

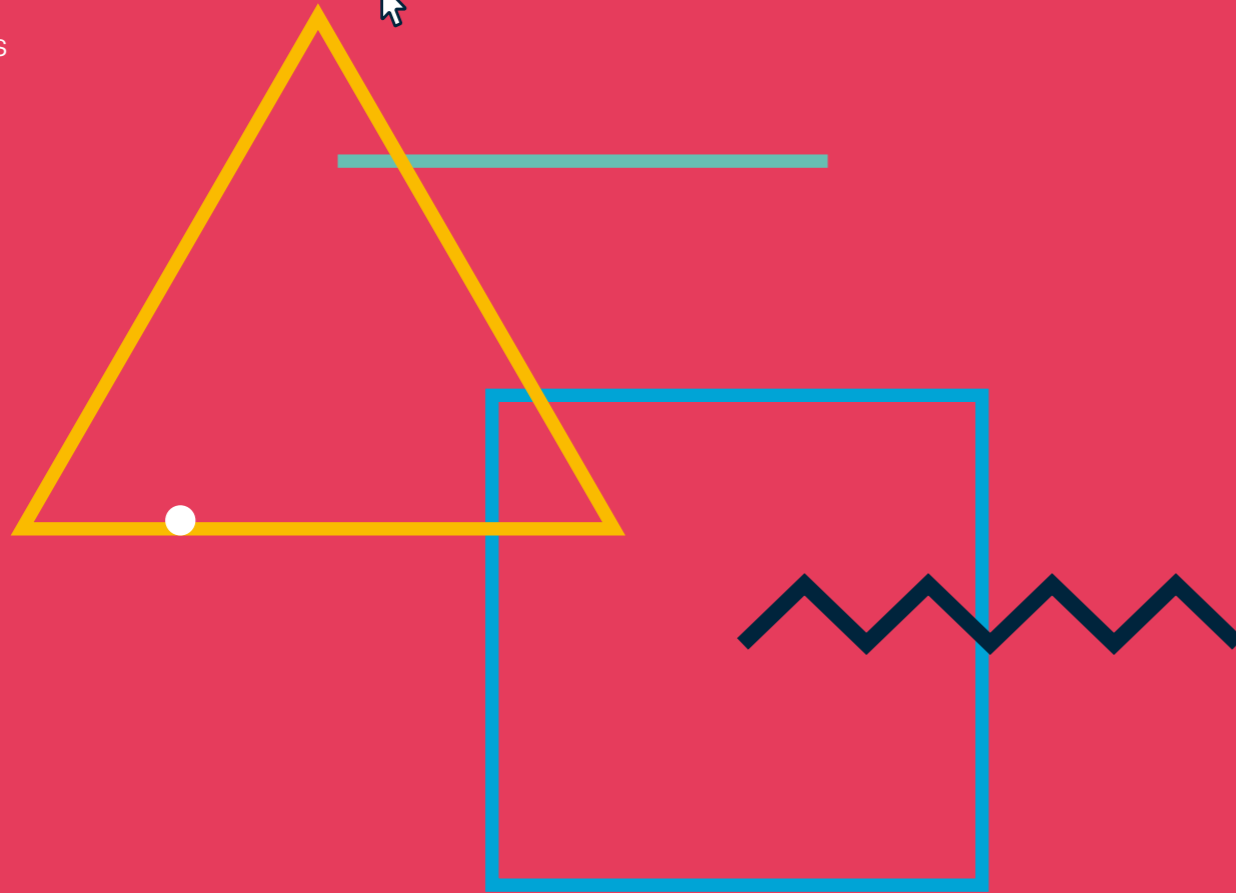
CCIs in the Basque Country

A journey through the development of the Basque cultural and creative sector

2010-2023

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***The content of this publication has been prepared between October 2019 and March 2020, prior to the Covid-19 pandemic.

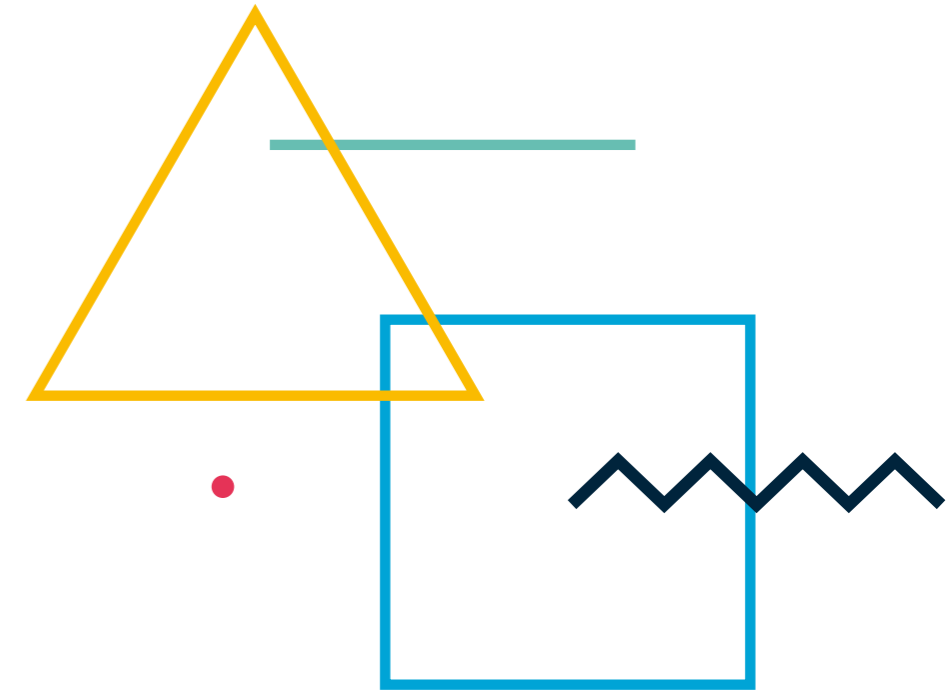


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CCIs in the Basque Country

2010-2023

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Points that draw lines, lines that create shapes and shapes that build creative societies.

Creativity is the ability to create something different, either from scratch or from different elements that already exist. The design of this publication refers to the journey of a creative process. The three basic elements are evoked: the vacuum as the phase 0, the point as the first graphic expression, the line as a succession of points and the planes as a succession of lines (*Point and line on the plane*, Wassily Kandinsky). Thus, each of the chronological phases that make up the recent evolution of the CCIs in the Basque Country is represented by a graphic element with the same number of points: the point, the line, the triangle and the square. The creation of this iconography allows the distinction of each one of the chronological "Phases" which, combined with "Experiences" and "Voices" complete this narrative.



Phases



Experiences



Voices



CCI

Introduction

Bingen Zupiria

*Minister of Culture and Linguistic Policy
Basque Government*



This publication takes a chronological journey through the evolution of the cultural and creative sector in the Basque Country in recent years: from initial studies and institutional efforts to understand and support the CCI sector, to conceptual and sectorial delimitation, development of new qualitative and quantitative studies and implementation of new supporting instruments in different fields, such as innovation and internationalisation. Initiatives such as the ones carried out under the framework of the CREADIS3 project or Basque District of Culture and Creativity (BDCC), conclude the publication and lay forth lines for the future in the Basque Government's institutional investment in CCIs as a driver for innovation and socioeconomic development.

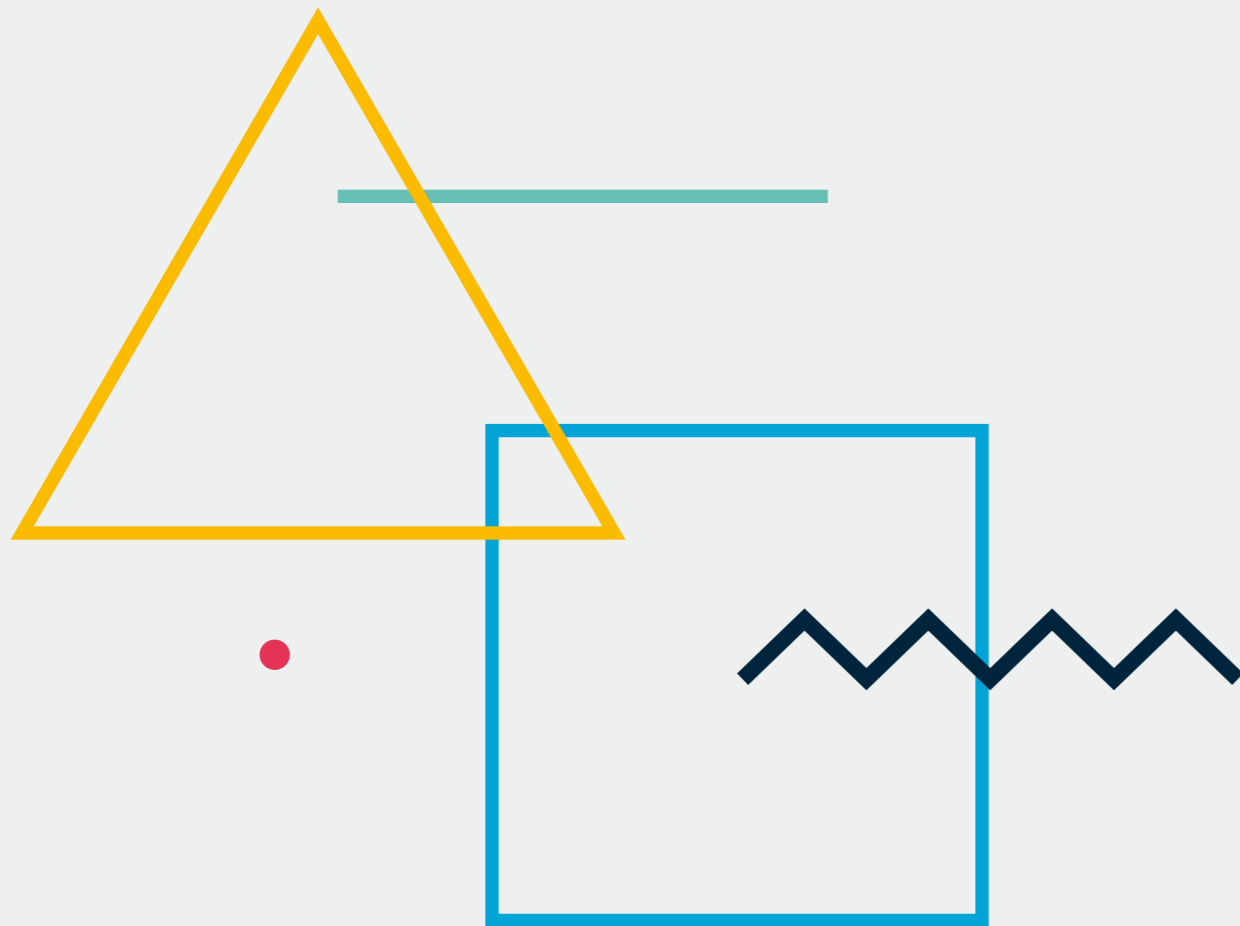
The initial phase, or phase 0, introduces the origins that gave way to the intense work conducted in the following years to solidify the Basque cultural and creative sector, work begun around the year 2012. Next, phase I introduces initial qualitative and quantitative approaches to the reality of CCIs in the Basque Country (2012–2015), followed by phase II, going further in depth in the knowledge of this reality (period 2016–2018). Phase III (the year 2019) shows actions and initiatives to design and lay the foundation for future development of the cultural and creative sector, particularly

under the framework of the RIS3 strategy (*Research and Innovation Strategy for Smart Specialisation*) in the Basque Country. Lastly, phase IV (2020–2023) introduces the Basque District of Culture and Creativity (BDCC), as a one-stop-shop project and service portfolio for CCIs that is integrated and multi-scope.

In each phase, in addition to reviewing the period's main milestones to build a detailed chronology of development of CCIs in the Basque Country, opinions from both public and private agents in Basque CCIs and good practises related to the CCIs are included.

Lastly, this publication seeks to raise visibility for the vast diversity and wealth in the Basque cultural and creative sector through the different sectors and all throughout the Basque region. Its content is also a way to acknowledge CCIs' engagement and innovative contribution to the Basque Country's socioeconomic development.

This timely recognition of CCIs' value constitutes the fundamental basis on which the consolidation of the Basque Country, as an innovative and creative country, must be founded. This is, a long-term commitment, built day by day.



CCIs in the Basque Country:

a journey through the development of the Basque cultural and creative sector



Interview with Joxean Muñoz

Former Vice-Minister of Culture o of the Basque Government



ORIGINS and EXPLORATION OF CCIs (until the year 2016)

In this initial phase of development of CCIs in the Basque Country, a remarkable milestone was the publication of the European Commission's Green Paper. What brought the Basque Government to commit to this political-strategic positioning, what did you come up against, and what was the status of the cultural and creative sector at that time?

The beginning of the process that brought us to the current reality of the Basque cultural and creative sector took place in 2013. At the beginning of that legislative term, with Cristina Uriarte as Minister, we were facing a challenge: Europe wanted to promote the cultural and creative sector, which was considered to be a strategic sector, and we, here, in the Basque Country did not have a defined policy for this new area that went beyond the cultural industry sector we had been caring for through public policies. What until then had been a central element in European cultural policy, through the Media Europe Plan (development of audio-visual content as a great European initiative) became part of a more complex strategic project, Creative Europe, which promoted the development of cultural and creative industries in all European States and regions.

We were aware that the European Union's requirement revealed a shortcoming in our public policies: cultural policy was restricted solely to the cultural sphere (creation, art, heritage and cultural industries: audio-visual, printing, music, performing arts, etc.) and economic development policies did not reach the cultural sector. This was due to their structural weakness from a business perspective, the singularity of their activity, the intangible nature of their value, etc. As such,

we believed that the economic aspect of cultural activity required further attention. Important sectors such as design, advertising, digital content development, architecture, etc., were left out from our policies. Under the previous legislative term, the Government had taken some steps by starting up lines to support creation spaces ("Creation Factories") in collaboration with cultural agents who had been working in cultural and social innovation, with a cross-cutting vision and a clear desire to interweave with the country's industries, but a specific policy for the cultural and creative sector as such had yet to be formed.

Within this context, we considered the need to design an appropriate strategy in the Basque Country for a sector that had yet to take shape. The very concept of CCIs, the idea of a creative sector, was not widespread in our area. So, we began, as we always begin, with knowledge policies. We commissioned a set of theoretical and statistical projects so we could best delimit the CCI sector and discover their situation in the Basque Country in detail.

To undertake this task, we requested the collaboration of *Sinnergiak Social Innovation* (Social Innovation Centre promoted by the University of the Basque Country/Euskal Herriko Unibertsitatea (UPV/EHU)). Knowing that the researchers from this centre (with Javier Echeverría and Alfonso Unceta in the lead) had already drawn up reports on CCIs, we asked them to frame the issue from a general theoretical perspective, to summarise the main documents to focus the issue, with special emphasis on EU guidelines, and to collect data that would provide an initial approximation to the sector's reality in the entire Autonomous Community.

Sinnergiak's contribution was fundamental. Those initial reports and an in-depth reading of the EU Green Paper allowed us to set forth an initial action plan which, at the same time, complied with our reality as a country and with the European guidelines. Firstly, the CCI sector in the Basque Country had to be delimited, its sub-sectors defined, and its economic and business reality analysed. We also needed to know which public grants were available, spread out through contests and programmes at different administrative levels (Basque Government, Provincial Councils and Town Halls), as well as training resources available at Basque universities (EHU/UPV, Deusto and Mondragón) and in Vocational Educational Training at different faculties, higher schools of education, etc. Most importantly, an initial report was drawn up on the impact that this sector had on the GDP and on employment in the Autonomous Community of the Basque Country, and to identify the companies that could act as drivers, thanks to their size and activity. As such, there was a battery of theoretical, propositional and statistical projects that allowed us to lay the foundation for our policy and, more than anything else, to seek the support and collaboration of other institutional levels, such as the Lehendakaria (Presidency of the Basque Country), the Department of Economic Development and the Basque Innovation Agency.

As mentioned earlier, this was a new issue at the Department of Culture specifically, and in the Government in general. From the very first moment, we were supported by the Lehendakari and the chief of staff of the Department of Economic Development, Jon Basterra, who in previous roles at the Provincial Council of Gipuzkoa had addressed these issues. In fact, the projects commissioned to Sinnergiak were commissioned by mutual agreement, and some of them were funded by its department. This was a way to begin the journey in collaboration between Culture and Economic Development, one of the key aspects in CCI development policies. But we will come back to this.

The time had come to lay the foundation for a policy specific to the cultural and creative sector. Firstly, following the EU Green Paper, we wanted to make clear that we were speaking of a cultural AND creative sector, maintaining the distinction established by Brussels between cultural and creative industries. The synthesis works by Sinnergiak clearly insisted on this aspect. We saw that, in some discourses and even in certain European regions, culture tended to be diluted into the concept of creativity and policies for this sector had a strong economic focus, very bent toward business and economic development, at the risk of blurring culture's intrinsic value. In this situation, we thought it was

fundamental to use Throsby's concentric circles model, because it preserves cultural values beyond their economic component. In other words, it highlights the economic value that culture also has, but what defines the cultural sphere is not its economic balance sheet, but rather the cultural balance sheet itself, with its social contribution, in cohesion, in a critical capacity and in the development of a creative society. I think it is important to keep this double definition (cultural AND creative industries). Our will as Department of Culture is to continue to drive the cultural sector and support the cultural values at stake with public funding. We cannot leave culture in the hands of immediate economic profit, because we cannot reduce it to something that functions commercially, even if this is profitable on the market (particularly in a small country such as ours, which defends its own cultural personality, with its own language, Basque, which has been marginalised and scorned for centuries and which, therefore, exists on a reduced and fragile market). However, at the same time, with specific CCI policies which, I insist, are not replacing cultural policy, but rather broadening and complementing it, we sought to open up to sectors we were unable to serve, and to strengthen the economic aspect of their activity, highlighting the economic impact of this sector and its contribution to the GDP, employment and innovation. To this end, close collaboration with the Department of Economic Development was essential.

This collaboration between departments with very different internal cultures was therefore a key aspect. At the same time, it was very complicated. This Green Paper insists on the need to give structure to this collaboration, to find a way to jointly develop CCI policies. As stated previously, we sought to address this from the very beginning. This is a long road. It is not easy, and we all have a great deal to learn. We are still under construction.

Another initial issue was defining the sector in our country, delimiting what we mean when we speak of CCIs in the Basque Country, with a methodology to respond to our reality and that also could be comparable and equivalent to initiatives in other regions and countries. We established a list of 15 sub-sectors, including two singular sectors on such list: language and creative gastronomy industries. The former, because our country's bilingual reality and the political, social and economic efforts to resurrect the language, have created an associative and business network that is learning to innovate and internationalise. Regarding the importance, capacity for innovation and the international visibility of haute cuisine in the Basque Country, I do not need to go any further in this aspect.

As such, in summary, the foundations were laid on these pillars: framing the Basque Country's policies under European policies, basing ourselves on knowledge of the sector, defining it, encouraging its structuring, and collaborating with the Department of Economic Development from the very beginning.

However, to roll out CCI policies, we needed a team we did not have at the time. Absorbed by the Department's day-to-day work, we could not tackle the task with the intensity and continuity required. The opportunity came in 2014, when we hired Juan Diego to exclusively work on CCI policies. With Juan as the Department of Culture's consultant for CCIs, we undertook several key projects: mapping the sector, configuring it, shaping the inter-institutional collaboration with Provincial Councils and Town Halls, beginning the CREADIS3 process and, above all else, joining the Basque Country's RIS3 strategy. We had held this ambition from the very beginning, but we had been unable to shape it until that time.

The CCIs were added to the RIS3 as a niche of opportunity, meaning fields that the Government understood should form part of smart specialisation, but that required greater development and growth. Logically, in the Basque Country, given their importance in the Basque economy, priority areas were advanced manufacturing, energy and bioscience, along with five spaces for opportunity. Indeed, forming part of RIS3 as a niche of opportunity was the chance to configure and boost the sector, the opportunity to participate in innovation policies, to collaborate and share experiences with other areas in RIS3 and to apply a shared methodology to all of them. Within this context, we built the first pilot tables. In my opinion, this was a milestone in this entire process. Three institutional levels participated in these pilot tables (Basque Government, Provincial Councils and Town Halls) and their two fields (Culture and Economic Development). With the Basque Network of Science, Technology and Innovation, cultural services held a driving role in the cultural field, and professional associations and clusters formed the private sector, the companies.

This was the first time that all sub-sectors were brought together through our professional organisations: it was the first time that they shared a table and methodology with different agents in the Basque Network of Science, Technology and Innovation (RVCTI) and that we brought such a complex institutional representation together. Up until that point, there had been no articulation between the two fields of culture and economic development at the

three institutional levels of the country. I think it was, and continues to be, an important photo. There were professional sectors with whom we had never shared the table before. The dialogue until then had been either with culture departments or with industry departments, but not with both at the same time, and also at all administrative levels: cities, historic regions (provinces) and the autonomous government.

In institutional terms, this was a way to address a complex aspect in CCIs. Literature on the topic repeatedly insists on the leadership role that cities, metropolitan settings, have and must hold in developing the cultural and creative sector. Shaping a table with cities and their regions, as key agents, and where the Government acts as driver and coordinator, meant undertaking a journey based on shared governance, collaborative work and mutual complementarity. In this case, the administrative and political organisation of the Autonomous Community of the Basque Country, in all its great complexity, was a highly suitable model for the development of the sector.

In some regions and cities, policies which we could call CCI policies were managed by the Department of Culture. In others, they were managed by that of Economic Development. With our dynamic, we all shared the same pilot table. And we moved forward by following European guidelines, which stipulated collaboration between both areas. For the cultural sector per se, the unusual complexity of the table entailed the opportunity to meet and collaborate with entities that had previously been removed (the RVCTI, industry departments, etc.), the knowledge of nearby areas (the creative sector) with which regular contact had not been held and, especially, the awareness that we needed to move to settings more complex than the ones we knew, and where sectorial representation needed to move toward greater articulation, overcoming the atomisation that existed at the time.

Forming part of the RIS3 strategy was, and continues to be, very important. We want to strengthen our space in this forum, but in a certain way, this also set our course. It urged us to place priority attention on the business and economic aspects of the issue. In other words, in recent years, we focused on the CCIs (industries) and not as much on the CCS (sector). This was fundamentally so because our structuring opportunity was very marked by being in RIS3, by having our place in that space, using the economic springboards provided to us, as well as tested methodology that was endorsed by the representatives with whom we needed to interact. We must continue on this path, all while

also developing aspects that are not so directly economic and business-related. We must go further in depth with a broader vision of the cultural and creative sector, drawing new private and public agents to these dynamics.

Along with joining RIS3 and organising the pilot groups, there was another important opportunity: the CREADIS3 project. This was the first time we participated in a European project in this sphere, and also the first time we were leading the project. In a certain way, CREADIS3 was an affirmation that the framework under which we needed to work was Europe. We have always worked by considering what was happening in other European countries and regions, seeking relationships that could help us as the Government, but also companies. In principle, CREADIS3 is a network consisting of public policy-makers, but it also includes stakeholders who can take advantage of these relationships to develop their own spheres of business.

As such, this first term made progress in knowledge policies, leaving behind a balance sheet with a series of important studies to map the sector, the resources available in training and the public resources at all Basque institutions, at departments of culture and economic development, for this entire sector. This made progress in shaping and strengthening the sector, through pilot groups, where we were able to recognise ourselves, all of us, at one single table, never-before-done until then, and finally, from the very beginning, to make use of a Europeanist vision through the European project we were leading.

At the end of the term (2016), a cultural and creative sector contest-grant pilot was started up for innovative projects. We were aware that the contest was held under poor conditions, meaning it came out late, at the end of the term, with not much time to present projects, with sectorial organisation that was still weak and an unfinished definition as to what we were seeking when speaking of innovation in our sector. But it was important to begin this journey, to set a course, to launch measures to foment and support innovation targeting companies. It was also a way to draw companies, to communicate that they were the targets of this work to organise the sector, to link CCI development to the idea of innovation. In short, to set the course we wanted to travel in the next term.

GOING DEEPER IN KNOWLEDGE and DESIGNING THE FUTURE OF CCIs (2017-2019)

What does this approximation to the industrial field, which is kicking off in this initial phase, mean, and which new steps in this regard are being taken in the second term?

At the beginning of the next term, with Bingen Zupiria as Minister, we considered the need to take the qualitative leap in the working team, to more coherently integrate CCI policies into the Department's general dynamic. During the previous term, having a free consultant to help us to develop the CCI sphere proved essential. This consultant's work allowed us to strengthen important aspects in our policy, but in a certain way, this work was conducted in parallel with the Culture Promotion Direction's operations. We needed the CCI sector roll-out to better overlap within the Direction and the Department, and for opening up to the creative sector and its industrial aspects to help provide a broader, more complex and richer vision of cultural policy and its possibilities for development. For this reason, we decided to make the work team more complex, adding professionals from the Department, with vast experience in cultural policies, and an external consultant to provide a vision more focused on business management. A new team was formed, headed by Josean Urdangarín, a senior technician in public management of culture, and Sabin Goitia, who came from the business world with several years of experience at BEAZ (the public company of the Provincial Council of Biscay to support entrepreneurship, innovation and internationalisation of companies, as pioneer organisation in the Basque Country in addressing CCIs), as a free consultant. Along with Faust Kanalaetxebarria and Itziar Redondo, technical staff also from the Department, partially devoted to this matter, they formed a team that allowed for faster and more solid evolution during this second term of policies to support CCIs, strengthening CCI policies as a comprehensive issue, not just in the Department of Culture, but in the Government as a whole.

The new team was faced with several challenges: making progress in organising the sector, having more impact on companies and agents, offering them programmes to support innovation, strengthening our participation in RIS3, always from an innovation perspective, completing the European project CREADIS3 and, very especially, strengthening cooperation with the Department of Economic Development in developing policies to support cultural and creative industries.

During this second term, work was begun on the programme that would be called KSI Berritzaile ("Innovative CCI"). Since its conception, this programme was designed to be time-limited, as preparation to tackle an open contest, once we had better defined the concept of innovation in this sector and had a more structured relationship with companies and a closer cooperative context with the Basque Network of Science, Technology and Innovation (RVCTi), a key element in the country's innovation policies.

In RIS3 dynamics, collaboration with technological centres and the University (a matter we will discuss later) was key. However, there has always been a huge distance between technological centres and our sector. KSI Berritzaile seeks to have an impact on all these aspects: draw closer to RVCTi, use its knowledge and experience, and foment an approximation between companies from our sector and technological centres. Our interest in its experience was three-fold: identifying elements of innovation in business projects, the transfer of existing technologies, and developing and applying new technological tools.

KSI Berritzaile means funding the service that technological centres offer companies, identifying and selecting innovation projects and establishing the time and devotion required by each project to transfer or develop technology. KSI Berritzaile operates with bonds that fund the time and devotion of technological centres to innovative projects in the CCI sector. Thus, we sought to better identify technological innovation projects, to better serve them and to facilitate the transfer of existing technologies, adapting them to the needs of companies and laying the foundation for shared knowledge and recognition between companies from the creative sector and technological centres.

The centres with whom we were collaborating in fomenting and supporting technological innovation are Tecnalia and Vicomtech. Over these four years, during this term of joint work, their implication and collaboration in supporting CCIs proved fundamental. With them, we developed the first line in the KSI Berritzaile programme: technological innovation. But the programme includes two lines more.

The second line is focused on innovation in the organisational model and business structure. Like everywhere else in the world, the CCI structure in the Basque Country consists of over 70% freelancers and micro-SMEs, very small companies with a weak company structure. The business fabric, made of very small organisations and companies, is most likely not a symptom of weakness, but rather something intrinsic to the

creative sector. However, organisational weakness, a lack of management skills, the lack of a clear business vision, with difficulties in tackling the challenges they face on the market, is an aspect we felt important to work on. To this end, we worked with Euskalit, a public centre devoted to facilitating and driving improvement and innovation in advanced management. Just like the technological line, Euskalit offers a set of time and tools to companies and organisations who seek to improve their organisational model and business management. This line was in high demand and has been sustained throughout the time it has been operating.

