

EXPLAINING AND UNDERSTANDING (2006-2017)

10 years of the Basque
Cultural Observatory

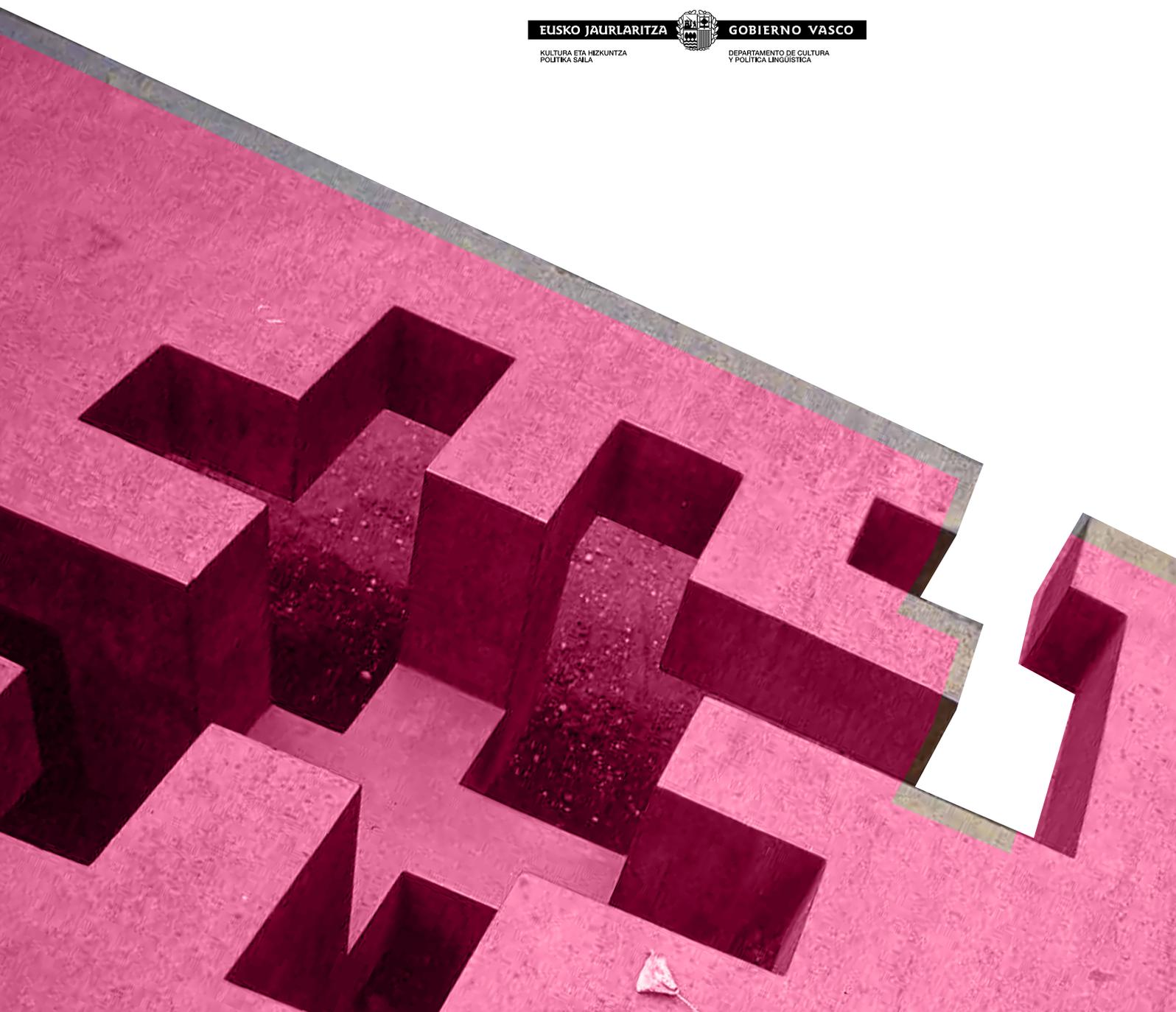
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PROLOGUE

In 2017, the Basque Cultural Observatory-*Kulturaren Euskal Behatokia* (BCO-KEB) celebrates its 10th year in existence. Anniversaries are moments to review what has been done and set new challenges for the future. The BCO was conceived in the framework of the Basque Plan for Culture-*Kulturaren Euskal Plana* (BPC-KEP), with the mission to become a structuring element for the Basque cultural system – a response to the lack of information and knowledge in the field of culture.

The Observatory is the main provider of analysis and forecasting tools about the Basque cultural system. In order to do so, it is always attentive to the cultural debates; it poses questions, formulates hypotheses, searches for the most suitable methodology, contrasts the results, translates the data, interprets them and values their usefulness. The BCO focuses on researching, exploring and reflecting, founded upon values of independence, rigour and transparency. Thus, over the past decade, the BCO has developed a large database and numerous qualitative studies that have tackled the most burning issues in the cultural debates. But the value tracking statistics with an entity like the Observatory is not only measured by the amount of work done, but rather by two particularly important aspects.

Firstly, the Observatory is a constitutive element of a cultural policy, not an instrument at the service of a policy. Its nurturing function for the Basque cultural system as a whole places it in a central position to have a critical vision of the ensemble, to facilitate decision-making and to project new policies. The informational dispositive is thus an agent who acts, participates, reflects and gets involved in the reality, contributing to the generation of a mature cultural environment. Willing to contribute and have an impact. Willing to transform reality.

Secondly, the service provided by the Observatory is a guarantee for good quality agreement. Culture is an area of confluence for what is public, private and communal. With more and more open and increasingly complex systems of relations, a body devoted to working with knowledge facilitates agreement because it provides the necessary, contextualized and useful information for informed decision-making. It helps bring about resolutions and agreements on policies with solid arguments.

And precisely because culture is a complex area that favours individual and collective development, it is necessary to continue supporting an instrument like the Observatory – to be able to develop important cultural policies; to judiciously assess them; to build a better society from culture.

This report summarizes a fertile decade of work. It is a journey that could not have been possible without the complicity of the ensemble of cultural agents. I invite you to read it and to better understand the Observatory – an instrument belonging to us all.

Bingen Zupiria Gorostidi
Ministry of Culture and Linguistic Policy

INTRODUCTION

This publication aims to offer a panoramic view of the work carried out by the Basque Cultural Observatory-Kulturaren Euskal Behatokia (BCO-KEB) since its creation in 2006. It is undoubtedly not easy to summarize more than a decade of work in just a few pages. That is why this publication does not aspire to provide a comprehensive account of each and every project developed by the BCO during this time. This information has already been punctually published, in pursuit of transparency, in the **annual reports** and **action plans**. Rather, the following report offers a chronological narration that, besides telling the story of the BCO, will emphasize some of the milestones in this trajectory.

Thus, our journey starts in 2006 when the BCO was formed. The origins of this body are to be found in a context where the Basque Plan for Culture-Kulturaren Euskal Plana (BPC-KEP) – a masterplan for Basque culture – was being developed (the Plan was approved in 2004). Next, the first years of activity of the BCO will be described. This was a moment in which the main guidelines were established, which would later lead the action at conceptual, technological, informational and communicational, and relational levels. We then turn our attention to the **statistical works and the qualitative investigations** pursued under the BCO banner. Three main groups of works will be distinguished, thereby offering a structured historical reading which includes the main statistical operations, other statistical studies (our own or in collaboration), and qualitative research and studies. To finalize this narration, a few remarks are made to show how the work done by the BCO has been in tune with the international and European research agenda on culture.

This narration is completed with a timeline that visually represents the milestones of the BCO and stands them in relation to important developments of the political-cultural reality in the Basque Country, as well as to other significant events in the field of culture at the European and international level. Finally, two figures graphically synthesize the main products of the BCO along these more than 10 years, on the one hand, and the main **statistical operations and studies**, on the other. A last figure shows the evolution of the BCO's budget for the analysed period, between 2006 and 2017.

THE ORIGIN OF THE BASQUE CULTURAL OBSERVATORY

The Basque Cultural Observatory-*Kulturaren Euskal Behatokia* (BCO-KEB) was created in 2006 as a centre of information, documentation and research in the field of culture in the Basque Autonomous Community (BAC). It was formed as part of the Direction for the Promotion of Culture of the Basque Government.

