, evolution has been different between the cultural and creative industries. Thus, while employment in **cultural** industries has grown by 1.83% with regard to 1 January 2020 (375 jobs), **creative** industries have suffered a decrease of 144 jobs (-1.07%) in the same period. That is, in the case of **creative** industries, pre-pandemic levels have not been reached.

In the case of cultural industries, the increase is mainly due to strong employment growth in **Audiovisual and multimedia** activities (+698 jobs), both in its own activities and in auxiliary activities, which means a growth of 11.69%.

On the contrary, companies in the fields of **Performing arts** and **Books and the press** have registered the loss of 169 (-4.15%) and 163 (-2.78%) jobs respectively. It must be pointed out that in the case of Performing arts the drop has occurred in its auxiliary activities. Thus, in this sector, its own activities grew by 3.37% while auxiliary activities shrank by 231 jobs (-10.33%). This difference between its own and auxiliary activities is also perceived in the evolution of the number of companies. This shows that the Covid-19 crisis has had the consequence in this sector of a reconfiguration with growth in its own activities (bigger companies than the auxiliaries) and a reduction in support activities. In the case of the latter, it has also brought about a reduction in the average size of companies.

The situation is different in the case of the **Books and the press** area. Employment has dropped by 163 jobs, of which 160 belong to its own activities. The sector's auxiliary activities have remained practically constant (-0.11%). Therefore, the impact of the crisis seems to have affected its main activities and therefore may come from changes in the market.

In the case of the area of **Music** (drop of 30 jobs, 1.89%), its own activities show a slight reduction (0.40%) while auxiliary activities have dropped by 24 jobs, 31.17%. This reduction contrasts with the number of companies which points towards a reconfiguration in the sector with a reduction in the average size of companies and which is reflected in the large increase in the percentage of self-employed persons, from 57.94% to 61.18%, in the companies of said area.

To finish the analysis of **cultural** activities, **Visual arts** grew by 17 jobs (0.96%) and **Heritage, museums, archives and libraries** grew by 22 jobs (1.75%).

If we analyse the case of **creative** industries, as mentioned above, they have suffered a drop in employment of 1.07%, mainly arising from the negative evolution of **Architecture** (-108 jobs) and **Language industries** (-163 jobs). **Fashion manufacturing** also had a negative evolution, losing 68 jobs since the beginning of 2020.

TABLE 6.1 EVOLUTION OF CCI EMPLOYMENT BETWEEN 2020 AND 2022 BY VALUE CHAINS AND ITS WEIGHT OVER THE TOTALITY OF THE BASQUE COUNTRY

	2020	2021	2022	Var. No. jobs 2022 vs. 2020	Var. No. jobs 2022 vs. 2020 (%)	No. of jobs / Total no. of jobs CAE (01.01.2020) (%)	No. of jobs / Total no. of jobs CAE (01.01.2022) (%)	Var. No. of jobs / Total no. of jobs CAE 2022 vs. 2020 (p.p.)
1. CULTURAL	**20.552**	**20.243**	**20.927**	**375**	**1,83%**	**2,23**	**2,30**	**0,07**
PERFORMING ARTS	**4.077**	**3.819**	**3.908**	**-169**	**-4,15%**	**0,44**	**0,43**	**-0,01**
1.- OWN	1.840	1.814	1.902	62	3,37%	0,20	0,21	0,01
2.- AUXILIARY	2.237	2.005	2.006	-231	-10,33%	0,24	0,22	-0,02
VISUAL ARTS	**1.772**	**1.733**	**1.789**	**17**	**0,96%**	**0,19**	**0,20**	**0,00**
1.- OWN	1.772	1.733	1.789	17	0,96%	0,19	0,20	0,00
AUDIOVISUAL AND MULTIMEDIA	**5.972**	**6.146**	**6.670**	**698**	**11,69%**	**0,65**	**0,73**	**0,08**
1.- OWN	3.208	3.216	3.373	165	5,14%	0,35	0,37	0,02
2.- AUXILIARY	2.764	2.930	3.297	533	19,28%	0,30	0,36	0,06
BOOKS AND THE PRESS	**5.853**	**5.741**	**5.690**	**-163**	**-2,78%**	**0,64**	**0,62**	**-0,01**
1.- OWN	3.069	2.951	2.909	-160	-5,21%	0,33	0,32	-0,01
2.- AUXILIARY	2.784	2.790	2.781	-3	-0,11%	0,30	0,31	0,00
MUSIC	**1.599**	**1.559**	**1.569**	**-30**	**-1,89%**	**0,17**	**0,17**	**-0,00**
1.- OWN	1.522	1.498	1.516	-6	-0,40%	0,17	0,17	0,00
2.- AUXILIARY	77	61	53	-24	-31,17%	0,01	0,01	-0,00
HERITAGE, MUSEUMS, ARCHIVES AND LIBRARIES	**1.279**	**1.245**	**1.301**	**22**	**1,75%**	**0,14**	**0,14**	**0,00**
1.- OWN	792	789	813	21	2,65%	0,09	0,09	0,00

	2020	2021	2022	Var. No. jobs 2022 vs. 2020	Var. No. jobs 2022 vs. 2020 (%)	No. of jobs / Total no. of jobs CAE (01.01.2020) (%)	No. of jobs / Total no. of jobs CAE (01.01.2022) (%)	Var. No. of jobs / Total no. of jobs CAE 2022 vs. 2020 (p.p.)
2.- AUXILIARY	487	456	488	1	0,28%	0,05	0,05	0,00
2. CREATIVE	**13.430**	**13.176**	**13.286**	**-144**	**-1,07%**	**1,46**	**1,46**	**-0,00**
ARCHITECTURE	**4.002**	**3.990**	**3.894**	**-108**	**-2,70%**	**0,43**	**0,43**	**-0,01**
1.- OWN	4.002	3.990	3.894	-108	-2,70%	0,43	0,43	-0,01
DESIGN	**1.165**	**1.173**	**1.209**	**44**	**3,78%**	**0,13**	**0,13**	**0,01**
1.- OWN	1.165	1.173	1.209	44	3,78%	0,13	0,13	0,01
LANGUAGE INDUSTRIES	**3.354**	**3.249**	**3.191**	**-163**	**-4,86%**	**0,36**	**0,35**	**-0,01**
1.- OWN	3.354	3.249	3.191	-163	-4,86%	0,36	0,35	-0,01
FASHION MANUFACTURE	**1.301**	**1.269**	**1.233**	**-68**	**-5,23%**	**0,14**	**0,14**	**-0,01**
1.- OWN	1.301	1.269	1.233	-68	-5,23%	0,14	0,14	-0,01
ADVERTISING	**3.581**	**3.470**	**3.698**	**117**	**3,27%**	**0,39**	**0,41**	**0,02**
1.- OWN	3.385	3.315	3.547	162	4,79%	0,37	0,39	0,02
2.- AUXILIARY	196	155	151	-45	-22,96%	0,02	0,02	-0,00
VIDEO GAMES	**27**	**25**	**61**	**34**	**125,93%**	**0,00**	**0,01**	**0,00**
1.- OWN	27	25	61	34	125,93%	0,00	0,01	0,00
GRAND TOTAL	**33.982**	**33.419**	**34.213**	**231**	**0,68%**	**3,69**	**3,75**	**0,07**

