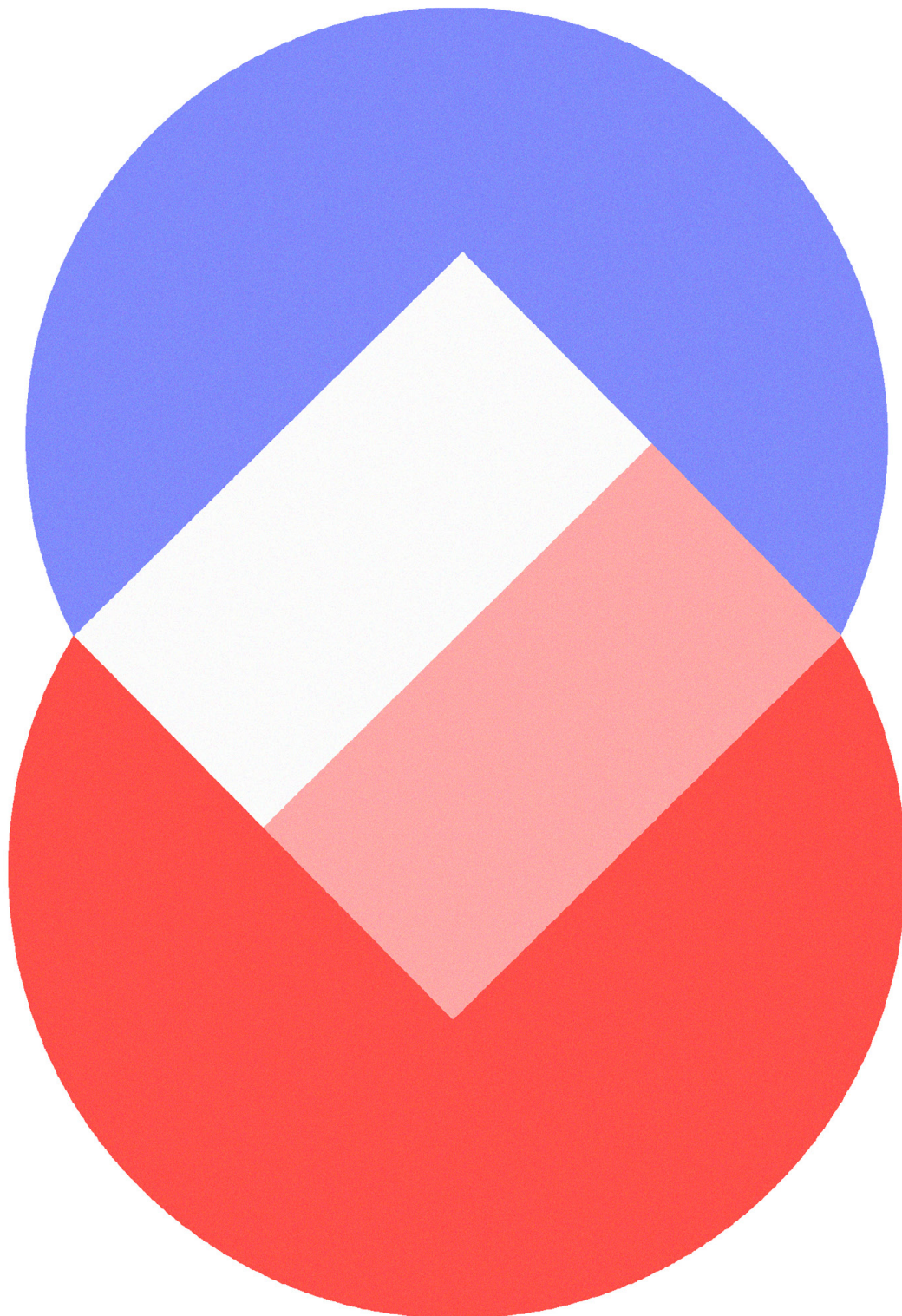


# Map of creative industries



**Barcelona**  
**January 2022**

Ajuntament de  
Barcelona



Launched by:



# Map of creative industries



# Jaume Collboni

## First Deputy Mayor. Area for Economy, Employment, Competitiveness and Tax.

Barcelona is fully committed to the design sector and the creative industries. Our creativity-linked city brand allows us to capture, attract and retain talent, while strengthening our position internationally.

We at the Municipal Government are clearly determined to push ahead in full force with these industries, as they are tantamount to the creation of quality jobs and at the same time capable of generating added value and strengthening other sectors of our social and economic fabric.

It is with this aim in mind that we have been launching strategic projects such as the new audio-visual creation and experimentation centre in Palo Alto where, deep inside Poble Nou, in the Sant Martí district, it will help to position Barcelona as the leader of the sector. We are also making the Disseny Hub Barcelona into the nerve centre and revitalisation hub of creative industries in the city, a space linked to Plaça de les Glòries and the 22@ area, associated with technology, innovation and entrepreneurship.

Now, for the first time, the city is publishing a map of its creative industries. This tool will help us to better analyse and also to raise awareness of the reality of the sectors that we will continue to promote, given their important role both in forming a more creative city and, above all, in outlining a more competitive, sustainable and equitable Barcelona.





# Xavier Marcé

## The Councillor for Tourism and Creative Industries.

One of the main problems that we have had throughout history, when it comes to setting out public programmes for supporting creative industries, has been defining the sectoral perimeter. This has given rise to differing opinions on their impact on the city's GDP, their employment aspects and, no less, their area of competence. There is now a pressing need for a mapping to be made so we can find out, as accurately as possible, about their reality, their economic and employment aspects and, above all, their relationship with their surrounding business and cultural environments.

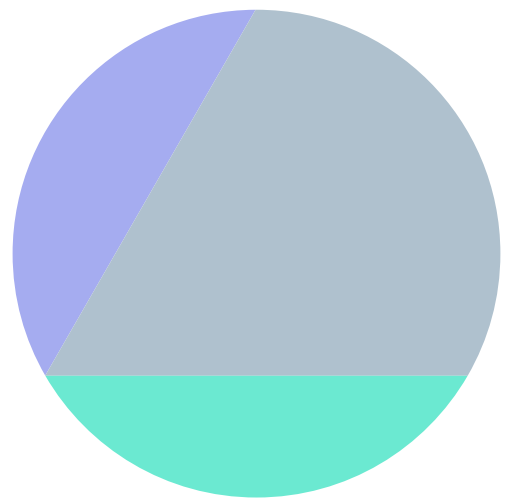
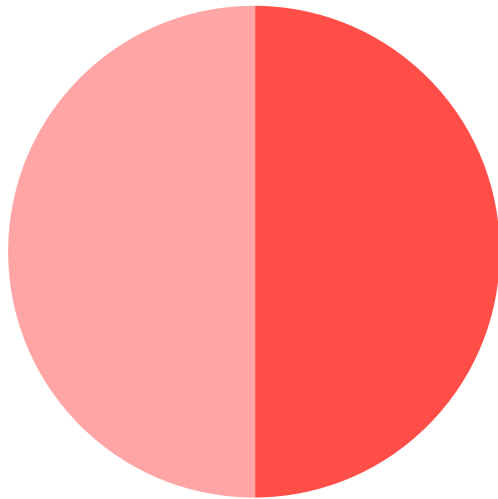
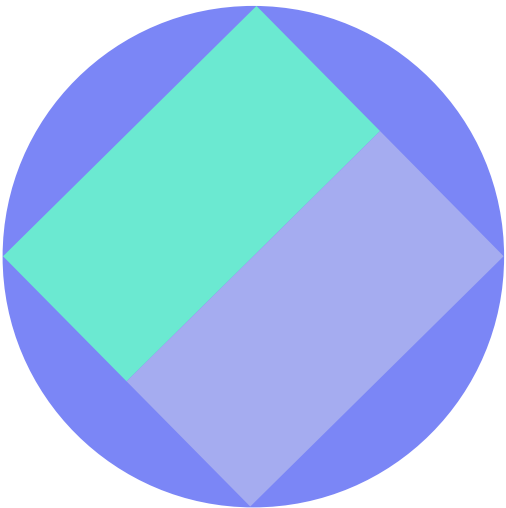
The map of Barcelona's creative industries we present provides solutions to some of these limitations. First, it gives an accurate definition of their sectoral perimeter and, as a result, brings us a more conscientious quantification in economic and socio-occupational terms and, second, it allows us to know where they are located in the city.

The map of Barcelona's creative industries will become an intrinsically dynamic tool, given the constant development of their areas of activity. It will also prove to be indispensable for drafting the public support policies that need to be made in an environment whose enormous capacity for developing unique content additionally has considerable influence on the city's entire economy.

This map must therefore be understood as the starting point for analysing an exponentially growing reality that will be a determining factor over the coming years in defining the role that Barcelona will play on a national and international scale.



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# Presentation

This report presents the economic and business ecosystem of Barcelona's creative industries in 2021. It offers a definition and characterisation of cultural and creative industries (CCIs) in the city, proposes a geo-locatable database and features international benchmarks of successful experiences in this field.

Given that this is a dynamic sector, the aim is to determine the scope and current physiognomy of creative industries, to generate proposals that encourage their development and which help to turn them into a backbone of policies for creating talent, wealth and employment.

The drafting process included a definition and characterisation of the sector, based on statistical and documentary sources, as well as interviews with the relevant players; and a benchmarking of reference regions and a strategical segmentation and analysis, identifying the main strategical challenges of the various sectors. Finally, proposals for public-policy initiatives have been included. This report is one of the tools provided for under the 2019 Government Measure for Creative Industries.

# Definition of cultural and creative industries (CCIs) in Barcelona



“Cultural and creative sectors are comprised of all sectors whose activities are based on cultural values, or other artistic individual or collective creative expressions”

European Commission (2013): “Regulation establishing the Creative Europe Programme N° 1295/2013”

## 1 Concentric circles model

This divides CCI into **core industries** (culture, art, heritage), **creative industries**, **cultural industries** and **other sectors**. It has been widely used in the European Union (European Commission, *Work Foundation*, the *Kultursistema* Model in the Basque Country, etc.) as well as in other countries (Chile etc.).

## 2 EU model

Cultural industries and creative industries are defined in the *Green Paper for unlocking the potential of cultural and creative industries*. Ten subcategories have been created. The European Commission’s ESSnet-CULTURE project also adds a further **six cultural functions** (creation, production and publishing, preservation, education and management), and 5 cultural dimensions (economy, employment, consumption, funding and social participation).

## 3 Anglo-Saxon model– DCMS / NESTA

NESTA divides creative activities up into four main blocks: **original producers**, **content producers**, **experience suppliers and service suppliers**. DCMS includes the processes of **creation, production, distribution, dissemination, promotion and activities relating to education and the press** as processes within CCIs (value chain).

## 4 UNCTAD model

Statistical model. This divides CCIs into four groups: **cultural heritage**, arts (visual and performing), **the media** (publishers and paper media, audiovisual media) and **functional creations** (design, new media, creative services).

## 5 UNESCO model

This divides areas of action into **cultural legacy** (heritage), creativity and media (visual arts and crafts, books and the press, etc.) and **functional creations** (design and creative services). It sees education and skills acquisition and archiving and preservation as cross-cutting domains. It considers domains relating to tourism and sport. The stages of the cultural cycle are: **creation, production, dissemination, exhibition and consumption**.

“The creative and cultural industry includes all organised activities whose main aim is the production or reproduction, promotion, dissemination and/or commercialisation of goods, services and activities with a cultural, artistic or heritage content”

Unesco (2009):  
“Unesco Framework for Cultural Statistics”

## 6 WIPO model

A model where **the impact of CCIs is especially important in intellectual-property generation**. It distinguishes between - **copyright industries** (press and literature, music, theatre, opera and design); **creative or interdependent industries** (software, databases, video games); and **cultural or partial industries** (heritage).

## 7 German model

Industries are regarded as the core of CCIs, with **12 different classification categories**: music, publishing, art, films, television, performing arts, architecture, design, the press, advertising, software and games, for example.

## 8 CEPAL model

It focuses on the **content industry**, which covers **all digital production designed for new information and communication technologies and for digital convergence** (*cross media*).

## 9 Orange economy model - BID

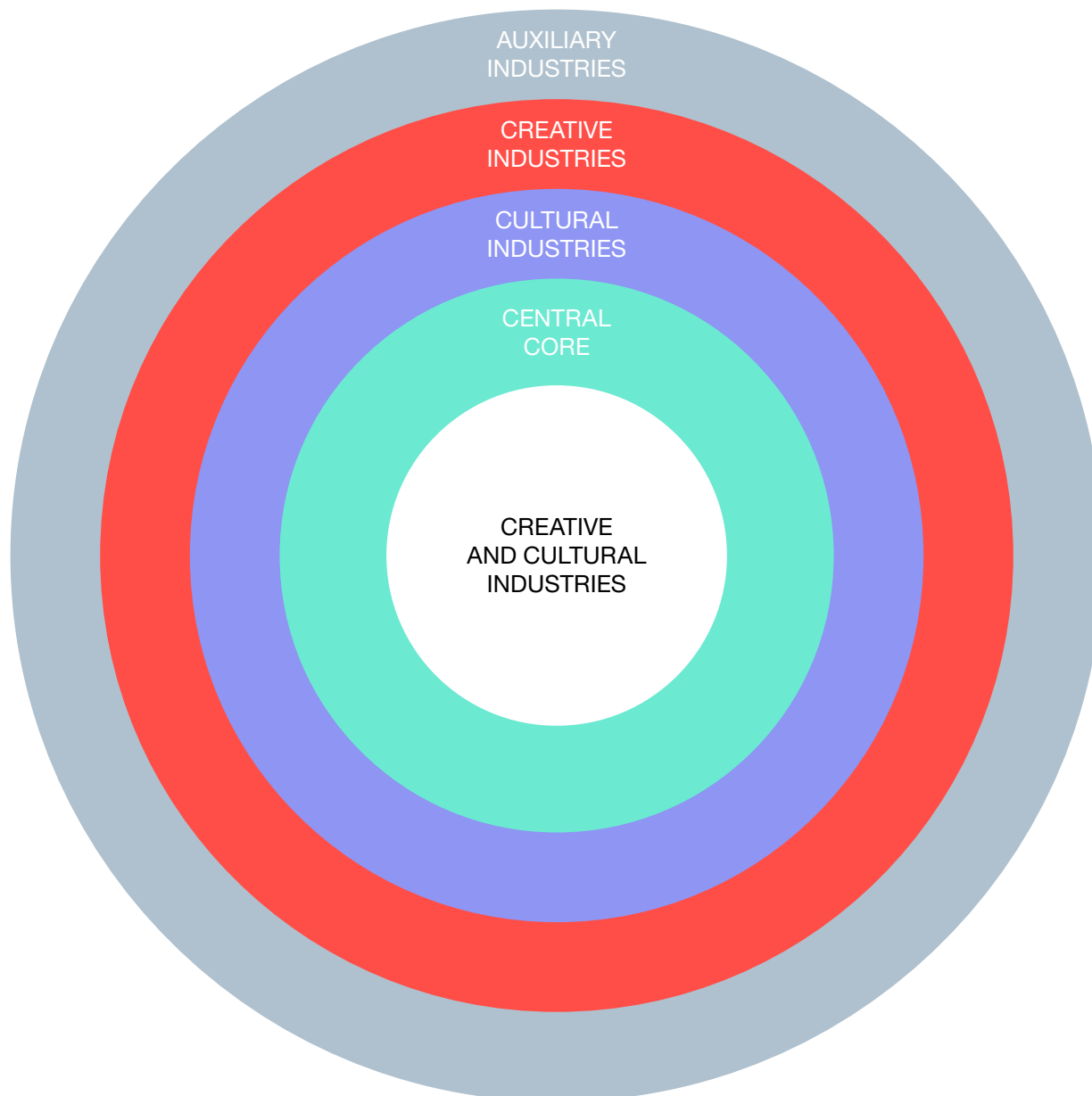
This is based on the classification of the Concentric Circles Model, but placing the **emphasis on the creative services value chain**, to make CCIs a cornerstone for economic development and job creating.

## 10 Basque Country KSI model

Part of the **Basque Smart Specialisation Strategy (RIS3)**, it includes every area and sector that is traditionally part of culture and is **adapted to the Basque reality under the concept of a cultural and creative enterprise archipelago**.

# Concentric circles model

The concentric circles model created by David Throsby in 2001 has been widely used in the European Union. It was on the basis of this system that the KEA European Affairs consultancy developed and conceptualised this very model in 2006, known as Radiation Process (the CCI radiation process).






According to the concentric circles model, the sectors are delimited and divided up as follows:






- **In the central circle: culture, art and heritage**  
Visual arts, performing arts and heritage
- **In the second circle: cultural industries**  
Films, video, TV and radio, video games, music and books and the press
- **In the third circle: creative industries**  
Design, architecture and advertising
- **In the fourth circle: other sectors**  
PC manufacturers, film services, mobile industry, etc.

The proposal is to use the concentric circles model as a basis for the CCI model in Barcelona, mainly because of its simplicity and extensive use in the European context. However, some adaptations are made for the purposes of responding to the city's cultural and creative reality.

## Central core

-  VISUAL ARTS
-  PERFORMING ARTS
-  HERITAGE

## Cultural industry





-  CINEMA AND VIDEO
-  TV AND RADIO
-  PUBLISHING MUSIC
-  VIDEOGAMES
-  BOOKS AND THE PRESS

## Creative industries and activities

-  DESIGN
-  ARCHITECTURE
-  ADVERTISING AND COMMUNICATION
-  FOOD DESIGN

Inclusion of Food Design<sup>1</sup>

## Coordination services and auxiliary industries

-  SOFTWARE-
-  MOBILE TELEPHONES
-  ARTISTIC AND CULTURAL EDUCATION
-  MEDIATION AND OTHER SERVICES

Non-inclusion of two business segments that are considered to fall within other strategic sectors in the city.

<sup>1</sup> Product-innovation systems as services or experiences relating to food, providing them with new cognitive, emotional and sensory meanings that challenge current food norms without losing sight of the nutritional, social and/or cultural benefits ("Food Design community for ADI Italia Food Design Manifesto", 2002)

The CCAE classification is used as a starting point for mapping. More specifically, the following CCAE codes are used for each of the sub-segments:

### Central core

VISUAL ARTS	7420.
PERFORMING ARTS	6920, 8559, 9001, 9002, 9004, 9321, 9329.
HERITAGE	9102, 9103, 9104, 9105, 9106.

### Cultural industry

CINEMA AND VIDEO	5912, 5914, 5915, 5917, 1820.
TV AND RADIO	5916, 5918, 6010, 6020.
MUSIC PUBLISHING	5920, 1820.
VIDEO GAMES	9499, 5821.
BOOKS AND THE PRESS	5811, 5812, 5813, 5814, 5819, 7420, 9003.

### Creative industries and activities

DESIGN	1811, 7490, 1411, 1413, 1414, 1419, 1420, 1439, 1511, 1512, 1520, 1812, 1813, 1814, 2790, 3101, 3102, 3109, 3212, 3213, 3240, 4771, 7410.
ARCHITECTURE	7111, 8299.
FOOD DESIGN	—
ADVERTISING	7311.

### Coordination services and auxiliary industries

MEDIATION AND OTHER SERVICES	6391, 6399, 7312.
ARTISTIC AND CULTURAL EDUCATION <sup>1</sup>	—

The following pages feature an adaptation of the value chain for cultural industries defined in the EU's “Mapping the Creative Value Chains” (2017), for each Barcelona subsector.