The most immediate precedent for the BCO was the Basque Plan for Culture-*Kulturaren Euskal Plana* (BPC-KEP), approved in 2004. The BPC included action plans until 2007 and working indicators until 2015, and it had been driven by the Basque Cultural Council-*Kulturaren Euskal Kontseilua* (BCC-KEK), which was created at the turn of the millennium. The document that would be the masterplan for Basque culture included a SWOT analysis (Strengths, Weaknesses, Opportunities and Threats), as a sort of state of the art of the cultural system viewed by the agents. The opportunities section pointed out the “need to count with a comprehensive compilation of statistics describing the Basque cultural sector, through a cultural observatory” (Basque Government-Department of Culture, 2004, p. 36). Furthermore, the future “Basque Cultural Observatory”, whose launch was foreseen for 2006-2007, was expected to be one of the structuring bodies of the BPC, together with the Basque Cultural Council and the Permanent Inter-Institutional Commission for Culture (ibid., p. 59). Thus, the creation of the BCO was defined as a priority action line within axis 2 of the BPC: “To establish an information and follow-up system to monitor the situation and evolution of culture in the BAC [Basque Autonomous Community] and to develop sectorial strategic plans and state-of-the-art studies” (ibid., p. 66).

According to the foresight established in the BPC, the BCO was officially created in 2006 through a decree that gave the Direction for the Promotion of Culture the function of leading the observatory. A few years later, in 2009, a specific legal order by the Minister of Culture meant a step further in the regulation and definition of functions, intervention fields or areas, as well as of the information instruments, services and products that the BCO was expected to generate. This order also established a collaboration between the BCO, the BCC, the Inter-Institutional Commission and the Special Commissions of the BPC. This ensured coordinated action between the different bodies engaged in policymaking in the field of culture, as well as in cultural management and monitoring.

The creation of the Basque Cultural Observatory was defined as a priority action line within one of the axes of the Basque Plan for Culture.

The different documents and norms defining the BCO deal, which embraced a broad understanding of the concept of culture, aligned with the latest developments in this field at the international level. A good illustration of this is the definition of the action areas of the BCO presented in the above-mentioned order of the Department of Culture, which include: 1) cultural heritage (archaeological, architectural, ethnographic, industrial, museums, libraries, archives); 2) artistic creation and expression (theatre, music, dance, literature, plastic arts), and 3) cultural industries (publishing, phonography, audio-visual, multimedia, digital culture, craftsmanship and media). These three areas represent the big research lines at the European and international level still today. A fourth point adds transversal issues as an action area of the observatory, providing it with an ever larger scope of action.

The birth of the BCO must be understood as well in the framework of a wider, global trend, of creating cultural observatories. Cultural observatories have emerged in the context of the knowledge society as a mechanism enabling the management and efficient use of information, so that its conversion and transmission in the form of knowledge is enhanced (UNESCO, 2005). Thus, cultural observatories aim to provide the cultural sector with information, analysis of a community's cultural reality and contribute to the visualization of the impacts of culture and the foresight of future scenarios (Ortega Nuere, 2010). Particularly, the rise of the observatories can be placed at the end of the 20th century in the European continent and, more specifically, in the second half of the 1990s. Research shows that more than the 50% of the cultural observatories in 2010 had been created between 1995 and 1999. However, a significant percentage of "pioneer" observatories were created before 1970 (14%). Some appeared between 1992 and 1994 (14%) and more still after 2000 (14%) (ibid.). The BCO belongs to that last group, quantitatively significant at the European and global level, and it would learn from the observatories that preceded it, or of its contemporary ones, as will be explained later on when referring to the international synergies established by the BCO.

The BCO was created in this immediate and international political context – a body meant to explain and understand the complex and intense cultural reality of the BAC, with its specificities and connections, proximities and distances with regard to a changing and interconnected global panorama.

LAYING THE FOUNDATION FOR A LONG-RUNNING PROJECT

The first efforts of the BCO were devoted to laying the foundations for the following work, as well as products and services to develop. Thus, four action vectors of work were immediately defined and pursued in a particularly balanced way during those first years. The four vectors were: 1) the conceptual vector, corresponding to the design of the **statistical framework** that would later support the BCO's statistical work; 2) the informational vector, related to the creation of proprietary statistics, the systematization of existing statistical data and the elaboration of reports and studies of a more qualitative nature; 3) the technological vector, where technological platforms would be designed to produce and store the statistical information, and, lastly, 4) the communicational and relational vector, which has to do with the communication actions and the institutional and sectorial relations. In terms of structure, in this first stage, it should be highlighted that the BCO began its journey with a single management post in 2006. This structure expanded with two more posts in 2010: a statistical post and a webmaster post.

The conceptual and technological vectors had a very significant weight in the early phases of the Basque Cultural Observatory, for the definition, respectively, of the statistical framework that would lead the future action, and of the technological information system that would allow the management and storage of that statistical information.

The conceptual and technological vectors held extraordinary significance during the BCO's embryonic stage from 2006 to 2007. Regarding the first vector, as a stepping stone to the design of the statistical framework, one of the first actions of the BCO in 2006 was the analysis of UNESCO and the European Union (Eurostat) information systems, as well as of the experiences of Quebec, France, Spain and Catalonia. Along the same lines, the cultural statistical information in the Basque Country at that time was also analysed. Drawing on this work, the base document of the BCO's conceptual model was drafted in 2006. This process continued to be central in the activity of the BCO in 2007, when the cultural information system was finally defined as the **cultural indicators system** – the definition of 15 sectors which would be the object of the BCO's research, with their corresponding sources of information and the working methodology to be followed for their sectorial comparison. This process was not only fundamental to lay the foundations of a future project necessarily systematic and systematised, but it was also a process of an enormous strategic importance, insofar as the resulting statistical programme established the action and research priorities that would mark BCO's future course.

The statistical framework would be reviewed in 2013 according to new developments in the political and cultural panorama at the local and inter

national level, such as: the publication of the “Europe 2020 Strategy”; the technological transformations that impacted cultural production and consumption, and which should be reflected in the way these phenomena are analysed; and, finally, the need to develop cultural statistics linked to the public policies and the budgetary capacity to undertake ambitious statistical projects.

With regard to the technological vector – the design of the technological platforms for the production, storage and visualization of the statistical information – a series of preliminary studies were conducted in 2006, exploring different statistical management systems and technological mediums, to find the most suitable solution for the specific work of the BCO. In 2007, the exploration of options continued and the criteria was further prioritised when choosing among the different alternatives. Among these criteria, heavy consideration was given to a solution that would allow personalised data selections in any dissemination function, as well as facilitating bottom-up data collection, and the storage and management of the data coming from different agents. Furthermore, it was considered paramount that the platform finally chosen should be compatible with other systems such as Eustat (*Euskal Estatistika Erakundea-Basque Institute of Statistics*) or the Spanish National Institute of Statistics (INE). In an example of institutional synergy and optimization of resources, the BCO eventually decided to use the same system which was in development at the Basque Youth Observatory for the publication and dynamic consultation of **statistical indicators**. At the technological level, the design for the visualization of statistical tables and the dynamic consultation of statistical information was finally completed in 2008. The existing information was also adjusted to the PC-Axis format. The “Statistics of habits, practices and cultural consumption in *Euskal Herria*”,¹ published for the first time that same year, would be the first one to be disseminated via the newly created application.

¹ Translator’s note: the term “Euskal Herria” refers to the Basque Country as a whole, which is formed by seven Spanish and French provinces.