Source: Own preparation based on Eustat data

On the contrary, **Advertising** presents a clearly positive trend having created 117 jobs (3.27%) over the two years, mainly driven by its own activities. **Design** activities have grown by 3.78% (44 jobs) and companies in the **Videogames** area have increased jobs by 34 which, bearing in mind its small size, represents a high percentage of growth (126%).

As a consequence of all of the above, the percentage of employment in CCI activities in the Basque Country has risen from 3.69% to 3.75% between 1 January 2020 and 1 January 2022. Said growth has arisen from **cultural** activities (2.30%, 0.07 p.p.) given that the weight of **creative** activities has remained constant (1.46%).

7. EVOLUTION OF CCI EMPLOYMENT BY BRANCHES OF ACTIVITY IN THE COVID-19 PERIOD

This section presents the analysis of the evolution of employment during the analysed period distributed by A38 branches of activity of the Statistical Classification of Economic Activities (NACE-CNAE), which includes CCIs. In economic terms, this period was especially affected by the Covid-19 pandemic.

TABLE 7.1 EVOLUTION OF THE CCI BRANCHES OF ACTIVITY (1 JANUARY 2020-1 JANUARY 2022)

	Manufacturing	Commercial	Publishing, audiovisuals, radio and television and information technology	Professional, scientific and technical activities	Education	Recreational and cultural activities	TOTAL
Employment on 1.1.2020	4.019	1.341	8.161	11.429	3.680	5.353	33.982
Employment on 1.1.2021	3.974	1.281	8.260	11.143	3.577	5.184	33.419
Employment on 1.1.2022	3.925	1.269	8.786	11.209	3.639	5.386	34.213
Variation in employment 2022 vs. 2020	-94	-72	625	-220	-41	33	231
Variation in employment 2022 vs. 2021	-49	-12	526	66	62	202	794
Variation in employment 2022 vs. 2020 (%)	-2,34	-5,37	7,66	-1,92	-1,12	0,62	0,68

Source: Own preparation based on Eustat data

As can be seen in the previous table, the **Publishing, audiovisuals, radio and television and information technology** branch of activity shows the biggest growth in employment since January 2020 (625 jobs), representing growth of 7.66%. Said growth took place mainly between 1 January 2021 and 1 January 2022 (526 jobs).

Recreational and cultural activities underwent a slight growth of 202 jobs, representing an increase of 0.62%.

Apart from that, the remaining branches of activity have decreased in employment terms. The **Commercial activities** branch of activity has reduced its employment by 72 jobs, which is -5.37%. **Manufacturing** and **Professional, scientific and technical activities** and **Education** are the remaining activities that have reduced employment with percentages of -2.34%, -1.92% and -1.12%, respectively.

The following table shows existing employment in CCI companies on 1 January 2022 distributed by the value chains they belong to and their branch of activity.

TABLE 7.2 EMPLOYMENT IN CCI AREAS AND BRANCHES OF ACTIVITY

	Manufacturing	Commercial	Publishing, audiovisuals, radio and television and information technology	Professional, scientific and technical activities	Education	Recreational and cultural activities	Total 2022
1. CULTURAL	**2.692**	**1.269**	**8.574**	**1.663**	**1.343**	**5.386**	**20.927**
PERFORMING ARTS				378		3.530	3.908
VISUAL ARTS				746		1.043	1.789
AUDIOVISUAL AND MULTIMEDIA			6.641	29			6.670
BOOKS AND THE PRESS	2.639	1.247	1.782	22			5.690
MUSIC	53	22	151		1.343		1.569
HERITAGE, MUSEUMS, ARCHIVES AND LIBRARIES			-	488		813	1.301
2. CREATIVE	**1.233**		**212**	**9.546**	**2.295**		**13.286**
ARCHITECTURE				3.894			3.894
DESIGN				1.209			1.209
LANGUAGE INDUSTRIES				896	2.295		3.191
FASHION MANUFACTURE	1.233						1.233
ADVERTISING			151	3.547			3.698
VIDEO GAMES			61				61
GRAND TOTAL	**3.925**	**1.269**	**8.786**	**11.209**	**3.639**	**5.386**	**34.213**

Source: Own preparation based on Eustat data

On 1 January 2022, employment in **Professional, scientific and technical activities** represented 33% of CCI employment (11,209 jobs). The area of **Publishing, audiovisuals, radio and television and information technology** represented 26% (8,786 jobs) and the areas of **Recreational and cultural activities**, **Manufacturing** and **Education**, 16% (5,386 jobs), 11% (3,925 jobs) and 11% (3,639 jobs), respectively. Lastly, **Commercial activities** represented 4% (1,269 jobs).

Cultural activities are concentrated in the **Publishing, audiovisuals, radio and television and information technology** branch (8,574 jobs) and in **Recreational and cultural activities** (5,386 jobs). Employment in said branches of activity represents 66.7% of employment in cultural value chains.

Creative activities are fundamentally supported by **Professional, scientific and technical activities** (9,546 jobs) which makes up 71.8% of employment in creative value chains.

Among the **Professional, scientific and technical activities** (9,546 jobs) **Architecture, Advertising and Design** stand out, all of which are activities in the creative field. Among the activities of

Publishing, audiovisuals, radio and television and information technology (8,786 jobs), **Audiovisual and multimedia** makes up 75.6% of employment in its branch of activity.