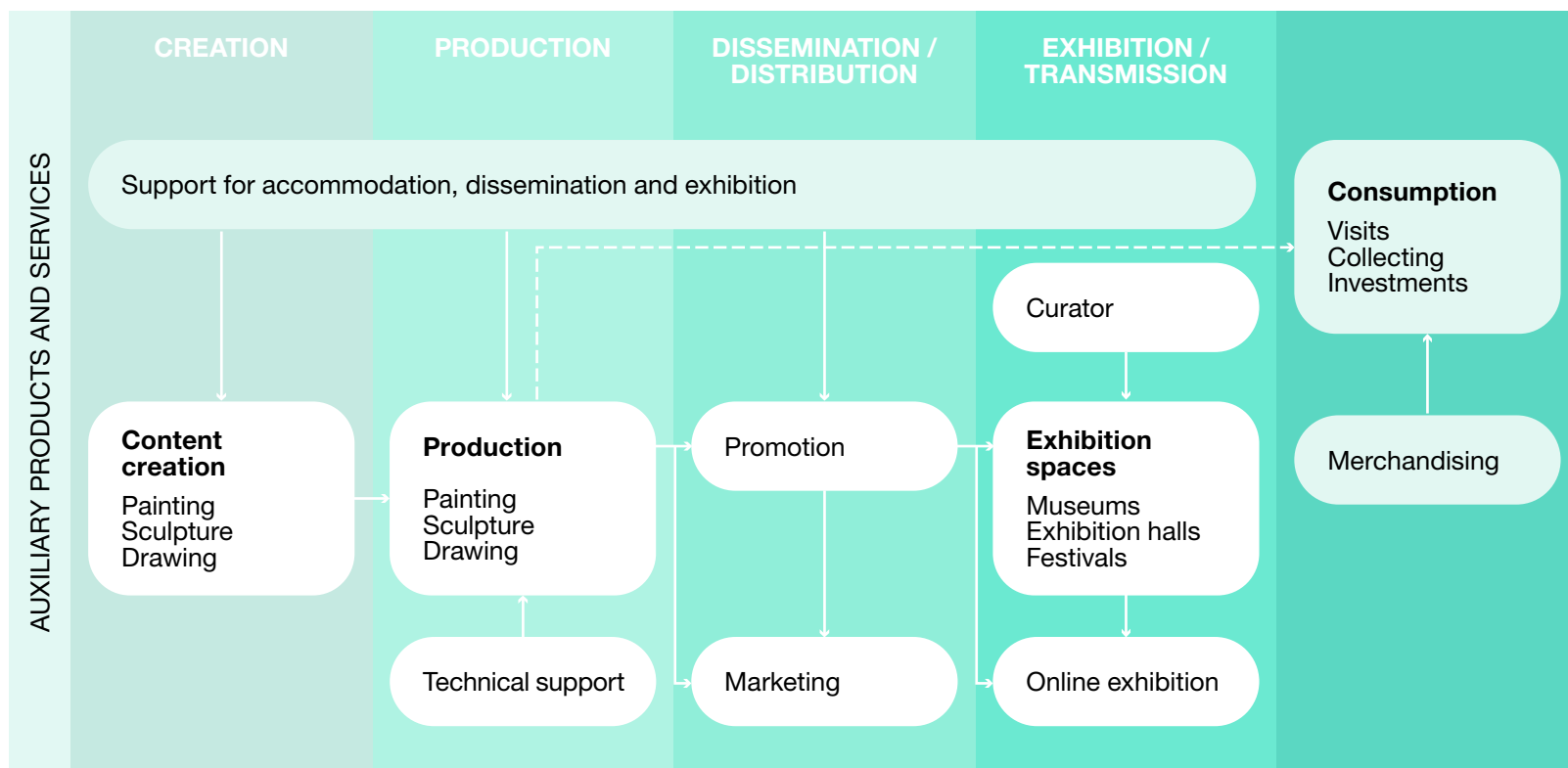
<sup>1</sup> The cross-cutting nature of the education and food design sectors makes it difficult to identify the various companies and organisations included in CCIs on the basis of the trade registry's date. That is why another search methodology has been used for these sub-segments.