While the work related to the conceptual and technological design was central during these first years, progress made in other areas of the BCO – the informational and the communicational-relational – would also be fundamental for future developments. In the informational working line, which includes the statistical operations and other studies conducted by the BCO, 2006 started with the systematization of the existing statistical information and the selection of some indicators from that existing information. The sectorial studies of the BPC (whose executive summaries would be disseminated in 2007) were also summarized that year. Furthermore, two preliminary studies were conducted in 2006, in the preparation for two statistical operations in 2007: “Habits, practices and cultural consumption in *Euskal Herria*”, on the one hand, and “Funding and public expenditure on culture in the BAC”, which was aimed at collecting statistical information on the budgetary allocations in the cultural sector by the different institutions (Basque Government, Provincial Council [Diputaciones], and City Councils), on the other hand. Building on

these preliminary studies, in 2007 the BCO kept working on these two large projects, both of which were necessary for a better understanding and a more informed perspective of the Basque cultural reality. Specifically, in the second year of activity of the BCO, the project design was further developed and the collection of statistics on habits, practices and cultural consumption started. Also, the proposal was further defined and the survey designed for the study on funding and public expenditure. The results of the first study were published in late 2008, while a pilot for the second was implemented in 2009 and the complete results of the fieldwork, with data from 2008, would be made public in 2011.

In the first years of the BCO, in addition to the launch of these two important statistical operations and still within the framework of the informational vector, other studies were conducted and series of products were generated which were relevant for deepening knowledge about the sector. Thus, the first draft of the directory of agents for the 15 sectors identified as priority sectors in the statistical framework was elaborated in 2007. That same year, in line with the work initiated one year before on the systematization and processing the existing statistical data, the databases of libraries and museums for the two previous years were adapted to PC-Axis (the application for the visualization of statistical tables that was being developed at the moment). The main sectorial and transversal indicators providing a partial reading of the Basque cultural reality were also adapted for dissemination via the BCO's website. Furthermore, two sectorial studies were analysed: "Theatre and dance study" and "Map of the infrastructures of the BAC". Finally, the design of an evaluation system of the BCP was initiated, considering other experiences as good practices, and in collaboration with the Plan's Technical Secretariat. It must be recalled that this was precisely one of the main functions assigned to the BCO at its conception.

From the point of view of communication and external relations of the BCO, this first stage was marked by the design and publication of the first editions of some products that would be the basis for the dissemination of activities in the following years. By way of example, the first annual cultural report, *Kultura 07*, was published in 2007. And the first two issues of the [newsletter Kulturkaria](#) were sent to a mailing list which included over 2,000 contacts. In addition to that, the executive summaries of the sectorial studies of the BPC, elaborated in 2006, were also published in 2007; specifically, those of the following sectors: publishing industry, phonographic industry, digitalisation, museums, ethnographic heritage, craftsmanship, and visual arts. Another important milestone was the celebration of the 1st International conference with cultural observatories in Donostia-San Sebastián, on November 14-16, 2007. The BCO was the host of the conference, which counted on the participation of the

Observatoire de la culture et des communications du Québec (Canada), the *Département des études, de la prospective et des statistiques* (DEPS, France); the *Osservatorio culturale del Piemonte* (Italy), the *Departament de Cultura of the Generalitat of Catalonia* and the *Conselleria de Cultura e Deporte* of the Galician Government. While the first two days were devoted to the internal work of the participating bodies, the last day was opened to the public, so that the conference became the space in which the BCO was presented to society as a whole. New editions of this conference, to a total of four, would be celebrated in the following years, strengthening the relations between these actors.

Two other important milestones at the relational level were: the creation of the BCO's website, in 2007, and the start, in 2008, of the **Collection of "Statistics and cultural studies"**. The website of the BCO would not only become the entrance door to this entity, including all the information about the observatory, regularly updated in the **annual reports** and **action plans**, but also a medium through which all statistics, studies, publications and communication materials could be consulted. Furthermore, parallel to the website, an intranet was also created in 2007, which would function as a working space for the BCO team. Since 2009, the website offers publicly accessible tools for the dynamic consultation of statistics. Regarding the collection of "Statistics and cultural studies", which includes printed and digital publications, the first publication of the series corresponded to the synthetic results of the statistics on habits, practices and cultural consumption, in four volumes; one for each of the territorial areas (Basque Autonomous Community, Chartered Community of Navarra, Northern or French Basque Country and *Euskal Herria*). Finally, a new dissemination channel, *Kulturklik*, was created in 2009, as an information portal to include information about studies, conferences, bibliography, experiences, etc.

Finally, among the first steps of a relational activity that would keep growing along the years, diverse public presentations of the BCO were delivered in 2006. And in 2007 the participation in activities in other territories added to coordination meetings with the Technical Secretariat of the BPC. An example of external activity was the course "Cultural indicators in Spain: uses, needs and strategies" (Valencia, 9-10 May), organized by the SGAE Foundation (Spanish Society of Authors and Publishers), together with the *Servici d'Assistència i Recursos Culturals* of the Provincial Council of Valencia (*Diputació de València*), in which representatives of the BCO participated with a communication.

MAJOR STATISTICAL AND QUALITATIVE WORKS

The first major statistical operation carried out by the BCO, “Statistics of habits, practices and cultural consumption in *Euskal Herria*”, was published and presented in 2008. The operation focused on two specific areas: the knowledge of the demand of cultural products and services, on the one hand, and the cultural offer, on the other. In the years that followed, many works progressively expanded the cultural information system offered by the BCO. Those works can be organized in three main blocks: large statistical operations; other statistical studies, developed by the BCO on its own or in collaboration with other agents; and qualitative research or studies.

Main statistical operations

Following the working line initiated in the first years, major **statistical operations** continued to be developed in 2008. Thus, the pilot of the “Statistics on funding and public expenditure on culture” concluded in 2009. The pilot was conducted in the main institutions of the BAC (Basque Government, provincial councils and city councils of the three Basque capitals). After this pilot study, the first edition of this statistical operation, with 2008 data, finished in 2010 and was publicly presented in 2011. This operation was conceived as a stable time series that would be fed by new editions in the following years. It offered a global vision of the public expenditure on culture (estimated at 510.2 million euros in 2008, 234.8 euros per inhabitant), but it also offered detailed information about the relationship between the public and private sector. It also touched on how political priorities materialize in the distinct investment levels in the different cultural subsectors, among other issues. The second edition of this statistical project, which was completed in 2012, offered data about 2010. One year later, in 2013, the third edition was set in motion. After the dissemination of the third edition in 2014, a fourth edition offered the last update in 2016, with 2014 data. These four editions (2008, 2010, 2012 and 2014) have provided information about funding and public expenditure on a periodic basis, enabling not only a detailed examination, but also the analysis of the evolution in time of these figures.

The first edition of the “Statistics of habits, practices and cultural consumption in *Euskal Herria*” (2008) – which estimated the total investment in culture in the BAC at 510.2 million euros, 234.8 euros per inhabitant – was presented in 2011.

In 2008 the BCO undertook another significant statistical project called the “Statistics of the Arts and Cultural Industries”. More specifically, during that year the methodological approach was outlined, the surveys for the data collection were designed and the fieldwork was assigned and initiated. A year later, in 2009, the first edition of the “Statistics of the Arts and Cultural Industries” was finalized with data from 2007. At first, this census-based statistical study still offered a kind of still-frame

**Together with the
"Statistics of
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and cultural
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Euskal Herria",
three more studies
– "Statistics about
funding and public
expenditure on
culture", "Statistics
of the Arts and
Cultural
Industries", and
"Archives
statistics" – with
their different
editions, constitute
the largest
statistical
operations of the
BCO.**

photography. Nevertheless, it was a great step forward insofar that it made available to the public a large amount of information about: the performing arts, music and visual arts, referring to the producers, the activity generated in artistic, productive, economic and employment terms, as well as detailed information about the offer. A new edition of this statistical analysis, with 2009 data, was launched in the second semester of 2010, and the data treatment, exploitation and analysis tasks were completed in 2011. This second edition included a new feature: the incorporation of the book industry and the record business sector. A third edition would be set in motion in 2012, with data from 2011, which would definitively consolidate this study as an excellent way to gauge the pulse of the cultural sector and the so-called creative economy in the BAC, especially from the perspective of production, exhibition and commercialization. Future editions would regularly update the study with data every few years.