The third line aims to improve financial training for companies. We know that companies, the small companies in this sector, have a difficult time accessing funding tools. There are several and very different reasons for this. Financial weakness in many of the sector's companies, the extreme variability in revenue and the lack of business "culture" in cultural industries make it difficult for them to access financial credit. However, at the same time, the conditions that are normally required to access credit are based on material guarantees, and it is often not easy to convince credit institutions of the values of a company or project's assets, which are often intangible. As such, it is necessary to work on that dialogue, to find a shared language, to make progress so that credit institutions and sectorial companies find a space for dialogue. This is a matter of translation, of finding "bilingual" people able to speak the language of creative projects and financial credit processes. In Elkargi's case (the most important credit institution in the Basque Country), we asked them to appoint someone specialised in the sector who could understand its nature and its needs.

I believe that this matter of "translation", or bilingualism, if you wish, is crucial. This is necessary to establish a dialogue with credit institutions, but also with technological centres or with innovation and economic development agencies. As such, in the three areas of KSI Berritzaile, we always find the matter of translation, of how to speak that double language, and that was precisely one of the programme's objectives. Now, we are at a moment for assessment, to undertake the third term of CCI policies and to decide how to make the programme evolve.

In addition to KSI Berritzaile's three lines, we started up a fourth line, KSIlatea, to support internationalisation. In Basque, Atea means door. In a certain way, the KSIlatea project is posed as a double door: on the one hand, it drives internationalisation of companies in the sector based on singularity, and on the other hand, it provides access to

grants for internationalisation that already exist in Economic Development policies, fundamentally through the Basque Internationalisation Agency. In its methodology, the Agency requires that companies have an internationalisation plan as a previous step. KSIlatea helps companies to draw up their own plan, so that they can access existing support lines for all kinds of companies. As such, this is a door to internationalisation, and also a door to already existing support lines.

To manage this programme, we worked with Tabakalera (International Centre of Contemporary Culture). Given its ongoing contact with cultural agents and companies, its desire to open up to the creative sector and its international dynamic, it seemed an ideal collaborator to us. We also thought that it was important to collaborate with a cultural centre in the future development of CCI policies, complementing the collaborations we already had with technological centres. I believe that, in addition to the network of public centres devoted to technological and organisational innovation, we must also add the centres that develop innovation in culture and support contemporary creation in all its facets, like the Tabakalera. In this regard, KSIlatea has also acted as an open door to new collaborations and participation.

To develop these innovation and internationalisation programmes, we had economic resources from *Lehendakaritza* (Presidency of the Basque Government) through the Basque Science, Technology and Innovation Plan. The result is the ever-present zeal to work with technological centres and institutions devoted to fomenting innovation, a vision focused on companies and their needs, and a zeal to connect the CCI sector, which is still being conformed, with the country's public tools. In short, we wanted the CCI sector to be treated as another economic sector, and also a sector with high growth capacity, with a heavy impact on innovation and the creative economy, and to be a sector considered as strategic in Europe.

Once again, here we see the need for collaboration with the Department of Economic Development. This is a key issue, and at the same time, it is complicated. For us, this was an essential objective since the very beginning. We had already discussed it. The need for a two-fold vision and co-responsibility between the Departments of Culture and of Economic Development is a very clear instruction given by Europe, encouraging us to work together, in coordination with a complementary vision. This is not about deciding which of the departments (Innovation, Economic Development,

Culture) must take care of CCIs, but rather finding a new working "culture" so we can address the matter with this two-fold vision. We knew it was complicated, and we have seen that this is an open matter all around Europe, without clear solutions: In most European regions, just like in the provincial regions in the Basque Country, policies to develop the creative sector fall under Economic Development or Industry policies. We began these processes with the Department of Culture, but always with the will to find a way to organise collaboration with the economic and industrial aspect. Much progress has been made in this commitment under this legislative term. The Minister of Economic Development, Arantza Tapia, and the Minister of Culture, Bingen Zupiria, agreed to collaborate in developing this sector. This put us into a direct relationship with SPRI (the body from the Department of Economic Development and Infrastructure of the Basque Government to drive Basque industry). The collaboration with SPRI and Innobasque (Basque Innovation Agency) is proving to be very important to move forward from the current phase, whose focus is KSI Berritzaile, to a new phase, with sights set on *BDCC* (*Basque District of Culture and Creativity*).

What did the CREADIS3 project entail in terms of internationalisation, and which actions were carried out in this regard?

The European project CREADIS3 has proven to be very productive. Leading this group, with European regions like Wallonia, Central Finland, Emilia-Romagna, Slovakia and Western Greece (Department of Culture and Linguistic Policy of the Basque Government [EUS], Public Service of Wallonia [BE], Region of Western Greece [EL], Regional Council of Central Finland [FI], Emilia-Romagna Region [IT], Ministry of Culture of the Slovak Republic [SK]) was truly enriching for us, and reaffirmed our conviction that we must develop our policies under a European framework. We are now in the final phase of the project (it ends in 2021) and the balance is frankly good.

CREADIS3 is an ambitious project, fully encompassing the objectives we have for our own country. The idea was to foment administrative collaboration at different levels to facilitate synergies between different authorities in charge of CCIs; to structure better cultural and economic policies to achieve innovation policies that were effective for CCIs; to support the international regional appeal in such a way so as to draw investment in each region's creative potential

and retain entrepreneurs; to improve collaboration within the local ecosystem of centres, laboratories, clusters, incubators, universities, scientific parks, etc.; to improve knowledge between cultural and technological sectors, and to support SME internationalisation by creating capacities and new business models within the field of research and innovation.

CREADIS3 has helped us move forward on these issues (I insist: key issues for us), but it has obviously not resolved them. They will continue to be crucial for many years, but CREADIS3 has reaffirmed our conviction that we must work under an international framework and seek out alliances with other cities and regions, especially in Europe. A European project such as this one, where companies and public centres also join as stakeholders, helps to identify references for political leaders, possible collaborators for public centres and possible markets for companies. And not only within the CREADIS3 working group, where there are obviously great differences as far as the degree of policy development is concerned. For example, for us it was very important to discover Flanders DC's policies (Creative District of Flanders), a European region that was not part of our network. This model is very closely aligned with company needs, offering them services and training and innovation-driving programmes to which we will return later.

I think it is important to note that CREADIS3 also helped us make progress in structuring the sector. The programme's dynamic brought different sectors and institutions together in the work groups, always with the support of technological and innovation centres. Study visits, contact between different European regions and the identification of good practises created an important bond between agents from different sub-sectors. It also reaffirmed the need to establish a stable framework for collaboration between the areas of culture and industry. We have verified that this relationship that the EU Green Paper called for is problematic or non-existent almost everywhere. With most regions with whom we have collaborated, CCI policies are developed by Departments of Industry or Departments of Economic Development, without overlapping cultural policies. I think the effort that we are making in the Basque Country in this regard might be a European example of good practises. I hope we achieve it.

The CREADIS3 European project will end in 2021, but we thought it was very important to keep participating in international networks. The opportunity arose for us to join a global network that puts regions from all around the world in contact, where creativity and innovation are part of the priority agenda: the international network *Districts of Creativity* (DC)

Network, created in 2004. We were accepted this same year, so we are collaborating as a network with regions like Tampere, Baden-Württemberg, Catalonia, Central-Denmark, Flanders, Karnataka, North-Brabant, Oklahoma, Rio de Janeiro, Scotland and Yangtze Delta River Region.

Two activities organised by this network are the most remarkable ones: Reverse Missions, organised by one of the member countries and welcoming the rest of the regions, and the *Creativity World Forum*. In 2022, we hope to be the hosts for this reverse visit, and that in 2023 or 2024, we can host the *Creativity World Forum*. Investment to help companies move forward in internationalisation is something that should come from public policy. For political decision-makers, it is also important to participate and collaborate in global networks.

What challenges are there in organising the CCI sector and for intra-sectorial dialogue, and beyond?

Indeed, organising the sector remains an open challenge. One of the sub-sectors has a very different internal structure (associations of all kinds, some clusters, professional associations, etc.) and many of them (visual arts, preservation and restoration of heritage, etc.) lack representative structures. Traditionally, there has been a great trend toward disaggregation in each one of the sub-sectors, and there were no organised forums where different sub-sectors could meet and interact. Those that have been taking shape arose from public policies that were precisely designed to profile and boost the sector. It would be very important to have a cluster of CCIs, or something similar, to group agents and companies from the sector (in all its sub-sectors), but this is still a long way off.

I believe that the programmes we have been driving (KSI Berritzaile, KSIlatea, studio visits at CREADIS3, etc.) were important and fruitful opportunities for meetings between agents and companies from the different sub-sectors. I also believe that the complexity of those tables, beginning with the pilot tables, are a good incentive to drive the restructuring of the cultural sector, which at this time is highly atomised and very uncoordinated.

We still have a long road to travel in raising awareness of belonging to one same sector, in strengthening the sector's identity and discovering possibilities of sharing needs, strategies and resources. I believe that developing public policies will help this desire for coming together and

collaboration, to organise the sector as such and its internal structure. However, it is fundamental that sectorial companies and agents with the ability to act as drivers organise and take prominence as fast as possible. Not only to develop internal policies in the CCI sector, but also to become involved in relationships with other economic sectors.

Cross-fertilisation, meaning fruitful interaction between activity sectors that were removed from one another up until now, is an important aspect in innovation policies. We must make palpable the contribution it can make to the cultural and creative sector in innovating services or products in areas like health, food, the environment or even the industry 4.0. And so, for this too, we must abandon the niche, the silo holding each sub-sector. We need to meet one another, identify ourselves and speak shared languages. The Government has begun working on this aspect, shining the spotlight mainly on the relation, or interrelation, with another two fields of opportunity in RIS3: food and health.

However, putting together companies, agencies and technological centres from different sectors is not enough. It is also fundamental to work with the University. And we are still too far removed. We must urgently establish channels for relationships, mutual knowledge and mutual collaboration. We need a greater involvement and connection with the University. In this regard, we are building a *Knowledge Pole* around CCIs in collaboration with the Vice Ministry of Universities and Euskampus. The first step is to map the university itself, seeking out the cross-cutting nature and diversity of agents. We clearly cannot limit ourselves to the sphere of artistic creation, even though this is fundamental, as occurred with an initial previous attempt years ago. This is because the diversity of knowledge at play in processes related to creation and creativity, both in cultural and in business processes, has been proven. As such, the participation of very diverse faculties and chairs is required. The first step is to identify and involve them. Then, we must define a series of strategic projects that help us jointly tackle the challenge of developing the cultural and creative sector, working shoulder-to-shoulder with CCI agents and companies.

With this same aim of organising the sector, we are building our candidacy to participate as the Basque Country in a *Knowledge & Innovation Community (KIC)*, a programme promoted by the European Institute of Innovation & Technology (EIT), a body dependent upon the European Commission that was created in 2008. Its objective is to strengthen and foment excellence in higher learning, research

and innovation within the EU. Knowledge & Innovation Communities are the EIT's main tool to reach its objectives. These are defined as creative and highly integrated associations that encompass education, technology, research and business initiative; they are designed to introduce innovations and innovation models, and to inspire others to emulate them.

Until now, KICs had been formed around topics such as health, food, urban mobility, climate, etc. Now, for the first time, a contest has been called to organise a KIC in the CCI sector. And we want to participate.

At minimum, the KICs must involve three independent organisations, from at least three EU member states or regions. One of the institutions must be of higher learning, and the other must be a private company. The objective is to collaborate in developing innovative products and services, in creating new companies and in training a new generation of entrepreneurs.

As we can see, the association with research, training and knowledge brought by the University is an important working line in our approach to the immediate future.

BASQUE CULTURAL AND CREATIVE DISTRICT (2020 onward)

Which milestones do you foresee in the near future, and what does the future look like for Basque CCIs under the framework of the BDCC?

The idea for a district comes from our initial intuition, as already mentioned: we know that the ideal framework to develop companies and creative contexts are cities. There are three capitals (Bilbao, San Sebastian and Vitoria-Gasteiz), which have a close relationship with the Provincial Councils in their regions. These are strong institutions, insofar as they have the ability to raise funds with their own tax treasuries. The Basque Government's task consists of designing and implementing policies whose scope covers the autonomous community, and to especially promote the professional sector of cultural production and coordinate and unify municipal and regional agents' policies. As such, we are a small country, but with a complex political organisation. In this case, we believe this complexity is a positive factor, and that the district idea could be ideal to define a space for organisation where the three administrative levels interact, with their culture

and economic development areas. The district concept therefore encompasses the private sector (professionals, companies, sectorial organisations); cultural, technological and organisational innovation centres; universities, and institutional action at all three levels (Government, Provincial Councils and Town Halls) and the three areas directly concerned: cultures, economic development and innovation.

The concept of "district" and "creative district" appears in many European cities and regions, but for us, the most direct reference was, as previously mentioned, the Flanders DC model.

At the same time, building the district model also meant building a collaborative relationship between the Department of Culture, the Department of Economic Development and the Basque Innovation Agency (Innobasque). The Agency is responsible for defining the services and programmes the district must offer. The Department of Culture, based on its support line for CCIs, continues with the evolution and assessment of the KSI Berritzaile and KSlatea programmes, while boosting relationships with companies. The Department of Economic Development, at SPRI, participates by temporarily hiring an individual to identify the paths (services and programmes) that SPRI offers, connecting them with those offered by the BDCC. This way, the companies accessing the services or programmes from the BDCC platform may, if they so choose, continue supporting general programmes to support the business fabric.

At this point, the idea of a temporary process also emerges, meaning, a trial period. The SPRI does not conduct sectorial programmes; it offers services to all companies in a cross-cutting way, taking charge of the production fabric without defining it by sectors. As such, we have a fixed period of time to show possible routes to companies in our sector between SPRI grants and to identify the obstacles our companies find, stemming from limitations to certain CNAEs, their size, etc., and to resolve them to the extent possible. In other words, the SPRI is not offering us a specific window, but rather a specific time, to iron out difficulties that companies face today, improving their journeys and also their reception points. I am convinced that acting on demand activation through BDCC and adapting the supply through SPRI will be good for the CCI sector, as well as for SMEs and micro-SMEs from other sectors.

This is the most important challenge in the years to come: starting up the Culture and Creativity District. This process must undergo constant evaluation, with our sights always

set on companies in the sector and their welcome of the programmes and services the BDCC offers.

There are two aspects I would like to highlight in what we are doing right now. On the one hand, this concerns intellectual property; on the other hand, the very concept of innovation itself. Intellectual property appears in the very definition of CCIs since their initial configuration: these are creative companies whose value is linked to creative talent and intellectual property. However, it is unclear that our companies know how to manage and duly value intellectual property. As such, we believe it is necessary to have a better understanding of the situation and make companies aware of the possibilities offered them by identifying, registering and exploiting intellectual property. In this line, a strategy will be defined to guide management of intellectual property for companies, revolving around the BDCC.

The intellectual property issue also brings us to the topic of creative talent. How to care for and nurture this talent, and how to care for processes that are normally more associated with craftsmanship as a concept rather than with industrial production? How, and from whence, with which public tools, we can support people and organisations who work professionally based on their talent? In this regard, I believe that cultural and artistic innovation centres can play a key role. They are close to the creation and the creators. They boost the creative ecosystem and provide it with resources for production and visibility. If their vision is expanded to include creative sectors, without limiting themselves to artistic creation, if linked not only to the creative individual (or collective) but also to the business fabric, they could play an essential role in developing the sector. I am thinking of the new generation of cultural centres, Tabakalera and Azkuna Zentroa, in our country. They can complement and enrich the existing network of innovation centres, providing knowledge, supporting innovation and specific tools to develop talent. Again, this leads us to the matter of innovation. What innovation are we talking about?

Is innovation only technological? It clearly is not, but we are finding it difficult to precisely define what it is: how to identify and how to assess non-technological innovation, and especially, social and cultural innovation? We know that a strong cultural and creative sector is a determining factor for a country investing in innovation. On the one hand, because it has a great deal to contribute to all activity sectors through creative talent. And this is what we need to make clear, what we need to make palpable, through specific projects that give way to specific results. This is the reason for cross-

Click and navigate through the different phases


fertilisation and for the interest in creating relationships between different sectors from the Basque Innovation Plan. On the other hand, because it also brings innovation to the activity itself. Oftentimes, this innovation is not appropriately viewed under parameters in force, by those responsible for leading innovation policies. In other words, although in a bit more schematic way: in the cultural field (artistic, literary, musical, cinematographic creation, etc.), we tend to think that everything we do is innovation, insofar as the cultural industry works with prototypes, with creations, with new and innovative proposals, and outside the cultural field, we think we are not innovating, because creative activity does not fall under the standards they know how to measure.

How can we show the cultural innovation and contribution from the creative sector, and how do we define what innovation in culture is, and how to distinguish between innovation and something new? I believe that the contribution of culture, a contribution from a strong creative sector, toward investment in the country's innovation, is undeniable. However, we must also precisely define in which cases we might speak of innovation in culture and how to measure and parameterise it. This is why we started up a process to reflect on this matter, through the Basque Culture Observatory, to reach a valid and validatable definition of innovation within the cultural sphere. This process is also planned in European terms, organising an international forum, to contrast it with specialists on the matter.

We still need to further organise all this and place creative talent at the centre of this operation, so that this talent is strengthened, developed and made visible. We need to broaden the scope of work, insisting on CCIs and companies, along with the CCS, in the cultural and creative sector. We must also develop non-business and non-economic aspects of the issue, with a special emphasis on social and cultural innovation. Not everything we must develop is related to direct economic activity, not everything will have immediate results on production and the market, but in all aspects of the matter, we must work toward talent, translation, bilingualism and bridge-building.






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Timeline

Timeline of development of CCIs in the Basque Country (2012-2023)

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Phase 0





Phase 0

Origins (prior to 2012)

In 2010, the *Green Paper: Unlocking the potential of cultural and creative industries*, by the European Commission (EC), argued for the exploitation of the "great potential (...) of cultural and creative industries (CCIs) to create growth and employment" (European Commission, 2010, p. 2), thus identifying the CCI sector as a key driving force that would become one of the decade's strategic objectives: smart, sustainable and inclusive growth. Moreover, the aforementioned Green Paper pays special attention to the local and regional dimension, devoting a specific section to this: "Local and regional development as a starting point to achieve global success".

One year later, in 2011, the European Parliament (EP), as a representative assembly, echoed the EC's stance through the resolution of 12 May 2011, "Unlocking the potential of cultural and creative industries." Specifically, this EP Resolution points out regional cultures and languages as an "irreplaceable raw material for cultural and creative industries" (European Parliament, 2011, section I). Moreover, it addresses issues that will guide sectorial development in the following years, such as working conditions and entrepreneurship – an issue wherein the need to create a solid business spirit and creative culture at a local, regional, national and European scale stands out (ibidem, section 25) – or CCI funding – encouraging Member States and local and regional collectives to create conditions favourable to CCIs and bodies capable of funding them to meet –. Within this context, the Basque Government is continuing with the work begun by different European bodies. In collaboration with other pioneer regions in the EU, it is beginning to lay the foundation to provide the institutional support to effectively unlock the potential of CCIs which, particularly in the Basque Country, promises to be relevant.

The fact that culture and creativity are a part of the Basque identity (in the imaginary of the region's own citizens, but also beyond its borders) does not seem to be up for debate. Cultural infrastructures that are known and recognised around the world, a linguistic policy that acts as a role model both nationally and internationally, a huge wealth in tangible and intangible heritage, an industrial and economic reconversion process where CCIs play a fundamental role – these, and

other issues, frequently shine the spotlight on the Basque Country when seeking to identify good practises in designing policies, planning and cultural management in Europe.

However, beyond all this, the following issues were raised at the time: what was the state of play in the Basque cultural and creative sector in the early 2010s? Of which sub-sectors was it composed? What were the specificities of each sub-sector, and what were their shared points and needs? What was the CCIs' contribution to the Basque economy in general, and what role did they play in areas such as innovation? Which initiatives and instruments did the Basque Government implement? How could Basque institutions contribute to shaping and encouraging greater development of the sector?

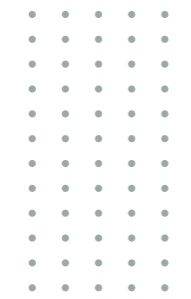
Milestones

2010

- *Green Paper: Unlocking the potential of cultural and creative industries*, European Commission (EC)

2011

- European Parliament resolution "Unlocking the potential of cultural and creative industries"



Txapela: from heritage to a fashionable product

Boinas (berets) are a "fashionable accessory" all around the world. In the Basque Country, in addition to a fashionable product, the boina is an element of Basque cultural heritage. Known in the Basque language as txapela, this is a traditional garment and symbol of the Basque identity, used as a cap.



CCI_The Encartada



© The Encartada Museoa



© Boinas Elosegui S.A.

The Encartada Museoa

La Encartada S.A. beret factory, located in the town of Balmaseda, was founded in 1892. It was operational for exactly 100 years, all of which were dedicated to the manufacture of textile articles with wool as raw material and the boina or beret as its main article. In 2007, La Encartada S.A. reopened as a museum, becoming symbol of the cultural heritage and industrial jewel of Bizkaia.

Since its transformation, this museum, managed by the Provincial Council of Bizkaia, has carried out countless activities. Some of them were new and related to CCIs, such as the "Contemporary Fashion and Tradition Gatherings". This is an event that combines the essence of tradition with avant-garde trends in art, fashion and design. The museum direction has had Alberto Sinpatron as curator of the meeting, who explains that "La Encartada Moda was born five years ago when I visited this old txapela factory and I was bewitched! (Alberto Etxebarrieta in Velasco, 2019), and describes the place as "A unique opportunity to hold a fashion meeting" (ibidem).

Boinas Elosegui

Initially known as La Casualidad, Boinas Elosegui S.A. was founded in 1858. Since then, it has been an international point of reference for this accessory, and others.

Throughout its history, Boinas Elosegui S.A. has collaborated with several different fashion houses, such as Loreak Mendian and Isabel Zapardiez. In the latter case, Boinas Elosegui S.A. participated in *Couture Fashion Week*, held in New York, to make hats based on the traditional *boina*.

In its designs, Boinas Elosegui S.A. combines portrayal of the identity that this traditional Basque garment represents with a personal touch for each one of its products, thus fulfilling its slogan: "The *boina*, a cultural, contractual, fashionable, revolutionary and contemporary icon, that aims to bring out the personality we all carry inside". On the other hand, its professional experience maintains the quality of its designs as far as craftsman production is concerned.



© Boinas Elosegui S.A.



© The Encartada Museoa

Guggenheim Effect



Arquitectura
Guggenheim 2016



Miniclip_Arquitectura



* Available in Spanish only

Today, 20 years after its inauguration, the Guggenheim Museum of Bilbao is still one of the main reasons for attracting visitors to the city, symbolising Bilbao's transformation.

Originally, Bilbao was an industrial city where the metallurgy industry and naval industry were key to local growth (Del Olmo, 2017). In the early nineties, the economic situation in the area was very unstable. Within this context, institutions conceived an ambitious revitalisation plan that encompassed several spheres (economy, transport, town planning, social regeneration, etc.). Part of this revitalisation plan was to build a museum of contemporary art, which ended up being designed by Frank O. Gehry. The huge impact of the Museum, now known world-wide, brought with it the "Bilbao effect" or the "Guggenheim effect", an allusion to the drastic change experienced by the city, which went from an industrial economy to tertiarization, and where cultural services arose as one of the factors driving the economy.

Several studies have been conducted on the impact that the Museum had (and continues to have) in Bilbao and its surroundings, to such an extent that it has been used as a model to attempt to replicate that effect and drive development and change in other cities, based on a cultural infrastructure. However, most cases were unsuccessful, partially because they sought to replicate the same actions as in Bilbao, without considering the circumstances in the cities where they intended to implement this system.

In Bilbao, several factors contributed to the success of this model, including "the good moment in worldwide economy in 1997 and the media impact of the Gehry building" (Esteban, 2017). Today, 20 years after its inauguration, the Museum is still one of the main reasons for attracting visitors to the city, symbolising Bilbao's transformation.



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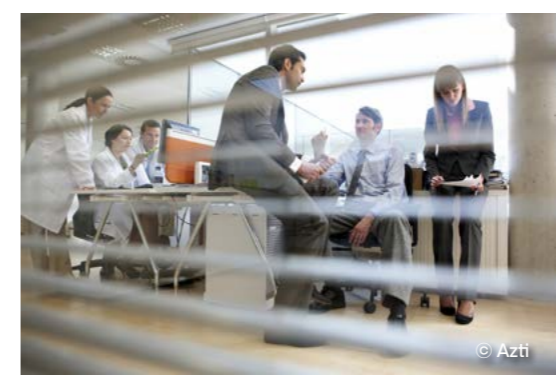
Phase 1

2012 - 2015

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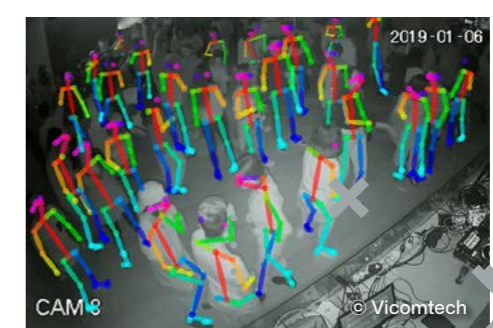
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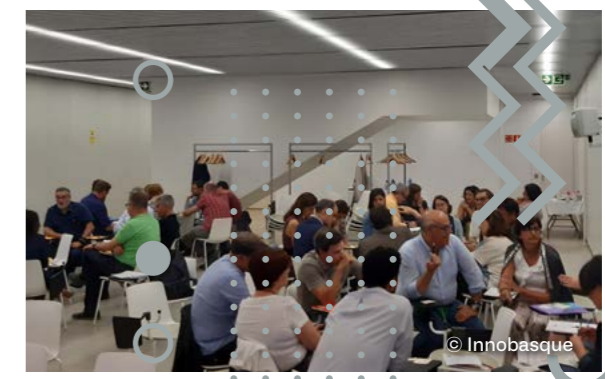
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Phase 1

Exploring CCIs in the Basque Country 2012-2015

The 2010s began with an in-depth analysis of the sector to define its delimitation which would in turn provide for the development of informed policies and the implementation of instruments in line with the reality of Basque CCIs. In the following years, this analysis would include a double qualitative and quantitative approach.

1.1 Conceptual delimitation of the CCIs: a qualitative approach

In 2013, the report "Cultural and Creative Industries. Theoretical debate from the European perspective" was published, drawn up by the Basque Culture Observatory (OVC, in its Spanish acronym). This was the first qualitative approach to make progress in understanding different ways to conceptualise and delimit the cultural and creative sector in different contexts, and to lay the foundation to define the sector within the Basque context.

The complexity and multiple definitions of the terms "culture" and "creativity" entail a myriad of ways to understand the cultural and creative sector. On the one hand, limiting "cultural industries" implies, in a certain way, adherence to a certain notion of culture, which may range from a more classic-humanist vision (distinguishing between high and low culture) and a broader vision, more anthropological in nature, or anything within this scope, or even beyond it. On the other hand, the definition of "creative industries" is not exempt from complexity either, since creativity is a concept far from univocal. Moreover, when both are grouped under the same single term, Cultural and Creative Industries (CCIs), new questions and nuances are introduced: are CCIs merely an aggregation of cultural industries and creative industries? Where should the spotlight be, on culture or on creativity? And what implications does this have to determine which sectors are included and which are excluded?



When the Basque Culture Observatory started up, the foundation was a classic concept of traditional cultural sectors, collected under a statistical framework in 2007. Around 2014, this statistical framework was revisited. At this point, debates held in relation to statistical work in Europe began to be incorporated".

Aintzane Larrabeiti
Partner-advisor for the company ICC Consultors



have a cultural dimension, even if their production is mainly functional. This includes architecture and design, which integrate creative elements into broader processes, as well as sub-sectors such as graphic design, fashion design and advertising" (European Commission, 2010, p. 6).



Some of us have been critical of the attempt to replace the cultural concept with a creative concept. We must speak of "cultural and creative industries," but culture could not be replaced by creativity, given that creativity was only at the expense of the market, the demands that companies may have, and their economic notion is central. In culture, on the other hand, we are dealing with the origins of culture; in other words, cultural development, the definition of cultural matrices from each period, trends, knowledge and collective symbology. For this reason, culture has always at times been more subsidised and supported, because we are dealing with collective symbolic values as assets of merit. In the Basque Country, there was an added factor: as this is a minority culture, specialisation and devotion to culture must exceed the average of any other majority culture that self-reproduces with ease".

Ramón Zallo
Professor Emeritus, University of the Basque Country



Terms such as added value, creativity and innovation are keywords for any approach to CCIs, but different institutions and international bodies have opted for different strategic definitions of the CCIs.