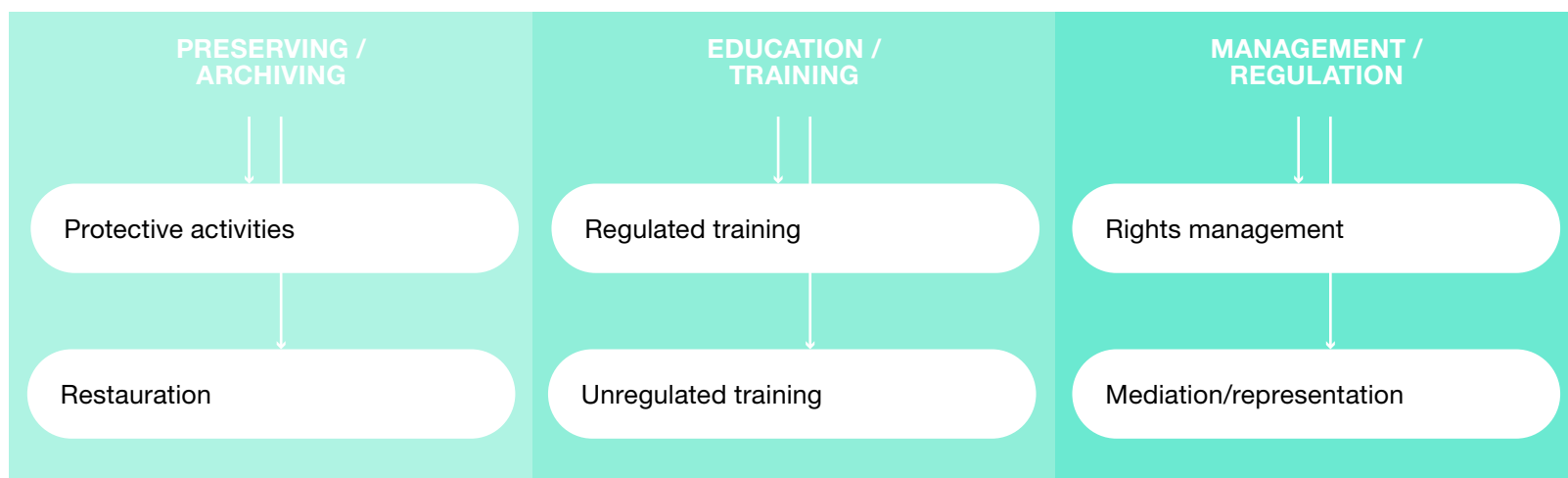
# Visual arts



## Main functions



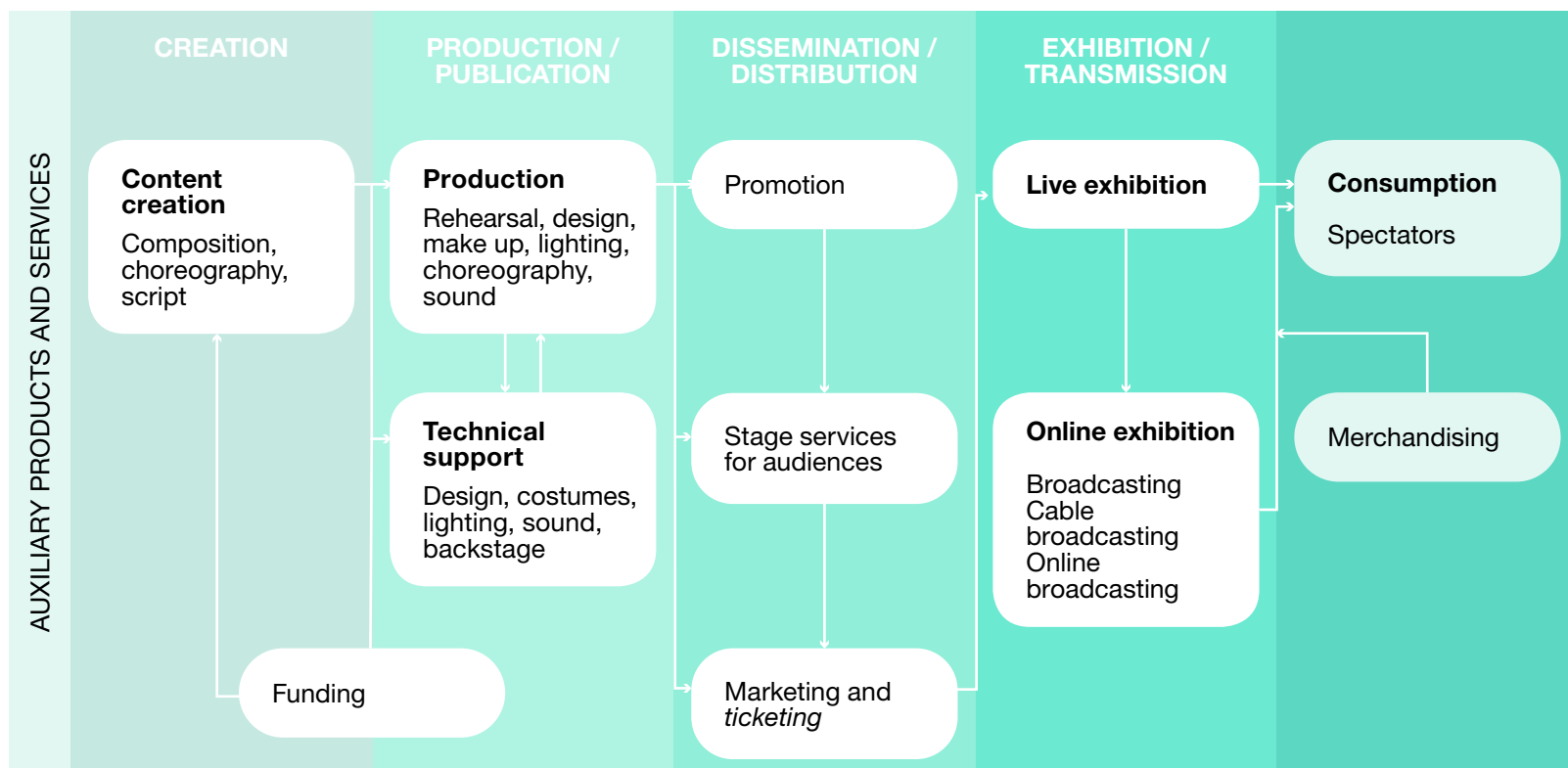
## Support functions



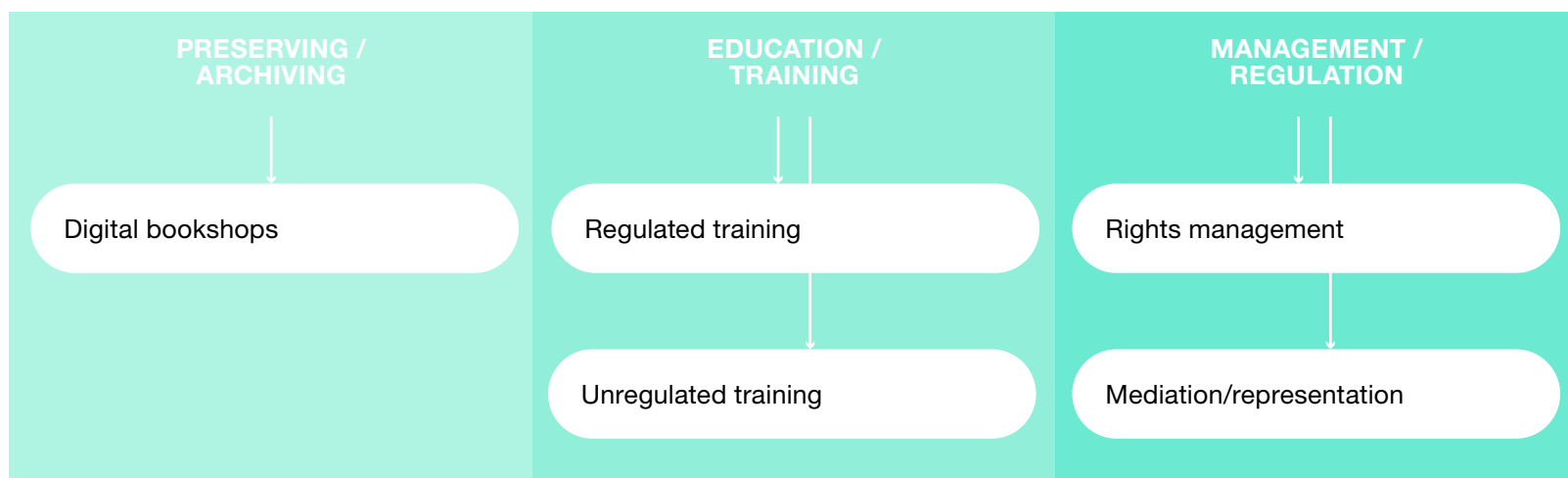
# Performing arts



## Main functions



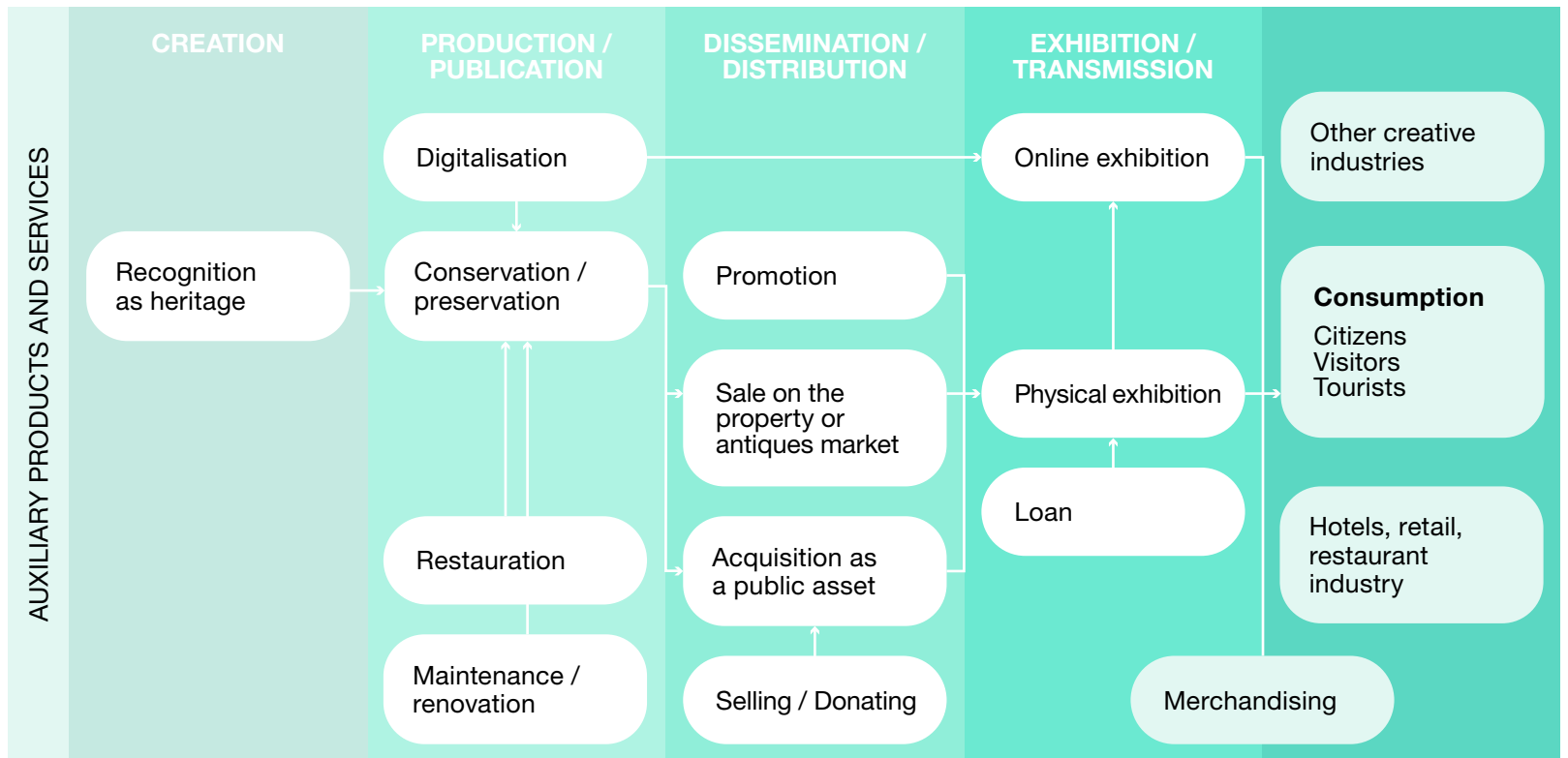
## Support functions



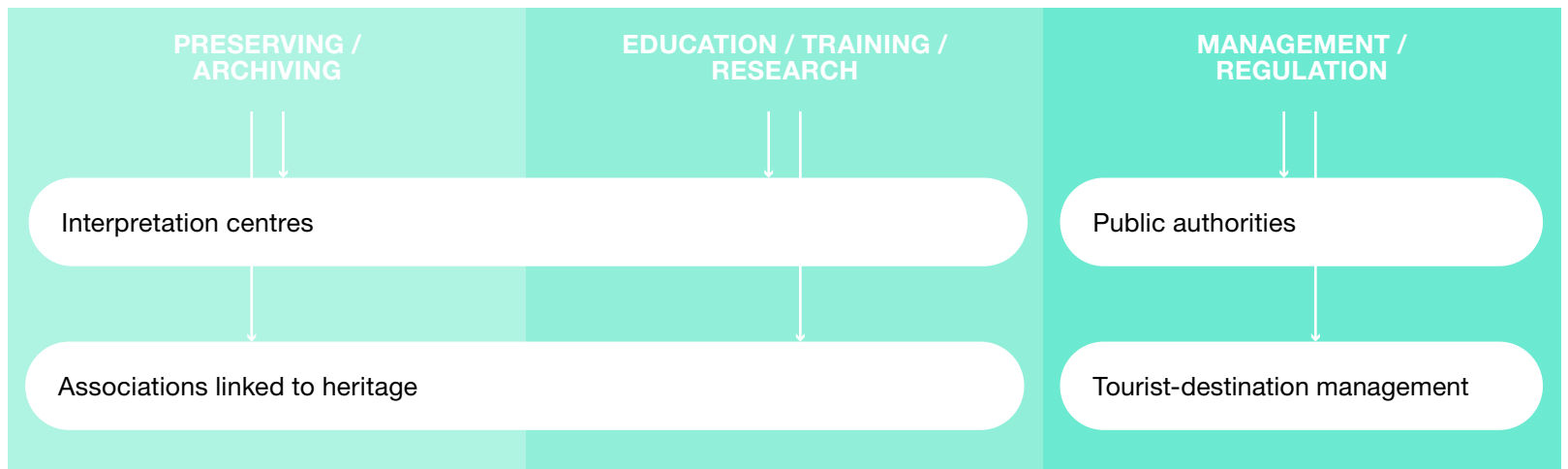
# Heritage



## Main functions



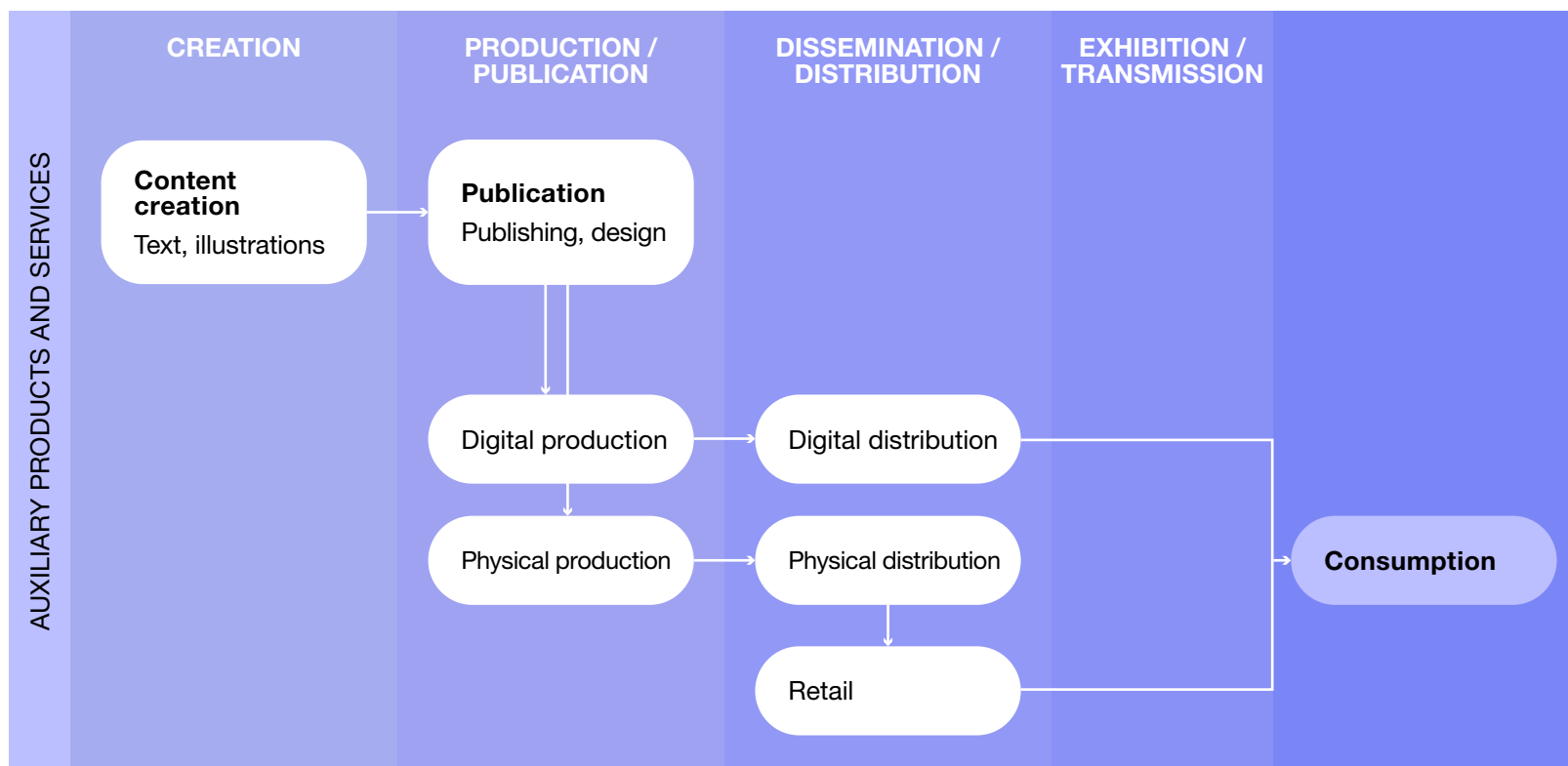
## Support functions



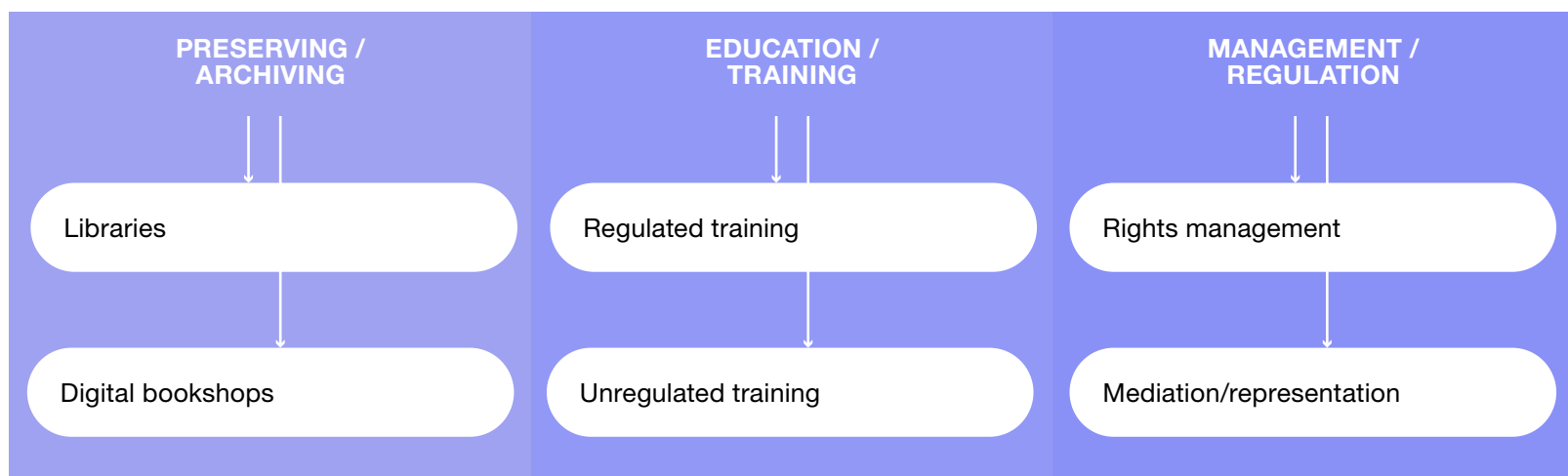
# Books and the press



## Main functions



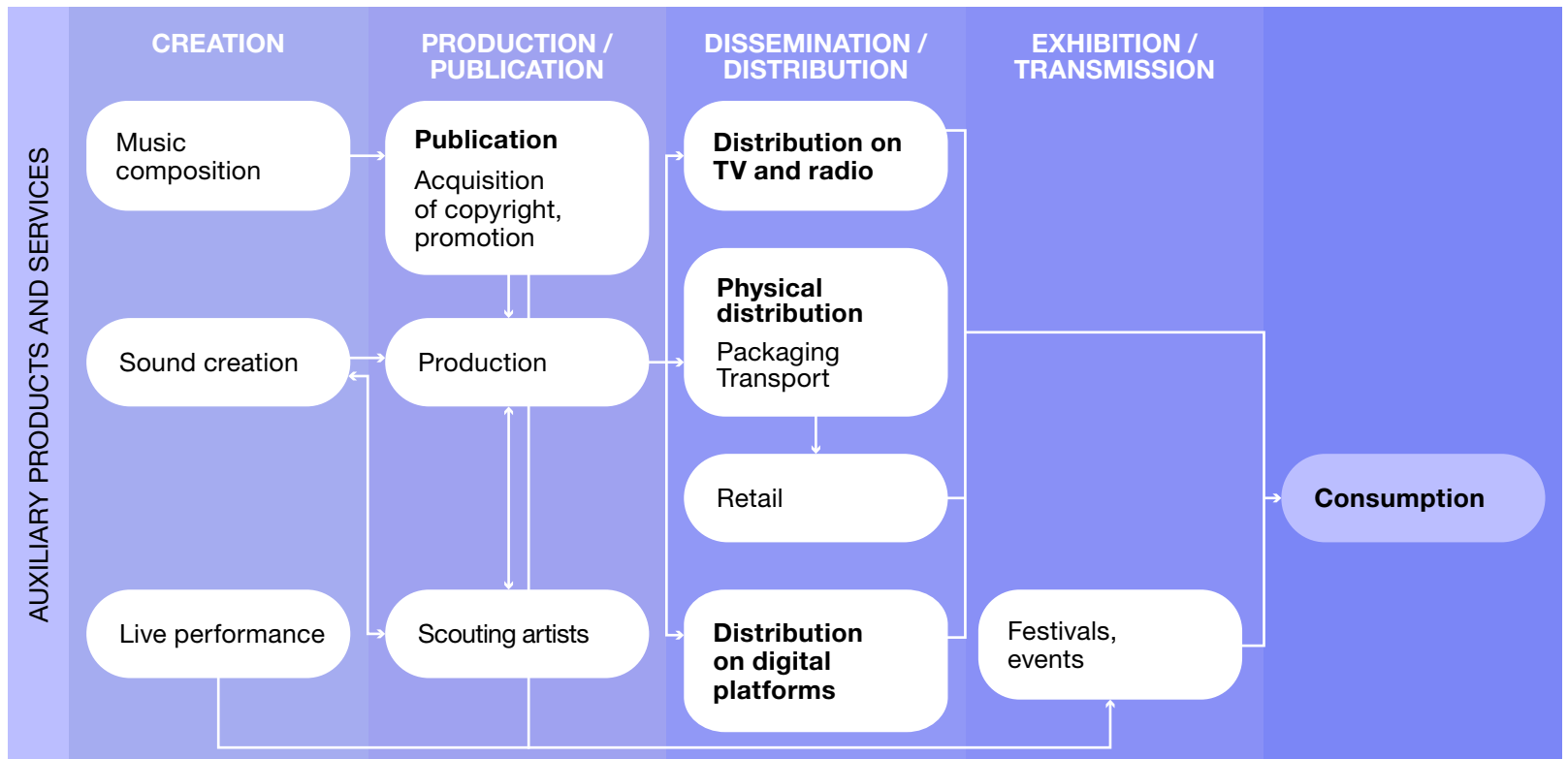
## Support functions



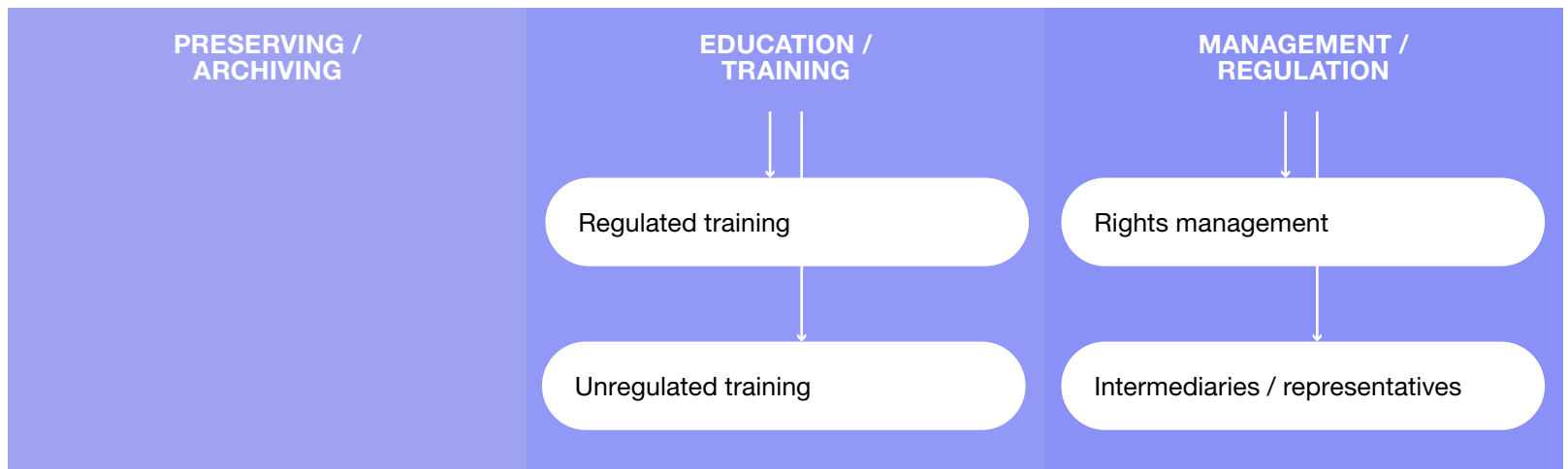
# Music publishing



## Main functions



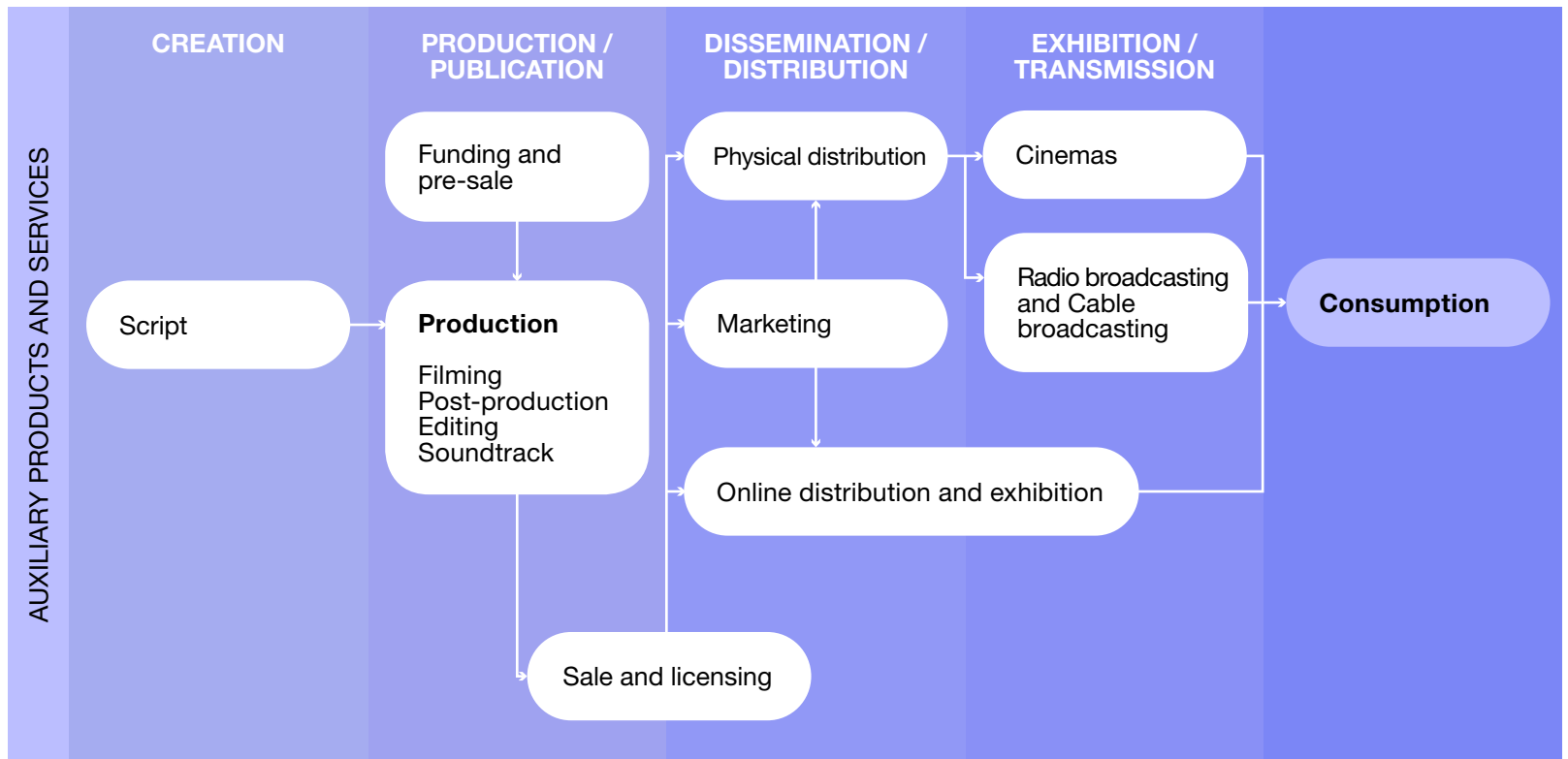
## Support functions



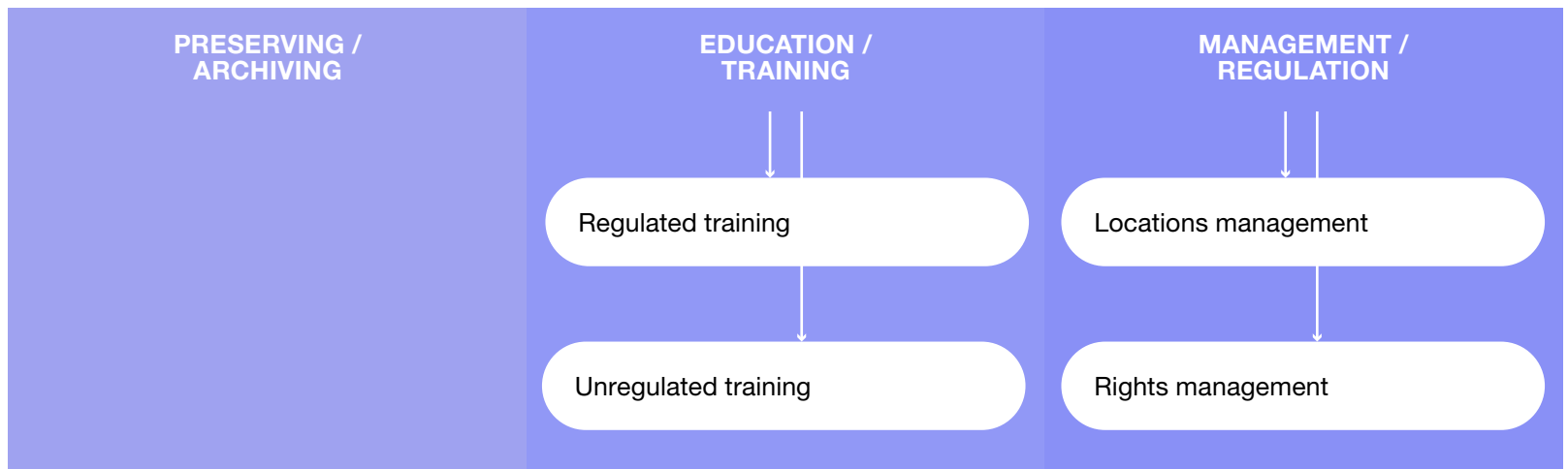
# Cinema and video



## Main functions



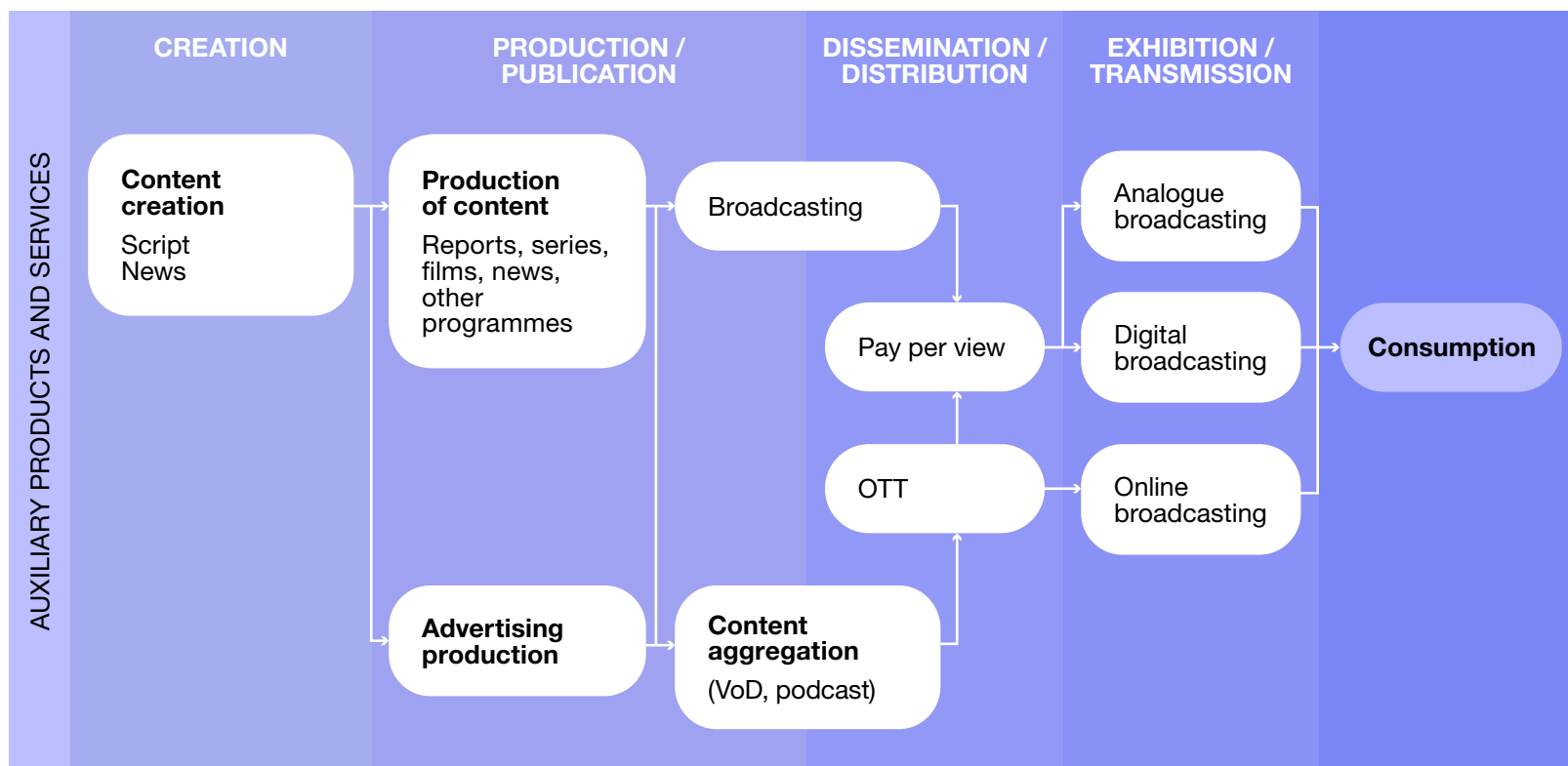
## Support functions



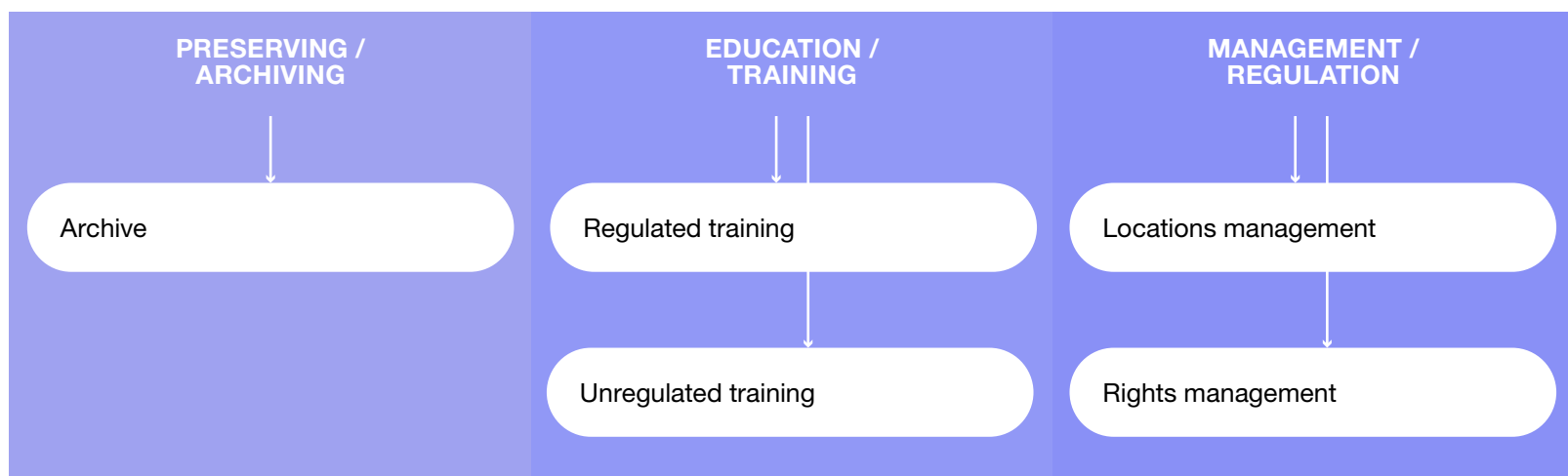
# TV and radio



## Main functions



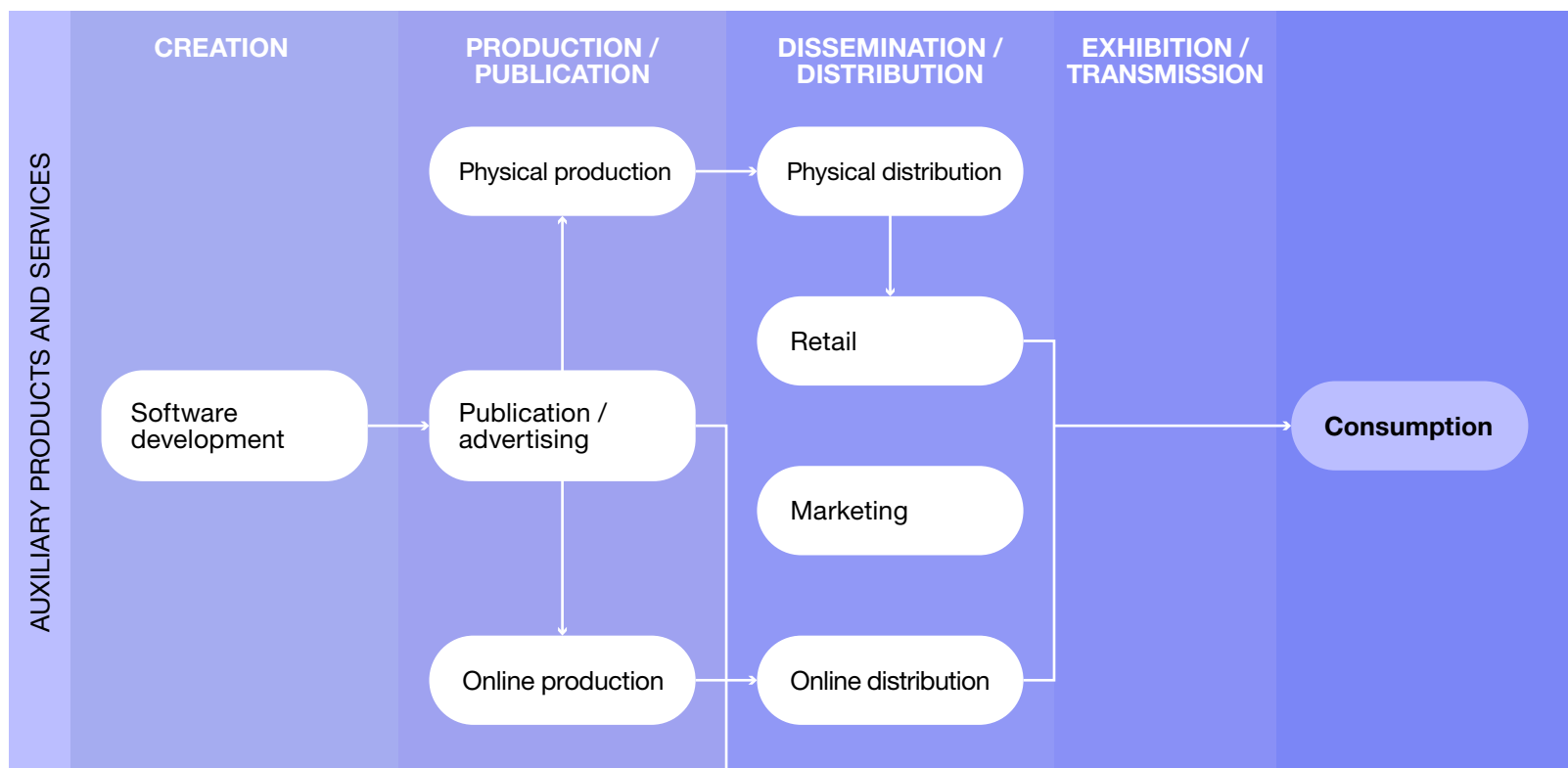