In 2009 another important statistical operation was initiated: the "Archives statistics". Its objective was to provide a comprehensive picture of the archival situation in the BAC (human and economic resources, typology and volume of the documentary heritage they contain, activity, infrastructure and services they offer). This study would complement the existing statistics in the field of documentary heritage. The fieldwork for these statistics was developed in 2010, and the results of this first edition would be presented in 2011. The BCO analysed these data in coordination with the Centre of the Basque Country's Documentary Heritage (IRARGI) and, thanks to this joint work, a report was elaborated describing the situation of 302 Basque archives. The weight of municipal archives (compared to non-municipal archives) in the total figures was thus corroborated (86.4%), as well as the employment archives generate (792 employees in 2009), and the services they offer to the users, among other issues. The data of this study were made available for public consultation through the BCO's website.

Together with the first proprietary statistical study from the BCO, the "Statistics of habits, practices and cultural consumption in *Euskal Herria*", these three large statistical operations – "Statistics about funding and public expenditure on culture", "Statistics of the Arts and Cultural Industries", and "Archives statistics" – with their different editions, show a historical timeline from the genesis of the BCO, and they constitute a major part of its work and priority lines.

Taking into account all of the above, and even if the process is to be understood as a gradual one, 2011 was a year of important changes with regard to the organization and resources of the BCO, which entailed new approaches and new ways of thinking. The fundamental pillar of the BCO, the statistical work, started then to be completed by new sectors, new operations, as well as new editions of the above-mentioned statistical operations.

Proprietary statistical studies and in collaboration with other agents

Some **other studies**, also of a statistical nature, add to the major statistical operations described above. They had been developed over the years by the BCO on its own or in collaboration with other entities. In 2008, by way of example, a preliminary approach was made to both the cultural offer and demand in the Basque language, drawing on the data available in the sectorial statistics of the arts and the cultural industries launched that same year. Another preliminary statistical study focused on the media and, more specifically, on gathering the existing information about the press, radio, TV and new media on the Internet.

An example of statistical study in collaboration is the one about the “Cultural employment and professions” in 2009. This study, which represented the first time the BCO approached this matter, consisted of the selection and analysis of sources of information to identify the employment, as well as experiences and systems that had already developed occupational repertoires. A collaboration mechanism was established with Eustat, the Department of Employment and Social Affairs of the Basque Government, and the Observatory of INEM (the Spanish agency for employment). The aim was to learn about the employment generated by the sector and the professions linked to culture, as well as to design a permanent information tool on the issue. While the data provided by INEM were used for the first report, from that moment onwards a collaboration was established with Lanbide (the Basque agency for employment), which regularly provides the BCO with data about employment demand and contracts. The statistical information provided by these bodies were used in 2010. Some of the information was synthesized, promoted by the BCO, the Department of Culture (Libraries, Museums and Craftsmanship) and other sources such as the Spanish Ministry of Culture. The aim was to quantify the economic weight of culture in the BAC through the analysis of three key areas: enterprises, employment and the job market of the professionals of culture. After these two approaches, new information requests were processed in 2013, addressed to the collaborating entities for the elaboration of a third report, which would be published in 2014. In 2016, in a fourth report, new economic activities were considered (architecture, advertising, videogames, translation and interpreting, and cultural education), and the data were also expanded for news agencies. A new field of analysis was thus introduced: the Creative Industries, with data from 2013 and 2014.

Among the statistical studies conducted in 2009, a study about the policies to support creation is also to be highlighted. It analysed good practices with regard to this issue – in France, Great Britain, Sweden, Denmark, Norway and the Netherlands – and extracted lessons applicable to the Basque reality. Building on this analysis, possible scenarios in the short, medium and long term were formulated. These lessons would be of much help for the formulation and launch, a few years later, in 2011, of

In 2016, for the first time, the BCO made a synthesis of all the main statistical indicators related to culture in the BAC.

the programme “Creation Factories” by the Basque Government – a programme aimed at supporting creators and creative enterprises.

While the major operations took up most of the BCO’s time at the statistical level between 2010 and 2012, the **statistical studies** strongly re-emerged in the activity of the BCO in 2013. A report was elaborated that year based on a set of 10 indicators. These basic indicators arose from the synthesis of the “Statistics of the Arts and Cultural Industries” and offered a coherent quantitative picture. They were able to reflect changes and were easily understandable, and accounted for the cultural vitality and diversity of the BAC. Another 2013 report, based on indicators offered by Eustat, focussed on those which intersected with culture in any aspect. More specifically, a few indicators were selected from the Statistics of Family Expenditure, the Survey about Information Society (SIS enterprises) and the Statistics of Expenditure and Funding of Education. In line with these works, in 2016 the BCO made the first synthesis of all the main statistical indicators related to culture in the BAC.

Finally, 2013 would prove a particularly important year for the statistical dimension of the BCO’s activity due to the preparation of two panels that would have certain continuity in the years to follow. These panels were a big novelty in the cultural field and they provide information about trends. The first of them was the “Panel for the analysis of the arts and the cultural industries”, a strategic sample of agents – a proposal for the sample was made in 2013 – on which a longitudinal or panel study would be applied. This would allow periodic gathering of data on their level of activity, economic situation and perception about the reality of the sectors, so as to grasp the quick changes between the different editions of the “Statistics of the Arts and Cultural Industries”. With this first proposal as a starting point, the “Panel of Business Confidence Indicators (BCI) of the Arts and Cultural Industries” was initiated in the biennium 2014-2015. It was formed by a strategic sample of 70 enterprises (representing the different subsectors). The panel aims to understand the perceptions of the enterprises belonging to the Arts and Cultural Industries – about the current business model and, specially, about their expectations in the short term. In 2016, two new biannual waves of consultation were carried out and their results disseminated. The first of them included a module about the human resources of enterprises, which allowed obtaining information about, for example, the participation of men and women in the working teams.

The other panel that was conceived in 2013, after a preparatory study, was the “Panel for the analysis of the habits, practices and cultural consumption in the BAC”, aimed at monitoring the changes in cultural consumption, particularly those linked to the introduction of new technologies. With the short name “Panel of habits and cultural consumption”, this

study continued into 2014 and 2015, when the selection of panellists was carried out (204 of them, divided into two samples according to age groups) and the data collection for the first wave began. The results of that first wave were disseminated in 2016, parallel to the start of the data collection for the second wave, and included a specific module on culture in Basque language.

Qualitative studies

Another very significant dimension with regard to the information and products generated in the last decade are the qualitative studies. This working line started to be developed more intensely around 2008, producing a series of studies and reports devoted to taking a transversal and strategic look at culture. The following offers a short history of the more than 40 qualitative works conducted by the BCO in its first decade.

Comparative studies and identification of good practices

A first group of these works are studies comparing national and/or international experiences, and identifying good practices in different fields that could inspire the design of possible scenarios to be applied to the cultural reality in the BAC. In this sense, and just as an example, the “Methodological laboratory: Study of cultural creation” was developed in 2008. It was an analysis of the policies of support to create at the international level (originally in nine countries). It also included a description of the situation in the BAC, as well as of public and private supporting initiatives. Along the same lines, a comparative study of national (Barcelona and Madrid) and international experiences (Berlin, London and Marseille) was conducted, and the key elements to be considered for the development of policies for the support of creation in the Basque Country were identified. Both this study and the 2008 methodological laboratory – and the above-mentioned research about policies supporting creation of 2009 – were certainly precedents to the project “Creation Factories”, launched by the Basque Government in 2011.

Among the qualitative studies, the BCO has conducted multiple studies comparing national and/or international experiences, and identifying good practices in different fields that could inspire the design of possible scenarios to be applied to the cultural reality in the BAC.

Another study of this kind was the one titled “Youth cultural consumption”, which combined a detailed analysis of statistical information with the modelling of the policies for the promotion of youth cultural consumption in other countries and in the BAC. It also made a few proposals in relation to this matter. Before that, a 2010 study “Young people and new consumptions” had specifically focussed on the influence of new technologies in the field of young people’s cultural practices.

In 2010, the prospective study, “Cultural 1%”, created a new comparative analysis. In this case, the normative framework was compared to the state and Catalan models, so to think of an approximation of this percentage in the BAC’s administration and a possible quantification of what that cultural one percent would represent at the level of the Basque Government.

Within this thematic area, also in 2010, the study, “Cultural funding lines”, was conducted to systematise the information and assess the different cultural funding tools that the Catalan Institute for the Cultural Industries (ICIC) promotes for the different cultural sectors.