The value chain of **Performing arts** is the most representative in **Recreational and cultural activities**, providing 3,530 jobs in said branch of activity.

The manufacturing activity of **Books and the press** and **Fashion manufacturing** make up almost the whole of the manufacturing branch of activity. **Education** activities are made up of training in **Music** and training in **Language industries**. The commercial activity of **Books and the press** represents approximately the totality of commercial activities.

The following table presents the evolution of employment between 1 January 2020 and 1 January 2022 distributed by fields and branches of activity. Cross analysis of the fields and branches of activity enables us to obtain some additional conclusions of interest.

TABLE 7.3 VARIATION OF CCI EMPLOYMENT BETWEEN 1/1/2020 AND 1/1/2022 BY AREA AND BRANCH OF ACTIVITY

	Manufacturing	Commercial	Publishing, audiovisuals, radio and television and information technology	Professional, scientific and technical activities	Education	Recreational and cultural activities	Total
1. CULTURAL	**-26**	**-72**	**636**	**-187**	**-9**	**33**	**375**
PERFORMING ARTS				-57		-112	-169
VISUAL ARTS				-107		124	17
AUDIOVISUAL AND MULTIMEDIA			722	-24			698
BOOKS AND THE PRESS	-2	-72	-89				-163
MUSIC	-24		3		-9		-30
HERIT. MUSEUMS, ARCH. & LIBR.				1		21	22
2. CREATIVE	**-68**		**-11**	**-33**	**-32**		**-144**
ARCHITECTURE				-108			-108
DESIGN				44			44
LANGUAGE INDUSTRIES				-131	-32	**0**	-163
FASHION MANUFACTURE	-68						-68
ADVERTISING			-45	162			117
VIDEO GAMES			34				34
GRAND TOTAL	**-94**	**-72**	**625**	**-220**	**-41**	**33**	**231**

Source: Own preparation based on Eustat data

And the following table shows the variation in employment in percentage terms.

TABLE 7.4 **PERCENTAGE OF VARIATION OF CCI EMPLOYMENT BETWEEN 1/1/2020 AND 1/1/2022 BY AREA AND BRANCH OF ACTIVITY**

	Manufacturing	Commercial	Publishing, audiovisuals, radio and television and information technology	Professional, scientific and technical activities	Education	Recreational and cultural activities	Total
1. CULTURAL	**-1,0**	**-5,4**	**8,0**	**-10,1**	**-0,7**	**0,6**	**1,8**
PERFORMING ARTS			**0,0**	-13,1		-3,1	-4,1
VISUAL ARTS			**0,0**	-12,5		13,5	1,0
AUDIOVISUAL AND MULTIMEDIA			12,2	-45,3			11,7
BOOKS AND THE PRESS	-0,1	-5,5	-4,8				-2,8
MUSIC	-31,2		2,0		-0,7		-1,9
HERIT. MUSEUMS, ARCH. & LIBR.				0,3		2,7	1,7
2. CREATIVE	**-5,2**		**-4,9**	**-0,3**	**-1,4**		**-1,1**
ARCHITECTURE				-2,7			-2,7
DESIGN				3,8			3,8
LANGUAGE INDUSTRIES				-12,8	-1,4		-4,9
FASHION MANUFACTURE	-5,2						-5,2
ADVERTISING			-23,0	4,8			3,3
VIDEO GAMES			125,9				125,9
GRAND TOTAL	**-2,3**	**-5,4**	**7,7**	**-1,9**	**-1,1**	**0,6**	**0,7**

Source: Own preparation based on Eustat data

Thus, in the previous table, beginning with cultural activities, it can be seen that in the case of **Performing arts**, the reduction of 169 jobs is made up of a decrease of 112 jobs (-3.1%) in the branch of activity **Recreational and cultural activities** and of 57 jobs (-13.1%) in the branch of activity **Professional, scientific and technical activities**.

In the case of **Visual arts**, the net value of an increase of 17 jobs is made up of a reduction of 107 jobs (-12.5%) in **Professional, scientific and technical activities** and an increase of 124 jobs (13.5%) in **Recreational and cultural activities**.

The large growth in **Audiovisual and multimedia** activities occurs in the branch of activity of **Publishing, audiovisuals, radio and television and information technology** (722 jobs, 12.2%) which more than compensate for the loss of 24 jobs in **Professional, scientific and technical activities**.

The reduction in employment in the field of **Books and the press** (163 jobs) is shared between activities in the **Publishing, audiovisuals, radio and television and information technology** (89 jobs) and **Commercial activities** branches of activity (72 jobs).

In the case of **Music**, the drop in employment is focused mainly on its **Manufacturing** activities (24 jobs) which means a drop of 31.2% of employment in **Manufacture of musical instruments**.

The variation of 22 jobs (1.7%) in **Heritage, museums, archives and libraries** is based on an increase of 21 jobs (2.7%) in the **Recreational and cultural activities** branch of activity.

Consequently, **cultural** activities present an increase in their activities of **Publishing, audiovisuals, radio and television and information technology** (375 jobs, 1.8%) and large reductions in the branches of **Professional, scientific and technical activities** (187 jobs, -10.1%) and **Commercial activities** (72 jobs, -5.4%).

With regard to variations in employment in the areas of **Architecture** and **Design**, the totality of the variations in employment presented earlier occur in the **Professional, scientific and technical activities** branches of activity.

The loss of employment in **Fashion manufacturing** represents a fall in **Manufacturing** activity and the growth in **Videogames** means an increase in the activity of **Publishing, audiovisuals, radio and television and information technology**.

The loss of 163 jobs in **Language industries** is mainly concentrated in **Professional, scientific and technical activities** (131 jobs, -12.8%) and not so much in **Education** activities. This indicates that the impact has probably been more focused on translation activities.

Lastly, the increase of 117 jobs in the area of **Advertising** is caused by an increase of 162 jobs (4.8%) in **Professional, scientific and technical activities** despite the decrease in **Publishing, audiovisuals, radio and television and information technology** (45 jobs, -23%).

In short, the fall in employment in **Creative** activities is generalised throughout all the branches of activity that make it up, with the 5.2% fall in **Manufacturing** activities and the 4.9% fall in **Publishing, audiovisuals, radio and television and information technology activities** standing out.

