The Implementation of Creative Europe: The Gap between Supranational Guidelines and Regional Realities. The Case of Spanish Creative Industries

Dr. Marcial Murciano and Dr. Carmina Crusafon / Universitat Autònoma de Barcelona
INTRODUCTION

Cultural & Creative Industries

EUROPE 2020
A European strategy for smart, sustainable and inclusive growth
INTRODUCTION

17 regions (Comunidad Autónoma)

Culture: transferred to regions

Ministry of Culture

Availability of statistics in each region

Research Team:
7 universities (25 researchers)
How can we harmonize statistics on the CCI of the Spanish regions to European standards?

- Spanish Statistics Institute (INE) offers limited data on the Annual Services Survey (ASS). It was necessary to have statistics on the specific ASS for this research project.

- **Solution:** Signing of a supply agreement INE data-UAB + defining a Statistical model for Value Assignment with UAB Service of Applied Statistics

- **Two difficulties with supplied data:**
  - **NACE coding:** Data available only included NACE codes with two digits. Distortions in some subcategories (Architecture and Advertising) occurred. Example: the NACE 71 includes Architecture together with Technical Engineering Services, Technical Testing and Analysis. We should have four-digit NCEA data, class 7111, which only includes architecture.

  - **Disaggregation by region:** In subcategories for Performing Arts and Libraries, archives and museums, the data supplied by the INE-UAB agreement were not disaggregated by region.
### METHODOLOGY

<table>
<thead>
<tr>
<th>Industry group</th>
<th>NACE Codes–2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Museums, galleries, archives and libraries</td>
<td>9102, 9103, 9105, 9106</td>
</tr>
<tr>
<td>Publishing (Books and Printed Press)</td>
<td>4761, 4762, 5811, 5813, 5814, 6391, 7430</td>
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<tr>
<td>Visual Arts</td>
<td>7410, 7420, 9003</td>
</tr>
<tr>
<td>Performing Arts</td>
<td>9001, 9002, 9004</td>
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<tr>
<td>Audiovisual and multimedia</td>
<td>4763, 5821, 5912–5920, 6010, 6020, 7722</td>
</tr>
<tr>
<td>Architecture</td>
<td>7111</td>
</tr>
<tr>
<td>Advertising</td>
<td>7311</td>
</tr>
</tbody>
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DATA AVAILABLE FROM DIFFERENT SOURCES

- MELICC
- ICC
- Modelo Estadístico LOCALCOM de las Industrias Culturales y Creativas

GENERALIZED ADDITIVE MODEL (GAM)
### METHODOLOGY

#### MELICC

**Modelo Estadístico LOCALCOM de las Industrias Culturales y Creativas**

<table>
<thead>
<tr>
<th>#</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>4</td>
<td>NACE digits</td>
</tr>
<tr>
<td>17</td>
<td>Regions (Comunidad Autónoma)</td>
</tr>
<tr>
<td>7</td>
<td>CCI Subcategories</td>
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<td>4</td>
<td>Study Indicators</td>
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<tr>
<td>7</td>
<td>Years of Statistical Series</td>
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</tbody>
</table>

- Publishing
- Advertising
- Libraries, Archives and Museums
- Performing Arts
- Visual Arts
- Architecture
- Audiovisual & Multimedia
RESULTS

- Data from 2008 – 2014
- Four indicators: employment, number of companies, business turnover, gross added value.
- Maps + graphics per region & Spain
- Individual reports for each region (data + relevant policy issues)
RESULTS

- Development of a web site for interactive visualization of data generated by the project
RESULTS

Presentation of disaggregated results for 7 CCI sectors

Data for 17 Comunidades Autónomas

Indicator #1: Employment

Indicator #2: Number of Companies

Indicator #3: Business Turnover

Indicator #4: Gross Added Value

7-year historical series

Relative Weight of Each Indicator Compared to Other CCI Sectors
There is a strong correlation between Cultural consumption and wealth (GDP) per capita for region.
RESULTS: CONTEXT OF SPANISH ICC

Cultural Consumption

Threshold: 300€/ per year

2008

2014
Employment in Creative and Cultural Industries has been vulnerable. During the crisis, it has been destroyed at a faster rate than total employment.
RESULTS: EMPLOYMENT (INDICATOR #1)

MADRID
RESULTS: EMPLOYMENT (INDICATOR #1)
RESULTS: CCI STUDENTS (EDUCATION VS EMPLOYMENT) (INDICATOR #1)
RESULTS: SPANISH CCI NUMBER OF COMPANIES (2014) (INDICATOR #2)
RESULTS: NUMBER OF CCI COMPANIES (INDICATOR #2)

CATALONIA

Compound Annual Growth Rate
RESULTS: BUSINESS TURNOVER (INDICATOR #3)

CCI Business Turnover vs Total Service Sector + by region

(2014)
RESULTS: BUSINESS TURNOVER (INDICATOR #3)

Annual Variation Rate of CCI turnover by region

(2008 – 2013)
RESULTS: GROSS ADDED VALUE (INDICATOR #4)

Audiovisual & Multimedia
(2014)
RESULTS: SECTORIAL CLUSTERS

Publishing

- Tool: **Algorithm** for clustering
- **19 variables** used for analysis:
- Madrid and Catalonia have the best results;
- Andalusia and Valencia, the worst.
I. A unique Model for Creative and Cultural Industries based on EU standards:

- **Quality of the model** based on 4 key indicators (Employment, Number of companies, Business Turnover, and Gross Added Value)

- A **tool for comparison** between Spanish regions:
  - Disaggregated statistics to define strategies for regional creative policies.
  - It presents the unbalancing between the regions and emphasizes the leadership of Madrid, Catalonia and the Basque Country.
2. **Data of the impact of economic crisis in the CCI sector in Spain:**
   - It strikes at the cultural and creative sector, especially the pace of job destruction is higher than the rest of the service economy.

3. **The increase of VAT (from 4% to 21%) in the cultural sector:** it had **significant impact** on the employment and turnover of the cultural and creative industries.

4. **The differences on the wealth per capita and cultural spending** among regions **have limited the access to culture and its consumption** of Spanish citizens.
THANK YOU FOR YOUR ATTENTION

Carmina.Crusafon@uab.cat / http://centresderecerca.uab.cat/oic/content/icc-estadisticas-resumen