In 2013, a new comparative study explored “Internationalisation models for the cultural industry”. The study, “Business accompaniment in culture”, analysed successful cases and made a proposal for the application to the Basque cultural sector. And, finally, the study, “Models for cultural consumption promotion”, also made a comparative examination, in this case of the policies developed by the Basque Government, with regard to other reference experiences. One last example of this type of study is “The proximity factor in cultural policies”, which was developed between 2014 and 2015 and approached this concept from two angles: from a theoretical perspective it reviewed the meaning and implications of proximity in cultural policies, concluding with a modelling exercise of the existing types of proximity policies; and from a practical point of view, relevant cases from outside the BAC were selected.

Digitalisation in the cultural field

Other groups of works within qualitative studies are articulated not that much by the methodology – comparative studies, identification of good practices – but rather by the topics tackled. By way of examples, an important set of qualitative research focused on what may be called “the digital issue”, or the influence of digitalisation in the cultural sphere from the beginning of this decade.

In 2010, an exploratory work titled “New technologies, Digitalisation and Cultural Industries” examined the impact of new technologies and the digital environment on the cultural industries (new business models, production models, distribution and exploitation, funding formulas; communication processes enhanced by Web 2.0 and social media that have revolutionized marketing strategies; new uses and consumption forms derived from the immediateness of access, the interactivity and the ubiquity enabled by the new mediums and formats; new agents operating in the digital business, etc).

In 2011, a new project emerged as a proposal of the working groups on culture and digitalisation coordinated by the Basque Cultural Observatory. The project analysed issues related to contents, formats, conservation, rights, dissemination and users, with the final objective of coordinating the ongoing digitalisation processes and offering guidelines for their future development. This project was named “Digitalisation map” and it also included, besides a qualitative study – with in-depth interviews with representatives of relevant entities in the field of digitalisation – a search for international referents, recommendations and

generic orientations about the principles and policies that could serve as a model and inspiration. Thus, this map could perfectly be included in the previous section, grouping comparative studies and those identifying good practices; however, it must be highlighted that the organization of qualitative works here presented is just one of the many possible.

The BCO showed its commitment to digitalisation with the 2011 launch of "Training 2.0", a collection of learning materials with a common theme that revolves around new technologies and "2.0 Culture". There were two types of materials: monographic publications and training "pills", with a more dynamic and punctual character, which respond to the specific demands of professionals in the sector. Furthermore, in 2011, the so-called "experiences" were celebrated – face-to-face encounters with experts on different topics within the 2.0 Culture sector.

More recently, in 2016, the study "The cultural sector and the new business opportunities in the digital environment" showed that the interest of the BCO in this topic is still strong.

Economic aspects and social return of culture

The BCO was created in 2006 – only two years before the outburst of economic crisis that affected the cultural sector around the globe. Studies on economic aspects, as well as on the value and the social return of culture, gained special relevance. In this context, the BCO – through the qualitative reflection and willingness not only to picture reality, but also to have an impact on it – has tried to shed some light on the current economic situation.

Thus, in 2011 the research line on funding sources for culture was picked up. It was initiated along with the above-mentioned studies, "Cultural 1%" and "Cultural funding lines". In 2011, the research "Funding and credits for culture" explored the public efforts for the financial support of culture, as well as the possibilities for agreement with financial institutions to provoke a multiplying effect of the resources allocated. Within this study on cultural enterprises' need for financing, the BCO elaborated a 2012 report titled "Valuation of intangibles in financial operations with cultural agents". The report was a first step towards a future guide targeting financial institutions for them to better assess the cultural projects linked to financial requests. Also in 2012, the study "Assessment and review of the systems of grants to the Basque creative and productive sectors" offered an analysis of the model of non-repayable grants awarded by the Direction for the Promotion of Culture to the BAC's cultural fabric.

Another topic tackled in 2012 was the social return of culture, which is an issue that receives a lot of attention at the international level, and whose measurement is the object of study to show the intrinsic value of culture. It goes beyond the purely economic indicators, and thus hopes to defend

the investments in culture in a context of economic crisis. Aware of the need to move forward in the measurement of this value, the BCO formulated a model, as a first approach, based on a "System of indicators for the measurement of the social return of public grants for culture", and focused on the analysis of the impacts enhanced by the projects receiving public grants.

In the same line of assessing cultural programmes, but from a wider perspective, the BCO also designed, in 2012, an "Analysis model for the rationalization and prioritization in public cultural management". Its objective was to become an easily applicable instrument for the analysis and evaluation of programmes developed by cultural organizations. It would provide them with criteria to improve their management, as well as help political leaders and people responsible at the technical level with decision-making. The report included an explanation and justification of the model, the description of the variables to be considered, and a first simulation for the evaluation of programmes which made it possible to visualize the application of the model to the public management of culture.

Finally, in 2013, a study was conducted on the "Impact of the VAT increase on the different cultural sectors in the BAC" from a qualitative perspective. It aimed at detecting discourses and perceptions about the direct and indirect effects of such increases.

Emerging issues

A last group of qualitative works is formed by the studies and research that focus on what might be called "emerging issues" or, at least, on the intersection of those issues with the cultural field. It must be highlighted that, particularly in recent times (2014-2017), a distinctive feature of the BCO's work has been innovation in the methodologies and the contents analysed. In 2016, more specifically, when 10 years had passed since the creation of the BCO, it tried to make the most out of the statistical information generated (synthetic indicators) and to open the qualitative studies to relatively unexplored topics related to culture.

An example of the latter is the 2011 report "Networked creation and cultural networks", which was elaborated from three angles: 1) a theoretical approach to the paradigm shift entailed by the new forms of creation and the new, networked organizational forms; 2) evolution and current support framework for the promotion of this kind of organization and infrastructure at the international and state level, as well as for the specific Basque reality; 3) the proposal of a series of guidelines, by way of conclusion, for cultural policymaking in accordance with the environment and current trends. Demonstrating that this theme continues to be topical, a publication by the AECID, the Spanish Agency for International Cooperation for Development, can be mentioned: *Redes culturales*.

Claves para sobrevivir en la globalización (Cultural networks. Keys to survive globalization). Published in 2008, this publication states: “We can affirm that the cultural sector, besides having consolidated the networks system, is nowadays one of the its main generators” (Nicolau Martí, in Brun, Tejero & Canut Ledo, 2008).

More recent examples of the BCO’s interest in some emerging themes is the 2016 study on “The situation of women in visual arts and the audio-visual sector”, the first research by the BCO about the presence of women in these two sectors. In 2014, a report elaborated by UNESCO, “Gender Equality: Heritage and Creativity”, emphasized the urgency of establishing deeper debates, research and awareness-raising actions about the need to achieve equal rights, responsibilities and opportunities for men and women, boys and girls in the fields of heritage and creativity (UNESCO, 2014). These first approximations by the BCO to the gender issue are new efforts feeding these debates.

That same year, the BCO conducted a study called “Approaching the relation between culture and poverty”. Again, multiple academic works and reports made by international organizations confirm that this topic attracts attention worldwide. Just as an example, UNESCO’s International Congress “Culture: Key to Sustainable Development”, held in Hangzhou, China, in May 2013, included as thematic areas the relation between culture, poverty and well-being, and cultural approaches to poverty reduction, among others.

Finally, in 2016 the BCO established a collaboration with Bertsozale Elkartea to accumulate information and research about *bertsolarism*². While *bertsolarism* is not strictly an emerging issue, this new collaboration fills a historical gap in the BCO with regard to this sector, compared to other sectors. The objective of this collaboration is the inclusion of *bertsolarism* as a field of analysis, together with other sectors, and thus recognize it as a relevant sector from the point of view of creation and social roots. In order to do so, a monitoring project was initiated in 2016 for *bertsolarism*, paying attention to its activity (training, typology of activities, attendance, etc.) and the professional dimension, building on the information available, the identification of the indicators of interest and the inauguration of a collaboration process to share information and knowledge.