8. DESTINATION OF CULTURAL AND CREATIVE PRODUCTS IN THE BASQUE ECONOMY

In this section we analyse the characteristics of the destination of cultural and creative products in the Basque economy. To do so, use has been made of the data obtained from the Autonomous Community of the Basque Country destination tables (thousands of euros) corresponding to 2020[3] by product, geographical origin, branch and period prepared by Eustat.

Said tables show the value of the consumption of the totality of products and services divided by the intermediate demand and the final demand[4]. In addition, they show the values relating to exports of products and services. From the totality of available products and services, this analysis extracts those relating to cultural and creative products and services for detailed analysis.

In the available CAE destination tables, the totality of products and services is split into 105 categories resulting in the combination of different CPA 2008 (Classification of Products by Activity)

3 Despite being data relating to a year deeply affected by the Covid-19 pandemic, these are used because they are the latest available data.

4 The intermediate demand corresponds to the volume of products and services consumed by other productive sectors and the final demand is made up of the final consumption of homes, the consumption of Public administrations, the gross capital formation and exports.

subcategories. In this way, the categories of products and services selected for analysis and the CPA 2008 categories in which they are included are as follows:

TABLE 8.1 PRODUCTS AND SERVICES ANALYSED

P105	PRODUCT	CPA 2008
019	Textiles, tailoring, leather and footwear	13-15
023	Graphic arts and recorded media	18
074	Publishing	58
075	Audiovisual services	59-60
077	Information technology and information services	62 y 63
083	Architecture, engineering and technical testing	71
085	Advertising and Marketing	73
097	Artistic services and shows	90
098	Cultural services	91
100	Sporting activities	931
101	Leisure activities	932
102	Activities of other membership organisations	94

Source: Own preparation based on Eustat data

Said list gathers the products and services associated with cultural and creative activities with the available degree of detail and its relationship with the CPA 2008 product classification. Generally, a more precise analysis would require a greater degree of detail in the classification of products and services[5]. However, as a first analysis, we will use the available data to try to understand how the CCIs affect the remaining sectors in the Basque economy.

The following table shows the amount (in thousands of euros) of cultural and creative products and services produced in the Basque economy and their destinations.

5 It must be pointed out that some of the analysed categories include both products and services that can be considered CCIs as well as others that should not be considered such, for example categories 77 Information technology and information services and 83. Architecture, engineering and technical services.

TABLE 8.2 DESTINATION OF CCI PRODUCTS AND SERVICES FROM THE BASQUE COUNTRY

CCI PRODUCTS	Final demand (thousand €)	Intermediate demand (thousand €)	Total demand (thousand €)	Exports (thousand €)	% Intermediate demand / Total demand	% Exports / Total demand
19. Textiles, tailoring, leather and footwear	163.099	47.209	210.308	150.766	22,4%	72%
23. Graphic arts and recorded media	47.205	223.164	270.369	40.438	82,5%	15%
74. Publishing	121.777	226.403	348.180	77.750	65,0%	22%
75. Audiovisual services	260.123	102.577	362.700	44.872	28,3%	12%
77. Information technology and information serv.	1.082.299	675.631	1.757.930	217.085	38,4%	12%
83. Architecture, engineering and technical testing	1.648.397	939.912	2.588.309	1.039.286	36,3%	40%
85. Advertising and marketing	107.688	349.630	457.318	105.464	76,5%	23%
97. Artistic services and shows	110.992	50.481	161.473	41.202	31,3%	26%
98. Cultural services	126.898	60.516	187.414	10.068	32,3%	5%
100. Sporting activities	345.573	111.824	457.397	26.176	24,4%	6%
101. Leisure activities	95.063	36.503	131.566	11.312	27,7%	9%
102. Activities of other membership organisations	320.142	144.570	464.712	-	31,1%	0%
TOTAL	**4.429.256**	**2.968.420**	**7.397.676**	**1.764.419**	**40,1%**	**24%**

Source: Own preparation based on Eustat data

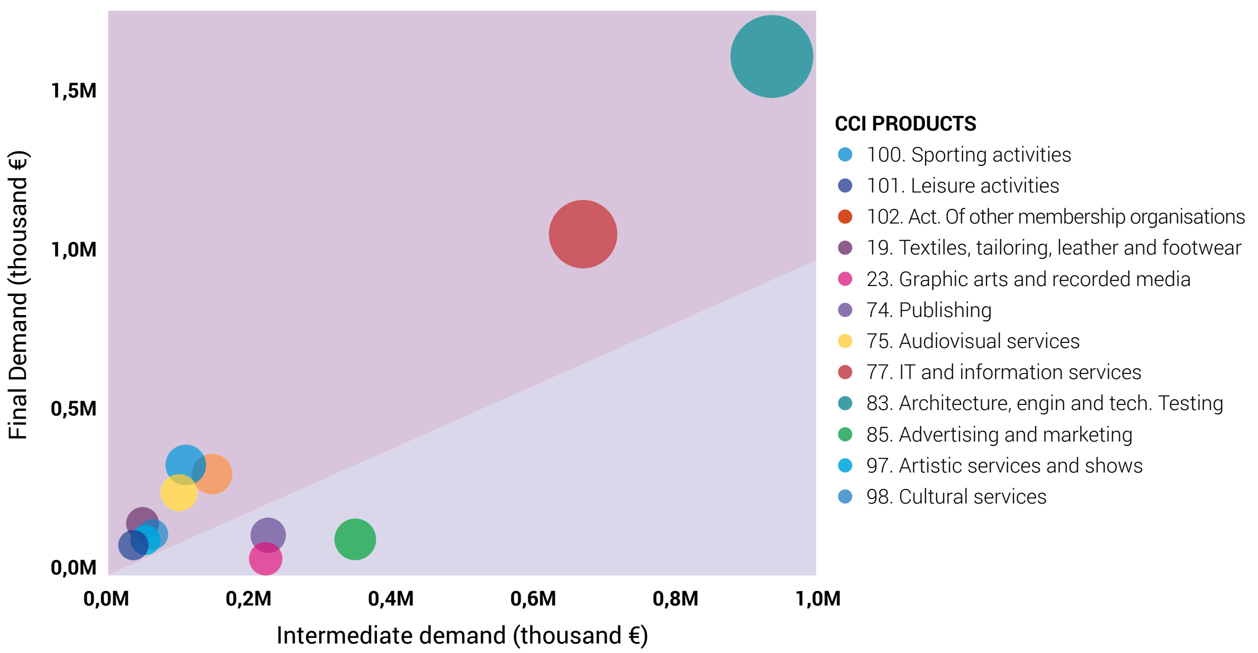
In accordance with the available data, the total demand of cultural and creative products and services is 7,397 million euros of which 40.1% is destined as intermediate demand, that is, destined to other productive sectors, and the remaining 59.9% is final demand. As a whole, the percentage of the production of CCI products and services destined to export is 24% of its value.