## Support functions



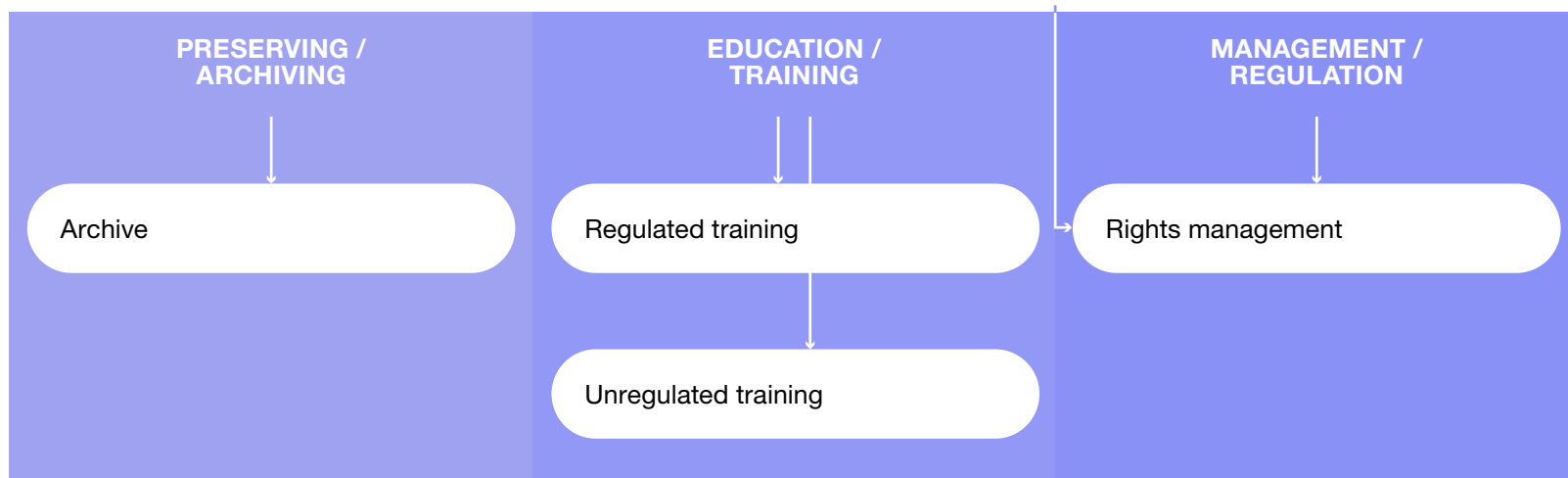
# Video games



## Main functions



## Support functions

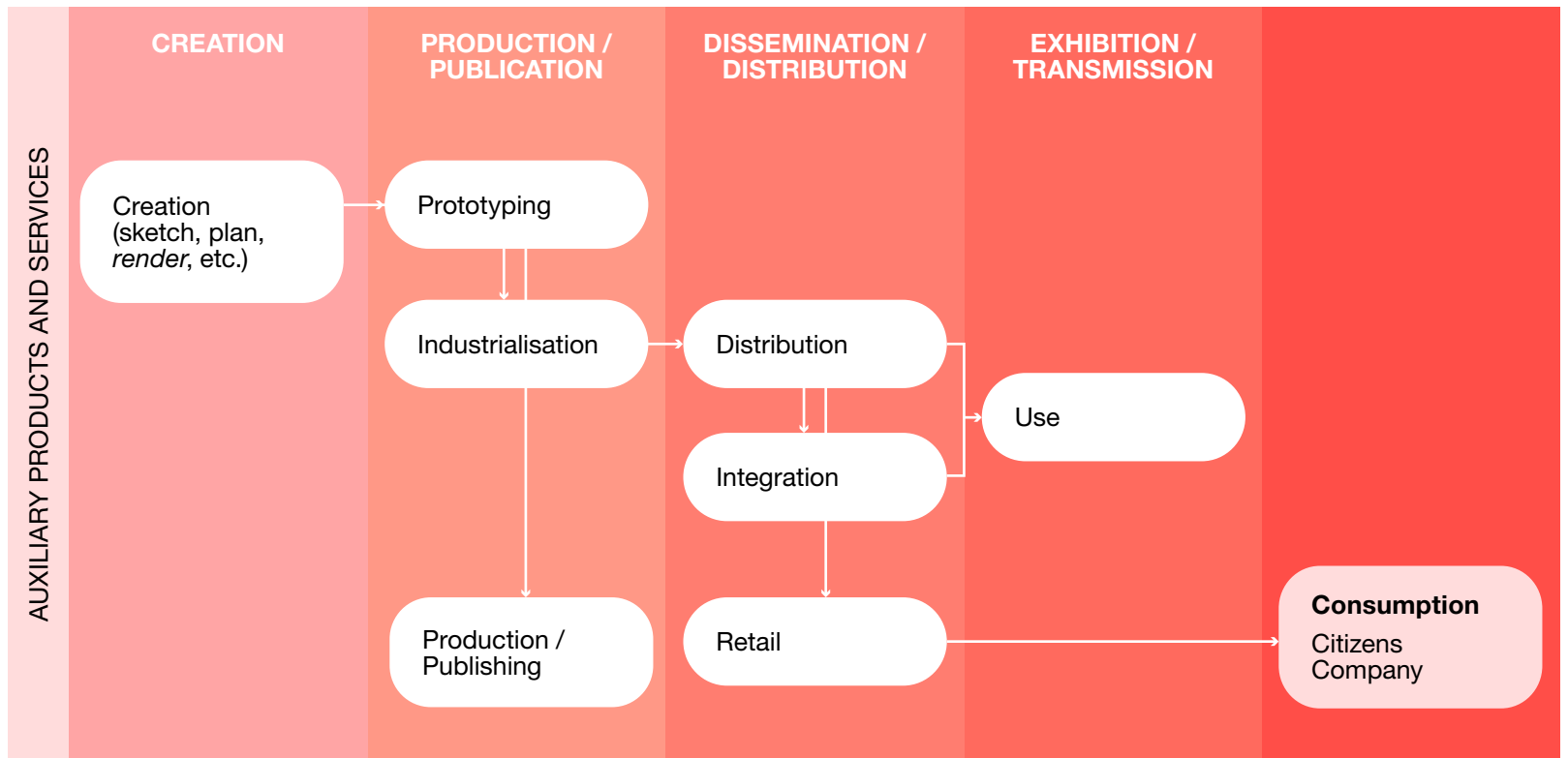




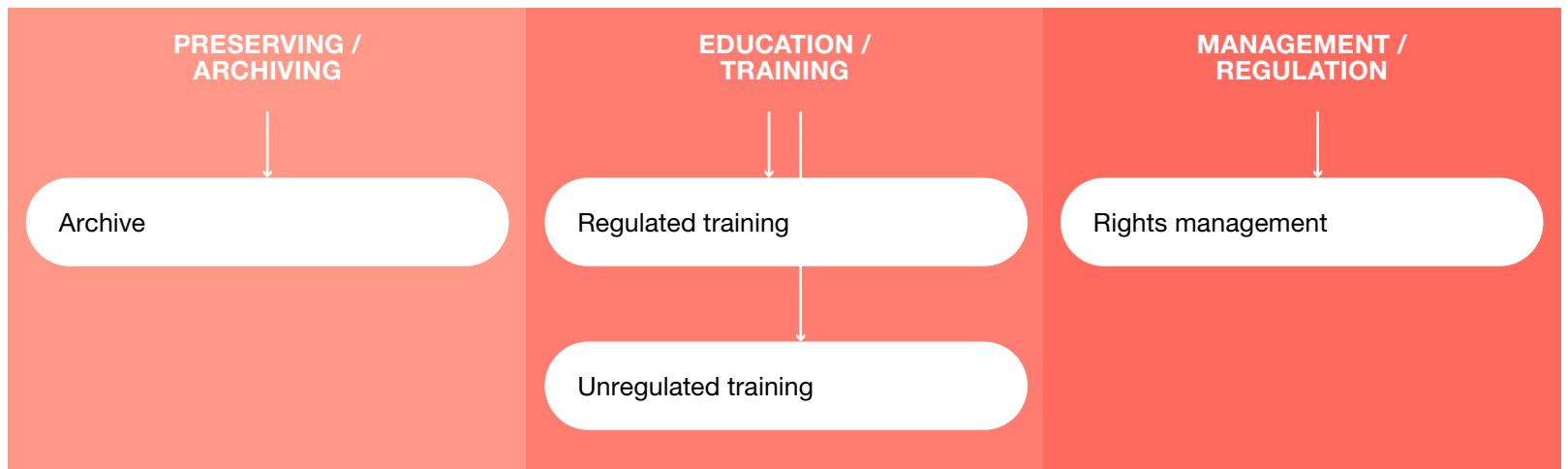
# Design



## Main functions



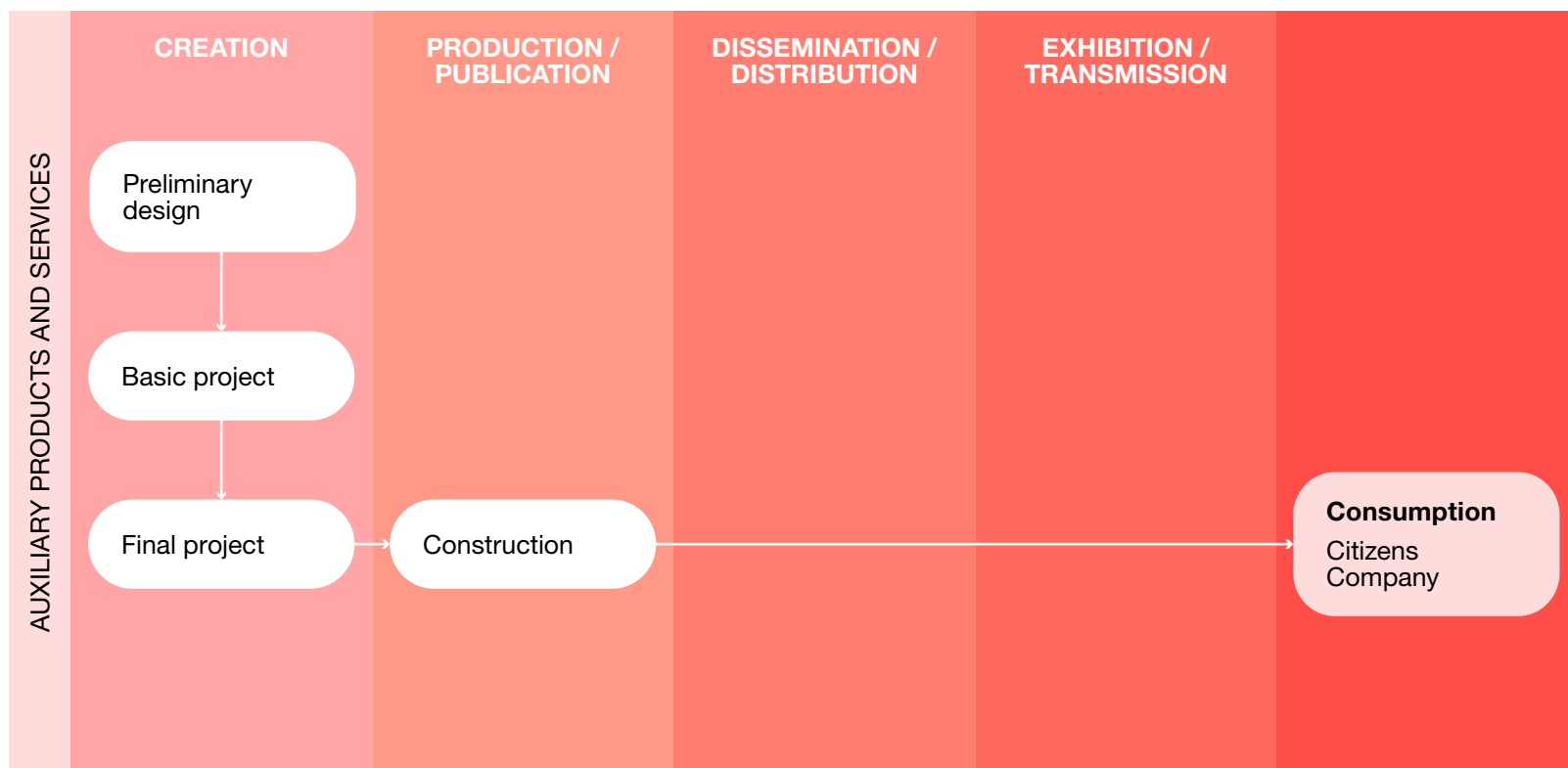
## Support functions



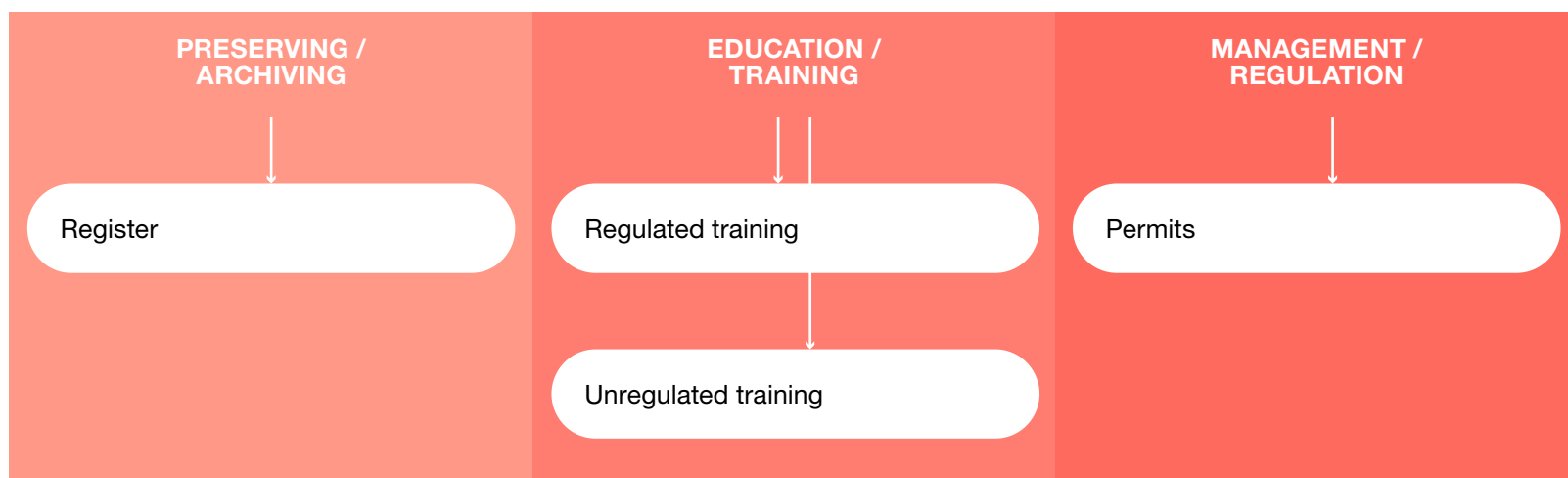
# Architecture



## Main functions



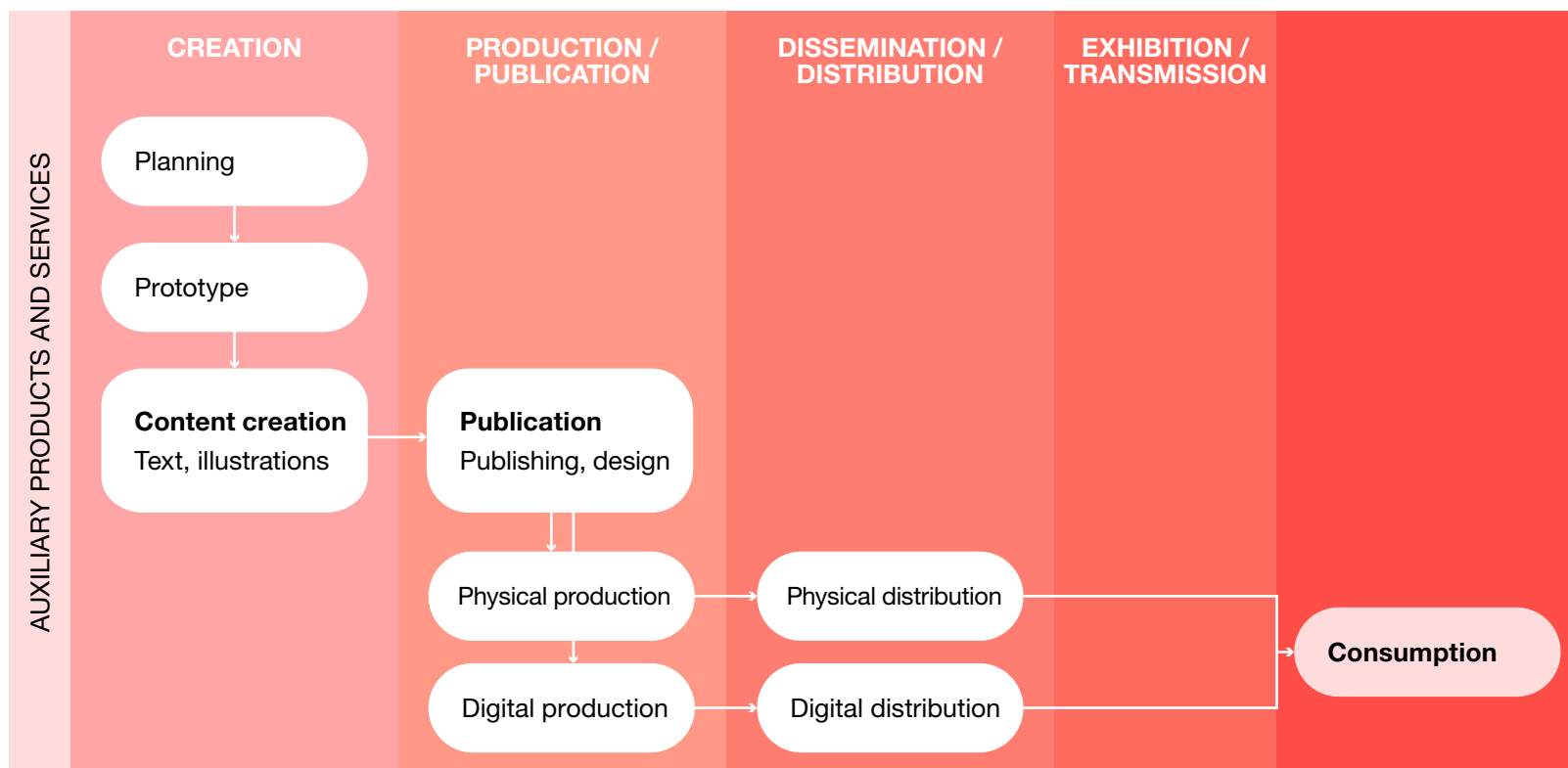
## Support functions



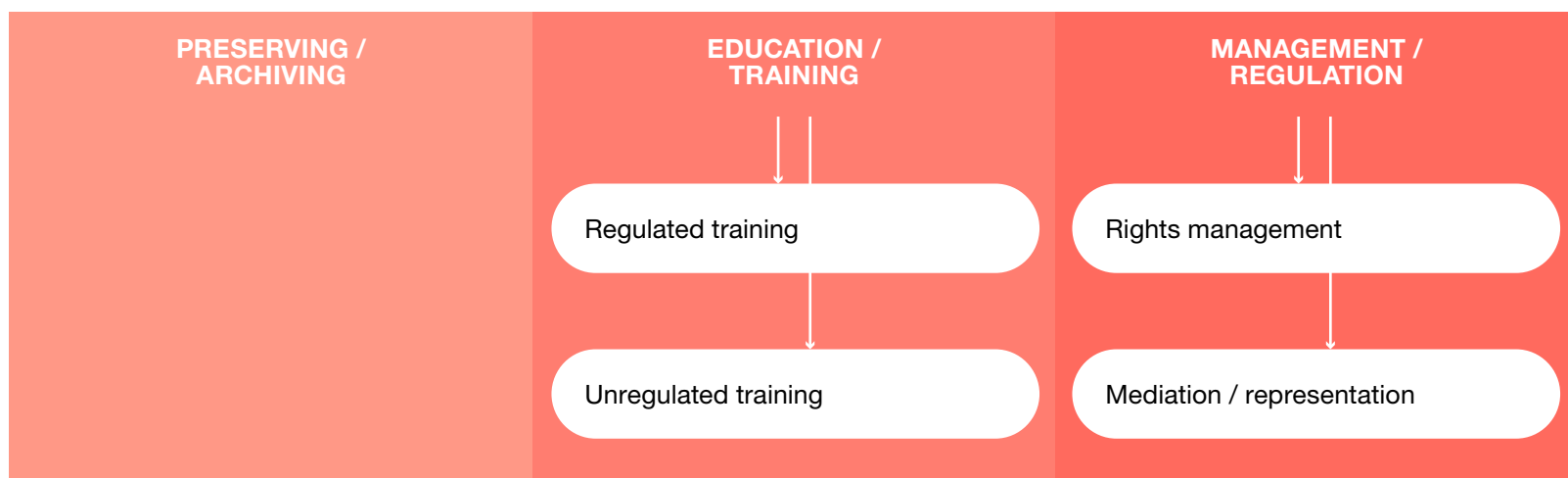
# Advertising



## Main functions

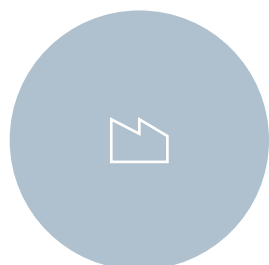


## Support functions



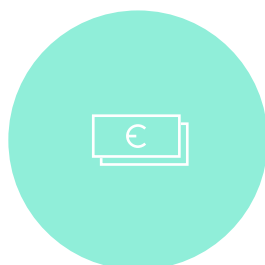
# Mapping and quantifying the CCIs in Barcelona





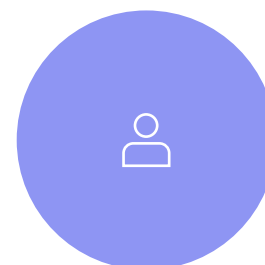
**4,675  
companies**

Representing 6.2%<sup>1</sup> of all companies in Barcelona



**€10,158 million  
in turnover**

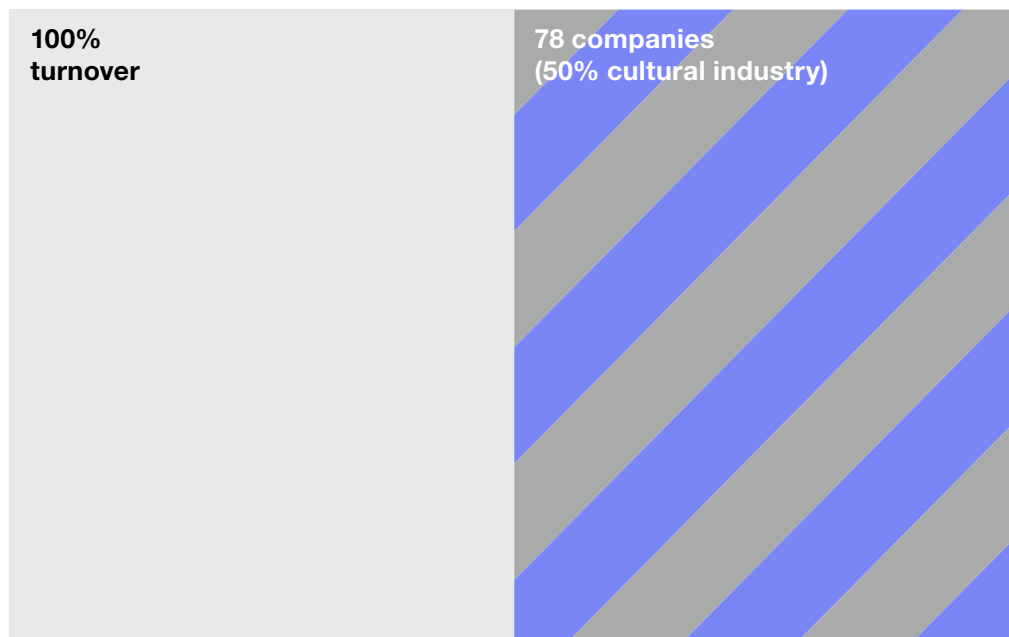
Representing 6.3%<sup>2</sup> of all companies in Barcelona



**43,535  
jobs**

Representing 3.8%<sup>1</sup> of all workers in Barcelona