As a sort of prospective identification of the challenges ahead, the first “Biennial report on the state of culture 2015” deserves to be mentioned. This work, done in collaboration by the BCO and the University of the Basque Country (UPV-EHU), offered an independent diagnosis of the situation of Basque cultural reality. Its main objective was to identify future

² Translator’s note: *bertsolarism* is the art of singing improvised songs in Basque language, whose composition responds to specific melodies, metrics and rhythms.

challenges and make proposals for actions. The report was directed by Ramón Zallo and staffed with a team of five experts to analyse the state of culture from the perspective of the value chain: creation-research-training (Eneko Lorente); production-editing (Miguel Ángel Casado); distribution-dissemination-exhibition (Pablo Malo and Kepa Sojo); habits and consumption (Josu Amezaga). The BCO coordinated the process of collection of opinions and perceptions, with the participation of 93 cultural agents.

BY WAY OF CONCLUSION: THE BCO AND THE INTERNATIONAL CULTURAL AGENDA

Along its history, the BCO has figured out how to gauge the pulse of the changing cultural reality, by establishing synergies with other actors and connecting with the major debates in the cultural field at the European and international level.

It is undeniable that the BCO has been able to gauge the pulse of the changing cultural reality, not only within its geographical scope of action, the BAC or *Euskal Herria*, but also beyond. It has established synergies with other actors and connected with the major debates in the cultural field at the European and international level.

As an example of this insertion in the debates on culture at the international level, it must be mentioned that the BCO has carried out works that dig deep into the priorities established by documents of global relevance in the field of culture, such as the 2001 UNESCO Universal Declaration on Cultural Diversity. The Action Plan accompanying this Declaration – to be followed by states but also by non-governmental organizations when designing their cultural proposals – included a total of 20 actions, among which was the conservation of cultural heritage, with a particular emphasis on linguistic heritage, the promotion of “digital literacy” at a global level, and the establishment of cultural industries in all countries. To the analysis of all these issues, the BCO has devoted significant resources.

Similarly, Agenda 21 for Culture, a reference document on the issue for cities and local governments, established some priorities in 2004. According to this document, some of the main responsibilities that local governments must assume with regard to culture are related to access to culture, audience development, assessment of the impact of culture (cultural indicators), cultural heritage or access to the digital dimension of culture, among others (UCLG, 2004). Again, these are all questions to which the BCO has paid much attention.

The research line about cultural funding developed by the BCO – and explored in several studies, as mentioned above – also echoes the European agenda in a context marked by the “Europe 2020 Strategy” from 2010; which, as a strategy to face and overcome the economic crisis, established three priorities: smart, sustainable and inclusive growth. While this document is not specific about culture, some of these issues are directly related to culture, insofar as the strategy aims to promote growth based on knowledge, innovation, and territorial and social cohesion. The development of a digital society – an issue the BCO has worked closely with – is also one of the recommendations included in this strategy to achieve smart growth.

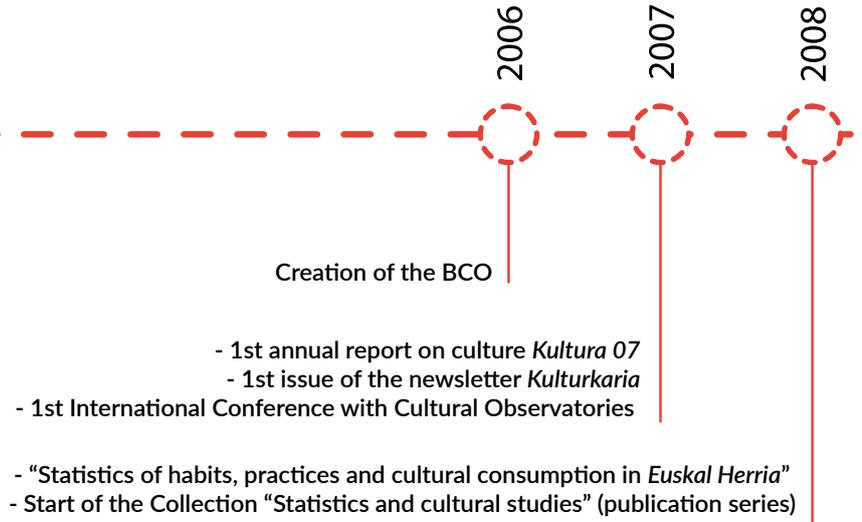
Another example of the BCO's engagement in European and international debates is the report "Cultural and creative industries". Theoretical debate from a European perspective", published in 2013. This report offers a synthetic, panoramic view of the conceptual framework of the Cultural and Creative Industries (CCIs), the promotion policies fostered by the European Union, and the policies affecting these sectors in the BAC. This issue occupied – and still occupies – a central position in the European agenda, as demonstrated by the publication "Green Paper, unlocking the potential of cultural and creative industries" (European Commission, 2010). CCIs were also among the priority lines of the EU Work Plan for Culture 2015-2018 (Council of the EU, 2014); the priority area, more specifically, was called "Cultural and creative sectors: Creative economy and innovation". Besides being central in the work plan of the EU, this issue was also a priority in the Action Plan for the implementation of the UNESCO Universal Declaration on Cultural Diversity, as pointed out above. The cited report by the BCO, together with the already mentioned large statistical operation on the Arts and Cultural Industries and other sectoral studies, demonstrate its commitment to this internationally topical issue.

In 2010, the BCO conducted the "Study on the concept of cultural diplomacy", which reflected on the practical consequences derived from the application of this concept. It drew on the main bibliographic references on the issue, as well as on the analysis of some case studies. A year later, in May 2011, the European Parliament passed the Resolution on the cultural dimensions of the EU's external actions, which would reinforce the relevance of cultural diplomacy in the European cultural agenda. In addition to that, the European Commission recently launched the Cultural Diplomacy Platform, which groups the main actors in the area of cultural external relations of the European Union. Furthermore, the "Promotion of cultural diversity, culture in the EU external relations and mobility" was one of the priority areas identified by the EU Work Plan for Culture 2015-2018 (Council of the EU, 2014).

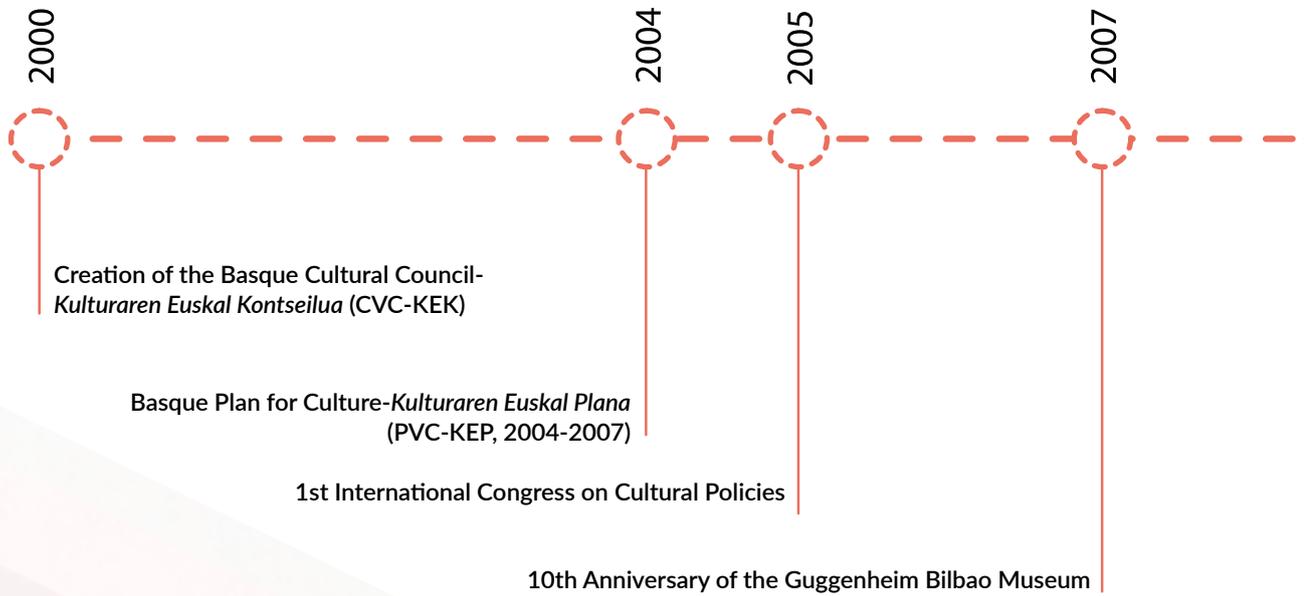
Finally, the "Study about audiences" directly relates to audience development – one of the key themes in the Agenda 21 for Culture, and a priority line in the funding programme for culture called Creative Europe, launched by the EU in 2014. Furthermore, the European Commission devoted a conference to this issue, titled "European Audiences: 2020 and beyond". The mentioned study about audiences, conducted by the BCO in 2014-2015, with a two-fold theoretical-practical dimension, established a conceptual framework about audience development, illustrating it with examples of good practices from international cultural institutions.