For example, the *Department for Digital, Culture, Media and Sport* (DCMS) in the United Kingdom, an international role model thanks to its conceptualisation and formulation of pioneering CCI policy, defines creative industries as "Those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property" (DCMS, 2001, p. 5).

For the UN Conference on Trade and Development (UNCTAD), "'Creative industries' can be defined as the cycles of creation, production and distribution of goods and services that use intellectual capital as their primary input. They comprise a set of knowledge-based activities that produce tangible goods and intangible intellectual or artistic services with creative content, economic value and market objectives" (UNCTAD, 2008, p. iv. and 4).

As a last source of reference, the European Union has broadened the focus to also include cultural industries and define CCIs as "those that use culture as material and

Milestones

2012

2013

- Cultural and creative industries: Notes for a strategy to support CCIs in the Autonomous Community of the Basque Country

2014

- Science, Technology and Innovation Plan 2014-2020: identification of the CCIs as a place for opportunity in RIS3 Basque Country
- CCIs in the Basque Country - Quantitative Analysis 2007-2012

2015

In the Basque Country, the Basque Government and projects in this field carried out by its different departments and bodies have not only not shirked this complexity; rather, they have actively participated in these debates, tracking the latest international conceptual and strategic developments and contributing to the discussion with their own reflections drawn from the observation of the specificities of the Basque cultural and creative sector. What are these specificities? What conceptualisation and operative definition best adapts to the reality of CCIs in the Basque Country? The goal of subsequent works will be to explore the Basque cultural and creative sector in greater depths to answer these questions.

Figure 1.
Approaches and definitions of cultural and/or creative industries by international bodies.

DCMS Creative Industries	UNCTAD Creative Industries	European Union CCIs
Creativity, ability and individual talent	Creation, production and distribution cycles	Culture as material, and CCIs have a cultural dimension
Potential of generating wealth and employment	Creativity and Intellectual capital	Production is mainly functional
Generation and exploitation of intellectual property	Based-on-knowledge activities	CCIs can integrate creative elements in broader processes
	Goods and services	

Source: Own elaboration.



BIO

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Prices in the cultural market do not usually give information about the quality of the content. It usually refers to the standard cost of material support. The economic potential in a society in which there is a lot of uncertainty is that art and shared knowledge (culture) are perceived as a safe value. But if the usual mechanism for informing the consumer and adjusting production doesn't work, we have a problem. Fortunately, the economy is advancing as a science and we are working on tools that have given very good results in other areas”.

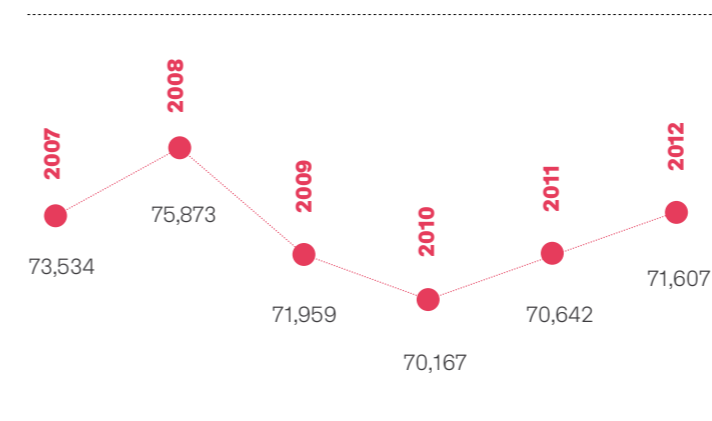
Fredi Paia
PDI, University of the Basque Country; *bertsolari*

1.2.
Quantitative approach: the CCIs in numbers

Along with the qualitative approach, the Basque Government is also promoting a quantitative approach to understand why a strong and dynamic cultural and creative sector is important. One initial example of these efforts to understand the magnitude of the CCIs, their dynamics and features, as well as their contribution to other sectors and to the Basque economy as a whole, is the report "Cultural and creative industries in the Basque Country. Present and future", prepared by Sinnergjak Social Innovation (University of the Basque Country/EHU), commissioned by the Department of Education, Linguistic Policy and Culture of the Basque Government, which was published in 2014.

This report acknowledges the difficulty of any quantitative approach to a sector whose delimitation does not enjoy clear international consensus. Within this context of lack of definition, certain operative decisions must be made. Thus, the Sinnergjak Social Innovation report (2014) drew up its own database, made from records provided by the three Provincial Tax Treasuries on taxpayers who conduct activities that match the UNCTAD's¹ classification. Figure 2, for example, shows a slight decrease in jobs created by the cultural and creative sector during the first years of the economic crisis, with an uptick beginning in 2010. It should be noted that, while total employment reduction between 2007 and 2012 was 8%, in the CCIs, it was only 3% (ibidem), which demonstrates the sector's resilience to crisis situations.

Figure 2.
Evolution of total employment created at CCI companies (2007-2012, absolute numbers).

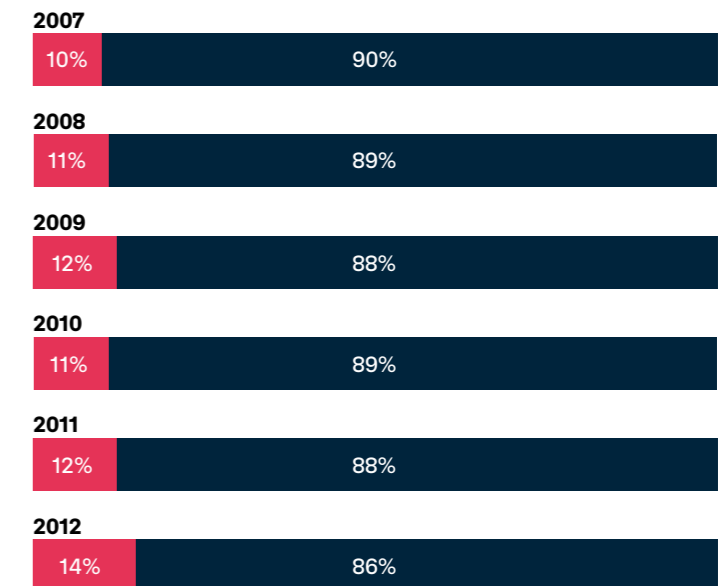


Source: Sinnergjak Social Innovation (2014), based on data from Provincial Tax Treasuries.

¹ For more information on this classification, please see UNCTAD (2008).

Moreover, the aforementioned period also bore witness to a sustained increase in self-employment as opposed to salaried employment in the sector, as shown in figure 3.

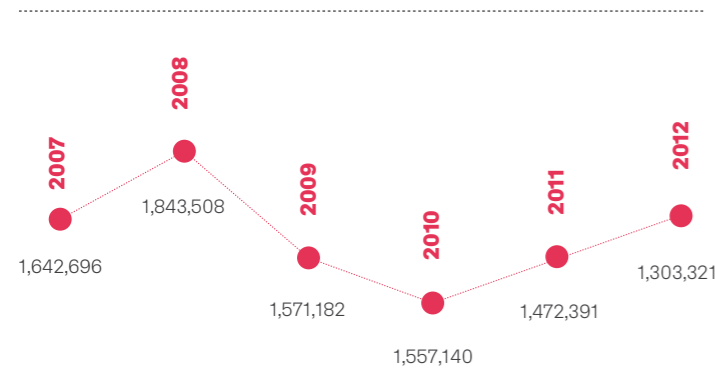
Figure 3.
Evolution of total employment created at CCI companies according to job types (2007-2012, %)



Source: Sinnergjak Social Innovation (2014), based on data from Provincial Tax Treasuries

Regarding the CCI sector's contribution to Gross Added Value (GAV), it should be noted that, despite the decrease caused by the economic crisis, the cultural and creative sector makes a significant contribution to the GAV of the Basque Country as a whole (figure 4). In percentages, this contribution remained relatively stable, at approximately 2% (2.7% in 2007 and 2.2% in 2012).

Figure 4.
Evolution of Gross Added Value (GAV) generated in the CCI sector (2007-2012, absolute numbers, in thousands of euros)



Source: Sinnergjak Social Innovation (2014), based on data from Provincial Tax Treasuries.

These, and other data confirm what other studies had already announced in other countries and in Europe, and what new analyses would reaffirm in following years, both for the Basque Country's context and the entire country and internationally: promoting the development of CCIs has positive effects for the economy as a whole, but also in aspects such as innovation and regional cohesion, as later analyses would demonstrate.

1.3.
RIS3: CCIs as land of opportunity

Another important milestone during this still-early phase of development in the cultural and creative sector was the identification, in 2014, of CCIs as a niche of opportunity under the framework of "Research and Innovation Strategy for Smart Specialisation" or RIS3 for the Basque Country. Moreover, the Basque Science, Technology and Innovation Plan 2020 (PCTI 2020)² brings together all the efforts and agents working on the smart specialisation strategy, that is to say, the RIS3 of the Basque Country.



BIO

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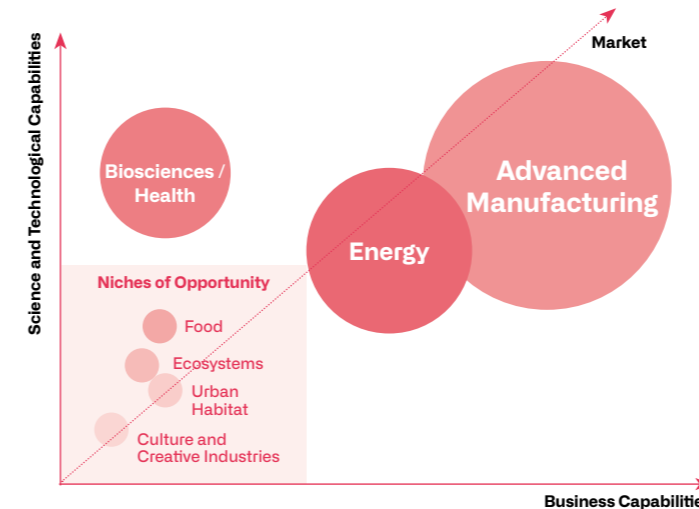
When the CCIs emerged as a sector drawing attention and analysis, many efforts have been made to define, delimit and learn about its reality at the time this report was written. From a statistical perspective, the sector did not have a specific delimitation and treatment. Cultural and creative companies appeared disaggregated in different reference sectors under titles which, moreover, on many occasions, fall under different activities. The lack of a properly-delimited universe prevents determination with absolute certainty of a representative sample, and therefore extrapolation of results and conclusions from the analyses conducted on the sample of the entire universe. For this reason, the proposal by UNCTAD (United Nations Conference on Trade and Development) was ideal. It was a fine-tuned development that sought to integrate previous proposals”.

Egoitz Pomares
Researcher, Sinnergjak-Social Innovation (University of the Basque Country/EHU)

² For more information on the Basque PCTI 2020, please see <https://www.euskadi.eus/gobierno-vasco/pcti-2020/>

Following the European Union guidelines for Member States and their regions³, this strategy identifies the fields of the knowledge economy in which the Basque Country can globally compete and it must therefore be specialised. Specifically, RIS3 includes CCIs as one of the niches of opportunity for the Basque Country (along with food, urban habitat and ecosystems) and the three strategic areas identified (advanced manufacturing, energy and biosciences/health).

Figure 5.
Priorities and niches of opportunity for RIS3 in the Basque Country



Source: RIS3 Basque Country.

³ Please see <https://s3platform.jrc.ec.europa.eu/home>

Within this context, emphasis is placed on the crucial role that CCIs play in creativity and innovation.



“

Since 2014, we have been looking toward a near future of new habits and foods, with new awareness of sustainability and responsibility toward the environment. For this reason, our porcelain products, designed to last and remain with us, are opening up to include biodegradable materials, so that new needs can express themselves and be designed at Cookplay”.

Ana Roquero
Designer, Cookplay

Thus, a stage where the need to unlock the potential of CCIs has been made clear concludes, and which will be followed by the sector's definitive delimitation and the development of the first supporting instruments and policies. The next phase of CCI development in the Basque Country will be closely linked to implications related to the identification of CCIs as a land for opportunity in RIS3, as well as actions conducted as a result of this identification.

Alfa Arte: The metallurgy of Art

www.alfaarte.com



While Alfa Arte is based on a traditional metallurgy company, it has been reconverted (through creativity and technology) into a source of creative services that works with well-known international visual artists to make their products.





Alfa Arte is an art smelting and manufacturing centre located in Eibar (Gipuzkoa). While it is based on a traditional metallurgy company, it has been reconverted (through creativity and technology) into a source of creative services that works with well-known international visual artists to make their products. They work with bronze and other materials like aluminium, stainless steel and iron. Located in a modern building, Alfa Arte has several establishments for the manufacturing process, an "art gallery and an open space for artists to develop their sculpture projects" (Jose Mari Armentia, quoted in the Department of Culture and Linguistic Policy, n.d.).

Digitisation and the progress this entails have largely facilitated the centre's ability to expand, thus joining the international market. Currently, one of Alfa Arte's most important investments is in 3D technology, since this allows them to "play" with the objects they work on, especially in terms of conservation and restoration: "Thanks to this technology, we carried out the entire complementary staging project for the replica of the caves of Ekain, Ekain Berri, including assembly and installation, in record time" (ibidem).



Santa María Cathedral Foundation



CCI_Cathedral of Vitoria



* Available in Spanish only

The project *Abierto por obras* (“Open for Works”), by the Santa María Cathedral Foundation allows the visitor to live a unique experience, since the restoration process of the Cathedral will be at a different stage depending on the moment in which it is visited.



The Santa María Cathedral Foundation came about to meet the need and desire to restore the Santa María Cathedral, considered the "most emblematic temple and with the greatest historical value in Vitoria-Gasteiz" (Santa María Cathedral Foundation, n.d.). This process began in 1999 with the aim of implementing the "Executive Plan for Comprehensive Restoration of the Cathedral".


Within this context, the project Abierto por obras ("Open for Works") was created. With this initiative, the visitor lives a unique experience, since the restoration process is at a different stage depending on the moment in which (s)he visits the Cathedral. Over the years, this methodology has been used for other projects in other places in the country. These projects share with the Santa María Cathedral Foundation its "vision of cultural heritage as a driver for social cohesion and economic development" (ibidem).

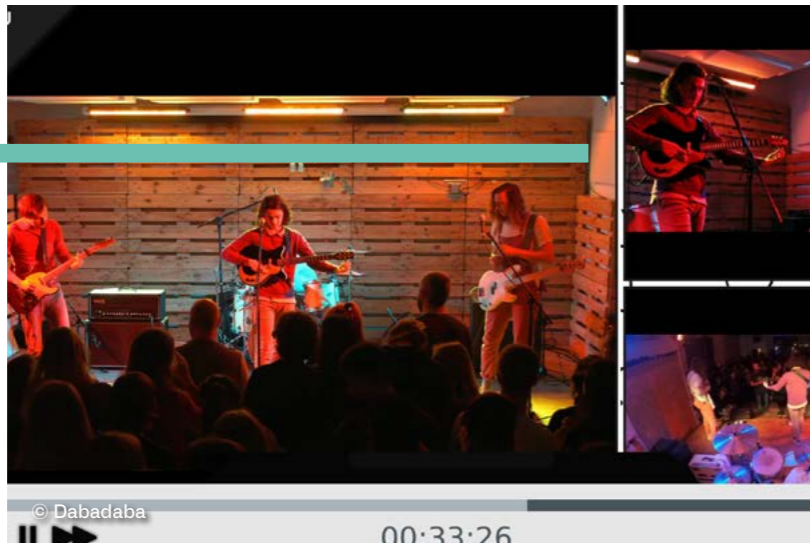


Click and navigate through the different phases

Phase 2



 Click and navigate through the different phases



Phase 2

Going further in depth in CCIs (2016-2018)

The 2016-2018 period bore witness to significant progress in strengthening the cultural and creative sector in the Basque Country, particularly in deepening knowledge of it, in the definitive delimitation of the sub-sectors composing it and in the development of cross-cutting policies to support CCIs. A flagship project, symbolising the comprehensive devotion for regional formation of the sector, is clearly the European project CREADIS3 -*Smart Specialisation Creative Districts* (2017-2021), led by the Department of Culture and Linguistic Policy of the Basque Government under the framework of the Interreg Europe programme.



BIO 

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Starting from the fundamental milestone, which is the inclusion of CCIs as a niche of opportunity in the Basque Country's RIS3 for 2014, the main milestones in institutional support for the sector over time are: in 2016, to configure the CREADIS3 project, with the Basque Country as a leading region, along with another 5 European regions, within the Interreg Europe programme; in 2017, to start up the pilot project KSI Berritzaile for technological innovation, the company model and the economic-financial management model for CCIs in the Basque Country; in 2018, the Basque Culture Observatory report for Conceptual Delimitation and Definition of the CCI sectors in the Basque Country, as well as the inclusion of creative industries in Arts and Cultural Industries Statistics, conducted on a biannual basis, and finally, in 2019, to start up the pilot project KSIlatea, to internationalise the Basque Country's CCIs”.

Sabin Goitia

Former Advisor in Cultural and Creative Industries, Basque Government

Milestones

2016

- Interreg Europe Project: CREADIS3 – Smart Specialisation Creative Districts
- Creation Spaces Map

2017

- Pilot launch of programme KSI Berritzaile - innovation in CCIs

2018

- Conceptual delimitation and definition of CCI sectors in the Basque Country
- Contrast workshop with international experts on Creative Industry Statistics
- Arts and CCIs Statistics



BIO 

“

In recent years in the Basque Country, we have seen a noteworthy increase in assessments, reflections, analyses, studies, publications, projects, congresses and other sorts of expressions addressing CCIs. From an institutional scope, this sector has attracted growing attention. The report written by Sinnergiak is a clear example of this desire and the impact the sector has on the Basque Country, not only in cultural terms, but also in economic and social aspects.

The integration between culture and creativity, which in a certain way is still emerging, incipient, almost invisible, is, however, shaping a fragmented sector that is complex to detect, analyse and evaluate”.

Egoitz Pomares

Researcher, Sinnergiak-Social Innovation (University of the Basque Country/EHU)

2.1

Firming up knowledge of the cultural and creative sector

During this period, different studies attempted to go further in depth in the knowledge of the sector's specificities, contributing to revealing the reasons why a strong and dynamic cultural and creative sector is important.



BIO 

“

Most professionals in culture are engaged in production. In the rest of the organizational structure we have a human resources problem. Each career develops specific capabilities. Taking a hospital as an example, who would be willing to have surgery by a doctor who has a degree in industrial engineering?”

Fredi Paia

PDI, University of the Basque Country; *bertsolari*

Beginning with the first years of this second phase, work has been conducted on organising the CCIs into 15 sub-sectors: 6 cultural sub-sectors (Heritage, Visual Arts, Music, Publishing and Printed Media, performing and Audio-visual Arts) and 9 creative sub-sectors (Craftsmanship, Architecture, Advertising and Marketing, Video Games, Digital Content, Design, Fashion, Language Industries and Gastronomy).

2.1.1.

Study on companies, employment and job markets in the cultural sphere

In 2016, the study "Analysis of companies, employment and job markets in the cultural sphere in the Autonomous Community of the Basque Country" (Basque Culture Observatory, 2016a) offers (for the 15 aforementioned cultural and creative sub-sectors) relevant quantitative data on the weight of CCIs in employment in the Basque Country.

Updated figures on the cultural and creative sector regarding the global economy in the Basque Country are: with approximately 15,500 CCI companies (specifically, 6,196 cultural companies and 9,245 creative companies, according to data from 2018), CCIs accounted for approximately 10% of total companies in the Basque Country in the 2016-2018 period. Moreover, they employed 47,412 people (also according to 2018 data). This number has been the subject of sustained growth in 2016-2018 and accounts for 5.33% of total employment in the Basque Country. That same year, creative industries employed 2.30 people on average, while cultural industries employed 4.22 people (table 1).



BIO

“

One of the main new developments was opening up the playing field to what CCIs were called. The Basque Culture Observatory worked to add a previous revision to what had been carried out, and drew up its own proposal (it mainly used European Union proposals as a reference), bearing in mind the need to include new sectors in addition to traditional cultural sectors. This was worked on from a theoretical perspective, but in turn, besides taking note of theoretical and conceptual debates, it was also addressed from a more practical perspective.

In other words, work was conducted in parallel, considering the theoretical challenges posed by adding or reformulating the CCIs, all while tackling the "difficulty" that may be entailed by incorporating these sectors into a purely statistical plane".

Aintzane Larrabeiti
Partner-advisor for the company ICC Consultors

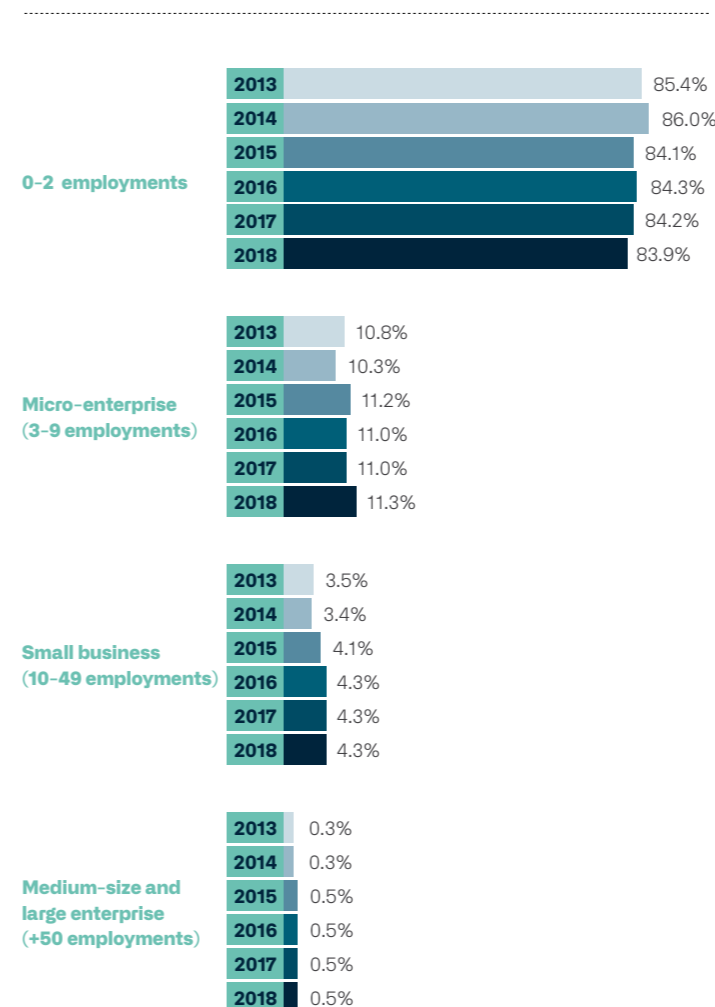
Table 1.
Number of companies and jobs in CCIs
(in absolute terms and % out of the Basque Country as a whole, 2016-2018)

		2016			2017			2018		
		Companies	Jobs	Ratio	Companies	Jobs	Ratio	Companies	Jobs	Ratio
Number	Cultural	6,286	25,263	4.02	6,173	26,024	4.22	6,196	26,156	4.22
	Creative	9,151	20,102	2.20	9,213	20,876	2.27	9,245	21,256	2.30
	CCIs	15,437	45,365	2.94	15,386	46,900	3.05	15,441	47,412	3.07
	Total Companies	154,687	854,154	5.52	154,301	874,241	5.67	152,637	889,853	5.83
Relative %	Cultural	4.06%	2.96%		4.00%	2.98%		4.06%	2.94%	
	Creative	5.92%	2.35%		5.97%	2.39%		6.06%	2.39%	
	CCIs	9.98%	5.31%		9.97%	5.36%		10.12%	5.33%	

Source: Department of Culture and Linguistic Policy

Regarding the number of jobs created by CCIs, figure 6 shows how there was a percentage growth in companies with three or more employees, while the number of companies employing two or fewer employees has decreased.

Figure 6.
Establishments in the CCI sector according to employment volume (2013-2018)



Source: Basque Culture Observatory

2.1.2. Approach through spaces for creation

In the collective imagery, even internationally, the Basque Country is frequently related to certain elements from its heritage or some of its cultural infrastructures. However, in addition to these infrastructures, of proven value for international visibility and to boost the cultural life of the cities and municipalities where they are located, an extensive network of cultural and creative spaces upholds the sector and the CCIs' activity.



BIO

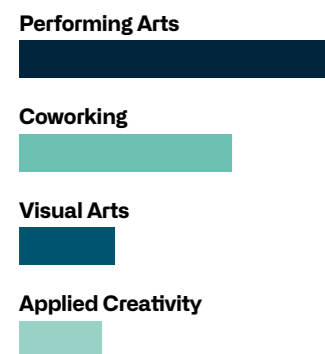
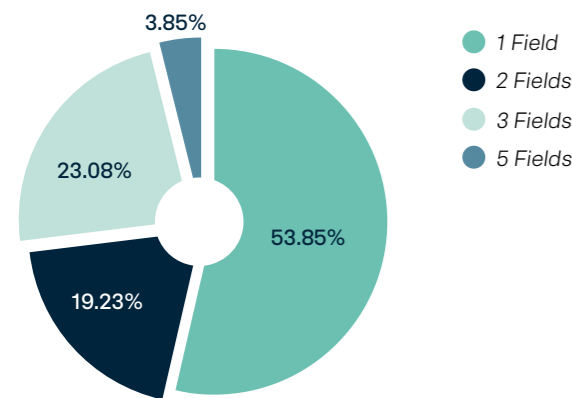
“

Bitamine Faktoria does what we might call "soft innovation", not so related to technological or digital innovation. Our job seeks to innovate in relationships between people, in collaboration and in mediation when carrying out a cultural project. For example, we have the contest to redesign a traditional Basque ethnographic object, HAU. We considered the possible institutions with whom we could collaborate on this project, the Aranzadi Science Society, the San Telmo Museum... We looked into which University has the industrial design degree, and this is what led us to the University of Mondragón. We presented the project and each organisation thought some aspects of the initiative were interesting, depending on their area of work. The ethnography department at Aranzadi was interested in sharing and highlighting a current ethnographic perspective. On the other hand, the San Telmo Museum was interested in hosting the exhibition because they were traditional objects that could be in this museum, but viewed from a contemporary perspective. And Mondragón was interested, because in fact, these are issues and approaches they work on in class. Here, innovation lies in joint work with different entities, from different places, creating a project that we feel is a shared project".

Helga Massetani
Bitamine Faktoria

In order to better understand this infrastructure network, the Basque Culture Observatory published the research work "Map of spaces for creation" in 2016. With a qualitative approach, this study seeks to identify public and private spaces for creation and to learn more about their characteristics. To this end, a survey was sent to the 29 spaces on census in the Basque Country that met the following criteria: 1) offer both individuals and collectives creative resources and collaborative accompaniment so that they may carry out their creation and production processes; 2) that provide a space for creation and production, as well as the technical resources necessary to do this, or 3) fall under a cultural or creative sector (Basque Culture Observatory, 2016b).

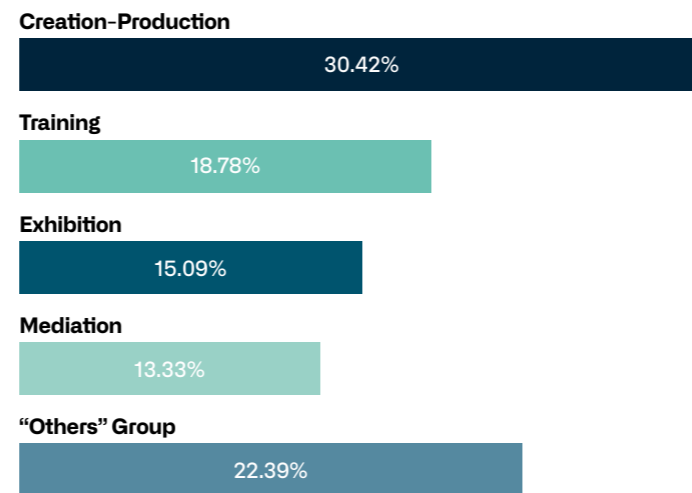
Figure 7.
Spaces according to main artistic fields and fields of specialisation (%)



Source: Basque Culture Observatory (2016b).

The aforementioned research work states "It is considered that there is specialisation in one sole artistic sphere when the dedication to it is more than 60%. This does not mean that they do not address other spheres, but that there is a sphere that characterises the space. If there is not a clearly majority sphere, all spheres with devotion greater than 20% are counted. (...) More than half the spaces are specialised (...) in one sphere" (ibidem, p. 10).