50% of CCI turnover in Barcelona is generated by only 78 companies, half of which belong to the cultural industry segment (films and video, TV and radio, books and the press, music publishing and video games).



<sup>1</sup> Data for the year 2019 from the Barcelona Tourist Consortium and Barcelona City Council's Department

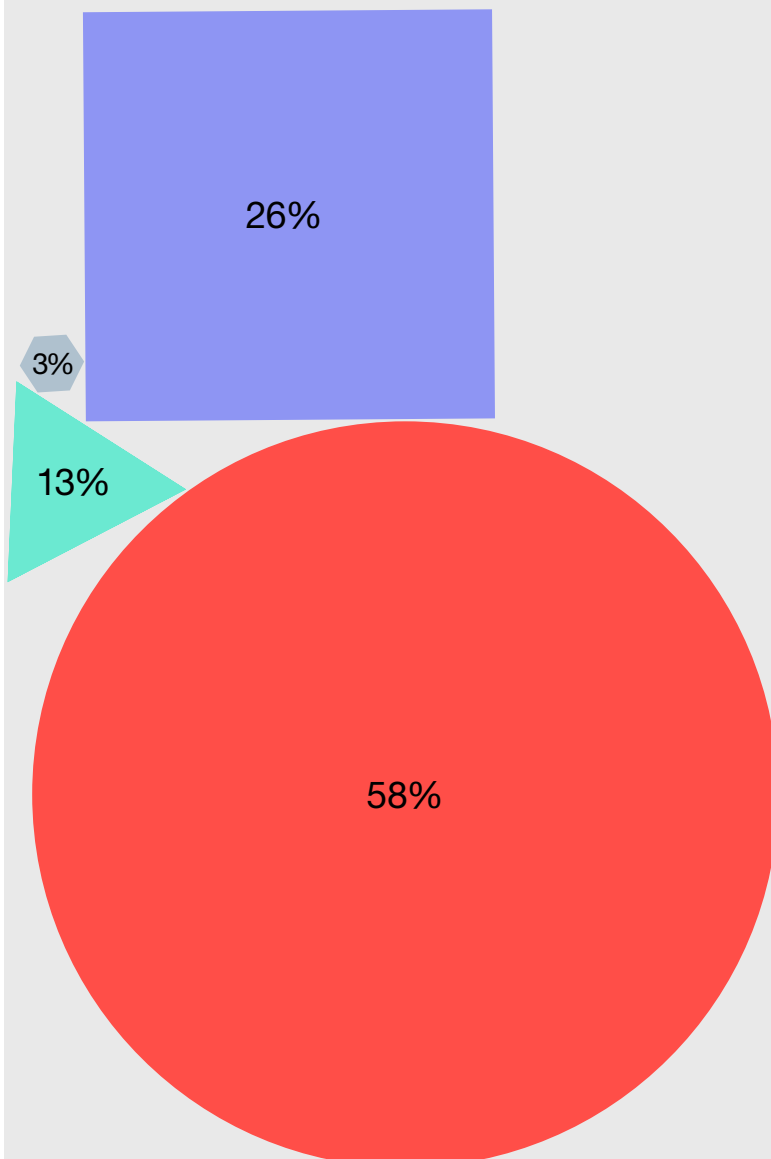
<sup>2</sup> Data exported from the Trade Registry through the SABI platform

# Companies by segment

58% of CCIs in Barcelona are in the **creative industries and activities segment** (nearly 40% of which are linked to advertising, 36% to design and 24% to architecture).

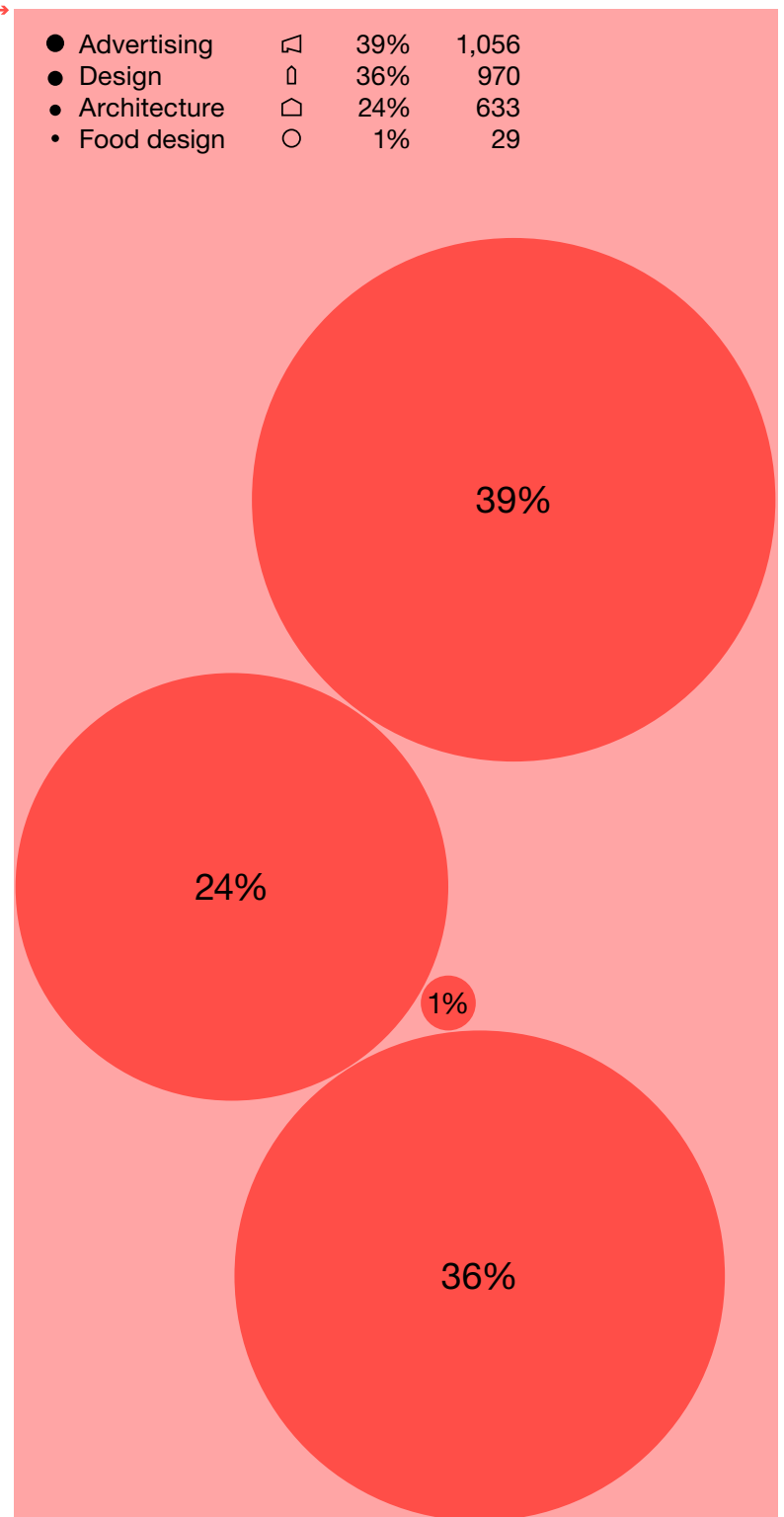
## GENERAL DISTRIBUTION

● Creative industries and activities	58%	2,688
■ Cultural industry	26%	1,227
▲ Central core	13%	622
● Complementary industries	3%	138



## CREATIVE INDUSTRIES AND ACTIVITIES

● Advertising	▣	39%	1,056
● Design	▤	36%	970
● Architecture	▥	24%	633
● Food design	○	1%	29