CCI products and services have a very different profile depending on the area referred to. Thus, the percentage of production destined to export varies between 0% of **Associational activities** and 72% of **Textiles, tailoring, leather and footwear** products. In addition to the aforementioned, among the most widely exported products and services we can find **Architecture, engineering and technical services**, **Artistic services and shows**, **Advertising and marketing** and **Publishing**. Among the least widely exported are **Associational activities**, **Cultural services**, **Sporting activities** and **Leisure activities**.

Meanwhile, the percentage of production destined for other productive sectors also presents a varied profile in the different products and services. Thus, while **Graphic arts and recorded media**, **Advertising and marketing** and **Publishing** devote 82.5%, 76.5% and 65.0% of their production to other productive sectors, the **Textiles, tailoring, leather and footwear**, **Sporting activities** and **Leisure activities** in all three cases devote less than 28% to other productive sectors and therefore the majority of their production is devoted to final demand.

Following figures shows a graphic representation of the classification of cultural and creative products according to their level of production devoted to intermediate demand with regard to that devoted to final demand. As can be seen, CCI products are fundamentally destined to being covered by final demand (bubbles above the diagonal line) rather than intermediate demand of other productive sectors. As previously mentioned, only three CCI products or services have a destination mainly oriented towards covering intermediate demand.

FIGURE 8.1 CLASSIFICATION OF CCI PRODUCTS AND SERVICES ACCORDING TO THEIR DESTINATION (INTERMEDIATE DEMAND AND FINAL DEMAND)



Source: Own preparation based on Eustat data

The area of the bubble corresponds to the total demand or service as the total of the intermediate demand and the final demand.

Next, the biggest destinations of intermediate branches of activity sectors for each one of the analysed CCI products are presented.

TABLE 8.3 TOP 10 OF THE MOST FREQUENT INTERMEDIATE DEMAND BRANCHES OF ACTIVITY FOR CCI PRODUCTS AND SERVICES

TOP 10 DESTINATIONS OF CCI PRODUCTS / SERVICES	19. Textiles, tailoring, leather and footwear	23. Graphic arts and recorded media	74. Publishing	75. Audiovisual services	77. Information technology and information serv.	83. Architecture, engineering and technical testing
1	53. Other land and freight transp.	76. Public administration	15. Graphic arts and reproduction	60. Audiovisual, cinema, radio and television	62. Information technology	68. Architecture and engineering services
2	47. Construction	68. Architecture and engineering services	62. Information technology	50. Retail sales	76. Public administration	47. Construction
3	58. Hospitality industry	50. Retail sales	67. Legal and accountancy activities	47. Construction	63. Financial services, except insurance	43. Electrical energy
4	12. Textiles, tailoring, leather and footwear	59. Publishing	68. Architecture and engineering services	85. Activities of other membership organisations	49. Wholesale	76. Public administration
5	49. Wholesale	70. Advertising and market studies	50. Retail sales	67. Legal and accountancy activities	68. Architecture and engineering services	35. General purpose machinery
6	76. Public administration	66. Real-estate activities	77. Market education	61. Telecommunications	53. Other land and freight transp.	37. Motor vehicle manufacture
7	21. Plastic products	60. Audiovisual, cinema, radio and television	76. Public administration	70. Advertising and market studies	67. Legal and accountancy activities	69. Research and development
8	87. Other personal services	49. Wholesale	63. Financial services, except insurance	82. Non-market social services	61. Telecommunications	39. Other transport material
9	84. Sporting and recreational activ.	15. Graphic arts and reproduction	43. Electrical energy	58. Hospitality industry	43. Electrical energy	61. Telecommunications
10	33. Electrical material and equipment	62. Information technology	58. Hospitality industry	68. Architecture and engineering services	56. Transportation-related activities	33. Electrical material and equipment

TOP 10 DESTINATIONS OF CCI PRODUCTS / SERVICES	85. Advertising and marketing	97. Artistic services and shows	98. Cultural services	100. Sporting activities	101. Leisure activities	102. Activities of other membership organisations
1	70. Advertising and market studies	76. Public administration	76. Public administration	84. Sporting and recreational activ.	84. Sporting and recreational activ.	50. Retail sales
2	63. Financial services, except insurance	60. Audiovisual, cinema, radio and television	58. Hospitality industry	49. Wholesale	49. Wholesale	67. Legal and accountancy activities
3	76. Public administration	62. Information technology	49. Wholesale	76. Public administration	85. Activities of other membership organisations	63. Financial services, except insurance
4	10. Drinks	85. Activities of other membership organisations	74. Travel agencies	10. Drinks	76. Public administration	49. Wholesale
5	49. Wholesale	58. Hospitality industry	10. Drinks	63. Financial services, except insurance	67. Legal and accountancy activities	75. Other auxiliary activities
6	50. Retail sales	10. Drinks	84. Sporting and recreational activ.	85. Activities of other membership organisations	74. Travel agencies	58. Hospitality industry
7	67. Legal and accountancy activities	59. Publishing	60. Audiovisual, cinema, radio and television	61. Telecommunications	58. Hospitality industry	39. Other transport material
8	37. Motor vehicle manufacture	72. Rental activities	35. General purpose machinery	56. Transportation-related activities	10. Drinks	85. Activities of other membership organisations
9	58. Hospitality industry	84. Sporting and recreational activ.	61. Telecommunications	39. Other transport material	61. Telecommunications	68. Architecture and engineering services
10	48. Sale and repair of vehicles	39. Other transport material	15. Graphic arts and reproduction	71. Other professional activ.	56. Transportation-related activities	25. Iron and Steel Industry

Source: Own preparation based on Eustat data

As can be seen, the demand profile for the different products and services is very varied and would need a specific future analysis to discover the effect of the products on the destination sectors, as well as their quantitative and qualitative value.