Figure 8.
Average devotion to each link on the value chain (%)



Source: Basque Culture Observatory (2016b).

Based on the activities carried out, it can be observed that creation spaces are mainly focused on creation-production (Basque Culture Observatory, 2016b). Moreover, the services most regularly offered are: consulting and accompaniment (96%), temporary sessions (85%), technical resources (81%) and communication (77%) (ibidem).

2.2 CREADIS3: coordinating regional public policies

CREADIS3 – Smart Specialisation Creative Districts is a European initiative binding six regions in the European Union, under the framework of the Interreg Europe programme¹. The Department of Culture and Linguistic Policy of the Basque Government is in charge of leading this project, which began in 2017 and will conclude in 2021. This initiative aims to align public policy agendas to attain innovative development of CCIs, contributing to economic development. CREADIS3 places the Basque Country as a leading spotlight in a sphere with increasing weight in European economy, all while helping it to improve its cultural policies.

More specifically, the CREADIS3 project came about with the fundamental objective of coordinating regional public policy agendas to support the development of more efficient policies in regions whose objective is to generate innovation and economic development around cultural policies. As such, the idea is to improve institutional governance and strengthen the contribution of CCIs to regional development.

Figure 9.
Partners, duration and budget for the CREADIS3 project

- Basque Country (Lead partner)
- Public Service of Wallonia
- Emilia-Romagna
- Ministry of Culture of the Slovak Republic
- Regional Development Fund on Behalf of the Region of Western Greece
- Central Finland



Project Duration: 01/01/2017 to 31/12/2021
First phase : 01/01/2017 to 31/12/2019
Segunda fase: 01/01/2020 to 31/12/2021

Presupuesto: 1,462,706 euros (85% ERDF)

Source: CREADIS3.

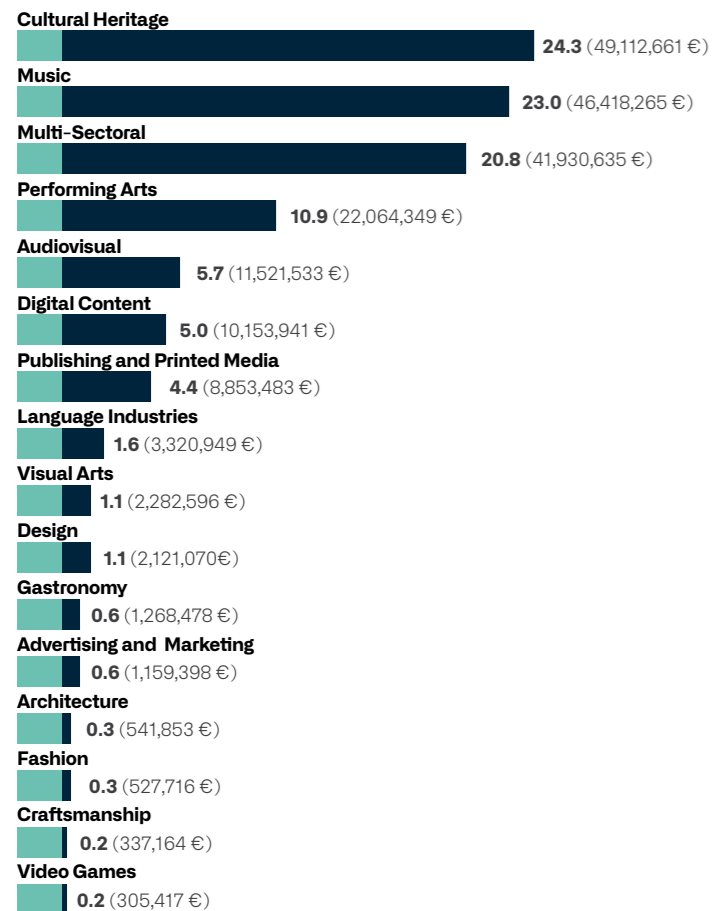
¹ Further information at <https://www.interregeurope.eu/creadis3/>

2.2.1. Map of competences and the regional creative ecosystem

The CREADIS3 project's partners drew up a series of maps (of competences and the regional creative ecosystem) and a diagnosis for each region.

The main objective of mapping competences was to identify the public bodies that participate in developing cultural and creative policies at different levels. For the Basque Country, these levels were: the Basque Government, the Regional Councils of the three Historic Regions and the Town Halls of

Figure 10. Distribution of grants to CCl's by sector (% , 2016)



Source: Basque Government (2017).

the three capital cities. This map drew interesting conclusions. For example, "in 2016, Basque public administrations granted a total of 202 million euros to Basque cultural and creative sectors (nominative grants and competition grant programmes), or that "music, digital content, publishers and written media and performing arts are the sectors to which more resources are allocated through support programmes", as opposed to sectors such as video games, craftsmanship, advertising and marketing or fashion (Basque Government, 2017, p. 57).

The second map carried out by CREADIS3 sought to "identify the existing regional ecosystem for CCl's, including supporting policies and tools, interested parties involved (universities, creative and technological centres, clusters, incubators, etc.) and services offered (competence development, creation of business management competences, programmes to support SME internationalisation, etc.)" (Basque Government, 2018a, p. 5). This second analysis is based on the classification of actions carried out by administrations identified in the first map, based on the level of the value chain that such actions reinforce.

Finally, in June 2018, the regional diagnostic report came out (Basque Government, 2018b). This report offers contextual information on the general regional profile and the CCl's, as well as an analysis of the cultural and creative sector (evolution, current status and creative districts) and a characterisation and SWOT analysis of the CCl's.

Figure 11. Levels of the value chain



Source: Basque Government (2018a).

2.2.2. Exchange of experiences

Under the CREADIS3 project, several study visits were carried out in order to learn about the realities of the creative ecosystems in other regions participating in the project to detect good practises and learn based on a comparative analysis.

CREADIS3 study visit:

- Slovakia: 21-22 March 2018.
- Central Finland: 16-17 May 2018.
- Basque Country: 3-4 July 2018.
- Wallonia: 1-2 November 2018.
- Western Greece: 11-12 April 2019.
- Emilia-Romagna: 26-28 June 2019.

2.2.3. Action Plans

As a result of the diagnosis and regional maps (internal dimension), along with knowledge and learning from other realities through the study visits (external dimension) and as a final milestone for phase 1 of the project (2017-2019), each region has defined its pertinent Action Plan.

The Basque Country's **Action Plan** (Basque Government, 2019) has three actions to be conducted and monitored during phase 2 of the project (2020-2021):

- A1. Start-up and implementation of the BDCC (*Basque District of Culture and Creativity*), as a window to coordinate policies related to CCl's, located in SPRI - Company Development Agency of the Basque Country.
- A2. Development of the RIS3 Pilot Group for CCl's: start-up of three strategic lines through specific working groups.
- A3. Incorporation of the CCl's into Public Culture Funding Statistics.



Raija Partanen
Development Manager,
Regional Council of Central Finland

What were the reasons and goals that led Central Finland to join the CREADIS3 project

Initially, there were two potential partners from Central Finland who were interested in joining the CREADIS3 project: the Regional Council of Central Finland and the Educational Consortium, Jyväskylä Gradia. However, it was only possible to include one partner per region, so as regional authority, the Regional Council of Central Finland took on this responsibility.

Regarding content, CREADIS3's general objective is what originally drew our interest in the project: regional development through non-technological methods of innovation to address economic, social and environmental challenges, and cross-fertilisation between technological sectors and culture-based creativity.

In our Regional Strategy 2040 (Finland's strategic plan to implement the structural fund programme "Sustainable growth and employment 2014-2020", meaning our RIS3 strategy), the main priorities are bioeconomy, digital economy, economy of knowledge, well-being and tourism. At a theoretical level, a perspective of creative industries may be included in all these priorities, but we needed good, innovative examples of specific implementation measures.

Based on our previous projects and efforts to develop CCl's in the region, we already had good knowledge and recognition of CCl's as a potential line of business, but we needed specific measures to develop them. Notwithstanding, we had also experienced how difficult it is to cross-pollinate between creative skills and industries and main actors and priorities in the regional strategy. We had attempted to do this in previous regional projects, but it was obvious that we needed examples from other places.



One of the important reasons to join the project was that the Basque Country was a partner (the lead partner). Without having deep knowledge of some of the measures taken in the region, we had the general impression and understanding of the Basque Country as a region with great experience in successfully tackling huge economic challenges and profound change in regional development. This was something we wanted to learn more about.

Were these objectives reached? To which extent are you satisfied with your participation in the project at its current phase (beginning of Phase 2, on implementation, and monitoring the Action Plan defined in Phase 1)

With this project, we sought good examples of inter-sectorial projects with new kinds of collaborations with spillover effects and the rupture of industry silos. These objectives also included broader understanding of the role of CCIs in regional development.

Our general focus was to consider CCIs from a broad regional development perspective, as inter-sectorial cooperation: the CCIs blended with other economic sectors, not as an independent industry as such. This made us hesitate a bit at first, because all other partners were focusing their activities on the CCIs and their support structures. Fortunately, our concern was irrelevant, as we saw later on.

Shortly after beginning the project, we decided to concentrate all our CREADIS3 efforts on just one of our strategic sectors: bioeconomy. Bioeconomy was selected because there were already (and still are) favourable activities that have been implemented to develop bioeconomy in our region, but the bioeconomy perspective needed to be differentiated and to have its own profile. Regarding the basis for collaboration, with partners such as the Basque Country and Emilia Romagna, as well as recognition of local needs, problems and deficiencies, within the scope of bioeconomy, special emphasis was placed on food and culinary matters.

This turned out to be the right choice, because we ended up capitalising more than we had expected, in a way we could not have anticipated beforehand. The most crucial result was understanding the concept of gastronomy in a very broad sense and taking advantage of all gastronomy's potential in regional development.

In this case, in addition to the fact that it acted as project leader, you maintained a close relationship with the Basque Country, given that this was your main partner in the region pairs defined in the project. How would you define this relationship, and from an external perspective, how would you assess the status of CCIs in the Basque Country?

The close cooperation with our peer region, the Basque Country, was essential. Especially so was the CREADIS3 study visit to the Basque Country in July 2018, which was crucial. As part of our bilateral workshop activity, we bore witness to an impressive presentation given by the Innovation Development Director of the Basque Culinary Centre (BCC), Begoña Rodríguez. In her presentation, she assessed the huge potential of gastronomy and topics related to food in regional development and gave an entirely new perspective to topics we had fortunately already selected as content for Central Finland's Action Plan.

Our close cooperation culminated with two workshops in Jyväskylä, for organisations responsible for activities and development related to food in our region, carried out by BCC Innovation experts. As such, it is no exaggeration to say that the relationship with the Basque Country was truly crucial for our successful implementation of CREADIS3 and to carry out our Action Plan.

Considering what we saw and experienced in the Basque Country during the study visits, and based on the theoretical material generated in CREADIS3, the status of CCIs in the Basque Country appears to be excellent. There is a strategy and a comprehensive development plan for the CCIs, with devoted stakeholders and sufficient resources to

implement the strategy. There is specific funding and consulting for agents in the creative sector, and huge efforts have been made in infrastructure like spaces for work and innovative facilities for joint work. Also worthy of mention is the role played by public cultural organisations, such as museums, in creating a favourable demand for creative talent.

Eskerrik asko Euskadi!

2.3

Cross-cutting policies to support CCIs

2.3.1.

Innovation in the CCI sector

Different measures and instruments, at an Autonomous Community, provincial and local level, were created with the total or partial goal of driving company innovation. In general, these are multi-sectorial programmes that CCIs can use, as well as companies from other economic sectors.



BIO 



Regarding economic development and supporting policies for CCIs, we must remember that the Basque Government's industrial policy tools do not set forth specific policies for CCIs. Rather, multi-sectorial policies are carried out where, through innovation, technology, funding for the purchase of assets, etc., support is provided for the competitiveness of Basque companies. As such, the strategy to drive the CCIs must reside in structuring the sector into industrial parameters of competitiveness. In my opinion, the CCIs must add much more technology and innovation to their products and services, so that they can provide greater added value and, consequently, increase their economic impact".

Jon Basterra

Advisor in the Department of Economic Development and Infrastructure, Basque Government

At an Autonomous-Community level, the SPRI Group - Company Development Agency of the Basque Country, is the point of reference for measurements and instruments to support innovation in industrial sectors. Given the characteristics of companies from the CCI sector (very small size, activity not always related to industrial production, etc.), their presence in this sort of programmes is residual. There are other instruments at a regional or local level in which companies enjoy broader inclusion. One example to be highlighted is the Bizkaia Creativa programme (identified as one of the Good Practises introduced in the CREADIS3 project), managed by Beaz, with its regional limitations (companies from Biscay) and sectorial limitations (creative sector, focused on design, video games, fashion and audio-visual).



BIO 

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From the perspective of competitiveness, the Department of Culture raises issues such as considering R+D+i and CCIs as another industry. From my point of view, this is a positive aspect and a fundamental change in perspective, one that the Basque Government seeks to transfer to CCIs so that they can add and use these tools to improve professionalisation, profitability and knowledge”.

Álvaro Sanz

President of Musika Industria Elkarte, member of the Board of Directors, EHMBE



BIO 

“

KSI Berritzaile came about within the context of RIS3, to bring innovation to the companies comprising CCIs. An initial diagnosis identified a sector without a structured relationship with technological agents in the country. As such, the first objective was to attempt to create these bonds by working with Tecnalia and Vicomtech (technological centres with the greatest capacity in this sphere) to attempt to conduct technological-transfer processes. Theory posits that, in highly atomised sectors, innovation vouchers are the most useful tool to create a bond between the technological sector and companies.

Regarding management, skills were lacking. As such, work was conducted along a second line with Euskalit to provide tools that had already been developed, but exclusively for this sector, in an attempt to strengthen their management models. In a third line, we verified the need to strengthen funding for companies. To this end, we counted on Elkargi’s support”.

Alaitz Landaluze

Director of the Department of Science, Technology and Innovation Policies, Innobasque



BIO 

“

KSI Berritzaile came about at a time when CCIs were beginning to make a slight comeback after a very severe crisis. In 2017, there was a bit of an upward tick (throughout Europe, as well), and for the first time, people took the leap and began to speak of "industry". Merely cataloguing CCIs as an industry, having this representation, even if small, within the Basque Government's strategy, within RIS3 as a land for opportunity, is an achievement in and of itself”.

María Teresa Linaza

Director of Promotion and Institutional Development, Vicomtech



BIO 

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Our work is shaped in two main steps:

1st step: diagnostic phase, referenced in the Advanced Management Model (AMM). The main objective is to discover the extent of AMM elements' development: Strategy, Clients, People, Innovation, Society and Results. The least-developed elements, in general, are Strategy, Clients and People. On the other hand, the social engagement of CCI companies and organisations is very high in comparison with other sectors of activity with which we work.

2nd step: accompaniment phase to improve management through consulting and training projects. Regarding projects, many were related to defining mid- and long-term strategies or defining indicators to measure results. Training also lies along these lines, although it is conducted as a group activity, taking advantage of the synergies created amongst participating companies. In short, the objective sought after is to professionalise management, a fairly generalised shortcoming in the sector”.

Nerea Obieta

Communication Manager, Euskalit

Over the course of its *three years of history* (2017-2019), 195 organisations (167 companies and 28 associations/ foundations) have participated in the programme, having supported 416 services/projects.



BIO

“

The KSI Berritzaile programme facilitates the incorporation of cutting-edge technologies into products or processes by developing functional prototypes or incorporating technological assets. These technologies cross-cut through all sectors, but are particularly applicable to cultural and creative sectors. This is a programme to drive innovation, especially targeting SMEs or companies without experience in this area. From an administrative perspective, the application process is very simple and does not require economic payout, only a commitment to devote time, as these projects are highly defined throughout time.

We schedule open houses to welcome companies and showcase our laboratories. During these open houses, we can host conversations with technicians and researchers. Through the demos, they can view opportunities provided by technology”.

Rubén Otero
Director, eServices Area ICT Division, Tecnalia

Table 2. Projects presented and approved by the KSI Berritzaile programme (2017-2019)

	Presented			Approved			% Approved		
	2017	2018	2019	2017	2018	2019	2017	2018	2019
Line 1: Innovation and Technological Transfer	56	33	28	25	20	16	44.6	60.6	57.1
Line 2: Organizational Model and Business Structure Innovation	61	53	60	61	53	60	100.0	100.0	100.0
Line 3: Financial Training for Companies	18	5	15	18	5	15	100.0	100.0	100.0
TOTAL	135	91	103	104	78	91	77.0	85.7	88.3

Source: Siadeco, based on KSI Berritzaile data.



“

Under KSI Berritzaile, we presented a project for the technological innovation branch twice (2017 and 2019), and once for innovation in the organisational model (2017) and financial training for companies (2017).

KSI Berritzaile helped us to develop a streaming channel that we have continued to improve. Over the course of this year, we will leave it open, so we can constantly create digital content. We were also able to develop a tool for analysis when scheduling concerts. Moreover, we were encouraged to develop an ERP to manage the company as a whole. It helped us to clean up financial balance sheets and have a better relationship with banking institutions. We are very happy and will keep using KSI all we are able to”.

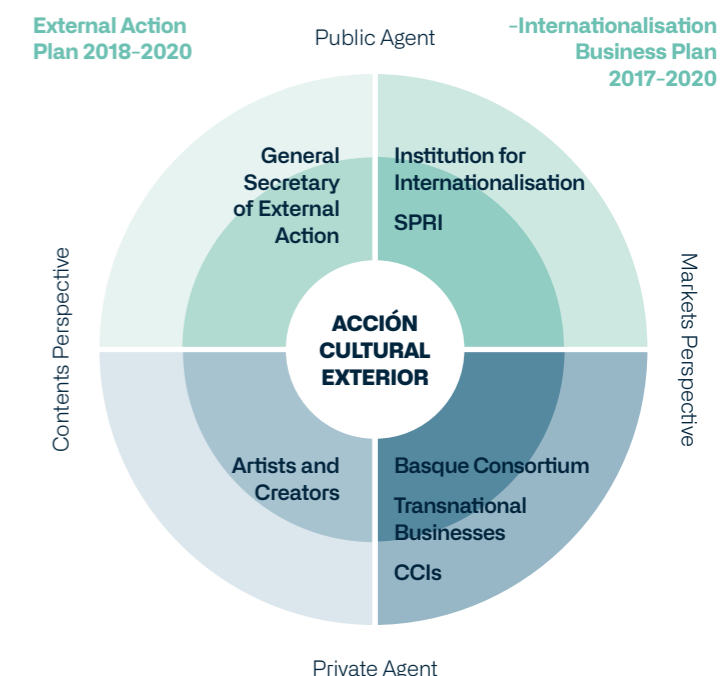
Sebastián Salaverry
Director, Dabadaba

2.3.2. CCI internationalisation

The study "Internationalisation of Culture", published by the Basque Culture Observatory in 2019, shows that in the Basque Country, while there are diverse actors (the Etxepare Institute, the SPRI Group - Company Development Agency of the Basque Country, etc.) participating in the external action, "latest plans show a clear will to seek unity in action through the EBC 2020 Framework Strategy" (Basque Culture Observatory, 2019a).

The "Framework Internationalisation Strategy 2020: Euskadi Basque Country Strategy 2020 (EBC 2020)" is the foundation for the unity in external action between different agents and in different fields².

Figure 12. Map of external cultural action actors in the Basque Country



Source: Basque Culture Observatory (2019a).

² More information at: <https://www.euskadi.eus/plan-gubernamental/06-estrategia-marco-de-internacionalizacion-2014-2020-euskadi-basque-country-plan-estrategico-de-internacionalizacion-de-euskadi/web01-s2lehen/es/>



BIO 

“

We confuse internationalisation with externalisation. When we work in culture, of course we must internationalise. But this means that, aside from constantly drawing from abroad, we must also produce here, in this region, so that the world can place us on the map and ask us for things: our multi-lingual educational model, sensitive to protecting the most fragile elements, our ability to adapt to multi-dimensional disruptive changes in Basque oral improvisation or bertsolaritza, the organic-participatory model for restoring the historic heritage of the Vitoria-Gasteiz Cathedral, etc. This is internationalising, but we still confuse it with externalising, repeating the automobile industry's mistakes”.

Fredi Paia
PDI, University of the Basque Country; bertsolari



BIO 

“

Regarding sectorial challenges, many people have the desire to internationalise. At the end of the day, this is a sector that can easily be internationalisable. But to take this leap, we must take previous steps, such as having a very clear long-term strategy”.

Nerea Obieta
Communication Manager, Euskalit

A noteworthy part of this desire to increase the support for the internationalisation of the cultural and creative sector is the KSlatea Programme 2019, a Pilot Internationalisation Programme for CCIs designed in 2018 and launched in 2019, promoted by the Department of Culture and Linguistic Policy of the Basque Government and managed by Tabakalera.



BIO 

“

KSlatea came about as a pilot initiative in 2019, as a response to the limited participation of the CCIs in public support programmes for internationalisation, where primordial scoring criteria were based on the existence of an Internationalisation or Strategic Plan to uphold the activities in the presented project. As such, KSlatea had the specific purpose to make internationalisation plans for CCI companies. The pilot began with an awareness phase, followed by diagnoses of the internationalisation capacities of 50 companies. Out of these 50 companies, the 20 best-prepared ones were selected to undertake a concrete internationalisation project. The 20 plans were drawn up to be presented to general internationalisation support programmes in 2020. Another pillar of the project was providing training in key issues for internationalisation, open training for the sector, structured into six sessions.

This pilot also identified the sector's specific difficulties in adapting to existing internationalisation support initiatives, and could thus propose measures for opening up to CCIs to the agents conducting these programmes”.

Edurne Ormazabal
Director, Tabakalera



BIO 

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The crisis was a turning point, since under these circumstances, people are more receptive to associative movements. We began with four associations with a certain history and experience: live performance association, music industry association (promoters, album labels, technical companies), a musician association and another composer association. Before, these associations were independently related to the Department of Culture of the Basque Government. Within this context and at the initiative of the Department itself, EHMBE was created 5 years ago, managed by these four associations. A couple of years ago, the professional staff working at the associations suggested joining the EHMBE structure to increase its entity. We are currently in a transition phase. EHMBE's Board of Directors consists of two members from each one of the associations, and there is a team of five workers and a general coordinator”.

Álvaro Sanz
President of Musika Industria Elkartea, member of the Board of Directors, EHMBE



“

Cookplay's true notoriety lies in its international nature. We work to design a new global table, with all parameters, areas and habits required by new products on an international market. My main support person is an expert in competitive surveillance; I spend a great deal of time analysing our competition and its position on international markets. From an institutional perspective, both the Basque Government and the Council of Biscay have supported us with grants for actions and participation in international fairs, proving that our project had high innovation and creative value with international potential.

We want to encourage all CCIs in the Basque Country to strive for internationalisation, to shed their fears and prejudices of what international competition means. The success of an ambitious project that stands out requires a global vision in all aspects”.

Ana Roquero
Designer, Cookplay

2.3.3. Sector structuring: clusterisation and cooperation

The aforementioned research work by Sinnergiak Social Innovation (2014) for the years 2012-2013 indicated that over 70% of Basque CCIs had carried out cooperation activities with other professionals or organisations. It can be stated that the associationism culture between cultural and creative sub-sectors is strong. Moreover, *clusterisation* experiences encompass an entire range of degrees of institutionalisation, and they are diverse regarding the nature of the link between CCIs: from the focus on the concentration in a certain physical space (a paradigmatic example is ZAWP in Bilbao, which is also one of the good practises in the CREADIS3 project) to alliances with clusters or associations within cultural or creative sub-sectors.



BIO 

“

The main challenges for the development of the sector are atomization, self-recognition as an industry and the vision of the CCIs as a whole, not by subsectors. Firstly, although it is possible to propose joint projects on topics that are affecting many companies and subsectors, the different agents are not used to cooperating with each other. This is related to the lack of outward vision. Individual companies are doing high impact projects, but they are not being projected internationally and for this, in many cases it is necessary to cluster and make collaborative projects of greater scope and impact. Second, you have to consider your CCI an industry and get into what are considered the "rules" of the industry. Thirdly, I think that it is also necessary to insist on understanding the CCIs as a whole, beyond the different subsectors, in order to articulate this ecosystem of value. We must collaborate not only with companies in the same subsector, but also with different companies, even outside the CCIs, to create these ecosystems. In short, it's about collaboration, believing you are part of an industry, and building ecosystems. For me, those are the three main challenges”.

María Teresa Linaza
Director of Promotion and Institutional Development, Vicomtech



BIO 

“

How does one drive creators and amateurs to be very present on more productive networks, with more exchange? It is highly important to have a list of resources and to be able to provide and inform people where they can go or stop going.

This should be added to the ensemble of living strengths in the digital Basque Country, where EITB grants its position as a driving centre and designs its own productions for simultaneous use on the radio, on television and for online services, as a participatory website. In other words, gateways that cross, transmedia productions and creative resources that are not too complex, but that also mean opening up to the participation of resources that may not be on staff. This could give an entirely different feel, working in a different context, one of digitisation, globalisation, diversity, and a bridge between local and global levels”.

Ramón Zallo
Professor Emeritus, University of the Basque Country



BIO 

“

CCIs must still generate this awareness of belonging and moving forward toward greater sectorial structuring. This is a sector with very clear challenges, such as digitisation, which is not being work on in a proactive way. In this regard, we must work on technological innovation, not just with technological centres, but also opening up to other kinds of entities”.


Alaitz Landaluze
Director of the Department of Science, Technology and Innovation Policies, Innobasque

Table 3.
Associations and clusters by cultural and creative sub-sectors

	Sub-sector	Cluster	Association
Cultural Associations	Performing Arts		Eskena
	Visual Arts		
	Audio-visual	Eiken+	EPE-APV, Ibaia
	Publishing and rint Media		Cámara del Libro
	Music		EHMBE
Creative Associations	Cultural Heritage		
	Architecture		COAVN
	Craftsmanship		Arbaso
	Digital Content	Gaia, Eiken+	
	Design	Habic	Eide
	Gastronomy		
	Language Industries	Eiken+	Langune
	Fashion		Basquemoda
	Advertising and Marketing	Eiken+	Asoc. Agencias Publicidad
Videogames	Gaia	Basquegame	

Source: Own elaboration.



 Click and navigate through the different phases

As such, and within the CCI development strategy, the Department of Culture and Linguistic Policy recognises how important this sort of entity is, and adds the figure of "facilitating nodes", selecting a reference-point entity from each sub-sector: Eiken, Eide, Habic, Ehmbé, Langune, Basquemoda, Karraskan, Eskena, Arbaso, Cámara del Libro (Chamber of Books), Gaia-Basquegame, Basque-Navarre Architectural Association and the Association of Advertising Agencies of Biscay.

Since this type of entity is in direct contact with companies in their sector, they can act as facilitators for communication and access to them, whether for programmes (KSI Berritzaile, KSlatea) or for any other cross-cutting activity promoted by the Department that can target CCIs.

On the other hand, the Fábricas de Creación (Creation Factories) programme, whose scope includes the Autonomous Region, held since 2015 on an annual basis by the Department of Culture and Linguistic Policy of the Basque Government, places special emphasis on mediation and collaborative work with the BITARTEZ line, which offers grants to mediation and cultural and social innovation projects. More specifically, these grants are designed for projects that are engaged with research, innovation and artistic contemporaneity which, through mediation and collaborative work, encourage: dialogue, collaboration, co-creation and/or creating hybrids between different agents and the promotion of talent to develop the maximum creative potential of our region.



BIO 



The collaboration between different companies, entities and associations that are working in the music sector, in different phases along the value chain, could provide more incentive for supporting and developing projects and potential collaborations throughout Europe”.

Iñaki Otalora

member of Kultura Live,
member of the Board of Directors, EHMBE



BIO 



The music sector is highly atomised; we are mainly micro-companies. Notwithstanding, our objective is to become more competitive so we can exploit all the sector's economic and development potential. To this end, we have a great asset, which is professionalisation. Our task consists of transferring the information and opportunities available to everyone, and to generate new generations who understand that this sector is important, to grow and gain muscle, for companies to have more associative processes or more important capitalisations, financial tools, etc”.

Álvaro Sanz

President of Musika Industria Elkarte,
member of the Board of Directors, EHMBE

2.3.4.