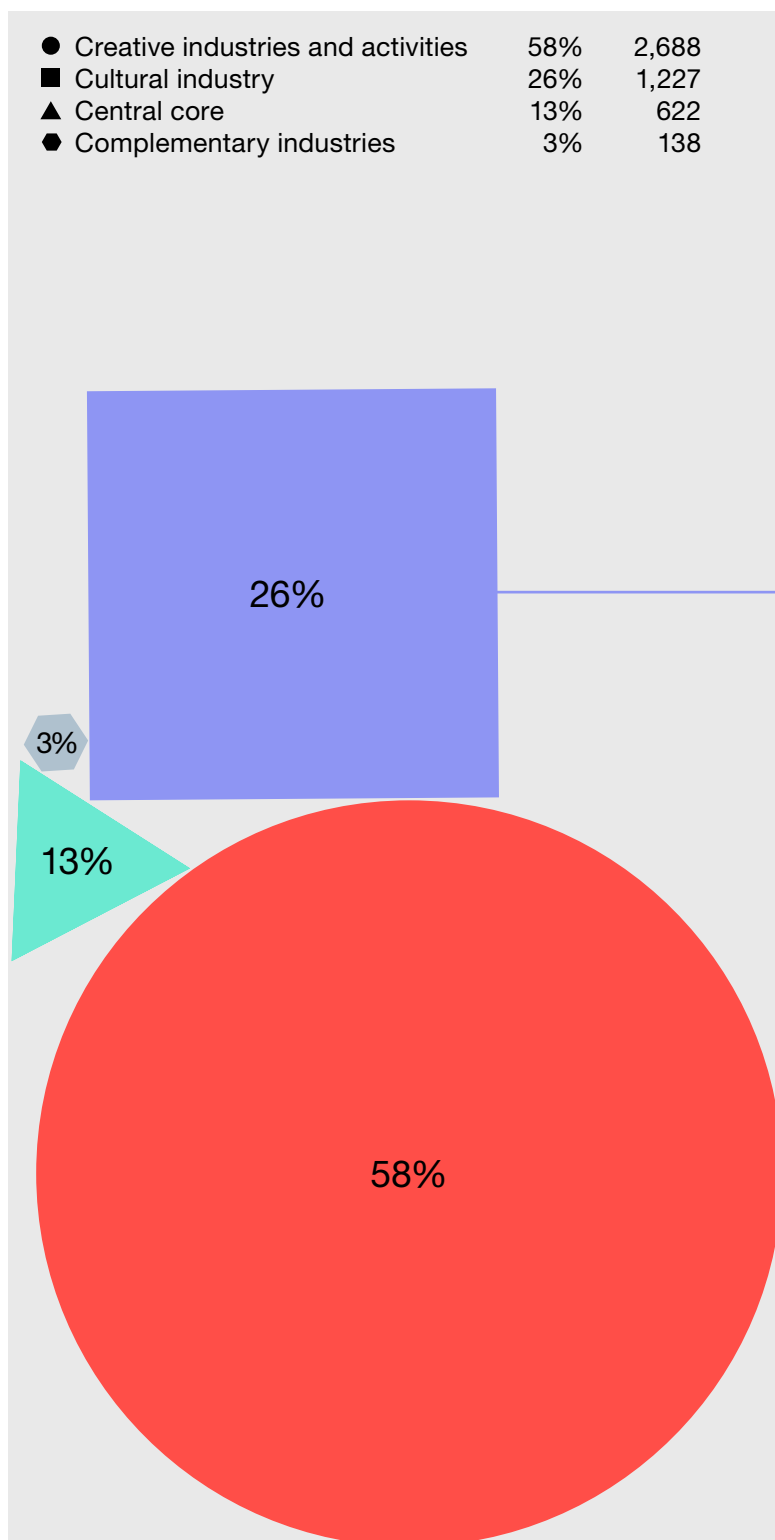


# Companies by segment

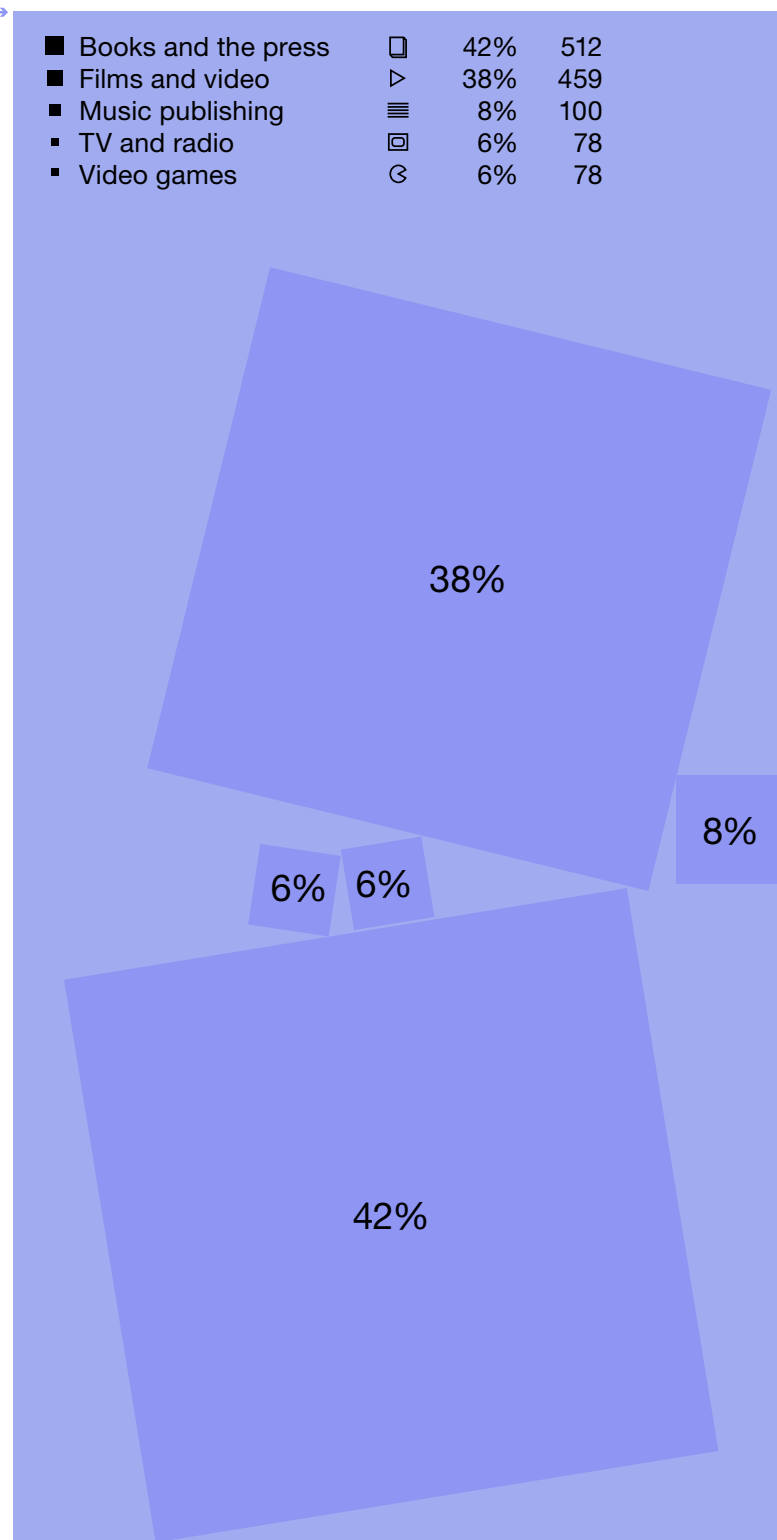
The **cultural industry** represents a quarter of CCIs in Barcelona. Books and the press plus films and video represent 80% of the total, by sub-segment. By contrast, music production companies represent 8%. Both the TV and radio sub-segment and the video games sub-segment are each represented by 6% of companies. It should be noted, however, that individual and start-up companies predominate in the video games sub-segment and it is possible that the data gathered does not totally reflect the reality in the city<sup>1</sup>.

<sup>1</sup> The databases consulted do not include some of the companies with a turnover of under €0.5 million.

## GENERAL DISTRIBUTION



## CULTURAL INDUSTRY

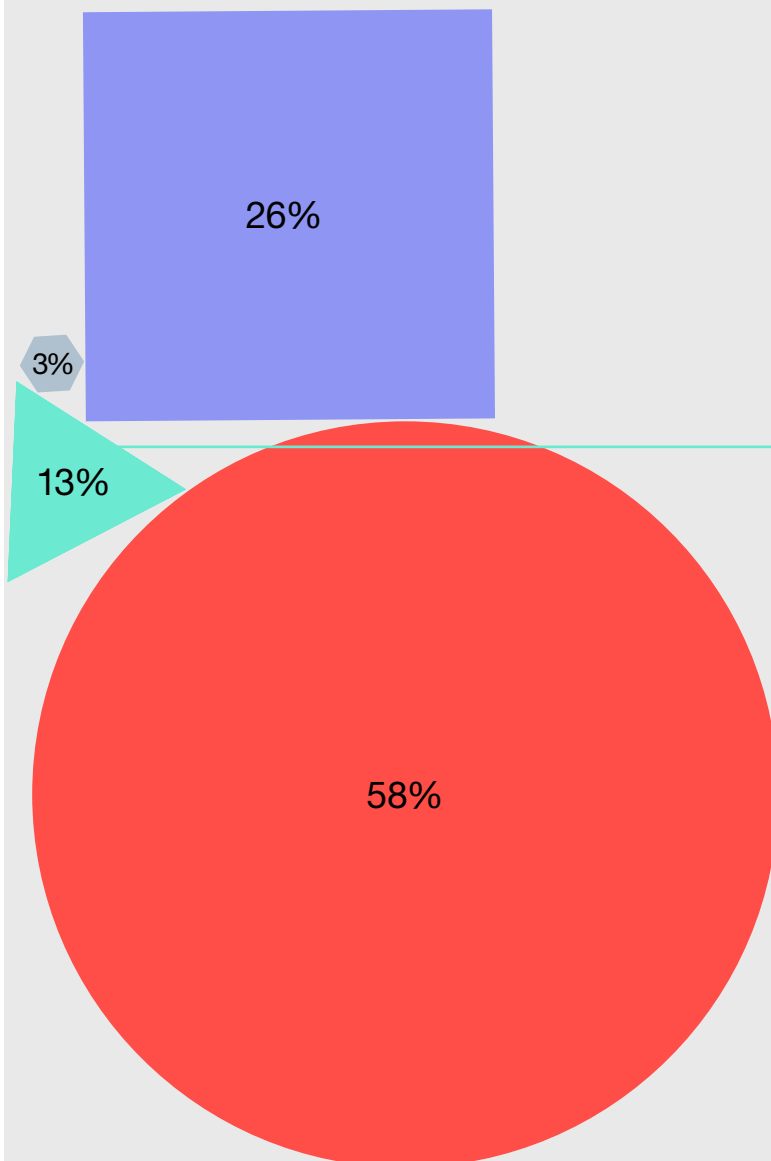


# Companies by segment

13% of CCI companies in Barcelona are in the **central core**. The largest sub-segment is the performing arts, with practically 80% of the total.

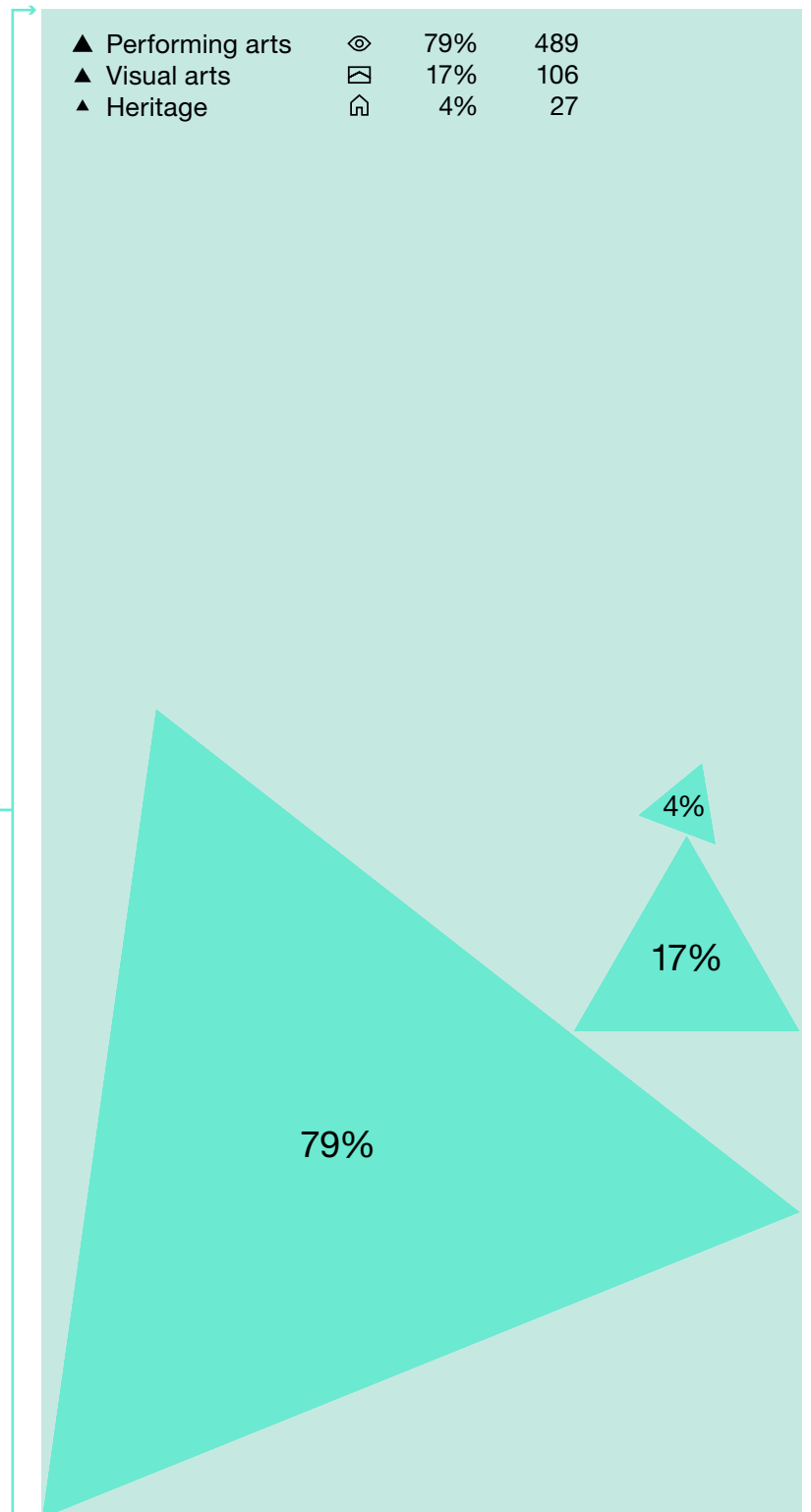
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● Creative industries and activities	58%	2,688
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## CENTRAL CORE

▲ Performing arts	👁	79%	489
▲ Visual arts	🖼	17%	106
▲ Heritage	🏠	4%	27

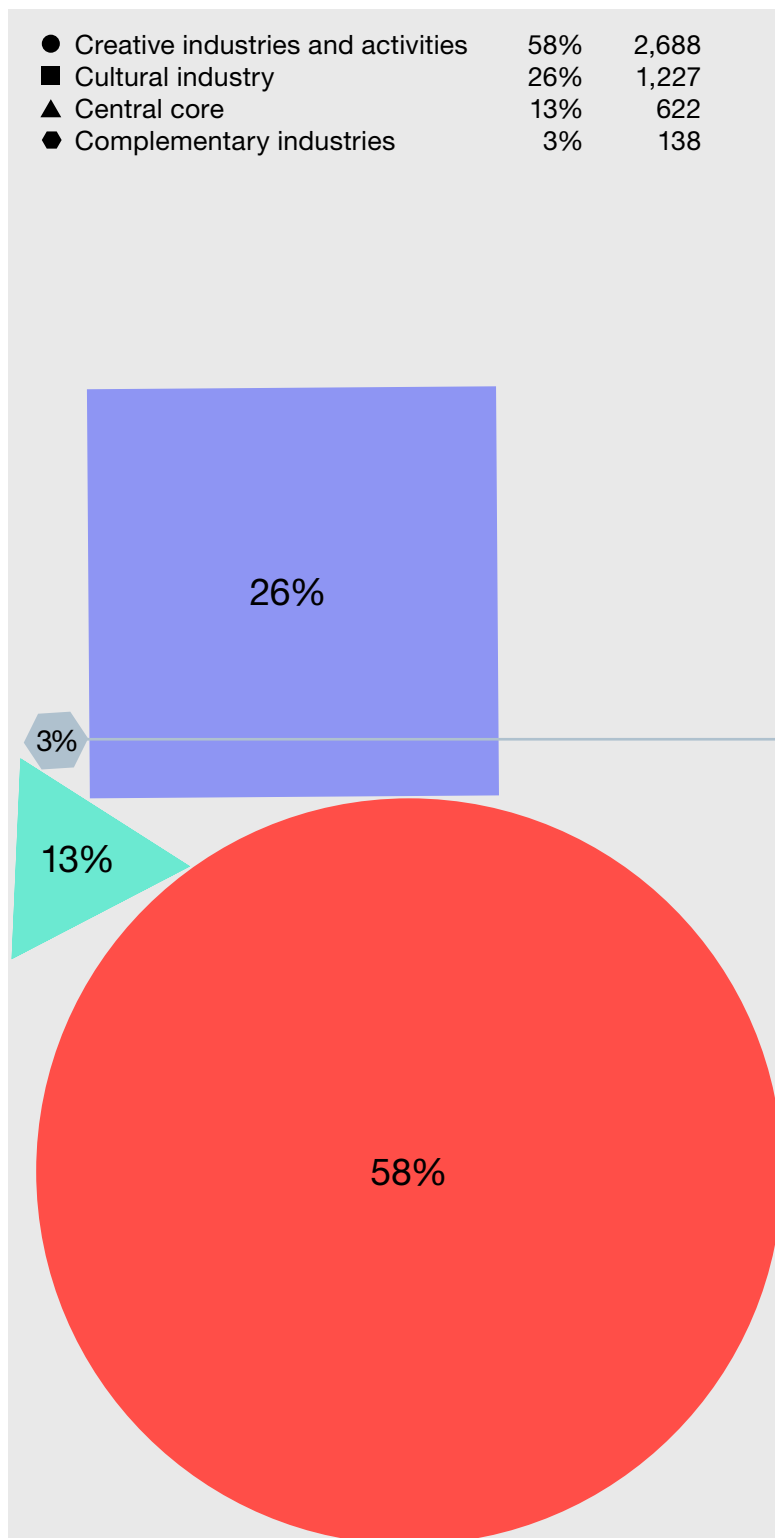




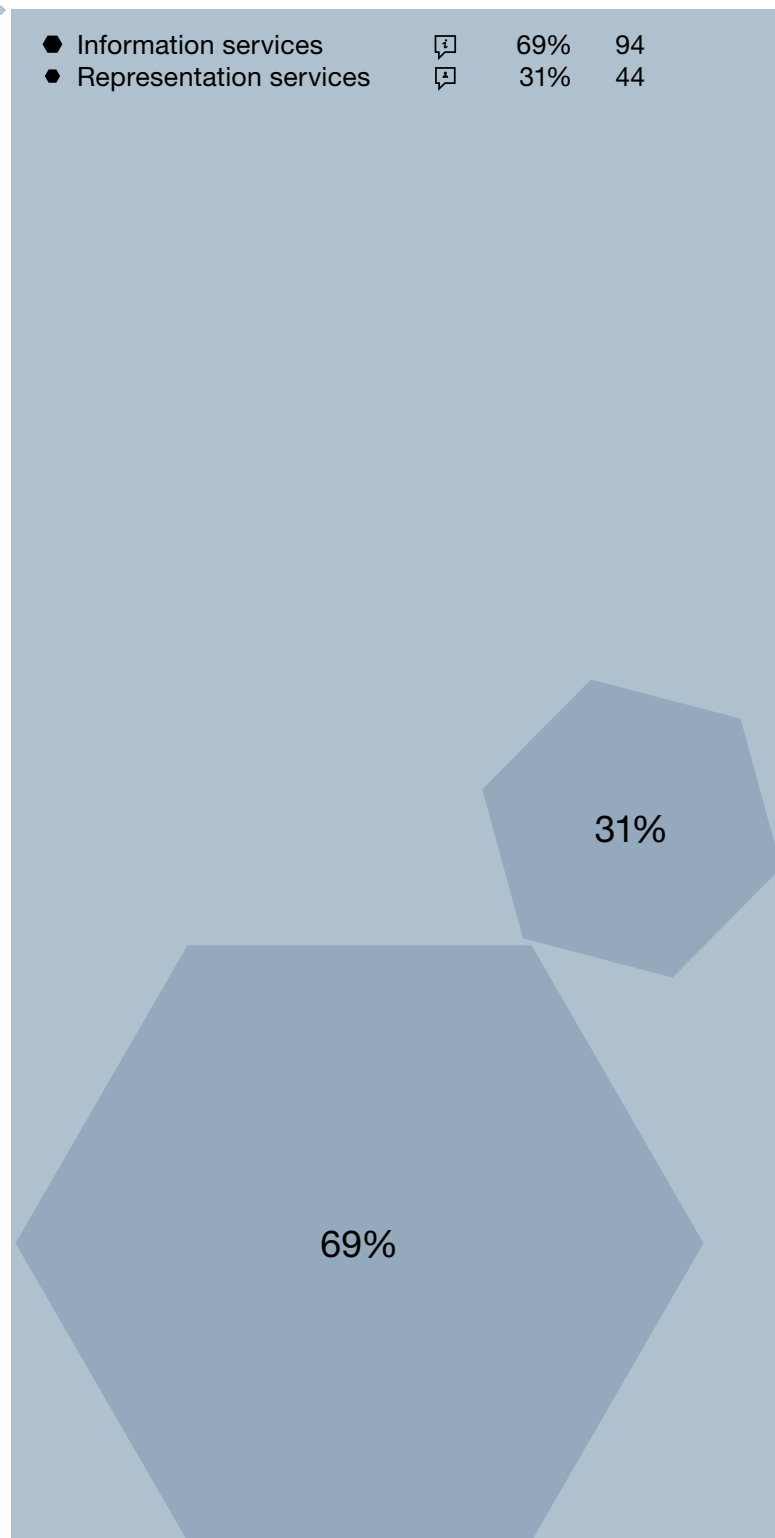
# Companies by segment

**Complementary Industries** represent only 3% of the total number of CCI companies in Barcelona. 69% are in information services and the remaining 31% in representation services.