BCO: 10 YEARS IN CONTEXT

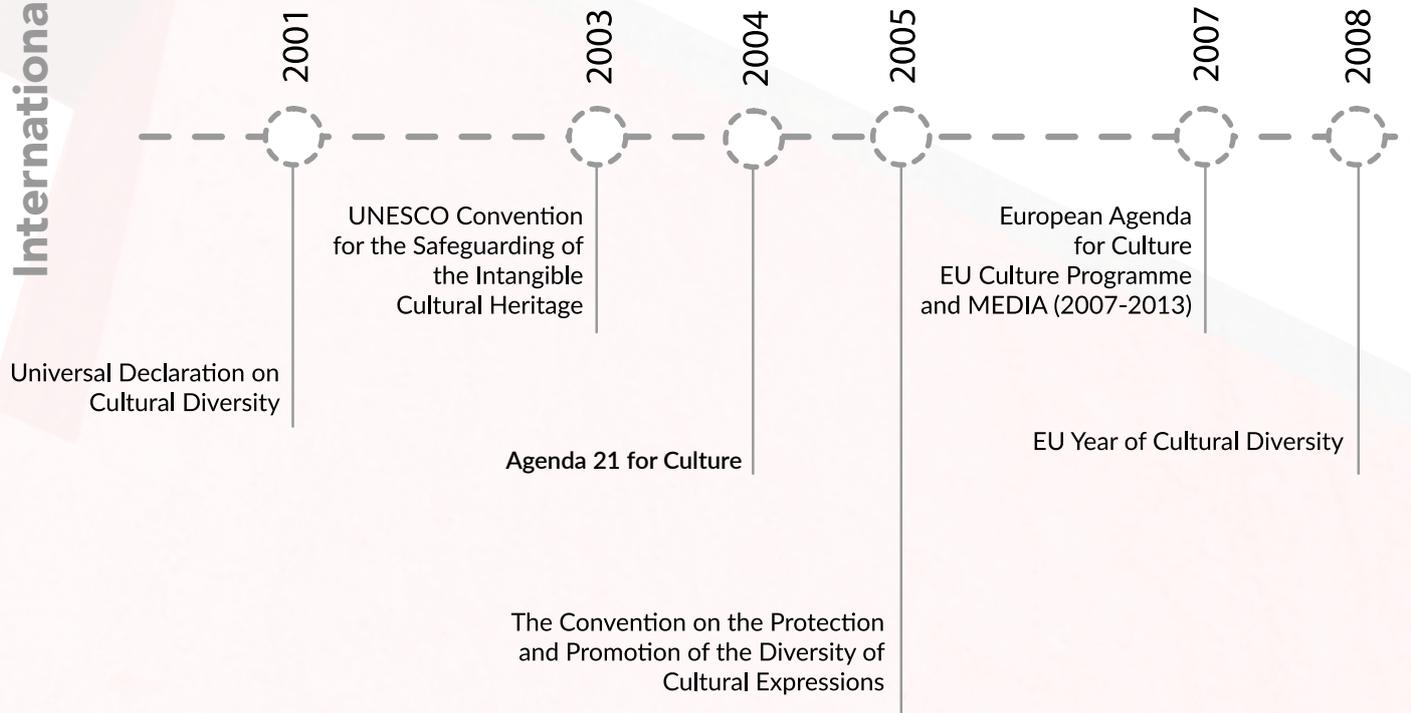
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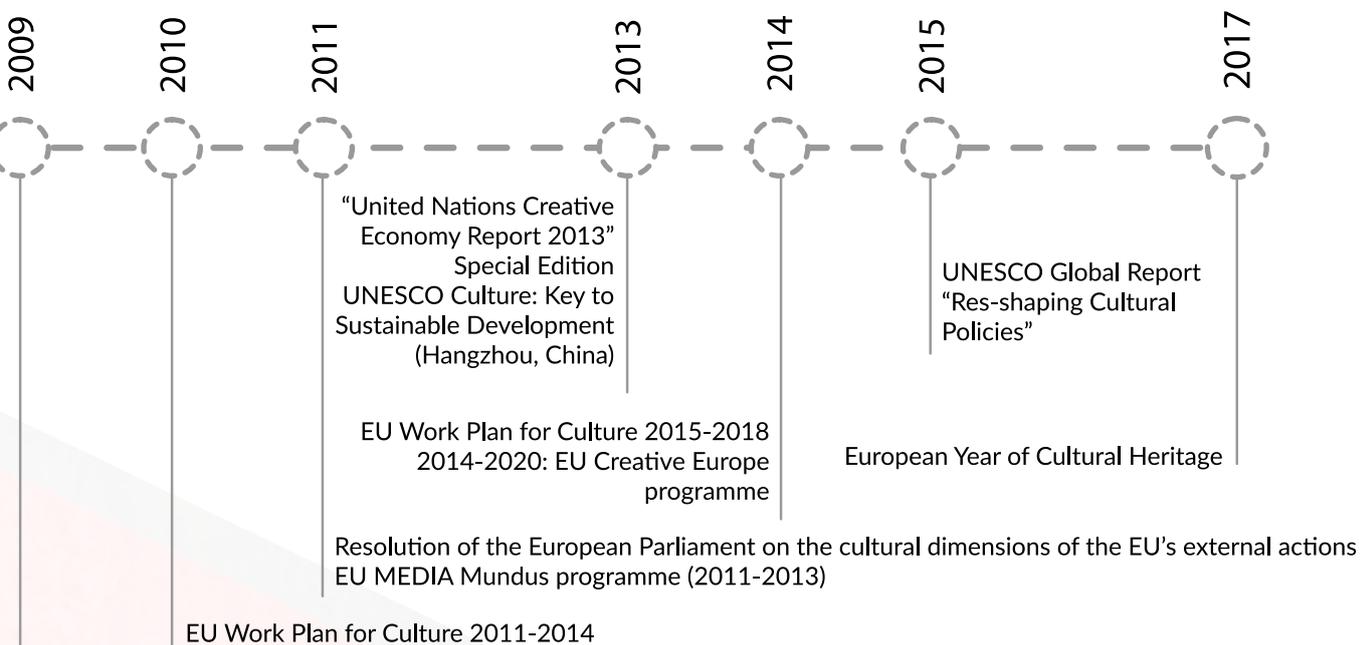
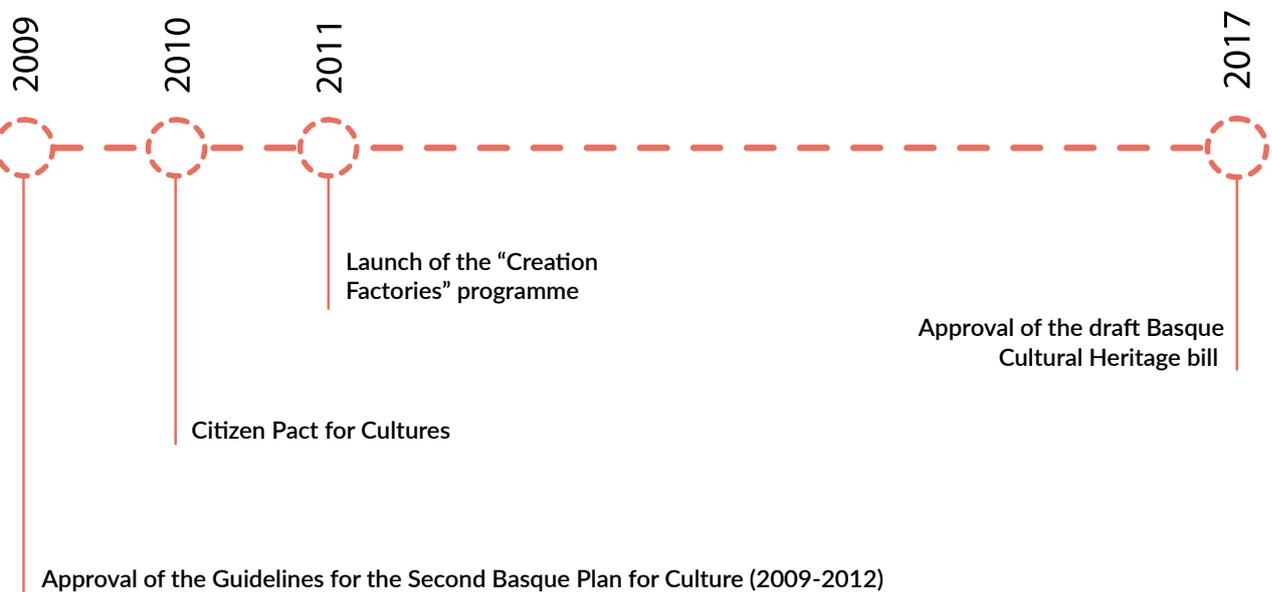
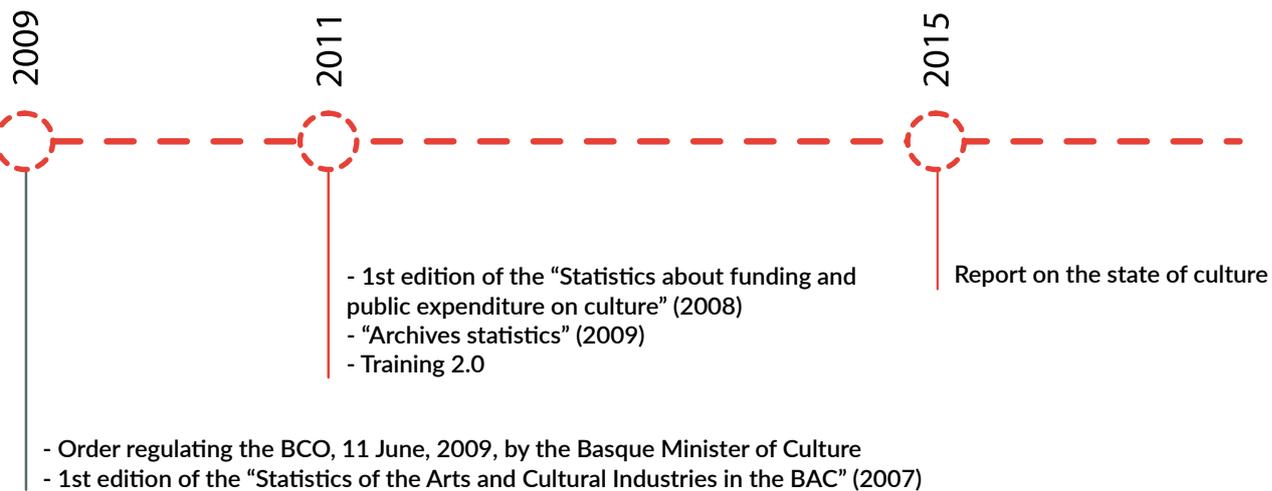