It is worth highlighting that the **Public administration** sector is in the list of 10 sectors with the greatest intermediate demand in 10 of the 12 products or services analysed, being the intermediate sector with the highest demand in the case of **Graphic arts and recorded media**, **Artistic services and shows** and **Cultural services**.

9. | CONCLUSIONS

The aim of the research project executed by Orkestra - Basque Institute of Competitiveness and presented in this publication is to discover the degree of recovery of CCI companies from the effects arising from the economic crisis caused by Covid-19. To do this, a comparative analysis of the situation on 1 January 2022 and compares it with that of the 1 January 2020, mainly evaluating business demographic and employment variables. An additional aim is to identify the main sectors to which cultural and creative products and services are devoted.

Said comparative analysis first tackles the number of cultural and creative companies and their representativeness in the Basque economy, as well as the proportion of companies per 100,000 inhabitants. The sector's distribution in the Historical Territories and according to the legal structure of its companies is then examined. Employment generated by the CCIs is also studied, with an analysis of its evolution in different areas and the different branches of activity included in the sector.

From the business demographic perspective, during the analysed period, **the CCI sector in the Basque Country has managed to recover the pre-pandemic level of companies**. On 1 January 2020, the number of companies in the region was 16,886, while two years later, this number has increased slightly to 16,924 companies, which is an increase of 0.2%. In comparison with 1 January 2021, the sector has undergone an increase of 1.7%.

The evolution of the CCI sector has been heterogeneous in the different areas under consideration. On the one hand, **cultural** companies have undergone and increase of 2.3% with regard to 1 January 2020, which represents an increase of 165 companies. On the other hand, **creative** companies have suffered a decrease of 127 companies, representing a decrease of 1.3% in the same period. As a result, the **creative** field has not yet managed to recover the pre-pandemic level of companies.

The fields of **Architecture** and **Books and the press** have undergone a negative evolution during the analysed period. In the case of **Architecture**, there has been a 5.6% reduction in the number of companies, which represents a fall of 174 companies with regard to the beginning of 2020. In the case of **Books and the press**, the situation is similar, with a reduction in the number of companies of 5.1% in two years, from 1,771 to 1,681 companies. Meanwhile, the **Language industries** area has also experienced a fall in the number of companies.

It is important to state that this trend takes place in a general context of economic growth, which suggests the existence of underlying structural causes which need an in-depth investigation.

Apart from that, the **Visual arts**, **Audiovisual and multimedia** and **Music** fields have experienced strong growth in the analysed period, boosting recovery from the Covid-19 crisis. Additionally, **Advertising** and **Design** have experienced an increase in the number of companies. The **Videogames** area has also evolved significantly in percentage terms. As for the remaining areas, **Performing arts** and **Heritage, museums, archives and libraries** have grown, while **Fashion manufacturing** has shrunk.

With regard to the ratio of CCI companies per 100,000 inhabitants, the Basque Country is behind Navarre, Madrid, Catalonia and Spain. The differences are largest in the case of **cultural** companies where the Basque Country is clearly below the rest of Autonomous Communities. The areas where the differences are most significant in comparison with Madrid, Catalonia and Spain are **Books and the press**, **Visual arts** and **Heritage, museums, archives and libraries**. On the contrary, in the area of **Music**, the Basque Country presents more favourable data than the other comparative environments.

In the case of **creative** companies, the Basque Country has a slightly higher ratio than Spain as a whole, but lower than Navarre, Madrid and Catalonia.

If we analyse the percentage of CCI companies against the totality of existing companies, in overall terms, the Basque Country (11 %) has a higher percentage than Navarre (10.8%) and the rest of Spain (10.5%) and lower than the Community of Madrid (13.5 %) and Catalonia (11.3 %).

After analysing the data, we can see that recovery from the crisis has been different in the three Historical Territories. Although Bizkaia has experienced a recovery in comparison with 2021, it has not yet reached the number of CCI companies it had before the start of the pandemic and has experienced a reduction of 1.3%, which is the equivalent of 112 fewer companies. On the other hand, Gipuzkoa and Araba have registered growth in the number of companies, adding 116 and 17 respectively in comparison with 1 January 2020.

Previous reports clearly showed the distribution of CCI companies according to the legal status, and this distribution holds steady with some slight changes in the data of the current report. Self-employed persons are still the most common legal status in the CCI sector in the Autonomous Community of the Basque Country, representing 68.94% of the total number of companies (11,668 self-employed persons). Limited companies represent 20.28% of companies (3,432 companies) and other companies (mainly Associations and Foundations) make up 5.12%. The remaining companies are distributed, in decreasing order of frequency, as Joint ownership companies, Cooperative societies, Public limited companies, Autonomous religious organisations and Local governments.

From the employment perspective, during the analysed period (2022 vs. 2021) a total increase of 231 jobs in CCI employment has been registered, representing 0.68%. During the last year (2022 vs. 2021), employment has grown by 794 jobs representing a 2.3% increase.

The evolution of employment in the **cultural** and **creative** industries has been unequal, in line with the situation with the number of companies. While **cultural** companies have registered a 1.83% increase in employment in the analysed period, **creative** companies have experienced a reduction of 144 jobs (-1.07%). That is, in the case of **creative** companies, pre-pandemic levels of employment have not yet been recovered.

As a consequence of this, the percentage of employment in CCI activities in the Basque Country has risen from 3.69% to 3.75% between 1 January 2020 and 1 January 2022. Said growth has arisen from **cultural** activities (2.30%, 0.07 p.p.) given that the weight of **creative** activities has remained constant (1.46%).

In the case of cultural industries, the increase is mainly due to strong employment growth in **Audiovisual and multimedia** activities (+698 jobs), both in its own activities and in auxiliary activities, which means a growth of 11.69%. However, companies in the fields of **Performing arts** and **Books and the press** have registered the loss of 169 jobs (-4.15%) and 163 jobs (-2.78%) respectively.

The evolution of employment in cultural industries has been different depending on the activity. Specifically, the growth in employment has occurred mainly in the activities of **Audiovisual and multimedia**, with an increase of 698 jobs (11.69%) in both own and auxiliary activities. Meanwhile, companies in the areas of **Performing arts** and **Books and the press** have registered a drop in employment with the loss of 169 jobs (-4.15%) and 163 jobs (-2.78%) respectively.