GENERAL DISTRIBUTION



COMPLEMENTARY INDUSTRIES

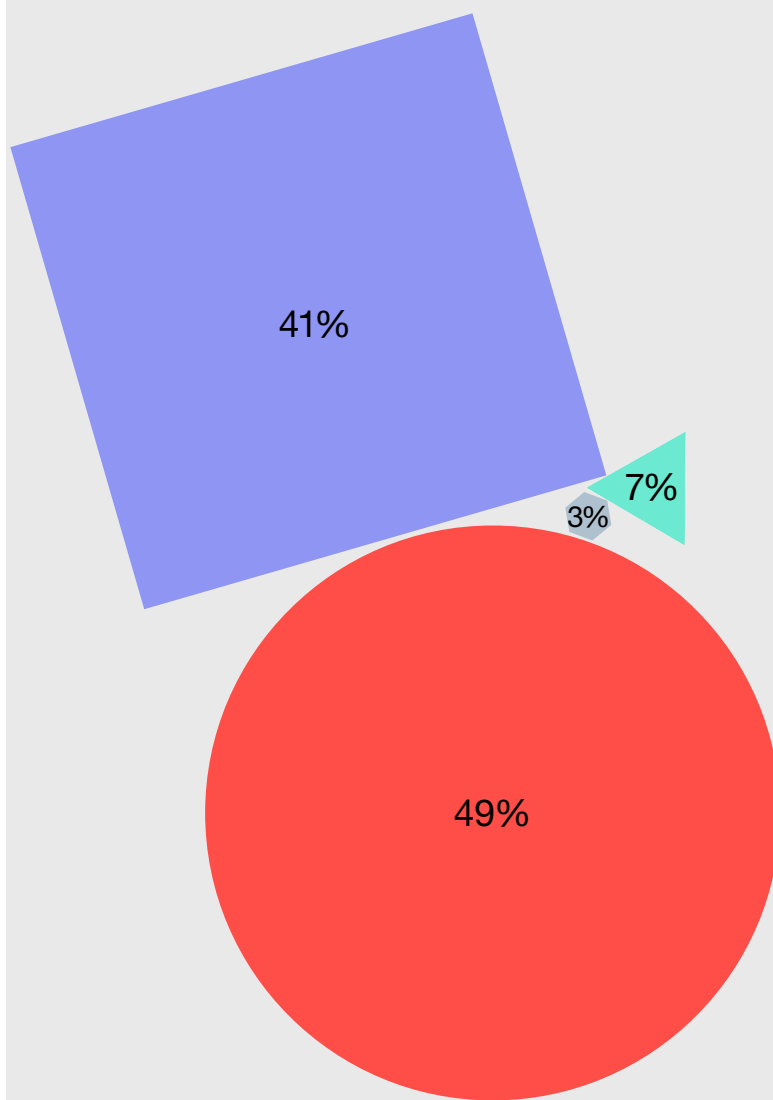


# Turnover by segment

Nearly half of the turnover generated by CCI companies in Barcelona comes from companies in the **Creative Industries and Activities** segment (49%). Of that turnover, 57% comes from the design sub-segment 37% from advertising and 6% from architecture.

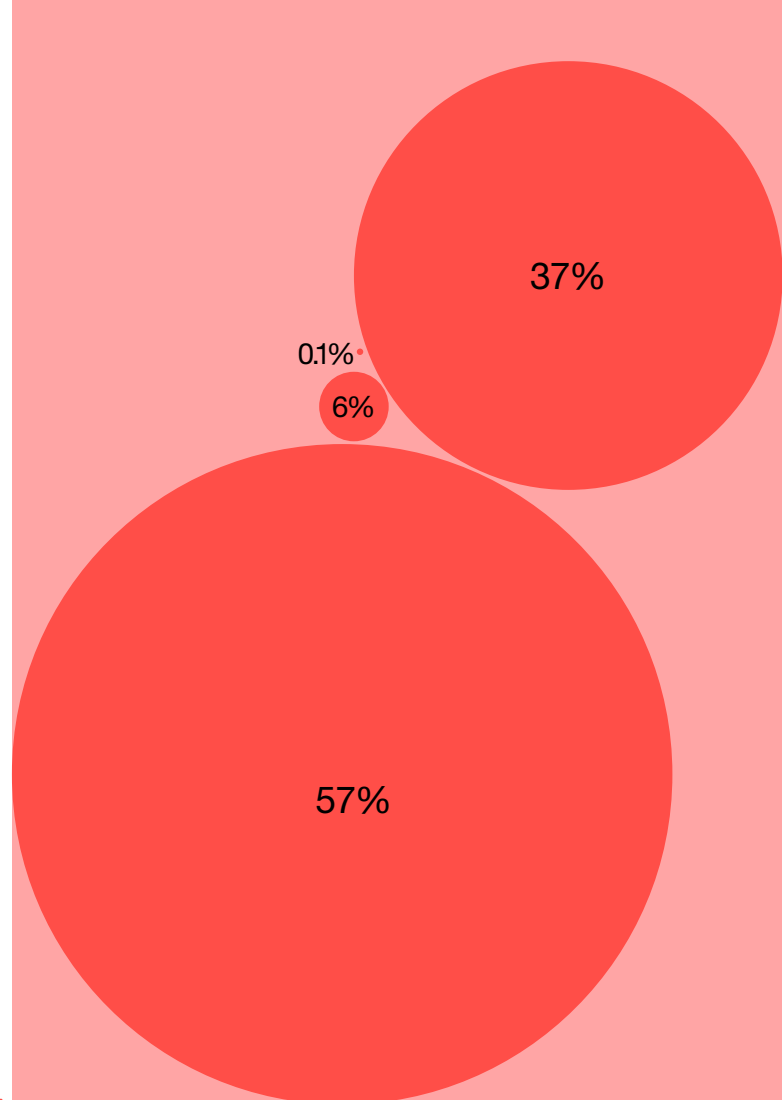
## GENERAL DISTRIBUTION

● Creative industries and activities	49%	€4,972 M
■ Cultural industry	41%	€4,139 M
▲ Central core	7%	€706 M
● Complementary industries	3%	€341 M



## CREATIVE INDUSTRIES AND ACTIVITIES

● Design	↑	57%	€2,833 M
● Advertising	⚑	37%	€1,816 M
● Architecture	⏏	6%	€316 M
• Food design	○	0.1%	€7 M

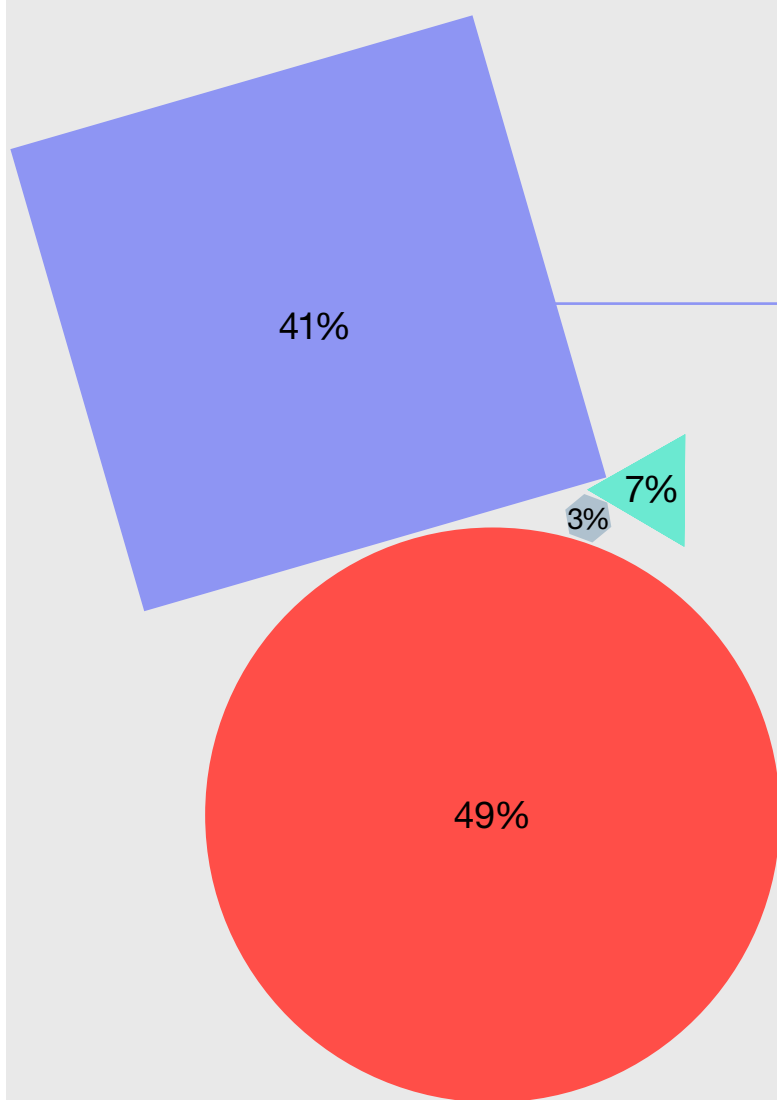


# Turnover by segment

41% of operational revenue in CCIs in Barcelona is concentrated in **Cultural Industries**. At least half of that income (49%) comes from the films and video sub-segment, 33% from books and the press, 13% from TV and radio, 3% from video games and 2% from music publishing.

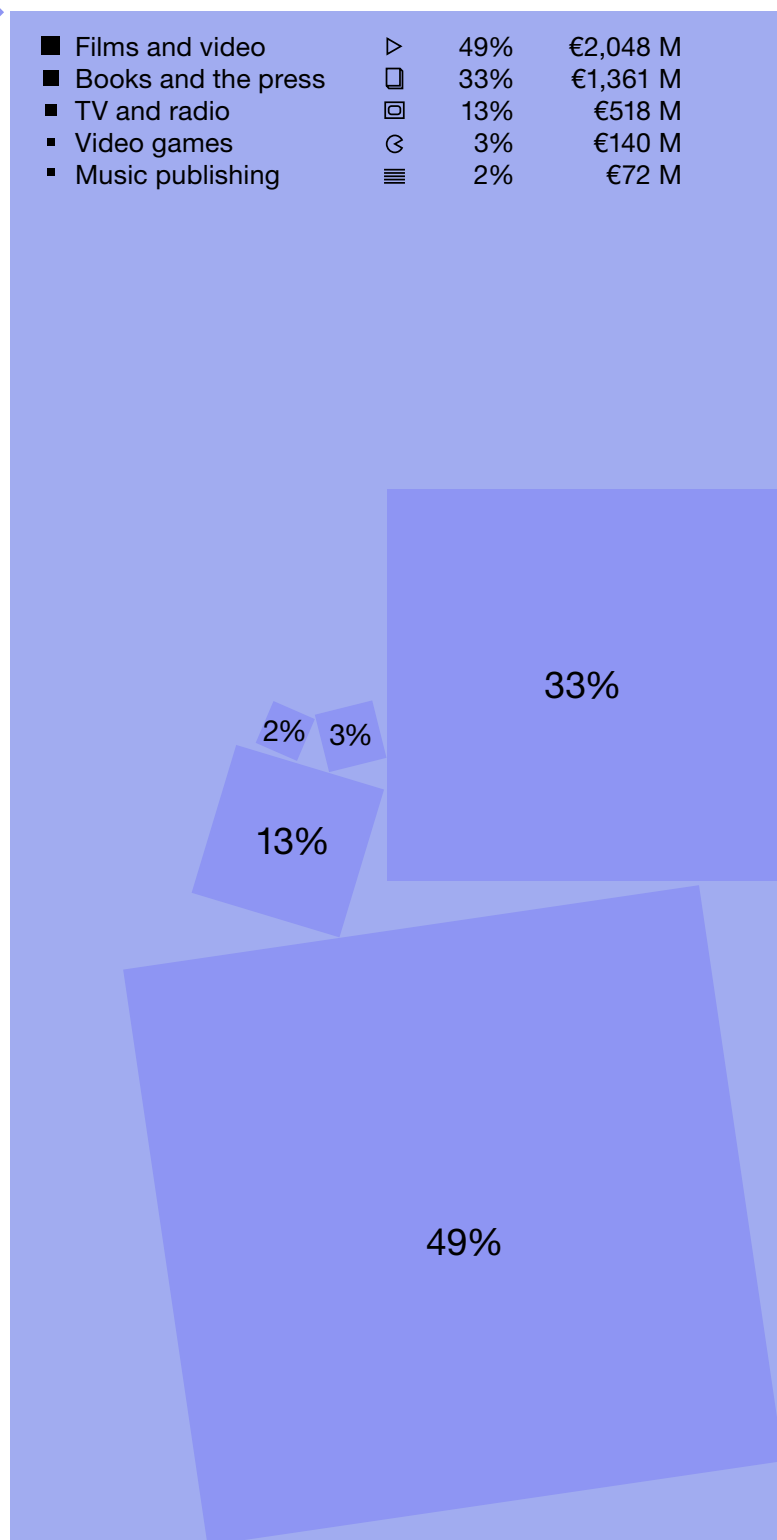
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■ Cultural industry	41%	€4,139 M
▲ Central core	7%	€706 M
● Complementary industries	3%	€341 M



## CULTURAL INDUSTRIES

■ Films and video	▷	49%	€2,048 M
■ Books and the press	□	33%	€1,361 M
■ TV and radio	⊞	13%	€518 M
■ Video games	⊙	3%	€140 M
■ Music publishing	≡	2%	€72 M

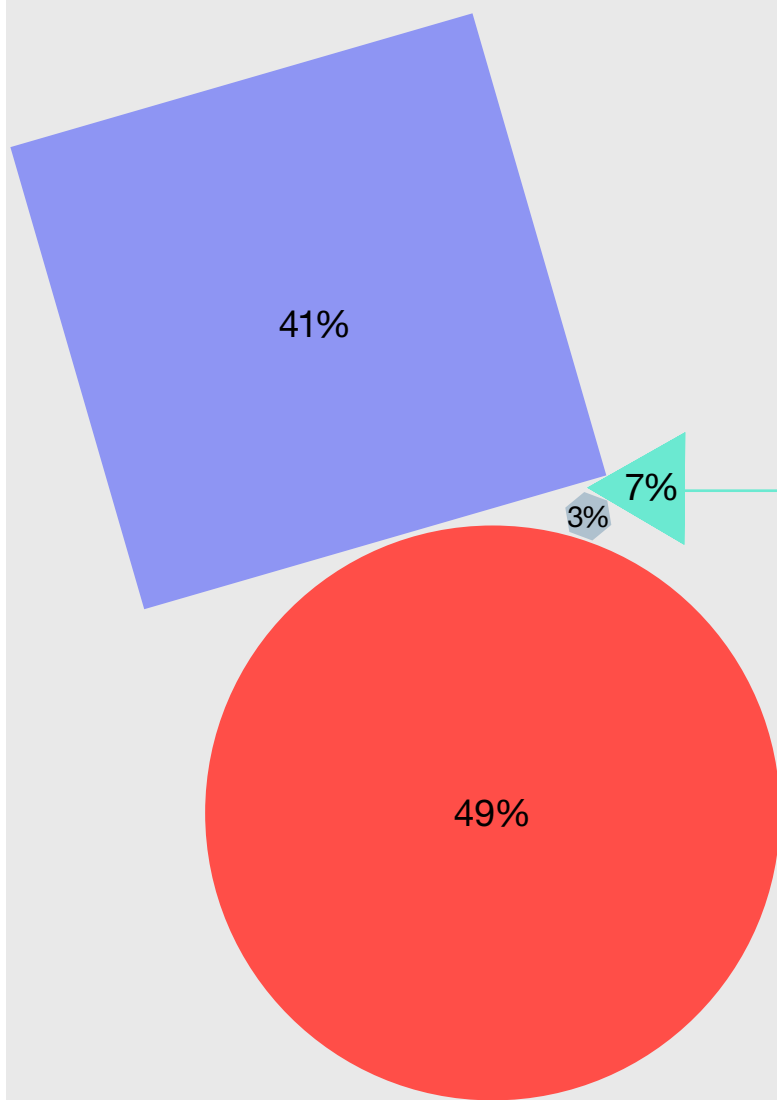


# Turnover by segment

It can be observed from a breakdown of the operational income of Barcelona's ICC companies that the **central core** represents 7% of the total. Of that total, 87% of the sector's enterprise turnover comes from the performing arts, followed by 10% from heritage sub-segment and the rest (3%), from the visual arts.

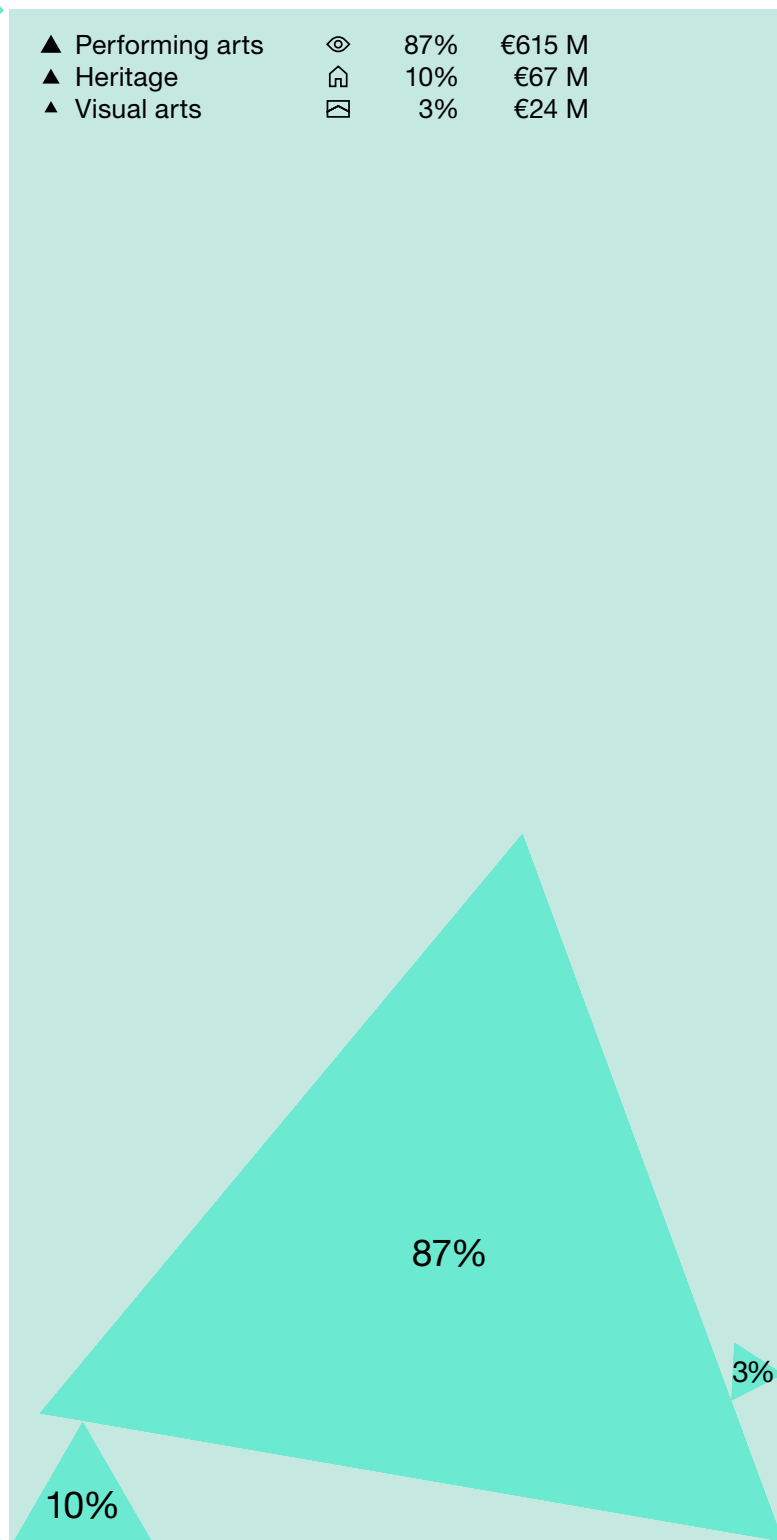
## GENERAL DISTRIBUTION

● Creative industries and activities	49%	€4,972 M
■ Cultural industry	41%	€4,139 M
▲ Central core	7%	€706 M
● Complementary industries	3%	€341 M