Support for development of structures

The Fábricas de Creación (Creation Factories) programme uses its SORGUNE line to offer grants to independent cultural spaces that support creative practises. Specifically, these grants are for projects that bring activity to independent cultural spaces which, by organising specific programmes, support both creative professionals and entities. They provide spaces, resources and collaborative accompaniment so that they can conduct their creation and production processes, always focused on innovating in different artistic expressions, spotting and supporting talent, participatory management and a relationship with the local environment.



BIO 



From a supply-and-demand perspective, because us economists don't make our lives difficult in this regard, there may be too many cultural real estate infrastructures. This does not mean that there is an excess of cultural supply, and much less a previous cultural demand from consumers for such infrastructures”.

Fredi Paia

PDI, University of the Basque Country; *bertsolari*



BIO 

2.4

Conceptual delimitation of CCI sub-sectors



One of the missions that many of us cultural centres share is fomenting creation through exhibition programmes and different resources and plans to support creators. However, it is not so customary for a cultural centre to promote programmes to support and develop CCIs as part of its main mission: bring cultural creation to citizens. At Tabakalera, we are working on a theoretic framework to integrate our commitment to creators and culture as an element for social transformation, with an innovative project to drive and raise visibility for the CCI sector in the Basque Country, into coordination with policies promoted by the Basque Government's Department of Culture”.

Edurne Ormazabal

Director, Tabakalera

Work on sectorial knowledge conducted in previous years made it possible to draw up the report "Conceptual delimitation and definition of CCI sectors in the Basque Country" (Basque Culture Observatory, 2018) in 2018. As indicated in the title, this is the definitive (although subject to future review) delimitation of the cultural and creative sector and the sub-sectors of which it is made, as well as their perimeters for statistical measurement. This is a fundamental step that will guide new quantitative and qualitative approaches where methodological decisions will now indeed be guided by a clear definition of the object of study.

As highlighted in this publication, the vision of the Basque Country's cultural and creative sector places emphasis on culture and not so much on creativity, unlike the definitions proposed by the British DCMS or the UNCTAD, and therefore more in line with the vision set forth by the European Union.

There are three nuances in this approach that also draw from other approaches to the cultural and creative sector and which, based on the concept of the sector in the Basque Country, are shared by all CCIs:

- *Relationship to the concept of cultural expressions.* All cultural sectors generate cultural expressions, based on heritage, arts and cultural industries. But creative industries also give way to cultural expressions, such as architecture, design, language, gastronomy, advertising, artisan crafts, etc. tc.
- *They base their creation and communication on the symbolic element.* The value of use of the cultural and creative is intrinsic or symbolic, attributed by the user (subjective), and this characterises and distinguishes it from other assets, whose value is technical (objective).
- *They are related to intellectual property rights (mainly copyright).* Most cultural content is subject to copyright, and that is something characteristic of it. Notwithstanding, not everything that is protected is cultural, and not everything that is cultural (goods and services) is necessarily protected.



BIO 

“

Without valid baseline data and information, it is very complicated or nigh impossible to consider supporting instruments and policies that are effective, and also to measure their impact. In this regard, the Basque Culture Observatory is a fundamental instrument that we have within the Department of Culture that provides us with qualitative statistics and reports, conducted by specialised staff. As such, we can build the foundation upon which we identify and implement supporting policies and instruments to develop CCIs in the Basque Country”.

Sabin Goitia

Former Advisor in Cultural and Creative Industries, Basque Government

These reflections lead to the publication of the conceptual delimitation of the 15 CCI sub-sectors, 6 that are cultural and 9 that are creative (of which two account for one-of-a-kind creative industries in the Basque Country), which are included under CCIs within the Basque context and upon which work had already been conducted in previous years.



BIO 

“

We conducted a two-fold process over the course of 2018. On the one hand, we contrasted it with sectorial associations from all CCI sectors, with each and every one of them. We explained the report's content as a whole and how it affected them and the proposed approach particularly. At the same time, international events were organised with experts. The idea was that these people who have more experience and are well-aware of the debates and difficulties that this entails could do this contrast work for us. This mainly allowed us to see that the difficulties they faced were the same. In other words, there are areas and regions where, without great difficulty, existing classifications allow oneself to include new sectors in this statistical and more global perspective, as well as other sectors whose analysis is more complicated, such as digital content”.

Aintzane Larrabeiti

Partner-advisor for the company ICC Consultors

2.5 Creative Industries Statistics

Since 2007, the Basque Culture Observatory has conducted the Cultural Arts and Industries Statistics operation on a biannual basis. Going one step further in global knowledge of the CCIs (in this case, based on a new quantitative approach), fieldwork was designed in 2017 and begun in 2018 to collect data for the Basque Culture Observatory to prepare the Creative Industries Statistic. This statistical operation determines regional distribution of agents and characterises the economic dimension, the employment they create and their activity, just as was already being done for cultural industries (music, audio-visual, performing arts, visual arts, publishing and printed media). The sectors targeted by the study are: fashion, design, architecture, language industries, advertising and video games. The Creative Industry Statistic therefore is in addition to the Cultural Industries and Arts Statistic, conducted since 2007 on a biannual basis.

Previously, a contrast was carried out with international experts in May 2018, during an event that addressed general related issues. These included a focus on the value chain and criteria for the inclusion/exclusion of certain industries in a statistical operation on Creative Industries like the aforementioned. During this contrasting event, other more specific issues were also addressed, such as how to handle the Basque specificity of sub-sectors like gastronomy, or how to approach single-person companies.

Regarding the static image provided by the Statistics on Arts, Cultural Industries and Creative Industries 2017³ (whose results were published in December 2019, with information from 1,092 agents in these sectors), it should be noted that the CCI income and expense statement is positive, with a 51.5 million euro profit. In terms of employment, creative industries in the Basque Country employ 6,834.4 people (counted as full-time staff).

61.6% of statistical agents belong to cultural sub-sectors, generating 53.5% of total income, and holding 43% of employment in the Basque Country. As far as creative industry agents are concerned, they account for 38.4% and bring in 46.5% of total income, occupying 57% of workers.

Figure 13.
Cultural and creative sub-sectors in the Basque Country



* One-of-a-kind creative industries in the Autonomous Community of the Basque Country

Source: Own elaboration.

³ As far as Creative Industries are concerned, given the lack of other criteria, since this is the first operation, statistics were limited to companies from the creative sector with three jobs or more (sector with a high number of self-employed professionals).

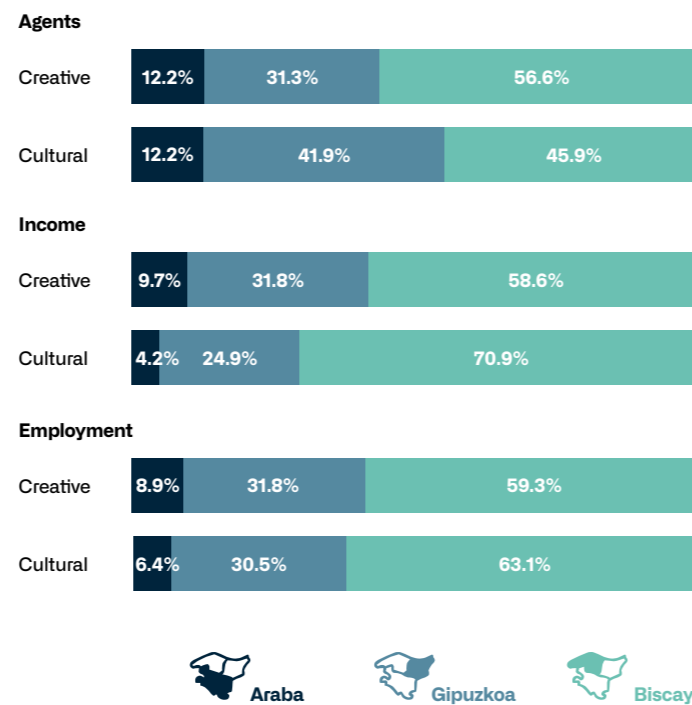
The ratio of workers per company is shown, with an average of 6.3 people per company. In creative sectors, there are 9.3 workers per company, and 4.4 in the cultural sector. Language industries stand out, with 16.4 workers per company, followed by video games at 11.2 and advertising with 10.2.

When observing data by region, Biscay stands out ahead of the rest; in terms of volume of agents, income and employment, this region has the greatest proportion. When calculating the ratio of workers per company in each region, Biscay is above the total average (6.3) with 7.6 workers per company. Gipuzkoa holds second place (5.2), followed by Araba (4.0). When analysing data between the cultural and creative sphere, we observe slight differences. Cultural industries' agents are more distributed between Biscay and Gipuzkoa than those of the creative industries. However, income and employment are proportionally lower in Gipuzkoa, with Biscay in the lead.

When breaking down employment and considering the gender perspective, we can observe sectors more dominated by women and those more dominated by men. The fashion and language industries occupy a greater number of women on staff. In the audio-visual sector, architecture and especially video games have a lower presence of women.

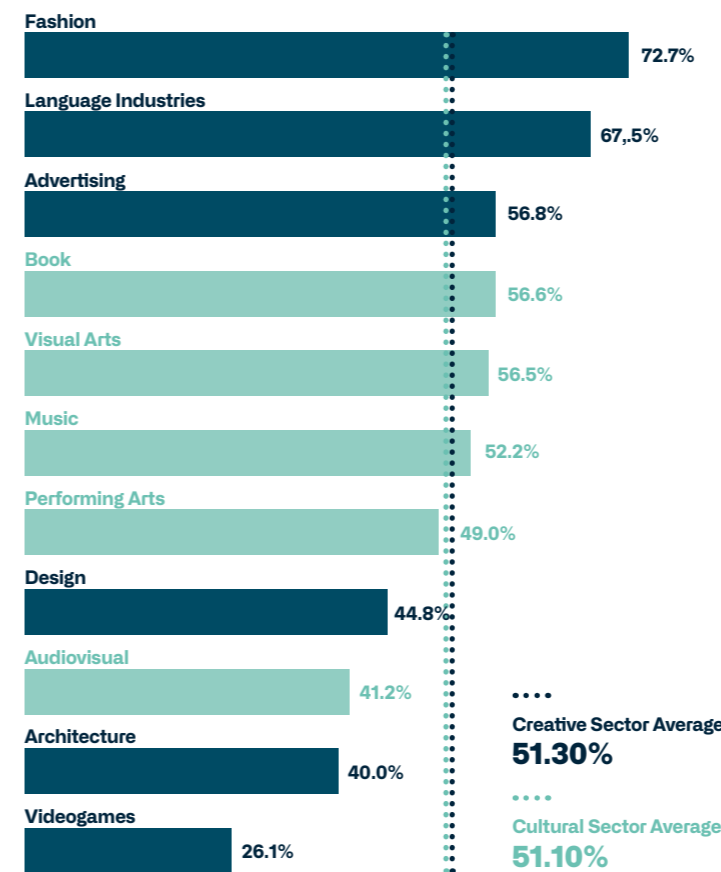


Figure 14.
CCI agents, income and employment in the Basque Country (2017, by Historic Region)



Source: Basque Culture Observatory (2019).

Figure 15.
Presence of women in CCIs in the Basque Country (2017)



Source: Basque Culture Observatory (2019).



“Our activities have an economic repercussion and effect, specifically on employment. Six years ago, there was a mindset change and visibility was raised on the fact that CCIs are also an economic driver. These are companies that generate fast employment. That was when they called us to the pilot groups. There are already driving elements here, like Tabakalera, museums, etc. The SPRI also joined, so actors not only related to the Department of Culture, but also the industrial sphere, are also in play”.

Álvaro Sanz
President of Musika Industria Elkarte, member of the Board of Directors, EHMBE

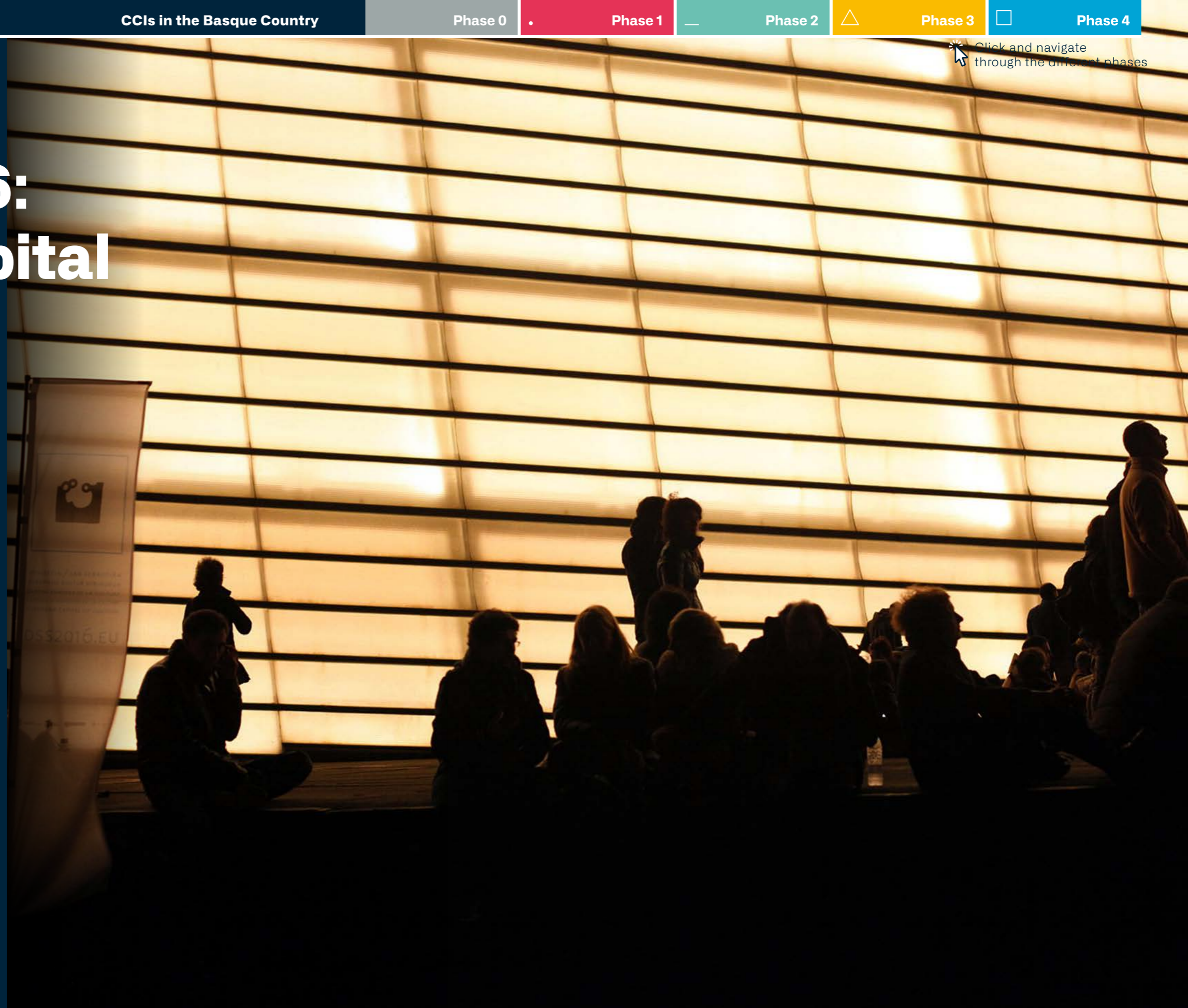
Donostia 2016: European Capital of Culture

#Donostia2016:
Elkar bizitzeko kultura //
Cultura para convivir.

DSS Living Together



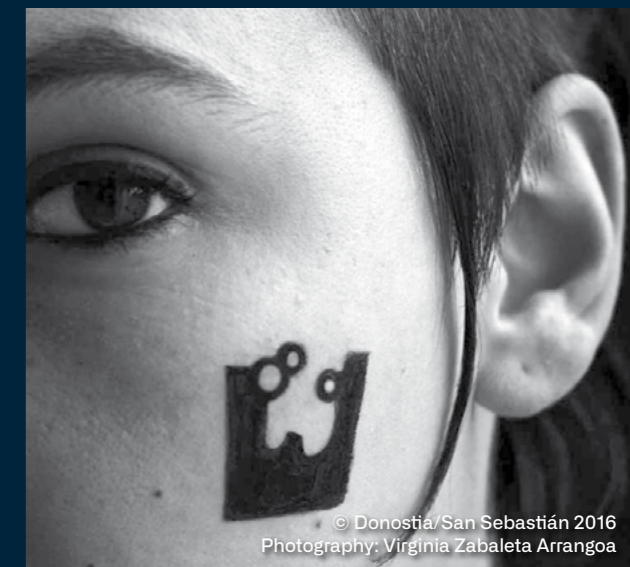
In 2016, the recognition of "European Capitals of Culture" reached the Basque Country with Donostia-San Sebastián's candidacy, presenting a project entitled *Cultura para la convivencia* (Culture for Co-Habitation).





The European project "European Capitals of Culture" (ECoC) is a recognition granted to a city to show its cultural values, and to boost local cultural and socioeconomic development. This is a huge opportunity for cities to show their cultural heritage in such a way that it also allows them to keep growing as a community (European Commission, n.d.).

In 2016, this recognition reached the Basque Country with Donostia-San Sebastián's candidacy. The project that the city presented covered a topic of great importance for its citizens. Entitled "Cultura para la convivencia (Culture for Co-Habitation)", the proposal revolved around "the city's recent past, marked for decades by terrorist activity" (European Commission, 2018, p. 2). According to the European Commission report evaluating Donostia as ECoC (2018), "the Donostia-San Sebastián programme mirrored local concerns and context, with a strong social and political focus" (ibidem, p. 5). Moreover, with this recognition, the city also sought to achieve "a new type of sensitive content, related to the city's complex identity and the social and individual well-being of its inhabitants, which also clearly shows a European dimension" (ibidem).



BIME PRO: The music industry's meeting



BIME PRO 2019



* Available in English and Spanish

BIME PRO acts as a meeting and business centre for a large part of the industry, locally and nationally, with the increasing participation of international professionals, which has turned into an important contributor to the cultural and creative ecosystem in the Basque Country.



© Javier Rosa



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BIME PRO is a project that began in 2013. It has turned into an important contributor to the cultural and creative ecosystem in the Basque Country. On the one hand, it acts as a meeting and business centre for a large part of the industry, locally and nationally, with the increasing participation of international professionals. On the other hand, the conference and workshop schedule seeks current and innovative topics within the sector, with the aim of acting as a source of knowledge and to update different agents in the music industry. The impact BIME has on its surroundings is great, considering that 70% of the nearly 3,000 professionals who participate in three days of the fair, and 50% of the 21,000 festival attendees during the other two, come from outside the Basque Country.

One of the event's key objectives continues to be greater international presence. Every year, this is reinforced, as it holds a position as a key event in connecting European and Latin American markets.

The intent is to continue attracting more and more international professionals who see BIME PRO as the perfect forum to strike up relationships, do business and receive training on the latest trends and innovations in the musical and creative industries.

The *latest projects* being developed under BIME PRO are: BIME CITY, which promotes new musical proposals in concert halls in Bilbao; BIME TECH, BIME PRO's first provider fair, for technicians, services companies and professionals who provide solutions for events of all sizes; AMCS (Atlantic Music Conferences Symposium), which seeks to act as a starting point to establish synergies between knowledge hubs in the musical industry on both sides of the Atlantic; BIME PRO START UP, a gathering about start-ups related to the music industry and BIME PRO CAMPUS, an intensive course designed for students with interest in cultural industries (especially the music sector) in all its facets (artistic, management, production, legal, marketing, etc.).



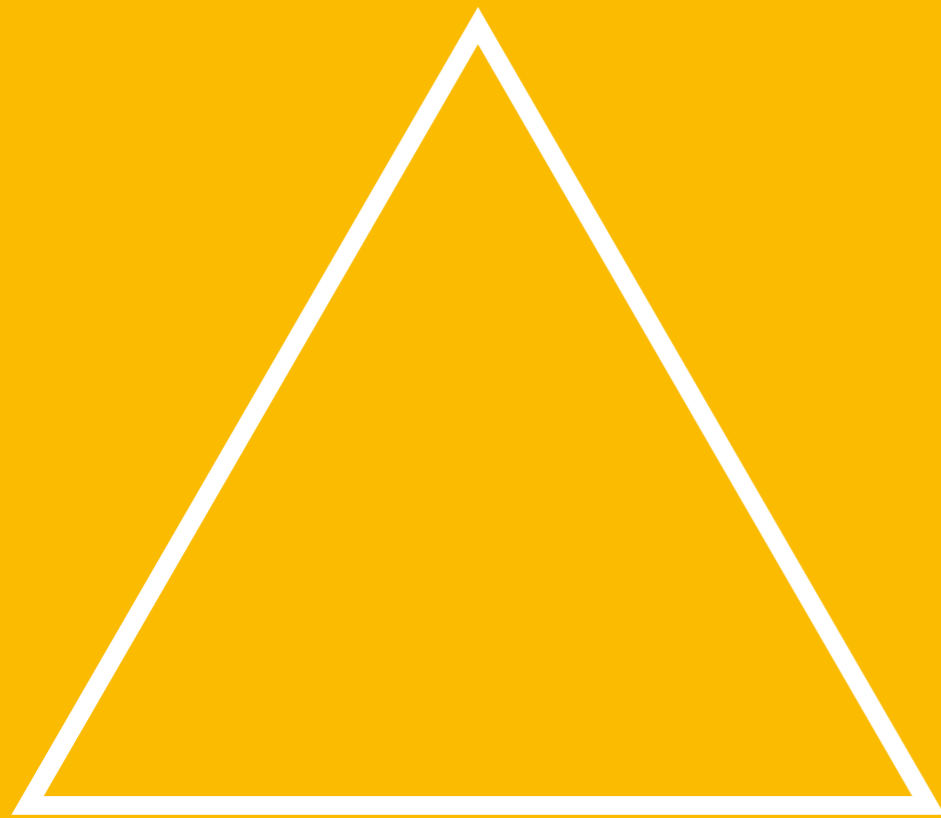
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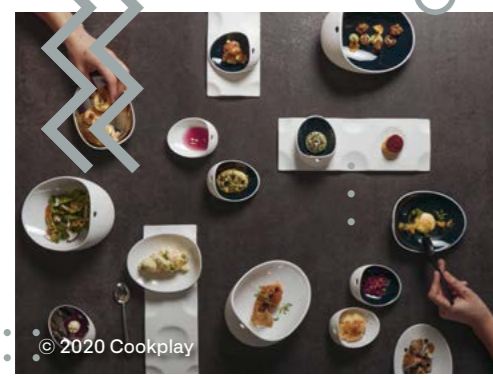
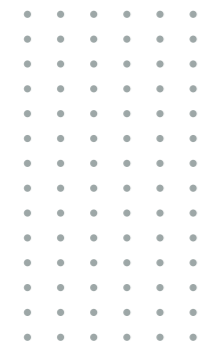
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Phase 3



 Click and navigate through the different phases



Phase 3

The future of CCIs 2019

3.1 Cross-cutting policies to support CCIs: one step further

3.1.1. Funding Models for cultural and creative industries

In 2019, a Basque Culture Observatory project explored the "Funding models for cultural and creative sectors" (Basque Culture Observatory, 2019b). Difficulties in accessing public and/or private funds must be sought in the characteristics of the very cultural and creative sector itself. In general lines, "this is a more unpredictable and riskier sector than others, where investment provides more guaranteed future scenarios. Financial institutions prefer to operate in sectors which, a priori, have greater guarantees of solvency and better match traditional criteria" (ibidem, p. 8).



 BIO

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During 2019, the foundations were laid for the policies for the next legislature (2020-2024), from an "industrial" and "economic development" perspective, all while considering the idiosyncrasy and special characteristics of the cultural and creative sector, with a clear and necessary perspective of networking”.

Sabin Goitia
Former Advisor in Cultural and Creative Industries, Basque Government

Milestones

2019

- Industrial and Intellectual Property in CCIs
- Regional RIS3: Year 1 with Administrations
- Funding Models for cultural and creative industries
- Pilot launch of the KSIlatea programme - CCI internationalisation
- RIS3 Pilot Group Meeting: Presentation of the Basque District of Culture and Creativity (BDCC) project; Cross-fertilisation: Food
- Regional presentation of CCI opportunity in Food Pilot Group
- Regional RIS3: Year 2 with Administrations
- Design of the Basque District of Culture and Creativity, BDCC
- R+D+i conceptualisation in cultural and creative industries
- RIS3 Pilot Group Meeting

Within this context, there are two great models for financial support of CCIs from public administrations: directly, mainly through grants, and indirectly, either through debt or capital funding instruments or through guarantees or tax incentives (ibidem).

In the Basque Country, instruments have been created that operate based on these two public-support models for different stages of CCI maturity and with different objectives: support for the embryo and seedling stage; growth; project development; innovation, and internationalisation.

Within the scope of training, pillar 3 of the KSI Berritzaile programme included support for financial education through training on basic economic-financial management concepts. Based on assessment of this programme for the 2017-2019 period, it was decided to integrate this area as a service within the BDCC.

Table 4.
Summary of noteworthy instruments in the Basque Country

	Entrepreneurship	Growth	Project Development	Innovation	Internationalisation
Cheques				SPRI: Basque digital innovation hub	
Refundable contributions					SPRI: Gauzatu implantaciones exteriores
Loans	SPRI, IVF y Elkargi: Aurrera Investments + floating assets for start ups	Elkargi: LANDU loans for CCIs Basque Institute of Finance. SMEs and NIDCAP	Elkargi: ERAIKI loans for CCIs	Elkargi: Innovation Fund	Basque Institute of Finance: Export
	Enisa				
Microcredits	Seed Capital Bizkaia: Nikro Fund				
Participatory loan	Seed Capital Bizkaia: Fund I	Basquefondo I	Basquefondo II	Seed Capital Bizkaia: Fondo BI Fondo FEIS	
Risk capital					
Business angels	Crecer + Keiretsu Forum Euskadi				
Seed capital	Hazibide, Seed capital Bizkaia Seed Gipuzkoa				

Source: Basque Culture Observatory (2016b).

3.1.2. Intellectual Property (IP) in CCI

A report by the Galbaian Association from 2019 recommended collecting information on the creation and exploitation of IP by CCIs, including a series of indicators for CCIs to measure their evolution and development, and to measure the impact of the programmes to drive IP in the cultural and creative sector (Galbaian Intellectual Property, 2019, p. 63).

Regarding measures or instruments to protect creativity (through IP protection), actions have been carried out in three different areas in the Basque Country: awareness and training, encouraging creation of intellectual property and assistance in IP management and exploitation.

Regarding the first area, awareness and training, the SPRI Group - Company Development Agency of the Basque Country, offers and sponsors several courses and training events on IP for companies and individuals. For example, the Patent Specialisation Course in the business area, or the course on Innobideak Prestakuntza - Active management of industrial and intellectual property to improve competitiveness (ibidem, p. 56).

From the perspective of encouraging IP generation, "R+D support programmes, such as Hazitek, for example, have items related to IP protection and exploitation from funded project profits" (ibidem). The Hazinnova⁴ project also has a specific section for "Marks and Designs" that covers expenses related to registering commercial marks and industrial designs in the EU to make investments in SMEs profitable.

In any event, and as occurs in the different areas associated with generic policies in business promotion, these initiatives are more oriented toward assistance in managing and exploiting Industrial Property (patents, marks and designs) than areas more associated with the Intellectual Property itself (copyright, associated rights, etc.), where the supply is more limited. For this reason, the Department of Culture in 2020-2021 will launch a series of services in pilot phase within the BDCC. They will mainly include awareness and training actions, diagnoses and personalised plans for participating CCIs.



BIO 



Within the CCIs, the different sectors have their particularities, and therefore, their own needs, as well. In any event, all sectors are harmed by piracy and a lack of value placed on intellectual work. One of the main shortcomings we have detected is a lack of contact with applicable regulations, lack of knowledge of rights available and which rights they are impacting with their different professional activities.

Through the BDCC, from recognition to strategic relevance of CCIs, and given the needs detected in this regard, Audens is working with the Department of Culture and Linguistic Policy to start up an action plan that seeks to implement awareness and training actions, as well as actions to generate resources and tools to solve general problems, and specific consulting for sectorial industries".

Maitane Valdecantos
Lawyer-Partner, Audens

3.1.3. R+D+i conceptualisation in cultural and creative industries

Under the framework of the RIS3 Pilot Group for CCIs, one of the three strategic lines started up through specific working groups was for R+D+i in CCIs.