In the **Music** area, there has been a reduction of 30 jobs (1.89%). Within this sector, own activities have experienced a slight reduction (-0.40%), while auxiliary activities have suffered a drop of 24 jobs (-31.17%). This drop in employment contrasts with the increase in the number of companies, which indicates a reconfiguration in the sector with a trend towards smaller companies. This change is reflected in the significant increase in the percentage of self-employed persons which has gone from 57.94% to 61.18% of companies in this area.

The **creative** industries have experienced a drop of 1.07% in employment. This fall is mainly due to the negative evolution in the **Architecture** and **Language industries** sectors. In addition, **Fashion manufacturing** has lost 68 jobs since the beginning of 2020. However, in contrast, the **Advertising**, **Design** and **Videogames** sectors have experienced an increase in the creation of employment.

Employment evolution during the analysed period distributed by branches of activity has behaved as follows: The **Publishing, audiovisuals, radio, television and information technology** branch of activity presents the greatest increase in employment in percentage terms since January 2020 (625 jobs) followed by **Recreational and cultural activities** which have grown slightly by 202 jobs.

Apart from that, the remaining branches of activity (**Commercial activities, Manufacturing, Professional, scientific and technical activities, Educational activities**) have decreased in employment terms. These trends show the importance for CCI companies of adapting to the technological-digital transition.

In this report we have also analysed the destination of cultural and creative products in the Basque economy. According to the available data, the total value of the demand for cultural and creative products and services is 7,397 million euros. Of this total, 40.1% is devoted to intermediate demand, that is, to other productive sectors, while the remaining 59.9% corresponds to final demand. Generally, approximately 24% of the production value of CCI products and services is destined to export.

CCI products are fundamentally destined to cover final demand rather than intermediate demand from other productive sectors. Only three CCI products or services have a destination mainly oriented towards covering intermediate demand (**Graphic arts and recorded media**, **Advertising and marketing** and **Publishing**).

It is important to highlight that the Public administration sector figures among the 10 sectors with greatest intermediate demand in 10 of the 12 analysed products or services. Specifically, it stands out as the intermediate sector with the greatest demand in the cases of **Graphic arts and recorded media**, **Artistic services and shows** and **Cultural services**. This shows the importance of Public administration as consumer of these products and services in the economy.

Below, we present summary sheets of the economic dimension, the degree of recovery of the activity for each of the CCI areas, qualitative comments and the destination of the products with which they can be associated[6].

6 The association between cultural and creative areas and associated products has been executed based on data from Eustat and the crossover between CNAE A86 sectors and P105 products/services. A more detailed analysis would require the obtaining of specific data regarding the link between 4 digit CNAE sectors and their products and services. There are areas in which the available degree of detail does not allow the assignation of destination sectors of their products.

TABLE 9.1 SUMMARY SHEETS OF THE EVOLUTION OF CCIS BY AREA

PERFORMING ARTS					
Main variables	**Employment (01.01.2022)**	**Companies (01.01.2022)**	**Employment evolution vs. 01.01.2020**	**% of total employment in the Basque Country**	**Average size Workers per company**
	3,908	1,441	-4.15%	0.43%	2.71
Comments	◆ Has not recovered pre-pandemic employment levels. ◆ Mainly due to a fall of 10.33% in performing arts auxiliary activities. ◆ Its own activities have grown by 3.37% with regard to 01.01.2020. ◆ Its representativeness in the whole of employment in the CAE has dropped slightly. ◆ However, the number of companies has increased by 1.9%. ◆ This indicates that the crisis has meant a reconfiguration of the sector with smaller companies, especially in the auxiliary industries, from 2.88 to 2.71 workers per company.				
5 potentially related main destinations of products and/or services	◆ Artistic services and shows – Public administration – Audiovisual, cinema, radio and television – Information technology – Activities of other membership organisations – Hospitality industry				

VISUAL ARTS					
Main variables	**Employment (01.01.2022)**	**Companies (01.01.2022)**	**Employment evolution vs. 01.01.2020**	**% of total employment in the Basque Country**	**Average size Workers per company**
	1,789	1,506	+0.96%	0.20%	1.18
Comments	◆ Has recovered pre-pandemic employment levels. ◆ The number of companies has grown more than employment. Therefore, the average size of company has reduced from 1.21 to 1.18 workers per company. ◆ It is the CCI area with the greatest percentage of self-employed persons among its legal statuses, 92.16%.				

AUDIOVISUAL AND MULTIMEDIA					
Main variables	**Employment (01.01.2022)**	**Companies (01.01.2022)**	**Employment evolution vs. 01.01.2020**	**% of total employment in the Basque Country**	**Average size Workers per company**
	6,670	1,606	+11.69%	0.73%	4.15
Comments	◆ Has undergone significant growth with regard to pre-pandemic employment. ◆ The increase is stronger in auxiliary companies than in companies from the area itself. ◆ The average size of company has increased from 3.94 to 4.15 workers per company. ◆ Expanding sector. Has slightly increased its representativeness by 0.08 percentage points in Basque Country employment as a whole. ◆ It is one of the CCI areas with the lowest percentage of self-employed persons among its legal statuses (51.62%).				
5 potentially related main destinations of products and/or services	◆ Audiovisual services – 60. Audiovisual, cinema, radio and television – 50. Retail sales – 47. Construction – 85. Activities of other membership organisations – 67. Legal and accountancy activities				

BOOKS AND THE PRESS					
Main variables	**Employment (01.01.2022)**	**Companies (01.01.2022)**	**Employment evolution vs. 01.01.2020**	**% of total employment in the Basque Country**	**Average size Workers per company**
	5,690	1,681	-2.78%	0.62%	3.38
Comments	◆ Employment has shrunk with regard to pre-pandemic levels. ◆ Employment in the sector has shrunk for the second consecutive year, a behaviour different from the general trend, which may indicate a structural change in the area. ◆ Employment has even shrunk between 01.01.2021 and 01.01.2022. ◆ The number of companies has also contracted by 5.1%. ◆ The impact has been clearly bigger in own activities than in auxiliary activities. ◆ The average size of company has gone from 3.30 to 3.38 workers per company.				
5 potentially related main destinations of products and/or services	◆ Publishing – 15. Graphic arts and reproduction – 62. Information technology – 67. Legal and accountancy activities – 68. Architecture and engineering services – 50. Retail sales ◆ Graphic arts and recorded media – 76. Public administration – 68. Architecture and engineering services – 50. Retail sales – 59. Publishing – 70. Advertising and market studies				