BAC



International





THE BCO FIGURES

Main products of the BCO

60

publications

Collection, "Statistics and cultural studies", available for consultation

31

reports and publications

46

publications

on the "Arts and Cultural Industries" sector

8

Performing arts

23

Book

6

Music

3

Visual arts

6

Audiovisual

54

sets of indicators available for dynamic consultation

14

publications

on the "Heritage" sector

1

Archives

8

Museums

3

Libraries

2

Digitalization

28

sectorial (6 sectors)

26

transversal

10

transversal publications

75

issues of the newsletter *Kulturkaria*

4

Participation in International conferences with cultural observatories

+50

events, courses, pre-conferences and working groups

Main statistics of the BCO

2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

Statistics of the Arts and Cultural Industries in the Basque Autonomous Community



Statistics of habits, practices and cultural consumption in *Euskal Herria*



Statistics about funding and public expenditure on culture in the Basque Autonomous Community



Archives statistics



Selection of indicators from secondary sources – Eustat



Panel of Business Confidence Indicators (BCI) of the Arts and Cultural Industries



Analysis of enterprises, employments and the job market in the cultural field in the BAC



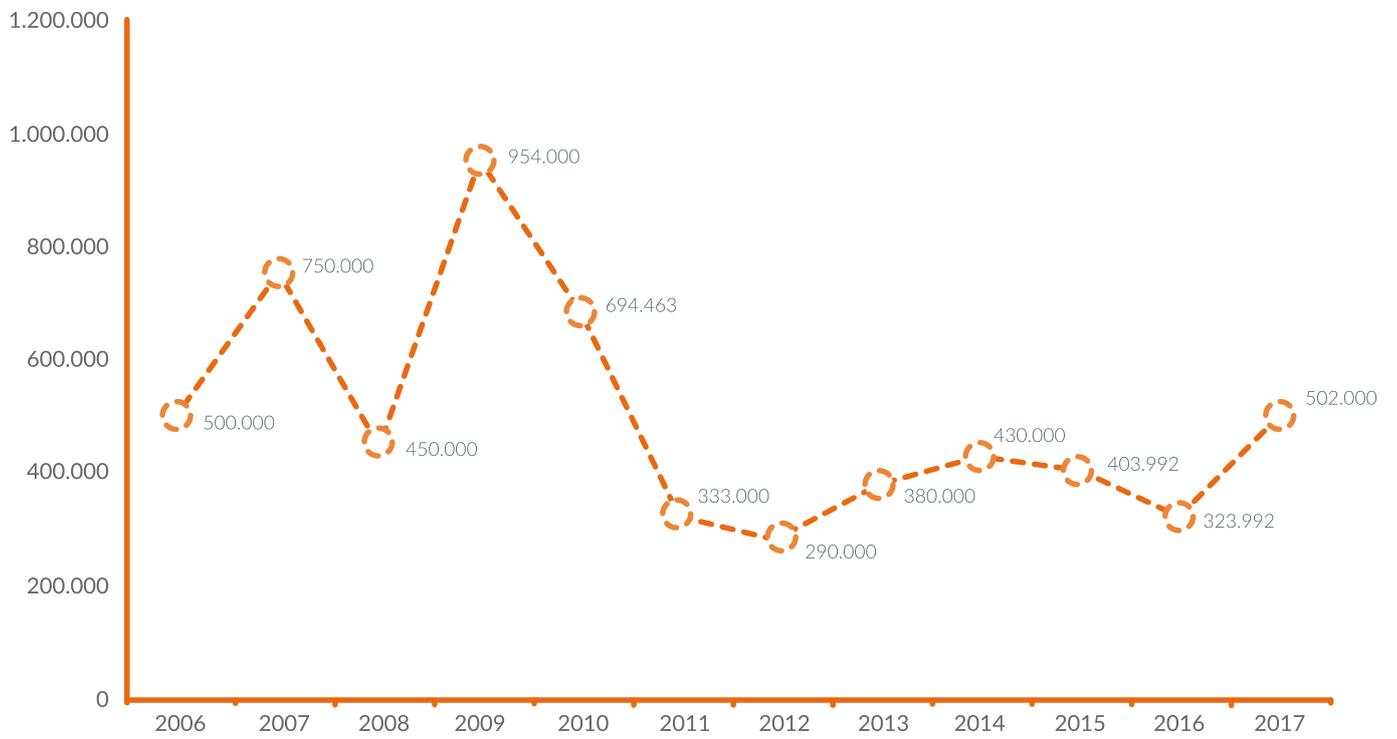
Panel of Cultural Habits



Synthesis of cultural indicators



Budget of the BCO (in euros, 2006-2017)



ANNEXES

Annual action plans of the Basque Cultural Observatory

Annual reports of the Basque Cultural Observatory

Indicators of the Basque Cultural Observatory

Kulturkaria monthly newsletter

Statistical Operations and Studies

Studies and publications of the Basque Cultural Observatory

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