Within this strategic line, a first fundamental step was identified: to define research, development and innovation in the cultural and creative sector, so this could be understood and shared in the sector and be comparable with other sectors. This task was assigned to ICC Consultors, to carry out a study that provided a vision of the conceptual framework of R+D+i in the sector based (amongst other elements) on international experiences. It was presented in November 2019.

The first step identified in the report was the need to distinguish between innovation and R+D because, while both of them fall under the generic framework of innovation, they have different specificities.

INNOVATION: Its definition is based on the Oslo Manual, jointly developed by Eurostat and the OECD, bearing on the measurement and interpretation of data on innovation.

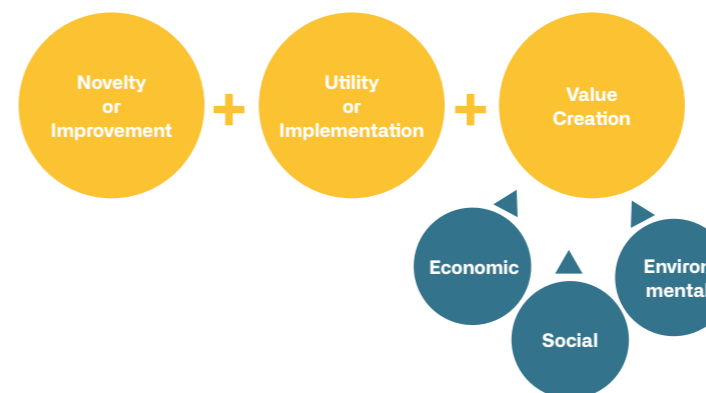
To consider a project or activity innovative, it must meet the requirements of *newness or improvement* (new product or process or a significant change to the existing product or process), *usefulness-implementation* (product, made available to potential users; process, put in use in the unit) and *creation of value* (evidence of creation's impact on economic, environmental or social value).

- Economic value: this is the project's capacity to create profits, such as increasing invoicing and profitability for the company; impact on employment; and the economic yield obtained through the project's intellectual property.
- Social value: this is the ensemble of factors contributing to increasing the social yield from the project. These include those that have an effect on cohesion and social inclusion, on education and autonomous development of people, on governance and participation and on sustainable employment.
- Environmental value: this is the project's contribution toward making efficient use of resources, preventing pollution and improving the physical environment.

Innovation activities include all development, financial and sales activities undertaken by a company that seek to provide innovation for the company. They identify seven types of innovation activities: R+D activities, engineering, design and other creative activities, marketing and brand value, activities related to intellectual property, staff training and education activities, software and database development, tangible asset purchase or leasing and innovation management activities.

Of these seven types of innovation activities, three are inherent to cultural and creative sectors: engineering, design and other creative activities, marketing and brand value and activities related to intellectual property.

Figure 16. Requirements for innovation in the CCI sector



Source: Own elaboration, based on the Oslo Manual (OECD/Eurostat, 2019).

⁴ For more information, please see <https://www.spri.eus/es/hazinnova/>

R+D: the definition is based on Frascati's Manual, mainly a technical document, considered a point of reference to understand the role that science, technology and innovation hold in analysing national research and innovation systems.

R+D is always focused on new findings, based on original concepts (and their interpretation) or hypotheses. The end result is largely uncertain. It is planned and budgeted and focused on producing results that can be freely transferred or sold on the market. For an activity to be considered R+D, it must meet five basic criteria: the activity must be new, creative, uncertain, systematic and transferrable and/or reproducible.

In cultural and creative sectors, in addition to applying the five R+D criteria, the institutional criteria is recommended. In short, the following additional guidelines must be considered:

- The context of execution (institutional criteria). The research carried out under the framework of a university or specialised, officially recognised institution (museums, art centres, libraries, archives, etc.) may be included under R+D.
- Adoption of recognised procedures. Research requires formalisation. We must be able to identify research activities, and their results must be made available to the scientific community through their publication in scientific or specialised magazines.

3.2

Prioritising cultural and creative sectors within the RIS3 strategy: a collaborative exercise

When the Basque Culture Observatory delimited the CCIs in the Basque Country, it was concluded that (since this is such a varied sector, with 15 sub-sectors in two different areas (cultural and creative)) prioritisation that allowed to focus efforts on sub-sector with greatest potential was necessary (Basque Culture Observatory, 2018).

To be able to prioritise in this way, 2019 bore witness to an illustrative exercise to discover the main assets in each region in the CCI sector, through two consultation rounds (in March-April and October of 2019), involving directors and economic and cultural promotion figures from the Basque Government, Provincial Councils and Town Halls of the three Basque capitals.

The result is prioritisation regarding the economic, innovation and internationalisation potential of the CCI sector. This prioritisation, drawn by crossing the contributions of the parties involved (Councils, Town Halls, other agents), the Basque Culture Observatory's statistical data (contribution from each sector to economic development) and the degree of development of the sub-sectors' activity (CCI actors' ecosystem), was validated by the agents involved after a consultation process conducted in late 2019.

In the future, this prioritisation could be periodically reviewed every two years, along with results from the Arts, Cultural and Creative Industries Statistic carried out by the Basque Culture Observatory, which is also biannual in nature.



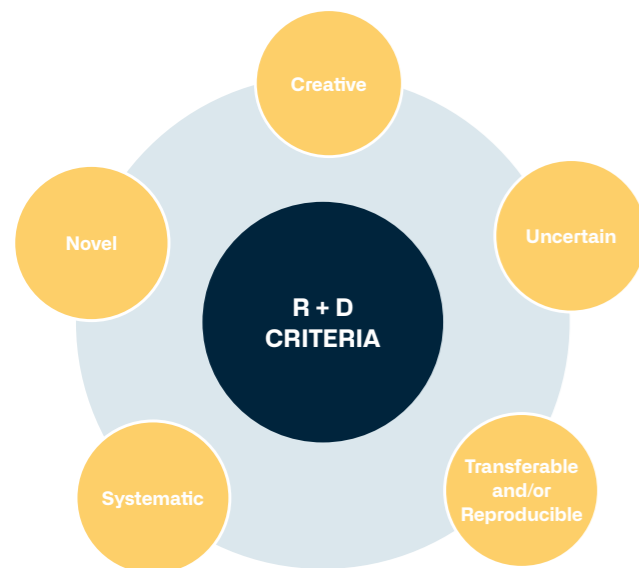
Over time, awareness has increased on the fact that the cultural and creative sector is a significant sector where two things are at stake: 1) this is something valued in Europe, culture and creativity as an area that is important in and of itself, and 2) an economic sector that creates employment and which is currently an unstructured, but growing sector accounting for 4.5% of Europe's GDP (in the Basque Country, this number is lower, around 2.7%).

We need to see which sectors currently have the greatest driving force in comparison with others. We must not ignore the fact that the Basque Country stands out in audio-visual terms”.

Ramón Zallo,
Professor Emeritus, University of the Basque Country

Figure 17.
Criteria for conceptualising R+D in the CCI sector

R + D Activity types



The scope of R+D projects in this sector must be calibrated. This is an issue yet to be resolved. We have done many projects at Vicomtech and they were successful, although the last year they were mainly technology-driven. The CCI sector needs technology for digitisation, that is for sure, but we must identify its real R+D needs beyond technological transfer”.

María Teresa Linaza,
Director of Promotion and Institutional Development, Vicomtech

Source: Own elaboration, based on Frascati's Manual (OECD, 2015).

Figure 18.
Prioritisation of sub-sectors in the cultural and creative sector in the Basque Country



Source: Basque Culture Observatory (2018).

While all programmes and services driven by the Department of Culture, either directly or through the BDCC, are globally targeting all CCIs, this prioritisation helps us to consider specific pilot actions for prioritised sectors, in cases where, for example, we wish to limit the number of sectors or where we seek rapid impact.



BIO

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There are different spaces for opportunity that facilitate CCI development. Biscay has always been a role model in this regard. Beaz began defining a series of priority sectors which included many that were closely related to creative industries. The technological start-up generation, related to the audio-visual sector, was mainly seeded in Biscay. In Gipuzkoa, opportunities related to the audio-visual sector were generated revolving around Tabakalera, with another absolutely different model. While there are opportunities in both regions, the approaches and regional development is different”.

María Teresa Linaza,
Director of Promotion and Institutional Development, Vicomtech

As shown in figure 18, sub-sectors of high prioritisation in the Basque Country are Audio-visual and Music for Cultural Industries, and Gastronomy, Video Games and Design for Creative Industries. There are certain regional specificities to bear in mind: Gipuzkoa is most different in specialisation, prioritising the Heritage sector amongst cultural sub-sectors, and the Language and Digital Content sub-sectors amongst creative sectors. Biscay prioritises the Visual Arts sector in Cultural Industries. Finally, prioritisation in Alava matches the Autonomous Community of the Basque Country as far as high-priority sectors are concerned.

3.3
Cross-fertilisation between lands of food opportunity and CCIs

Under the RIS3 strategic framework, the main objective of cross-fertilisation between sectors is to create new knowledge and assets that enrich both parties. Cross-fertilisation or inter-sectorial pollination between CCIs and other areas or lands of opportunity is an exercise that can provide important advantages to industries in this sector in the Basque Country. The search for opportunities in this regard led to the identification of clear synergies in the food area. As a first step, there was cross-participation at Pilot Group meetings for both sectors in 2019. The Food Group meeting was held in October, and the CCI Group one, in June and December.



BIO

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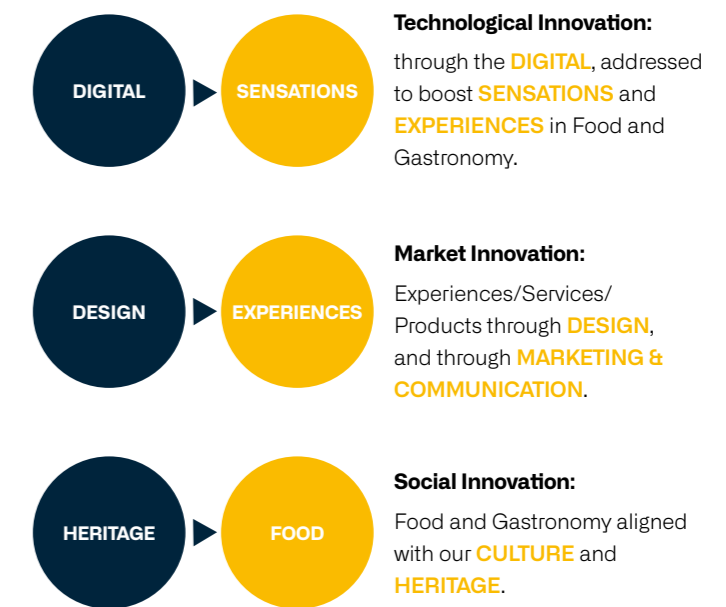
We are in a time of cross-fertilisation and horizontal collaborations. Some CCI sub-sectors may contribute to others, but to do so, they must first acquire greater added value, both in technological capacity and in company approach”.

Jon Basterra
Advisor in the Department of Economic Development and Infrastructure, Basque Government

Thus, in the Pilot Food Group meeting on 20 June 2019, the main lines of cooperation amongst companies from the food sector and CCIs were identified and the advisability of continuing to explore possibilities by means of a presentation to the Pilot Food Group in October 2019 was discussed.

For the time being, a series of opportunities has been detected (figure 19) and a specific working group was created which (since early 2020) will be working to spot opportunities and projects. For such identification, we expect the participation of companies from the food sector, CCIs, agents from the Basque Network of Science, Technology and Innovation (such as Neiker, AZTI and BCC Innovation as representatives of the food sector on the one hand, and Tecnalia and Vicomtech from CCIs, on the other hand, clusters and sectorial associations from both sectors, and agents from Public Administrations (such as the Vice-Minister of Agriculture, Fish and Food Policy, the Vice-Ministry of Culture of the Basque Government, the SPRI Agency, HAZI and Innobasque).

Figure 19.
Opportunities in inter-sectorial pollination between CCIs and the food sector in the Basque Country



Source: RIS3 Basque Country.



The Basque Government is driving programmes to support music which are useful, in my personal experience. While there are also counterparts, there are also very on-the-mark initiatives, such as supporting musical-company initiatives, working on audiences. The Basque Government has recently been working in this direction, attempting to provide incentive for working on new audiences, which is something we usually do in physical halls.

It would be highly interesting to work on music's intersection with other CCI sub-sectors. Shows have changed to an incredible extent with new technologies, and culture is now consumed in a different way”.

Iñaki Otalora
member of Kultura Live,
member of the Board of Directors, EHMBE



For example, music's relationship with video games is very clear. Other connections, like fashion or food, are fields yet to be explored, but it would be very interesting to analyse them”.

Álvaro Sanz
President of Musika Industria Elkartea,
member of the Board of Directors, EHMBE



The food sector in the Basque Country mainly consists of SMEs and MICRO-SMEs. The main strategy that they must develop, considering the need for excellence in productive efficiency, is to generate value, where design, packaging, non-technological innovation, the cultural narrative related to food production and development of related skills to understand consumer behaviour and needs are key to guarantee competitiveness. Collaboration between food SMEs and creative and cultural industries would facilitate the incorporation of non-technological innovation into the food value chain. To facilitate company cooperation, we must develop a shared language where the needs of one sector can be understood and heard with the capacities and skills of the other.

It has been proposed to create a mixed working group between companies from both sectors to identify specific projects. In addition to this channel, there are individual collaborations between companies from both sectors in the areas of design, eco-packaging, etc. In terms of the future, from food's perspective, priorities are mainly: Consumer knowledge and behaviour, communication with the consumer, design (including eco-design), and packaging”.

Rogelio Pozo
General Director, AZTI

3.4 Designing the pilot for the Basque District of Culture and Creativity - BDCC

Within the line designed to reinforce CCIs by driving innovation, the Culture Plan 2019-2022 (Department of Culture and Linguistic Policy, 2019) establishes the creation of the BDCC, with the aim of unifying innovative policies within the sector.

“The district concept will contribute to compacting the CCI sector. It will seek the structure and optimise initiatives underway at different regional levels, offering qualified and specialised support services to improve capacities and opportunities in the future for companies and individuals in the sector, increasing possibilities for Basque CCIs to internationalise and draw international talent to the Basque Country” (ibidem: 31).

The BDCC's main roles are:

- To offer information and consulting to CCI professionals and companies to promote innovation.
- To create networks and synergies between main agents involved and with agents from other sectors.
- To facilitate internationalisation.
- To participate in international networks.

To start up the BDCC, in 2019, an intense initial phase was conducted to design the pilot: through several interviews with point-of-reference agents and companies, as well as different work sessions with hubs and involved companies, the sector was characterised (meaning a map of existing services), identifying needs and drawing up a services map.

Needs shared amongst different sub-sectors in cultural and creative industries identified through this process are:

- Professionalisation of company management (including strategy and definition of the business model and scope of the optimum company dimension).
- Improved financial and economic management and management of intellectual property rights.

- Improved capacities, both in innovation (technological and non-technological) and in internationalisation for the sector.

- Training, recruiting and retaining talent, as well as access to existing information (for example, regarding funding programmes, both locally and internationally).

- Need to improve articulation of the CCI sector (meeting and matchmaking spaces) and to raise visibility for the design and creativity sector in the Basque Country by raising awareness of the importance of creation and design in other sectors.

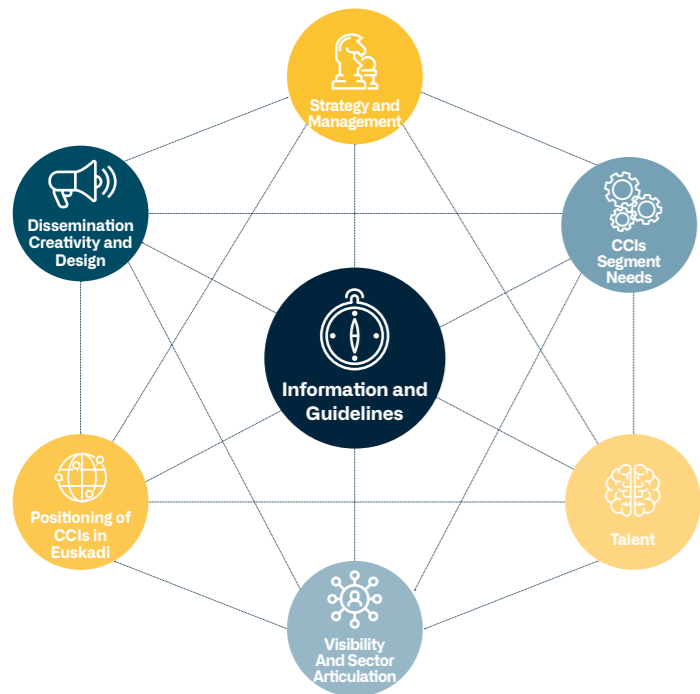


There is a clear turning point, which is considering the cultural and creative sector as a "land of opportunity" within RIS3. Over these past two or three years, a series of initiatives driven by the Basque Government were rolled out (KSI Berritzaile, CREADIS3, BDCC) to allow CCIs to improve aspects such as technology, innovation, company management, funding, internationalisation, etc., and take a qualitative leap in the sector. Within the concept of the Cultural District, SPRI has also established a specific dialogue point as a "one-stop-shop" to provide access to industry programmes and grants”.

Jon Basterra
Advisor in the Department of Economic Development and Infrastructure, Basque Government

To meet these needs, a broad portfolio of services for the BDCC to provide was designed (figure 20). This task was supported by the collaboration agreement signed between Innobasque and Flanders District of Creativity, an international leader thanks to its focus on fomenting business for cultural and creative companies, its ability to speak the same language as the sectorial industries, and its orientation toward accompaniment programmes and personalised consulting based on each actor's needs.

Figure 20. BDCC services and initiatives portfolio proposal



Source: BDCC.

Click and navigate through the different phases

CCIs in the Basque Country:

a journey through the development of the Basque cultural and creative sector

SUBMERSED

ARE YOU AFRAID OF THE DEPTHS?
YOU WILL BE.

CCI_Submersed



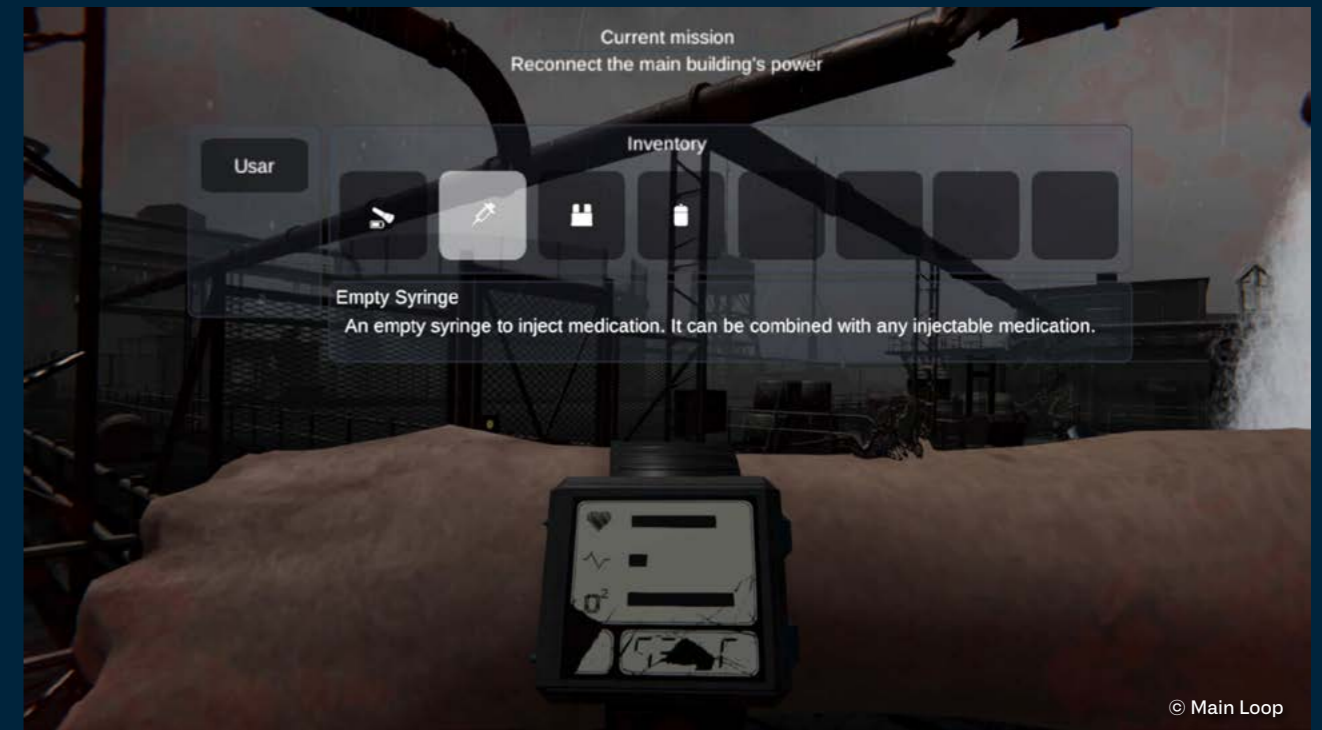
***Submersed:* finalist GameLab awards 2019**

Created by Main Loop, *Submersed* –a first-person horror survival game– won in 2018 the award for the "Best Basque Video Game 2018" when presented at the European festival Fun & Serious Game Festival (held that year in Bilbao).



Submersed is a video game created by Main Loop, "a study on indie game development founded in Bilbao in 2017" (Beaz Bizkaia, 2019), with the cooperation of the Bizkaia Creativa programme, which offers various services to strengthen entrepreneurship and video games as part of the digital industry (ibidem). This video game is "a first-person horror survival game that pays tribute to genre classics and horror and science fiction film" (PlayStationTalents, 2019). Furthermore, *Submersed* is available for digital purchase all around in the world, in Basque, Spanish, English and other languages.

In 2018, when presented at the European festival *Fun & Serious Game Festival* (held that year in Bilbao), *Submersed* won the award for the "Best Basque Video Game 2018" (ibidem). For the team that created this video game, this title is a huge support, since it mainly acts as a "motor for visibility" in the role that Biscay could play in the digital industry (Beaz Bizkaia, 2019).



Kutxa Kultur: culture under the framework of Kutxa Social Work

2018 Kutxa Kultur Resumen



* Available in Basque only

Kutxa Kultur Moda Pildora 2020



* Available in Basque only

Kutxa Kultur is the project that Kutxa Fundazioa carries out at the International Centre for Contemporary Culture Tabakalera of Donostia-San Sebastián, with a vast daily cultural offer, educational entertainment programmes for all audiences, an exhibition space specialised in photography and different programmes to support up-and-coming and amateur talent.





© Kutxa Fundazioa



© Kutxa Fundazioa

Since its founding in 1990, Kutxa Fundazioa's purpose has been to foment, develop and sustain social, charity, assistance, educational and/or cultural activities by managing a very significant portion of Kutxa's social work, focusing its main activity on developing general-interest purposes such as assistance and social inclusion, civic, education, cultural and scientific-research purposes and technological development.

Moreover, Kutxa Kultur is the project that this institution carries out at the International Centre for Contemporary Culture Tabakalera of Donostia-San Sebastián, with a vast daily cultural offer, educational entertainment programmes for all audiences, an exhibition space specialised in photography and different programmes to support up-and-coming and amateur talent of cultural agents and artists with visibility in the region of Gipuzkoa for fashion designers, music groups and entrepreneurship within the CCI sector.



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Click and navigate through the different phases



Phase 4



Click and navigate through the different phases



Phase 4

Basque District of Culture and Creativity – BDCC 2020-2023

While in 2019 the pilot for the *Basque District of Culture and Creativity* was designed (BDCC), this new decade will bear witness to the consolidation of this initiative. Its main objective is to shape and connect the cultural and creative sector from a comprehensive, holistic perspective. Moreover, in this last phase, a new Statistic of Public Funding of Creative Industries shall be developed, and cross-fertilisation between strategic sectors will continue to be fomented (adding other sectors like health or urban habitat to food, in order to explore their synergies with the cultural and creative sector).

Milestones

2020

- RIS3 Pilot Group Development: start-up of 3 Working Groups (BDCC, R+D+i, Cross-fertilisation)
- Strategy for the promotion of Intellectual Property in CCIs - Through BDCC
- R+D+i Strategy in the Cultural and Creative Industry of the Basque Country (start)
- Pilot Implementation of the Basque District of Culture and Creativity, BDCC (start)

2021

- R+D+i Strategy in the Cultural and Creative Industry of the Basque Country (continuation)
- Pilot Implementation of the Basque District of Culture and Creativity, BDCC (end)

2022

- R+D+i Strategy in the Cultural and Creative Industry of the Basque Country (end)
- Public Funding of Cultural and Creative Industries
- Consolidation of the Basque District of Culture and Creativity, BDCC (start)

2023

- Consolidation of the Basque District of Culture and Creativity, BDCC (end)



When you need someone to come on a dragon to tell you that Gaztelugatxe is a beautiful, magnetic, unkempt place, this is when you lose control over the situation, people feel overwhelmed and we stuff it all with concrete. Euskal Herria is a model of Europe: the Atlantic and Mediterranean worlds in miniature. If we manage to make a future proposal on our shared cultural diversity, we will have made a contribution, an incredible storytelling that Europe seems to urgently need. We need a process of learning how to shift our gaze and to trust ourselves. We are a people who does not know who we are. We must transform into know-how our mystery, our fertile emptiness”.

Fredi Paia

PDI, University of the Basque Country; *bertsolari*

BIO

4.1.

Implementation of the pilot and consolidation of the BDCC (2022)

The start-up of a Basque District of Culture and Creativity (BDCC) is one of the key activities in the sector in the Basque Country for upcoming years. According to the former Vice-Minister of Culture of the Basque Government, Joxean Muñoz, this is about "putting tools at the service of Basque cultural and creative companies for their development, understanding it as both fomenting entrepreneurship and innovation, and improving competitiveness, structuring and professionalising the sector, fomenting internationalisation and pollination with other areas, pursuant to the needs identified in the pilot design phase.

After the pilot design phase for the BDCC in 2019, initial activities in each one of these areas will be conducted in 2020:

a) Information and initial orientation

- Start-up of a website that collects all information of interest on the CCI sector in the Basque Country (for example, a map of administrations and institutions of interest for the cultural and creative sector, and a map of grants, subsidies and services (local, European and international)).
- Fomenting dialogue with public administrations and with hubs.
- Orientation for support programmes and existing services, focused on identified sectorial needs.

b) Strategy and management

- Development of templates and/or documents (available on the aforementioned website) to support companies in practical tasks related to business management.
- Organisation of events and workshops with experts on specific issues that meet the sector needs (for example, issues such as intellectual property structures in CCIs, how to set a price for creative services, analysis of organisational structure models to improve management capacities, training on new technologies in CCIs, etc.) in formats that facilitate interaction between participants and spaces to consult experts.

c) Visibility and shaping the sector

Joint CCI sector events shall be held with professionals of international renown from the creative sphere, as well as matchmaking events between cultural and creative sector companies.

d) Positioning the Basque cultural and creative sector internationally

The BDCC shall participate in the international creative district network, *Districts of Creativity Network*.

Figure 21 shows these initial activities to be conducted in 2020 (as the initial moment of pilot implementation), organised based on different areas in the services and initiatives portfolio to be promoted by the BDCC. Moreover, it adds these other actions to be implemented in following years until 2022, during the phase to consolidate BDCC.

Figure 21.

Proposal for services and initiatives portfolio to be promoted by BDCC (2020-2022)

INFORMATION AND GUIDELINES

- **Web with all information on the CCS.**
- **Guidelines for support programmes and existing services.**
- **Administrative dialogue and nodes and creation of intermediate entities .**

TALENT

- **Training on new technologies.**
- *Business and Tech. talent: Opportunity to work in CCIs in Euskadi.*
- *CCIs talent: opportunity other industries and importance of management.*

STRATEGY AND MANAGEMENT

- **Support tools for business management.**
- **Tools and sessions. Set a price for creative services.**
- **Joint sessions and conferences with experts.**
- *Individual enquiries with experts.*
- *Joint programmes of strategic reflections.*
- *Consultancy – individualized coaching.*

CCIS SEGMENT NEEDS

- **Specific sessions for CCIs segments.**
- *Identification of motivational profiles live culture.*
- *Development of CCIs businesses in other industries.*

POSITIONING OF CCIS IN EUSKADI

- **Districts of Creativity Network.**
- *Endorsement joint international activities.*

VISIBILITY AND SECTOR ARTICULATION

- **CCIs joint events.**
- **Matchmaking sessions among CCI enterprises.**
- **Dissemination of data regarding the economic impact of CCIs.**
- *Dissemination of qualitative information regarding CCI sub-sectors.*

DISSEMINATION CREATIVITY AND DESIGN

- *Dissemination of successful cases design and creativity in other industries.*
- *Opportunity to incorporate CCI talent in other industries.*

Note: in bold, services/ initiatives proposed for 2020; in italics, ad hoc initiatives (not services) to be promoted by BDCC

Source: BDCC.