MUSIC					
Main variables	**Employment (01.01.2022)**	**Companies (01.01.2022)**	**Employment evolution vs. 01.01.2020**	**% of total employment in the Basque Country**	**Average size Workers per company**
	1,569	626	-1.89%	0.17%	2.50
Comments	◆ The sector has not recovered pre-pandemic employment levels. ◆ As its fall is equivalent to that of Basque Country employment as a whole, its representativeness remains constant at 0.17%. ◆ However, the number of companies has grown (5.7%) causing the number of workers per company fall from 2.7 to 2.5 workers per company. ◆ Employment is clearly concentrated in its own activities.				
5 potentially related main destinations of products and/or services	◆ Artistic services and shows – Public administration – Audiovisual, cinema, radio and television – Information technology – Activities of other membership organisations – Hospitality industry ◆ Cultural services – 76. Public administration – 58. Hospitality industry – 49. Wholesale – 74. Travel agencies – 10. Drinks				

HERITAGE, MUSEUMS, ARCHIVES AND LIBRARIES					
Main variables	**Employment (01.01.2022)**	**Companies (01.01.2022)**	**Employment evolution vs. 01.01.2020**	**% of total employment in the Basque Country**	**Average size Workers per company**
	1,301	454	+1.75%	0.14%	2.86
Comments	◆ It has recovered and exceeded pre-pandemic employment levels in both its own and auxiliary activities. ◆ The number of companies has grown by 3.7% which compared with employment growth implies a reduction in company size from 2.92 to 2.86 workers per company. ◆ It is one of the CCI areas with the lowest percentage of self-employed persons over the total number of companies 39.21%.				
5 potentially related main destinations of products and/or services	◆ Cultural services – 76. Public administration – 58. Hospitality industry – 49. Wholesale – 74. Travel agencies – 10. Drinks				

ARCHITECTURE					
Main variables	**Employment (01.01.2022)**	**Companies (01.01.2022)**	**Employment evolution vs. 01.01.2020**	**% of total employment in the Basque Country**	**Average size Workers per company**
	3,894	2,939	-2.70%	0.43%	1.32
Comments	◆ In the area of Architecture, pre-pandemic levels have not been reached. ◆ It has decreased slightly more than the employment average in the Basque Country, reducing its representativeness by 0.01 percentage points. ◆ The number of companies has decreased by 5.6%. ◆ The percentage of self-employed persons is 78.90% of the total in the area.				
5 potentially related main destinations of products and/or services	◆ Architecture, engineering and technical testing – 68. Architecture and engineering services – 47. Construction – 43. Electrical energy – 76. Public administration – 35. General purpose machinery				

DESIGN					
Main variables	**Employment (01.01.2022)**	**Companies (01.01.2022)**	**Employment evolution vs. 01.01.2020**	**% of total employment in the Basque Country**	**Average size Workers per company**
	1,209	836	+3.78%	0.13%	1.44
Comments	◆ The level of recovery of the sector is clearly higher than the Basque Country employment average. ◆ The number of companies has also increased by 5.8%. ◆ The level of self-employed persons is 78.59% of the total number of companies in the area.				

LANGUAGE INDUSTRIES					
Main variables	**Employment (01.01.2022)**	**Companies (01.01.2022)**	**Employment evolution vs. 01.01.2020**	**% of total employment in the Basque Country**	**Average size Workers per company[7]**
	3,191	4,082	-4.86%	0.35%	0.78
Comments	◆ It is one of the sectors whose employed has most decreased between 01.01.2020 and 01.01.2022. ◆ It would need in-depth analysis with more detailed data to discover the precise evolution of the sub-areas present in said 4-digit CNAEs. ◆ The number of companies has also fallen by 1.4%. ◆ The percentage of self-employed persons is 76.16%.				

FASHION MANUFACTURE					
Main variables	**Employment (01.01.2022)**	**Companies (01.01.2022)**	**Employment evolution vs. 01.01.2020**	**% of total employment in the Basque Country**	**Average size Workers per company**
	1,233	533	-5.23%	0.14%	2.31
Comments	◆ Employment in the sector has shrunk for the second consecutive year, a behaviour different from the general trend, which may indicate a structural change in the area. ◆ The number of companies has fallen by 0.7%, which indicates that he companies that have decreased in size had a greater than average size. ◆ The average size of company has decreased from 2.42 to 2.31 workers per company.				
5 potentially related main destinations of products and/or services	◆ Textiles, tailoring, leather and footwear – 53. Other land and freight transport – 47. Construction – 58. Hospitality industry – 12. Textiles, tailoring, leather and footwear – 49. Wholesale				

7 The average number of workers per company is lower than one due to the high percentage of companies without workers. We do not have the details for the Basque Country, but as a reference in Spain, of a total of 87,631 existing CNAE 855 companies in 2022, 58,505 did not have workers.

ADVERTISING					
Main variables	**Employment (01.01.2022)**	**Companies (01.01.2022)**	**Employment evolution vs. 01.01.2020**	**% of total employment in the Basque Country**	**Average size Workers per company**
	3,698	1,207	3.27%	0.41	3.06
Comments	◆ This sector has clearly exceeded pre-pandemic levels. ◆ This has allowed its representativeness in the totality of Basque Country employment to climb from 0.39% to 0.41%. ◆ The number of companies has increased by 5.2%. ◆ This implies that the average number of workers per company has fallen from 3.12 to 3.06.				
5 potentially related main destinations of products and/or services	◆ Advertising and Marketing – 70. Advertising and market studies – 63. Financial services, except insurance – 76. Public administration – 10. Drinks – 49. Wholesale				

VIDEO GAMES					
Main variables	**Employment (01.01.2022)**	**Companies (01.01.2022)**	**Employment evolution vs. 01.01.2020**	**% of total employment in the Basque Country**	**Average size Workers per company**
	61	13	125.93%	0.01%	4.69
Comments	◆ Although it is a sector with a low level of employment, its growth over the last two years is clearly the highest in the sector. ◆ The number of companies has increased by 44.4%. ◆ The average size of company is 4.69 workers per company.				

Source: Own preparation based on data from different sources mentioned in the report (Eustat, INE)

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