4.2. R+D+i Strategy in the Cultural and Creative sector of the Basque Country

The R+D+i strategy in the CCI sector over the upcoming years is structured around three strategic lines.

4.2.1. International contrast of conceptualisation and pilot during two cross-cutting meetings (2020)

In 2020, the idea is to monitor the study conducted by ICC Consultors (2019) for the conceptualisation of R+D+i in the cultural and creative sector with a contrast event with international experts. The main objective of these events is to gain knowledge to develop policies and initiatives to support innovation in the CCI sector that are better-informed. More specifically, the concept is to move toward consensus in the conceptual framework for innovation in the CCI sector, improve measurement of innovation in the CCI sector, make it possible for CCIs in the Basque Country to access first-hand information on successful innovation cases around the world and reflect on public policies to support R+D+i in the Autonomous Community of the Basque Country.

In the mid-term (2021-2022), the need has been raised to analyse the projects founded on the two contests launched by the Direction of Cultural Promotion, to assess to which extent R+D+i is being integrated into them. These two contests are: SORGUNE, grants for independent cultural spaces that support creative practises, and BITARTEZ, grants for mediation and cultural and social innovation projects, both of which fall under the Fábricas de Creación programme.



BIO

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In the cultural and creative sector, there are issues in clearly differentiating R+D+i activities, and for them to be shown in measurement indicators for R+D+i in the Basque Country. For this reason, we are working through a working group derived from the Piloting Group on three differentiated, yet complementary lines: a report on R+D+i conceptualisation in the cultural and creative sector, the creation of a CCI Knowledge Pole (in collaboration with the Department of Education) and the analysis to present a proposal for the Basque Country's participation in the new KIC (Knowledge and Innovation Community) in CCIs. The launch is planned for 2022”.

Sabin Goitia
Former Advisor in Cultural and Creative Industries, Basque Government

4.2.2. Creation of a CCI knowledge hub (2020)

At the behest of the Basque Government Department of Education, the development of a *CCI knowledge hub* was begun (ksiGUNE). It puts companies in contact with agents who generate knowledge (both within the university and research system, and outside, given the peculiarities of the sector). To do this work, Euskampus Fundazioa is participating, aggregating agents such as the University of the Basque Country/Euskal Herriko Unibertsitatea (UPV/EHU), The Tecnalia Corporation (Tecnalia) and Donostia International Physics Centre (DIPC).

This knowledge hub is defined as an *open space for multi-disciplinary and inter-institutional collaboration* that seeks to meet social and global challenges from the perspective of science, *technology and innovation*, through actions in training, research and transfer to society, using *co-creation methodologies with no need for added structures*.

In the past, there was a timid attempt in the Basque Country to launch two knowledge hubs in the cultural and creative sector. They did not prosper, due to their broadness or lack of focus. On the other hand, today, the opportunity to develop this knowledge hub is backed up by the solid local and international conviction of this sector's economic weight and social importance. Thus, the idea is to reinforce existing capacities and create a permanent space for dialogue between university centres, companies and public administrations in the CCI sector.

In order to develop this knowledge hub, university capacities in the cultural and creative sector in the Basque Country shall soon be identified or mapped (beginning with co-creative capacities). On the other hand, the possibility of basing ksiGUNE on the previous experience of the advanced manufacturing knowledge hub 4GUNE⁵ in the cultural and creative sector was proposed, as well as designing executive training programmes to reinforce knowledge of CCIs in the university sphere. The launch of this knowledge hub seeks to raise the level of CCI competitiveness and their ability to create wealth.



BIO

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I think the government is doing a good job. There are two policy vectors at the Department of Culture and Linguistic Policy of the Basque Government: one, which seeks to support innovation at companies in the sector to make them more competitive (mainly based on the KSI Berritzaila programme) and another vector that attempts to drive innovation in the culture sphere to obtain greater public value, greater social value and greater cultural heritage, so that culture acts for social transformation. We must seek out the interrelation between the two vectors”.

Alaitz Landaluze
Director of the Department of Science, Technology and Innovation Policies, Innobasque

⁵ For more information, please see <http://4gune.eus/>



There are mainly two circumstances that have encouraged the idea of presenting candidacy for a KIC: on the one hand, strong institutional support from the Basque Government for CCIs in recent years (as shown by the inclusion of CCIs in the PCTI 2020 as a niche for opportunity, a sustained investment in the CCI innovation programme KSI-Berritzaile, the creation of the R+D+i working group in CCIs to conceptualise R+D+i and start-up of a Knowledge Hub) and, on the other, a strong and dynamic technological-business network, with several technological centres working for technological innovation in the CCI sector and a distinguished group of companies (mainly micro and small) with great concern for CCIs.

From my perspective, the Basque Country would mainly make three contributions to a KIC on CCIs: firstly, a region with rich cultural heritage (where the language is a clear example of specificity and idiosyncrasy), with very relevant and impacting sectors (such as haute cuisine, video games and digital content) and great initiatives (architecture and urban transformation); secondly, clear and firm institutional support, with a stable, well-established trajectory in support for innovation; third, a strong R+D+i network of agents who are engaged with the CCI sector.

The creation of a KIC in the Basque Country would also have a positive impact on local CCIs, given that this means the possibility of accessing European funds that support innovation, education and training and CCI entrepreneurship, the possibility of collaborating with relevant top-level European actors (universities, research centres, SMEs, large companies, associations, municipal, regional and national governments) and the possibility of internationalising activities, in forming part of a European forum, where CCIs can engage in networking, interacting, meeting others, etc.

Txetxu Santamaria,
Programme Director, ICT Division, Tecnalia



BIO 

4.2.3. New Knowledge and Innovation Community (KIC) in ICCs from the European Institute of Innovation and Technology (EIT)

After the announcement of a European contest by the *European Institute of Innovation and Technology* (EIT) to create a new *Knowledge and Innovation Community* (KIC) in 2022, it was deemed necessary to explore opportunities to form part of this community of international knowledge. To this end, Tecnalia collaborated to analyse possible actions.

The KICs are creative associations funded by the EIT. They bring together actors from the education, technology, research and business sectors in order to *bring innovative products and services to the market*, foment the creation of new companies and conduct training activities (talent creation) in a specific sector. The EIT has established that the CCIs are a priority area.

Each KIC has its rules and governance models. The objective is, from a local perspective, to contribute toward forming part of a winning proposal in coalition with other European partners. The long-term objective is for KIC to work autonomously, without European funding, so economic sustainability criteria are fundamental from their conception.

In 2020, progress will be made in creating a local consortium to integrate the international consortium for a final candidacy in 2021.

4.3. Statistic on Public Funding of Cultural and Creative Industries

In 2020, the Basque Culture Observatory shall carry out qualitative work to identify new sources and specificities in the Creative Industries in order to draw up a Statistic on Public Funding of Creative Industries. In 2021, field work and data collection shall be completed and, finally, the information shall be processed and analysed to draw up the pertinent reports in 2022.

This operation will complement the Statistic on Public Culture Funding, whose objective is to offer a panoramic view of the numbers in economic contribution and investment in culture from main Public Administrations in the Basque Country. This is one of the actions set forth in the CREADIS3 Action Plan, within the Creative Industries' inclusion strategy, in the main statistics we already had been carrying out, and reports that are proposed and created by the Basque Culture Observatory.

The final objective is to learn what the characteristics of the public support being given to CCIs by different administrative levels are, both in the quantitative aspect and in the qualitative aspect (type of grants, most and less-protected sectors, etc.), and to analyse where we have our main gaps. Based on this, administrations will be able to put forth policies and/or actions to cover these gaps and provide more effective support to the sector. Moreover, the evolution of this statistic, along with that of Arts and Cultural and Creative Industries, which measures the activity of companies in the sector, shall allow us to evaluate the real impact of these measures in the future.

4.4. Cross-fertilisation: Personalised Health and Sustainable Cities

Under RIS3 and PCTI 2030, and after exploring synergies with the food sphere, a new phase fomenting cross-fertilisation is proposed as a pilot in 2020. In this case, between Euskadi Creativa (Cultural and Creative Industries in PCTI 2020), as a land of opportunity, and other priority spheres such as Personalised Health and Sustainable Cities (Biosciences/ Health and Urban habitat in PCTI 2020).

It should be noted that Personalised Health is one of the priorities set forth by PCTI 2030, while Sustainable Cities is identified as a land of opportunity within the plan. Priorities

and opportunity niches are related in the PCTI 2030 by a "guiding thread" shaped around three large transitions (technological-digital; energetic-environmental and demographic-social).

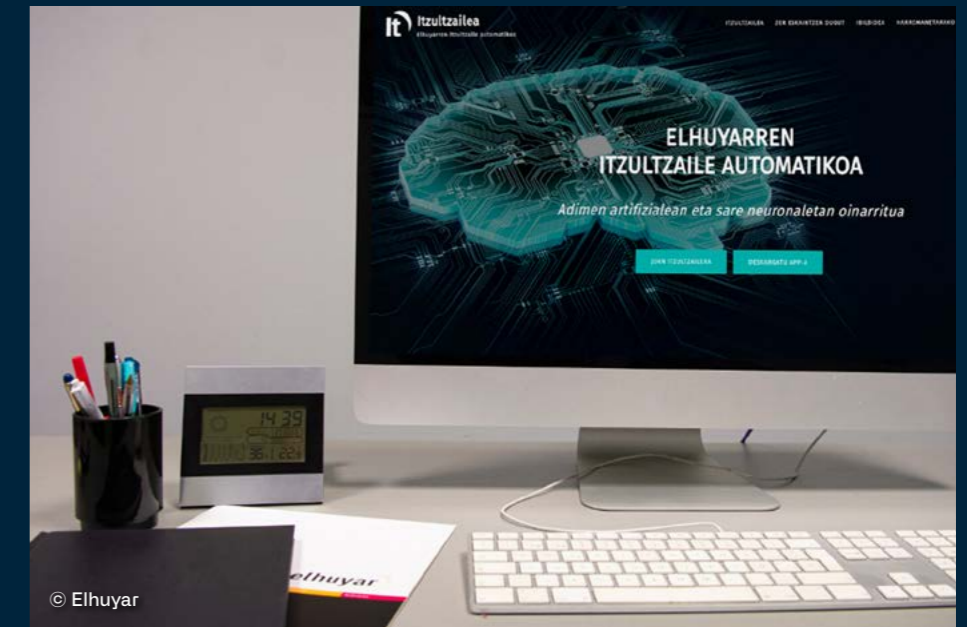
The urban habitat and construction is one of the segments identified by the BDCC, in an exercise to segment the cultural and creative sector into large spheres (instead of sub-sectors) to understand the shared needs and possibilities for the development of inter-sectorial synergies. Within the creative services for habitat and construction, we recognise potential contributions from sectors like architecture and design (interior and industrial). Within this segment, some of the needs to which CCIs could contribute are: training on new tools in construction, making contacts and partnerships to open new markets, specialisation in the end market, with the same objective of opening new markets, and increased visibility for the design sector in habitat/construction in the Basque Country.

On the other hand, the Health area was already identified in 2019 as a priority for its crossover with CCIs (although it was decided to begin with Food as a pilot, considering that, between these two spheres, there was already cross-contrasted experience, through the Healthy Food strategy).

Notwithstanding, throughout this time, a couple of cross-contrast experiences between CCIs and Health were conducted, through the emerging practises programme CREADIS3. One of them, through Karraskan⁶, was to work on communication and dissemination of Innopal tools, developed by Osakidetza for palliative care in 2019, and another through the Do Re Ni Association, to make a pilot for scientific proof in active and healthy ageing for the population, researching the speed and effectiveness of music therapy as an instrument to optimise quality of life, mental health and neurocognition processes for the elderly. This project shall be conducted throughout 2020.

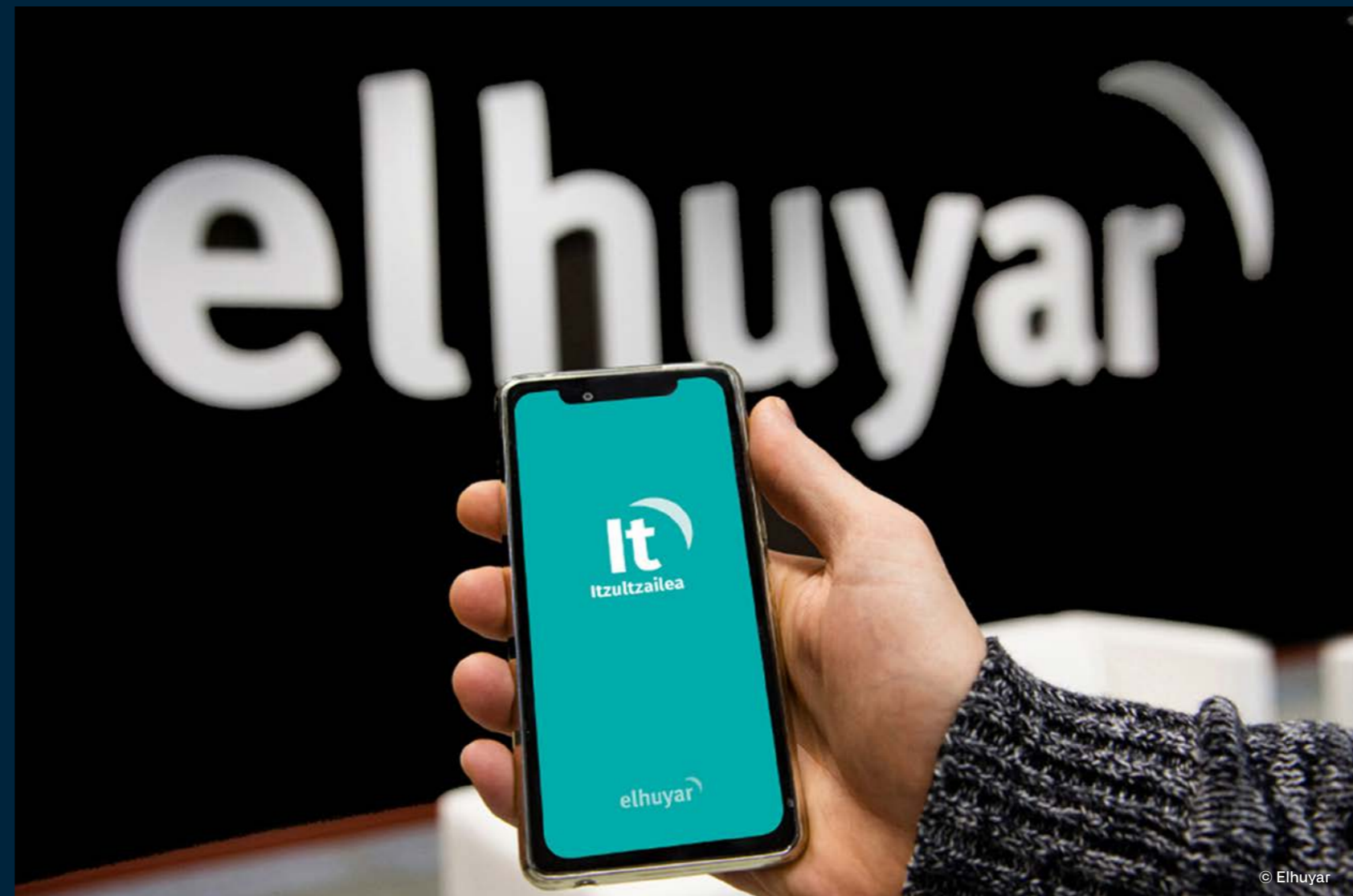
⁶ For further information, please see <https://www.karraskan.org/es/>

Elhuyar: technology at the service of automatic language processing and artificial intelligence



- Aditu el reconecedor del habla de Elhuyar
* Available in Spanish only
- Itzultzailea: Elhuyarren itzultzaile automatiko eleaniztuna, doan ordenagailu eta mugikorretarako
* Available in Basque only
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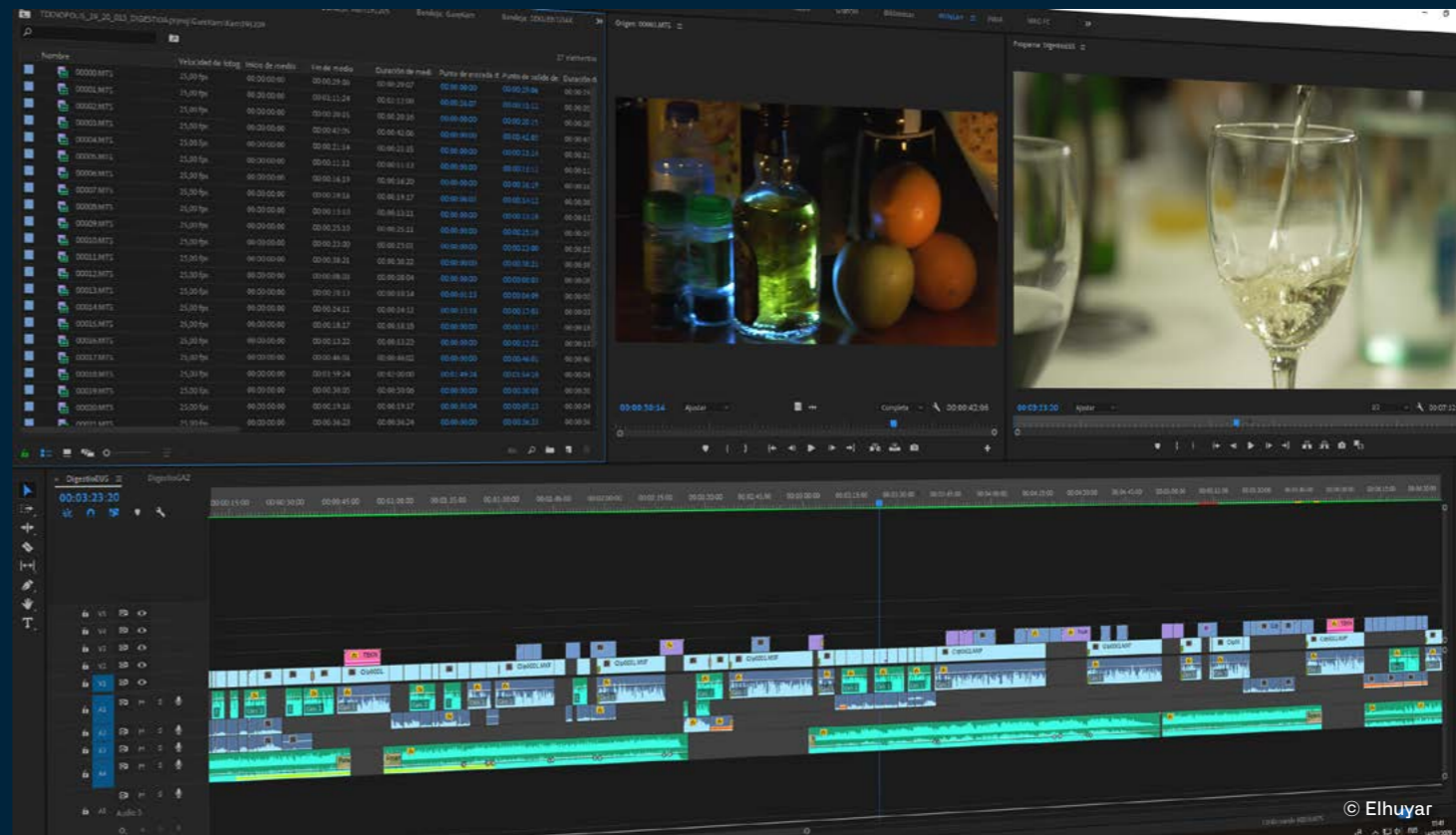
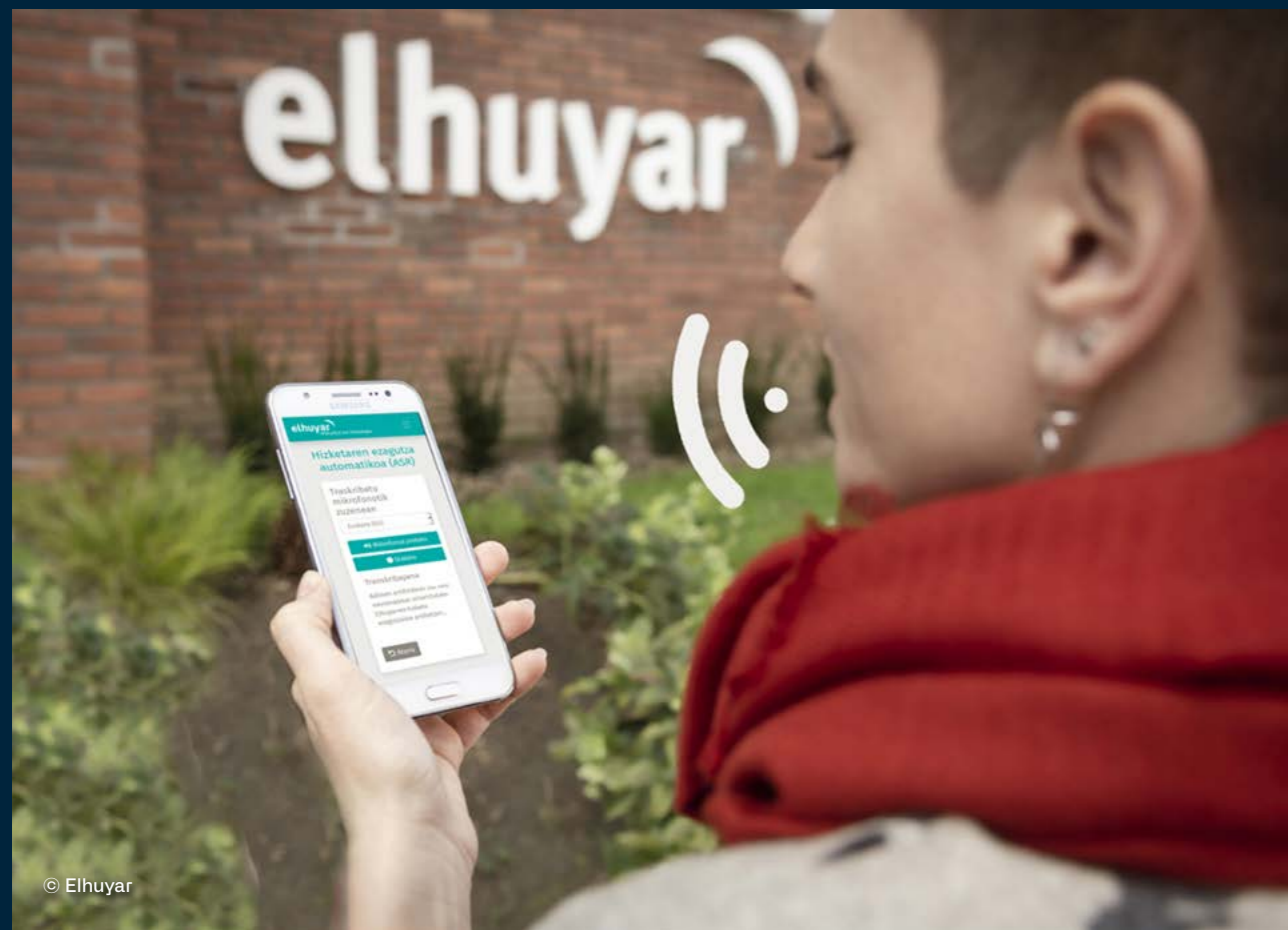
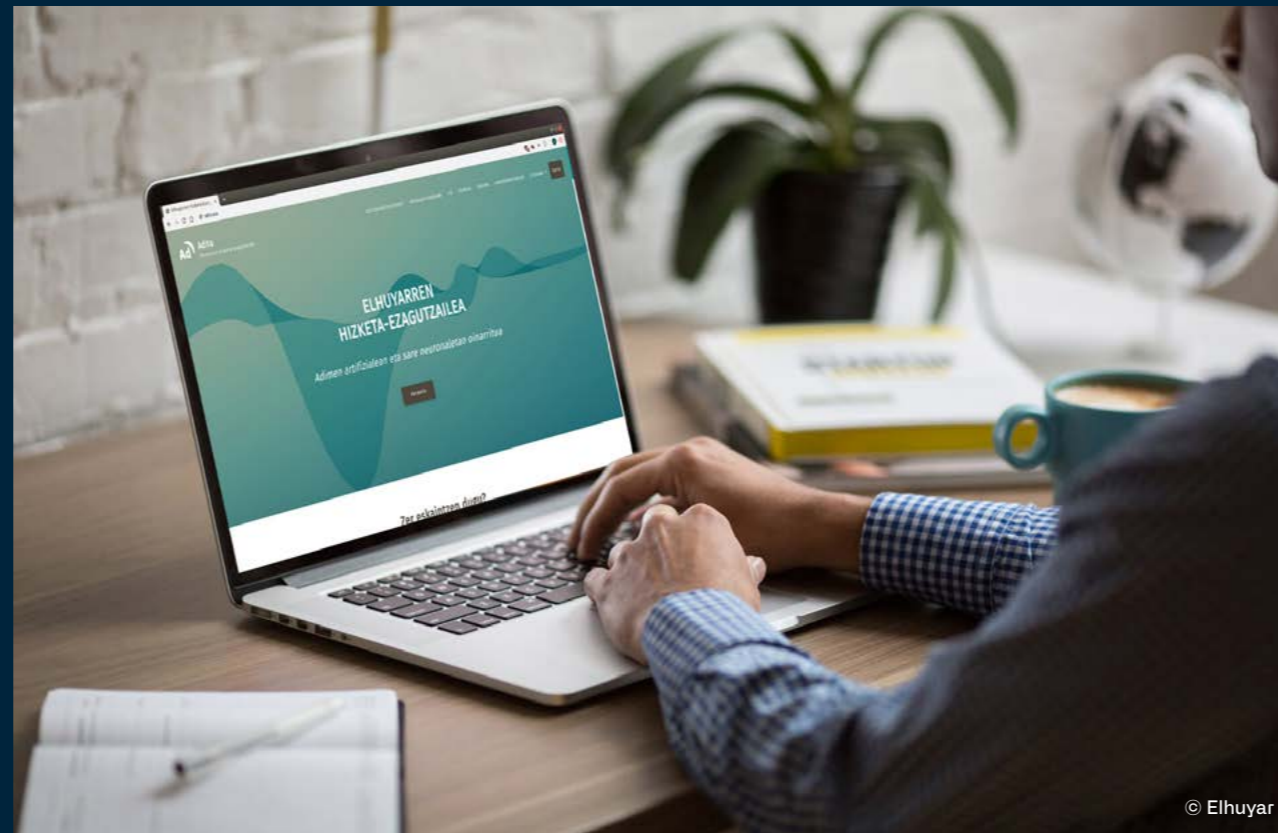
Elhuyar focuses on using Basque both in society and in the digital setting, in an inclusive way, encouraging citizen participation and equality. Since 2001, it has been carrying out key research in the language technology field, all while developing technological solutions.



Elhuyar, as a private not-for-profit entity, since its creation in 1972, has been focused on developing the Basque language in science and technology, being aware of the importance of a multilingual environment in the Basque Country. To this end, it focuses on using Basque both in society and in the digital setting, in an inclusive way, encouraging citizen participation and equality.

Elhuyar is an accredited technological unit of the Basque Science and Technology Network that works in the field of automatic language processing and artificial intelligence. Since 2001, it has been carrying out key research in the language technology field, all while developing technological solutions. As a result of the creation of the company Eleka Ingeniaritza Linguistikoa in 2002, the results of this research streamline commercialisation.

Among the language technologies developed by Elhuyar, of note is the automatic neuronal translator itzultzailea.eus and the artificial intelligence and neuron network-based speech recognition aditu.eus. In addition to offering advanced interaction services, this technology includes multilingual search, listing of similar documents and disambiguation of institutions.



Elkar: the entire book, publishing, distribution and sales chain



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Elkar boosts several projects to raise visibility and normalise books and albums related to Basque culture and, in an express way, those produced in Basque. Over the years, Elkar has created a network of bookshops in the Basque Country and has expanded a sales network throughout Spain, while adapting itself to the digital age.



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In the late 60s and early 70s, the Jaka brothers, with Joseba Jaka in the lead, began selling books in Basque or on Basque themes as home delivery, and materials for incipient *ikastolas*. In the 70s, they created the publishing house Elkar in Bayonne (*Euskal Liburu eta Kantuen Argitaldaria*-Basque Book and Song Publisher-). It was initially created by 20 people from Iparralde, and another 20 later joined from Hegoalde, along with the Zabal bookshop, in order to raise visibility of the Basque culture.

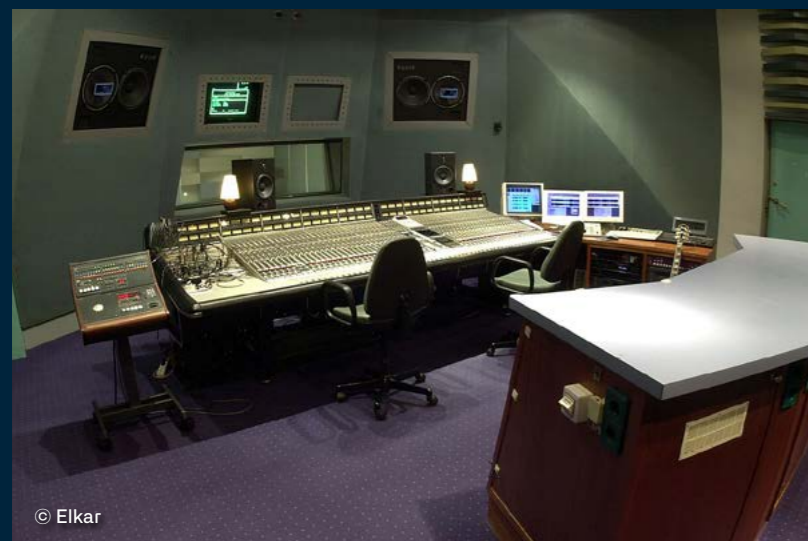
After Franco's death in 1976, the bookshop Bilintx was opened in San Sebastian and general distribution of books (*Zabaltzen*) began, as well as the publication of books and music in Basque and/or related to the Basque culture. These were the beginnings of what today is Elkar Fundazioa, created in 1996 with the contribution of all assets of companies in the Elkar group.

The central idea driving all these projects was to raise visibility and normalise books and albums

related to Basque culture and, in an express way, those produced in Basque. An effort is made to offer books in Basque to the general public and provide the material necessary for teaching in Basque. To this end, Elkar collaborates with other agents (UZEI, Elhuyar, etc.). It holds the greatest relationship with *Ikastolen Elkarte*a (federation of *ikastolas*), which continues today. Between the two organisations, they created the publisher *Ikaselkar*, dedicated to teaching material in Basque.

Over the years, Elkar has created a network of bookshops in the Basque Country (17 bookshops) and has expanded a sales network throughout Spain that distributes books with headquarters in Barcelona, Madrid, Seville and Valencia. It has also adapted to the digital age, both in publishing and in sales, with an online bookshop. Elkar continuously collaborates with other agents in the sector.

In 2005, it renewed its corporate image and both distribution in *Euskal Herria* and in bookshops took on the same name, **elkar**.



Conclusions

This publication's task was certainly not an easy one: to review the efforts made by the Basque Government for cultural and creative industries, in a process with multiple bilateral flows in dialogue between main CCI actors and the government's different departments. A process where, as shown throughout the publication, researching and consulting with cultural and creative agents bore a close relationship with the development of policies and supporting initiatives.

The beginning of this chronological narrative (called phase 0) goes back to 2010, with the European Commission's publication of the *Green Paper: Unlocking the potential of cultural and creative industries*. It identified CCIs as a key driving force for employment and smart, sustainable and inclusive growth, and encouraged institutions at different levels of government in Member States to invest their efforts in developing this potential. This call received a warm welcome in the Basque Country, where the Basque Government invested in research as the first necessary step to develop informed policies to support CCIs.

Between 2012 and 2015 during phase I, important work was conducted that was still exploratory in nature to learn more about CCIs. Firstly, the report "Cultural and Creative Industries. A theoretical debate from the European perspective", drawn up by the Basque Culture Observatory (OVC), published in 2013, was an initial exercise in understanding CCIs at a conceptual level, within the European framework and in consideration of the different models existing in the Union. Also during this period, the first quantitative approach to the CCI sector occurred, with the report "Cultural and creative industries in the Basque Country. Present and future", drawn up by Sinnergiak Social Innovation (University of the Basque Country-UPV/EHU) and published in 2014. Despite its limitations (related to the difficulty of working with sectors whose statistical limits had not yet been defined, and for which consistent and comparable data were not always available), this work offers initial data that shed light on the relevance of cultural and creative sectors in the Basque Country in terms of, for example, economic contribution or employment, among others. This first phase ends with a fundamental milestone: it included CCIs as a land of opportunity in the *Smart Specialization Strategy* RIS3 of the Basque Country. Beyond the symbolic value of this recognition, it allowed CCIs to work by following RIS3's own methodology. This proved fundamental in later years for specific issues, such as cross-pollination with other RIS3 sectors.

Phase II, which spans 2016 until 2018, was fundamental for gaining further in-depth knowledge of the CCI sector. Some of the main milestones of this phase include the European project CREADIS3 – *Smart Specialisation Creative Districts*, led by the Department of Culture and Linguistic Policy of the Basque Government under the framework of the Interreg Europe programme. This initiative aims to align public policy agendas to reach innovative development in CCIs, contributing to economic development in the region. Moreover, in 2017 and in collaboration with Innobasque (Basque Innovation Agency), the KSI Berritzaile programme was born. This is an innovation programme for CCIs promoted by the Department of Culture and Linguistic Policy of the Basque Government. Up until 2019, 195 organisations had benefited from it, with 416 services/projects supported. Also of note is the publication of the conceptual delimitation of CCI sub-sectors in 2018. As of this moment, the 15 sub-sectors comprising the CCIs were defined. Six of them are cultural sub-sectors and nine are creative (of which two account for singular creative sectors in the Basque Country), and work was done to define their limits for statistical measurement. Along these lines, in 2017, the OVC designed the Creative Industries Statistic, which joined the Arts and Creative Industries Statistic, conducted biannually since 2017.

In 2019 (phase III), work was begun on the Conceptualisation of R+D+i in cultural and creative sectors. A collaborative exercise in regional prioritisation for cultural and creative sectors under the RIS3 strategy was also carried out. Also under the framework of this regional specialisation strategy, we began piloting cross-fertilisation between sectors. Specifically, at this initial moment, we did so with an initial exercise between CCIs and the food sector. Lastly, 2019 bore witness to intense work to design the *Basque District of Culture and Creativity* pilot (BDCC) in collaboration with Innobasque and SPRI. It sought to act as a network platform to collect and integrate existing services and initiatives to support CCIs in the Basque Country in different fields like innovation, talent promotion, intellectual property, internationalisation, and more.

Phase IV spans 2020 to 2023, and is a projection of the near future for CCIs in the Basque Country. Its main objective is to strengthen the foundation laid in previous phases and to make the CCI ecosystem in the Basque Country grow upon such foundation. In this regard, this publication is an important milestone as a starting point to assess how it evolves later

on. Strengthening the BDCC or the R+D+i strategy in the cultural and creative sector of the Basque Country are huge projects that will entail a great qualitative leap for the sector's positioning in the Basque Country, its visibility and the way other sectors and areas perceive it. As an example, we will achieve better international positioning through the BDCC's participation in the Districts of Creativity Network, and a Basque consortium's participating in the European Institute of Innovation and Technology's contest (EIT) to create a *Knowledge and Innovation Community* (KIC) in CCIs. Also underway is a new statistical operation on Public Funding of Cultural and Creative Industries, and exploration will continue into cross-fertilisation with new sectors, particularly, personalised health and sustainable cities.

All these actions will help tackle the challenges of the future, from which the following can be highlighted: strengthening the BDCC; raising awareness and supporting intellectual property management; developing talent through cultural and artistic innovation centres as key actors; defining, promoting and assessing non-technological innovation and, especially, social and cultural innovation in CCIs and, finally, raising greater sectorial awareness, moving from CCIs (industries) to CCS (sector).

Preparing this publication was a challenge, not only due to the volume of work carried out over the past decade in relation to CCIs and the enormous number of resources created, but also because of the diversity of the available information. The chronological narrative allowed us to reconstruct the most recent history of the development of CCIs in the Basque Country and the support offered by the Basque Government. This is certainly an open history with a promising future that will require new retrospectives in the not-so-distant future.

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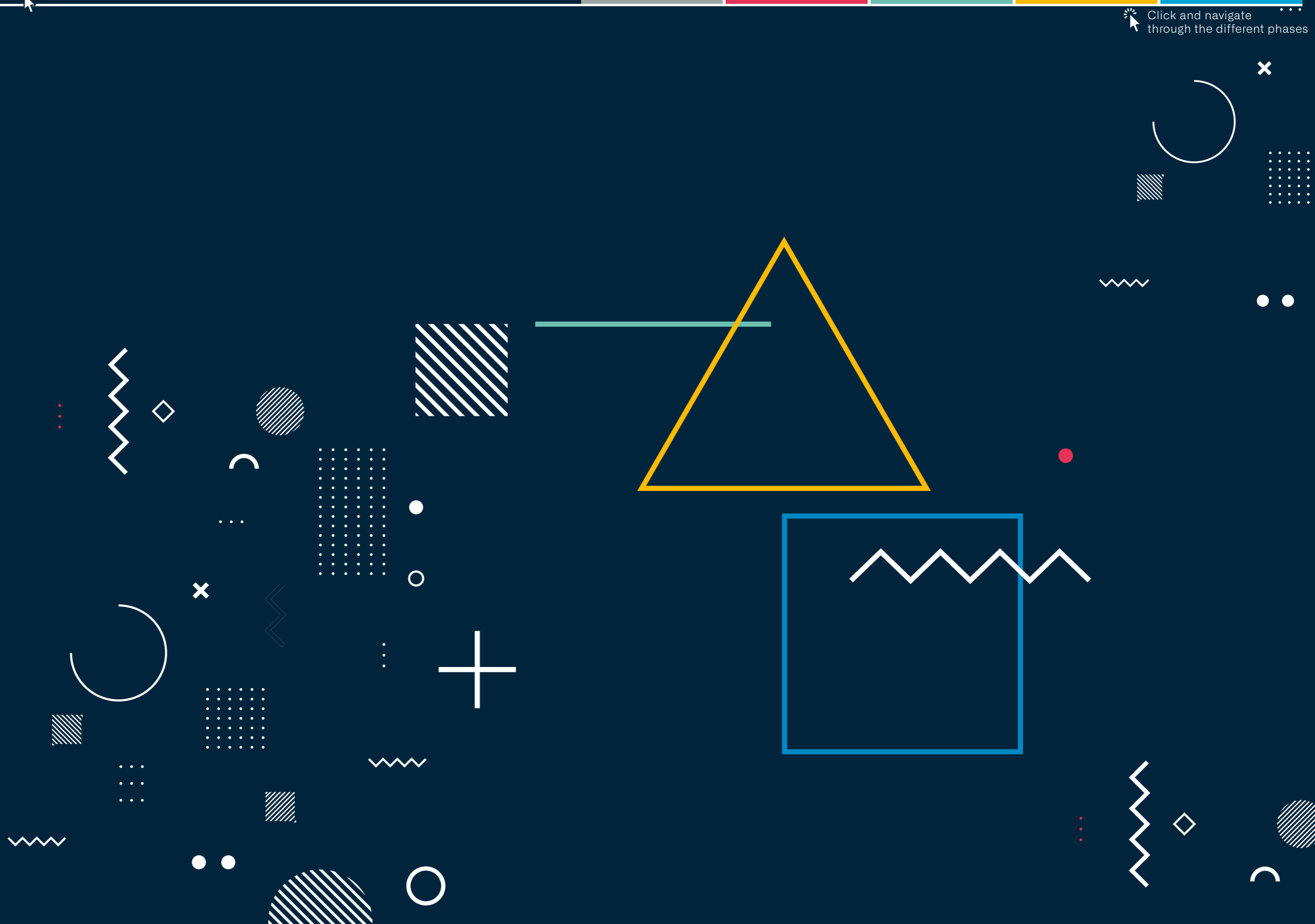
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Biograpphies



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José Ángel Muñoz



previous view

BIO

José Ángel Muñoz Otaegi

Jose Angel Muñoz Otaegi is the Former Vice-Minister of Culture of the Basque Government.

In this position, he has been in charge of the following areas: safeguarding of historical-artistic heritage, museums, libraries and archives. Joxean Muñoz is a writer, scriptwriter and exhibitions curator. As a scriptwriter and director, he won the Spanish film academy Goya Award to the best animation film in 2000. He has curated exhibitions on urban issues, graphic artists and intangible issues, such as the co-existence of languages.

Click and navigate through the different phases

Aitziber Larrabeiti



previous view

BIO

Aintzane Larrabeiti

Philosophy Degree (Deusto University), Master's in Cultural Management (DU). Her professional degree bears on culture, both in public administration and at the university and private companies. She has worked as a consultant in areas related to cultural policy, strategic planning, entertainment education, quality management and human resources. She has acted as coordinator of technical assistance at the Basque Culture Observatory (2006-2010). She has been collaborating with ICC Consultants since 2006, a company she joined in 2012.

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Ramón Zallo



previous view

BIO

Ramón Zallo Elgezabal (Gernika 1948)

He holds a degree in Law and Economy, and today is Professor Emeritus of the University of the Basque Country (UPV). Besides frequent analyses in the press and magazines and several books on Basque politics and culture, as a researcher and professor, he is specialised in the economy and audio-visual, cultural and communicative policies, with several publications and books: Economía de la comunicación y la cultura (1987), Estructuras de la comunicación y la cultura. Políticas para la era digital (2011), Tendencias en comunicación. Cultura digital y poder (2016). He acted as Cultural Consultant for the Basque Government for communication, audio-visual and culture during the 2002-2009 legislative terms.

Fredi Paia



previous view

BIO

Alfredo Eusebio Payá Ruiz. (Algorta, Getxo; 1981)
Artistic name: Fredi Paia

He holds a degree in Business Management and Administration, majoring in Public and Fiscal Administration. He holds a professional degree in music, majoring in piano. Postgraduate in Transfer of Basque Culture. Award for the best academic record in the Master's degree in Business Management Based on Innovation and Internationalisation. He is currently completing his doctoral thesis, Matching Markets for Cultural and Creative Commodities.

In the field of researching popular culture, immaterial heritage and Basque oral heritage, he has published five books and three documentaries: Aupa Maurizia! (2008), Maruri-Jatabe Bizimodua eta Ohiturak (2010), Busturia Bizimodua eta Ohiturak (2011), Uribe Kostako Bertsolaritza 1900-1980 (2013), Zitze Isukitze Hauspogoran (2019), Getxo Akordaten naz I and II (2007, 2011) and Akabuko Martxea-Dominica (2016).

As a bertsolari and Biscay's 2014 champion, his critical thought and experimental, research and educational work stand out. He has shared work in collective projects designed to develop a more artistic and less competitive aesthetic for Basque oral improvisation: Geko Eskola, Txapel bete bertso, Zaharrak Berri Xou, Hudaltzainak, Bertso Tranpak, Euripideren Botika...

Opinion columnist in the newspapers Euskaldunon Egunkaria (2000-2003), Berria (2003-2011) and Gara (2011-2019).

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Egoitz Pomares



previous view

BIO

Egoitz Pomares

Egoitz Pomares has been a researcher since 2013 at Sinnergiak Social Innovation (University of the Basque Country-UPV/EHU). In addition to a degree in Economic Law (Deusto University, 2004), he has master's studies in fields such as business administration and management (Mondragón Unibertsitatea, 2005) and social innovation and cultural and creative industries (University of the Basque Country [UPV]). He is currently a Sociology PhD candidate at the University of the Basque Country. Egoitz's research activity leads him to participate in research projects in fields related to innovation, both regionally and throughout Europe. Proof of this are projects focused on clusterisation, innovation and skill development in the CCI sector (Transcreativa, 2012-2014) and, currently, BEYOND4.0, funded by the European Commission's Horizon 2020 programme.

Sinnergiak-Social Innovation (UPV/EHU)

Overview on Beyond 4.0 Summer School



Gipuzkoa Workplace Innovation : Solasaldi Zikloen Laburpena | Resumen del Ciclo de Diálogos



Gipuzkoa Workplace Innovation



Polos Creativos Transcreativa



* Available in Spanish only

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Sabin Goitia



previous view

BIO

Sabin Goitia

Sabin Goitia is former Advisor in Cultural and Creative Industries in the Basque Government. He holds a degree in Industrial Engineering, he has worked for several years in industrial companies (metal, automotive), in Organization and Quality System Departments, and then moved to the public sector, working in the public company Beaz, whose mission is that of creation and strengthening the growth of the business tissue of Biscay Council, in terms of economic activity and employment through the development of innovative projects. He has been Coordinator of Zaintek, Technology Watch and Competitive Intelligence Service for SMEs, Coordinator of Enterprise Europe Network in Beaz, Director of Internationalization and Responsible of BIC Bizkaia, an advanced incubator for high added value specialized start-ups, among other duties in 15 years.

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Helga Massetani



previous view

BIO

Helga Massetani

Helga Massetani Piemonte is a professor of Visual Arts from the National University of Arts of Buenos Aires, with an equivalency for a degree in Visual Arts from the same Institution, where she also obtained a scholarship for the Postgraduate Programme in Cultural Management and Administration from the University of Palermo (Buenos Aires). Founder of the Artitadetó artists collective (which became an association in 2009), with which she participated in different European cities, and of Bitamine Faktoria, where she currently acts as content manager and designs internationalisation programmes.

With Bitamine Faktoria, she established several international collaboration networks, such as: Mugakide, a cross-border cooperation network, promoted along with Nekatoenea; the mobility programme for professionals in the arts and culture sector in the Aquitaine-Basque Country Euroregion, created along with Garapen and Fabrique Pola (Bordeaux); the internationalisation programme for Basque contemporary art in Argentina and Brazil (EAS-EZE / EAS-RIO), in close collaboration with the Basque Government's Delegation in Mercosur (Buenos Aires) and the artists' residence Capacete (Rio de Janeiro); and the exchange project Frontière, transfrontières: pratiques frontalières du territoire with the artists' centre Agence Topo (Quebec, Canada).

BITAMINE FAKTORIA

Ribera 2020

Bidasoa Art Residency 2019

Euskararen eguna Irun 2019



* In Spanish and Basque

* Available in Basque only

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Raija Partanen



previous view

BIO

Raija Partanen

Ms. Raija Partanen has been working at the Regional Council of Central Finland since 2004, on development projects of creative industries and cultural issues. She has a MA degree in art history, and before her occupation at the Regional Council, she has been working at the Alvar Aalto Museum and Jyväskylä Art Museum.

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Jon Basterra



previous view

BIO

Jon Basterra Aldea (Bilbao, 1956)

Journalist. Degree in Information Sciences. He has conducted his professional career by alternating positions both in the news media (Egin, Euskadi Irratia) and in institutional communication and strategic consulting at public institutions (Provincial Council of Gipuzkoa, Basque Government).

Throughout 2012, he was part of the team that started up Sinnergiak Social Innovation, a social innovation centre promoted by the University of the Basque Country (UPV/EHU) under the Euskampus strategy.

Since January 2013, he has consulted for the Department of Economic Development and Infrastructure of the Basque Government.

Click and navigate through the different phases

Álvaro Sanz*



previous view

BIO

Álvaro Sanz

President of MIE (Musika Industria Elkarte) and member of EHMBE's Board of Directors. He holds a Law degree from the University of the Basque Country (UPV). Álvaro Sanz has over 20 years of experience in coordinating all kinds of events and knows practically all local production offices and many national offices, as well as most auditoriums in the region.

EHMBE

BESTEBAT!
Zuzeneko Arteen Zirkuitua



* In Spanish and Basque

COVID 19: Formación guía
para la organización de
conciertos y espectáculos



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BIME PRO:
Artes en Vivo conviviendo
con la COVID-19



* In Spanish and Basque

Musika Bulegoa Sariak 2020
aftermovie



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Alaitz Landaluze



previous view

BIO

Alaitz Landaluze

Alaitz Landaluze holds a Telecommunications Engineering degree from the University of the Basque Country (UPV/EHU) and is an expert in monitoring and assessing science, technology and innovation policies. In 2008, she joined the Basque Innovation Agency, Innobasque. Currently, she heads up the Science, Technology and Innovation Policies Unit, which supports the Basque Government in designing and implementing the Science, Technology and Innovation 2030 Plan for the Basque Country. She is also responsible for measuring and assessing the state of innovation in the region and R+D+i investment into the business network, and for monitoring the Basque Network of Science, Technology and Innovation. She participated in this Network's reorganisation. She has also worked on the Sustainable Building Strategy for the Basque Country, and on the design, implementation and assessment of the Science, Technology and Innovation Plan 2020 for the Basque Country.

During the eight years she acted as consultant at Accenture, she mainly worked for large companies in the power industry. She holds a Master's degree in Business Administration (MBA) from Deusto University, where she has been a professor in the Master's Programme in Information Security, and she has taught at the University of the Basque Country (UPV), in the Transport Systems Postgraduate Programme.

INNOBASQUE

Actividad Innobasque 2019



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Principales hitos Innobasque 2019



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Maria Teresa Linaza



previous view

BIO

Maria Teresa Linaza

She studied Industrial Engineering, majoring in Electricity, at the Higher School of Engineers at the University of Navarre, and obtained her PhD in Industrial Engineering from the Higher School of Engineers at the University of Navarre. While she is currently Director of Institutional Promotion and Development, she has directed the eTourism and Heritage Department, where she collaborated in different regional, national and international projects related to Creative and Cultural Industries, developing advanced technologies for content management, experience recommendations, analysis of feeling of comments on social media and advanced interaction through Augmented Reality technologies. She is the author of many publications and has spoken at international forums and conferences.

VICOMTECH



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Nerea Obieta



previous view

BIO

Nerea Obieta

She holds a degree in Audio-Visual Communication and a master's degree in Marketing (University of the Basque Country-UPV-EHU). She has been with Euskalit since 2007, acting as communication manager, but has also worked in more operative fields, such as the cultural sector, knowledge exchange groups, etc.

EUSKALIT

EUSKALITeko Ebaluazio Kluba
Club de Evaluación de EUSKALIT



* In Spanish and Basque

Resumen Gala entrega
Premio Vasco Gestión
Avanzada (2019-Gasteiz)



* In Spanish and Basque

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Rubén Otero



previous view

BIO

Rubén Otero

Rubén Otero holds a degree in Business Management and Administration from the University of the Basque Country. He has also completed a master's degree in e-Business from Deusto University (Eside). He holds an expert degree in Management and Technology from Deusto Business School. He is Manager of the eServices Business Department in the ICT Division at Tecnalia Research and Innovation. This business department is comprised of 40 experts whose mission is to digitally transform organisations by incorporating technologies related to advanced interaction (augmented reality and virtual reality) and wearable architectures (wearables, IoT, etc.). He has over fifteen years of experience in the scientific-technological field related to the digital transformation of organisations. He has also consulted for Governments, conducted competitiveness studies and designed and rolled out driving initiatives in the digital field.

eServices Area ICT Division, TECNALIA

Immersivity Lab: tecnologías a través de la realidad virtual inmersiva



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Sistemas de captura para generación de contenido 360°



* Available in Spanish only

TECNALIA es el socio de las empresas, que saben que la I+D+i es el cambio



* Available in Spanish only

Demo SyncroWoW 20 09 2019



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Edurne Ormazabal



previous view

BIO

Edurne Ormazabal

She holds a degree in Philosophy and Educational Science (Psychology Major) from the University of the Basque Country (UPV). Since February 2018, she has held the position of General Director of Tabakalera, an International Contemporary Culture Centre.

With over twenty years of experience on radio and in television, her professional media career was built both in management and in a purely journalistic sphere. Specialised in culture, she has worked for communication companies like CANAL+ and EITB. While working with the Basque public communication group, she held different positions of responsibility, such as head of broadcasting at GAZTEA radio, head of EITBNET's digital department and sales manager for the television, radio and digital group.

For over two decades, she has held a close relationship with the San Sebastian International Film Festival, with which she continues to collaborate.

TABAKALERA

Berriro zurekin | De nuevo contigo



* In Spanish and Basque

Udako zinea | Cine de verano 202



* In Spanish and Basque

Tabakalerak, 5 Urte | Tabakalera, 5º Aniversario



* In Spanish and Basque

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Iñaki Otalora



previous view

BIO

Iñaki Otalora

He holds a Law degree from the University of Navarre and a master's degree in Advocacy from the University of the Basque Country / Euskal Herriko Unibertsitatea. A member of the Bar Association of Guipuzcoa, Iñaki Otalora is a founding partner of the incubator company for culture projects Guajira in Donostia-San Sebastián, and a member of EHMBE's Board of Directors.

EHMBE

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* In Spanish and Basque

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Musika Bulegoa Sariak 2020
aftermovie



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Maitane Valdecantos



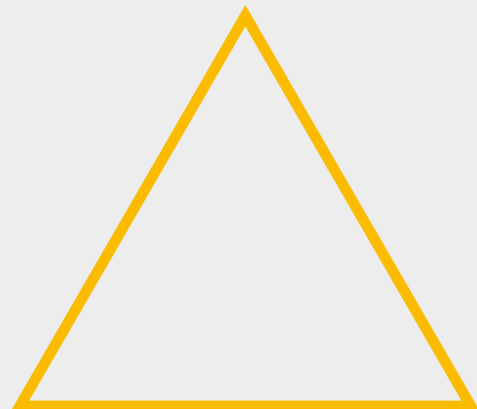
previous view

BIO

Maitane Valdecantos

Economist lawyer. A partner at Audens specialised in consulting on Creative and Cultural Industries on Intellectual Property and Digital Law. She is head of studies at the School of Legal Practise of the Bar Association of Biscay and professor at different universities and centres, such as Mondragón University or Deusto University. She combines this activity with publishing research works and educational articles related to the topic.

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Rogelio Pozo



previous view

BIO

Rogelio Pozo

Ph.D in Chemical Science. He carried out his career at AZTI, where he currently acts as executive director. He is known as an investor and entrepreneur in developing products and international funds; in the science sector, for launching products to market (B2B and B2C) and developing strategies and business plans for companies in the food sector. He is managing partner of F4F Capital (20 M€), a company in the food sector. He is a member of the board at the Basque Culinary Centre Foundation, ELIKA - Basque agency of food safety, Aquarium San Sebastian Foundation, Euskalit - Basque Foundation for quality management, MM SL – oyster and mussel production. He has registered eight patents. As a researcher, he has participated in over 65 research projects and 32 European projects. Additionally, he is author or co-author of six books on food technology and food. He is supervisor of Food Science and Technology International and the magazine International Journal of Food Science & Technology. Moreover, he is a collaborator of Euro-toques, a European chef association, in his educational action, and is a master's professor on food safety at the veterinarian and medicine faculty of the Complutense University of Madrid. He is also a member of the Spanish Food Safety and Nutrition Agency.

AZTI

AZTI: Grandes retos, soluciones sostenibles



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Txetxu Santamaria



previous view

BIO

Jesus María Santamaria Yugueros

He holds a degree in Physical Sciences from the University of the Basque Country (1986). With over 30 years of experience on R+D+i projects, he first worked at the technological centre Robotiker, and is now at TECNALIA, where he acts as principal investigator and manager of international R+D+i initiatives in the ICT division. Throughout this time, he has participated in, and managed, several R+D projects related to process control and supervision systems, digital contents, infomobility, smart cities, logistics and transport and application of information technologies and communications for the digital transformation of companies. He is co-author of the book *Estudios de Prospectiva Tecnológica: Horizonte 2005*, conducted by the ROBOTIKER Foundation, where he participated as director of the working group "Process Supervision and Control". He gained a great deal of experience in European projects during the last Framework Programmes, FP7 and Horizon 2020. He is currently a member of the Board of Directors of NEM (New European Media), the European technological platform for creative and cultural industries, and member of an expert group on interactive technologies that consults for the European Commission.

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