## CENTRAL CORE

▲ Performing arts	👁️	87%	€615 M
▲ Heritage	🏠	10%	€67 M
▲ Visual arts	🖼️	3%	€24 M

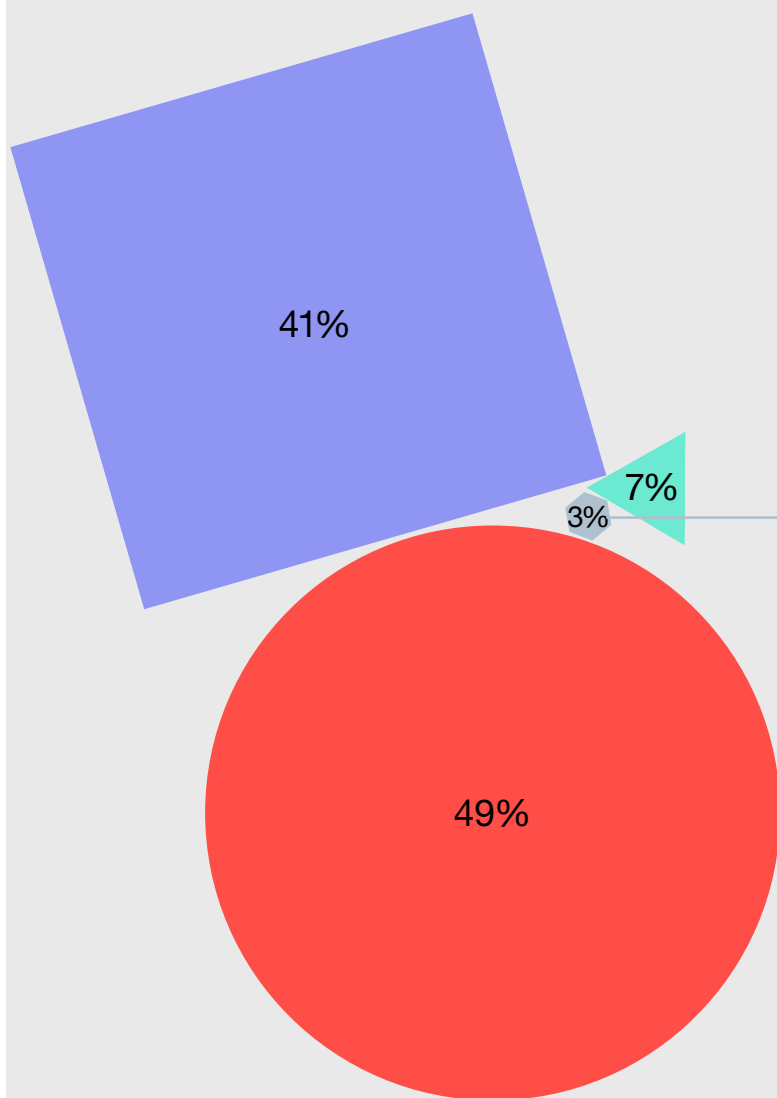


# Turnover by segment

The operating income from **complementary industries** represent 3% of the total of CCIs in Barcelona. Of that income, 68% comes from representation services and 32% from information services.

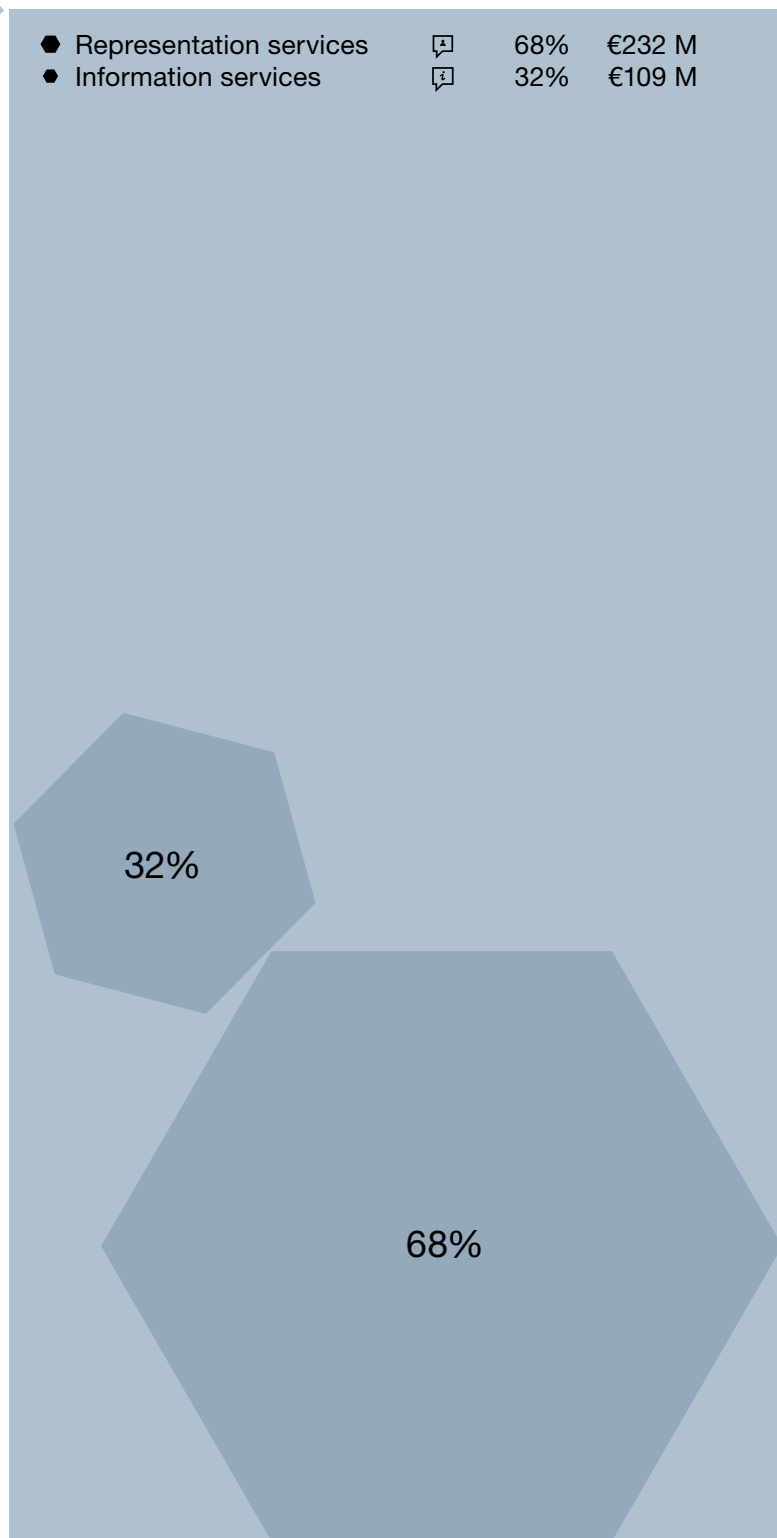
## GENERAL DISTRIBUTION

● Creative industries and activities	49%	€4,972 M
■ Cultural industry	41%	€4,139 M
▲ Central core	7%	€706 M
● Complementary industries	3%	€341 M



## COMPLEMENTARY INDUSTRIES

● Representation services	68%	€232 M
● Information services	32%	€109 M

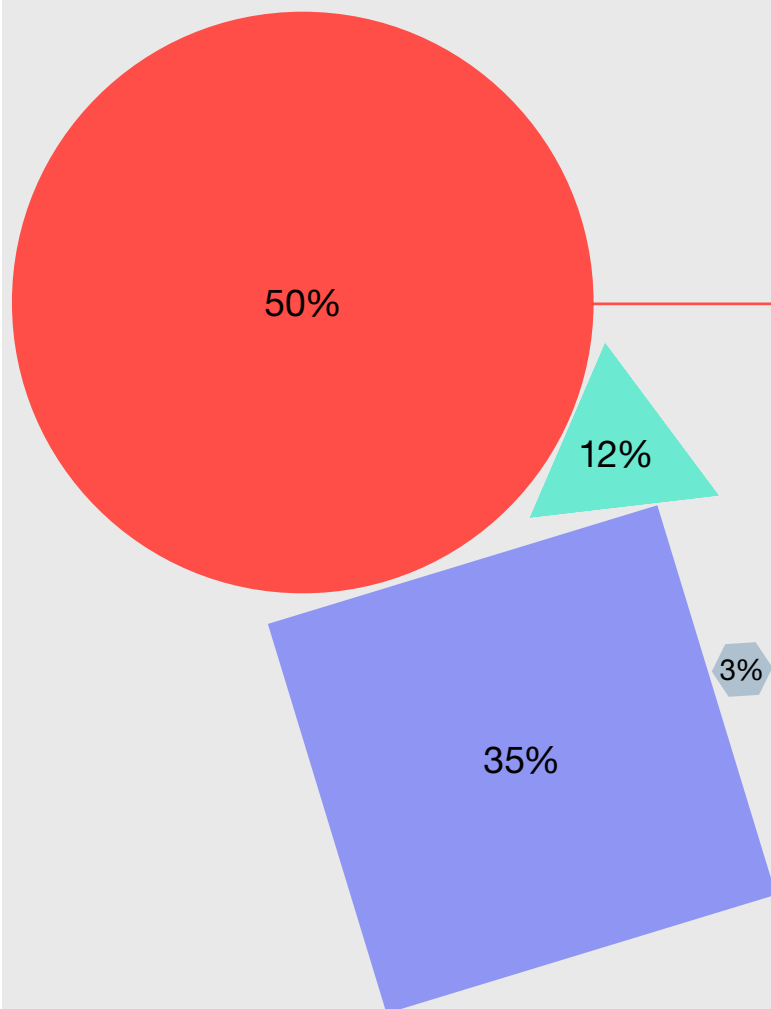


# Employees by segment

Half of the jobs generated by CCIs in Barcelona comes from the **creative industries and activities** segment. Half of these are in the Design sub-segment, 37% in advertising and 13% in architecture.

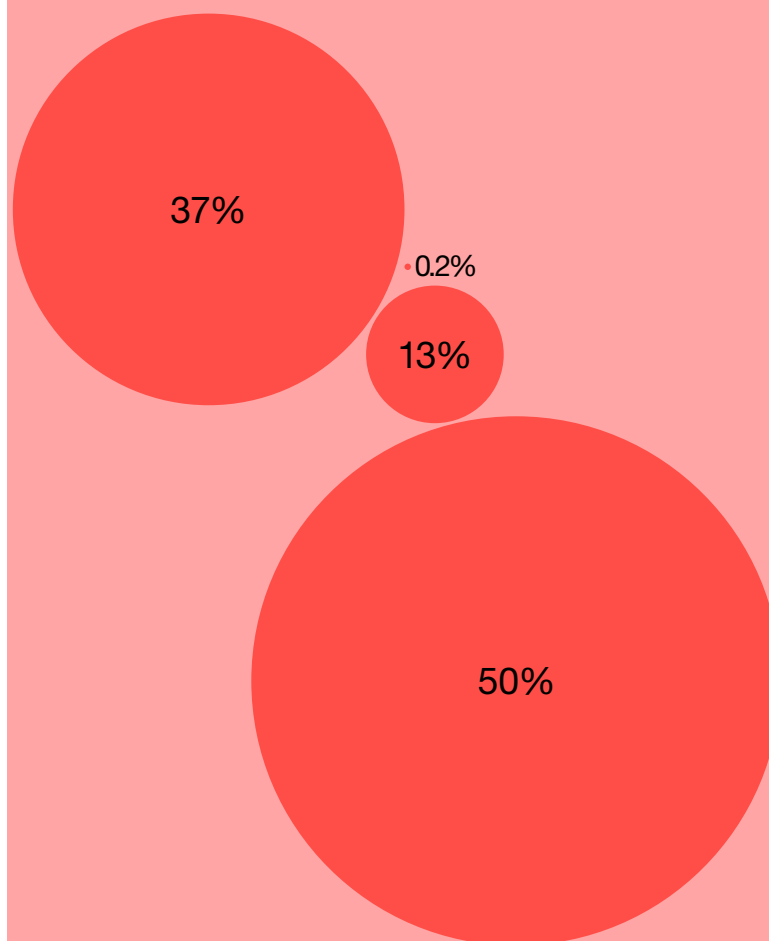
## GENERAL DISTRIBUTION

● Creative industries and activities	50%	21,713
■ Cultural industry	35%	15,325
▲ Central core	12%	5,226
● Complementary industries	3%	1,271



## CREATIVE INDUSTRIES AND ACTIVITIES

● Design	⏏	50%	10,936
● Advertising	⏏	37%	7,983
● Architecture	⏏	13%	2,741
● Food design	○	0,2%	53

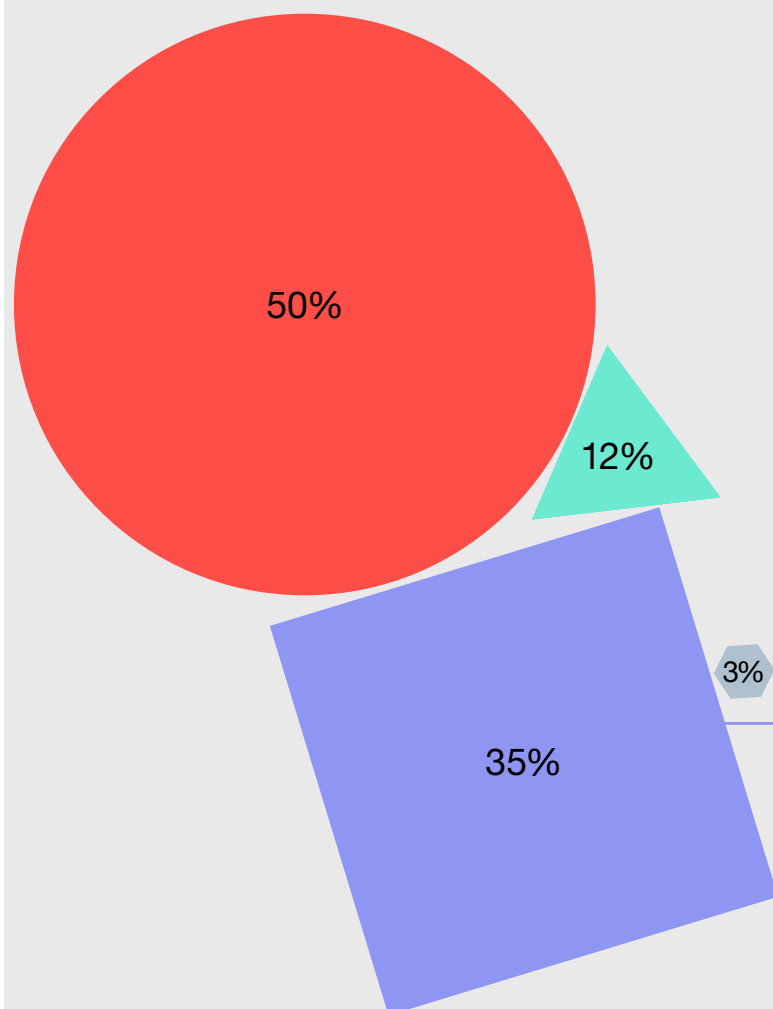


# Employees by segment

The **cultural industry** segment generates a quarter of CCI jobs in Barcelona. Of those jobs, 41% are in the films and video sub-segment, 38% in books and the press, 10% in TV and radio, 6% in video games and 5% in music publishing.

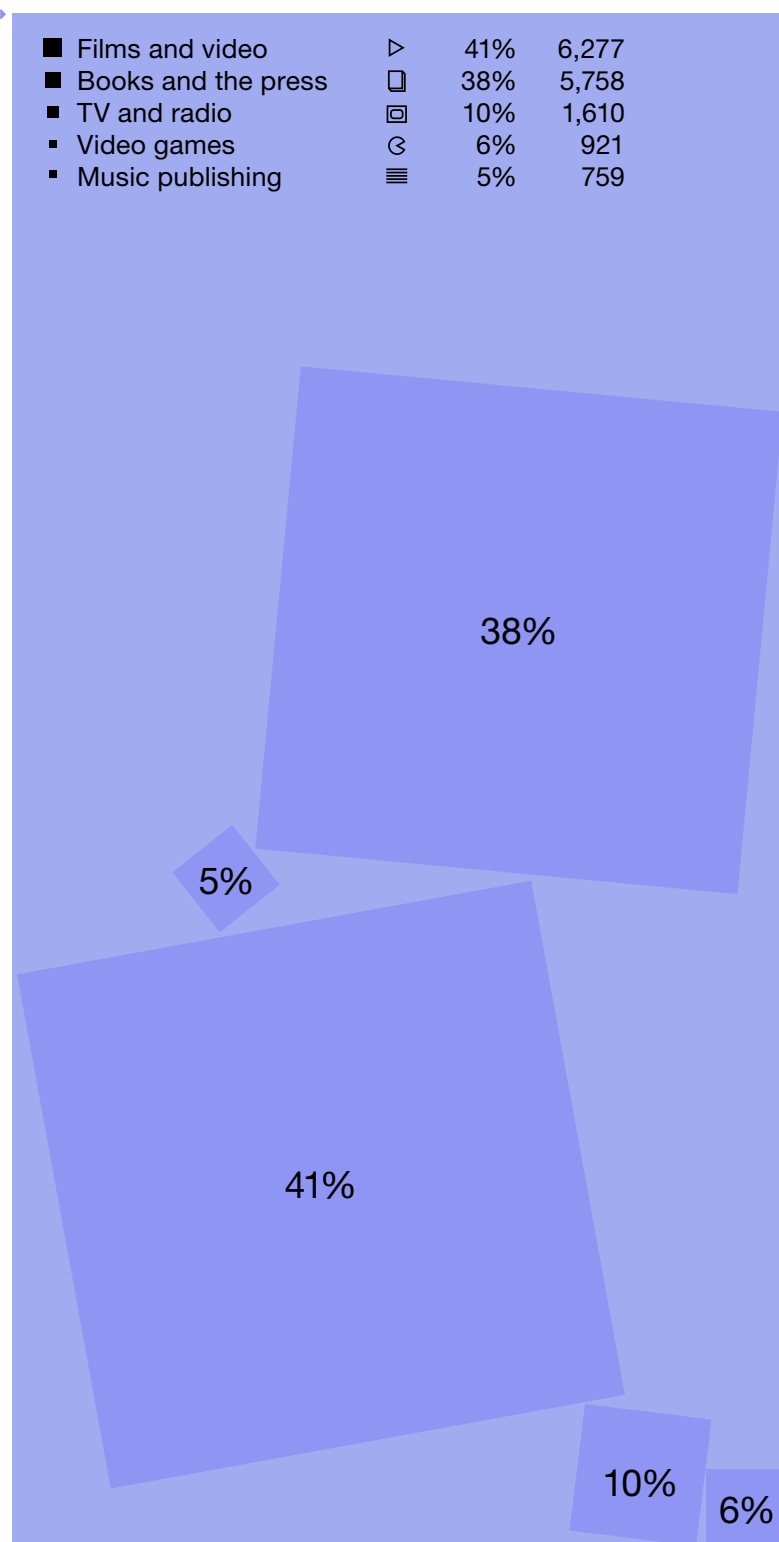
## GENERAL DISTRIBUTION

● Creative industries and activities	50%	21,713
■ Cultural industry	35%	15,325
▲ Central core	12%	5,226
● Complementary industries	3%	1,271



## CULTURAL INDUSTRY

■ Films and video	▷	41%	6,277
■ Books and the press	□	38%	5,758
■ TV and radio	▣	10%	1,610
■ Video games	⊙	6%	921
■ Music publishing	≡	5%	759

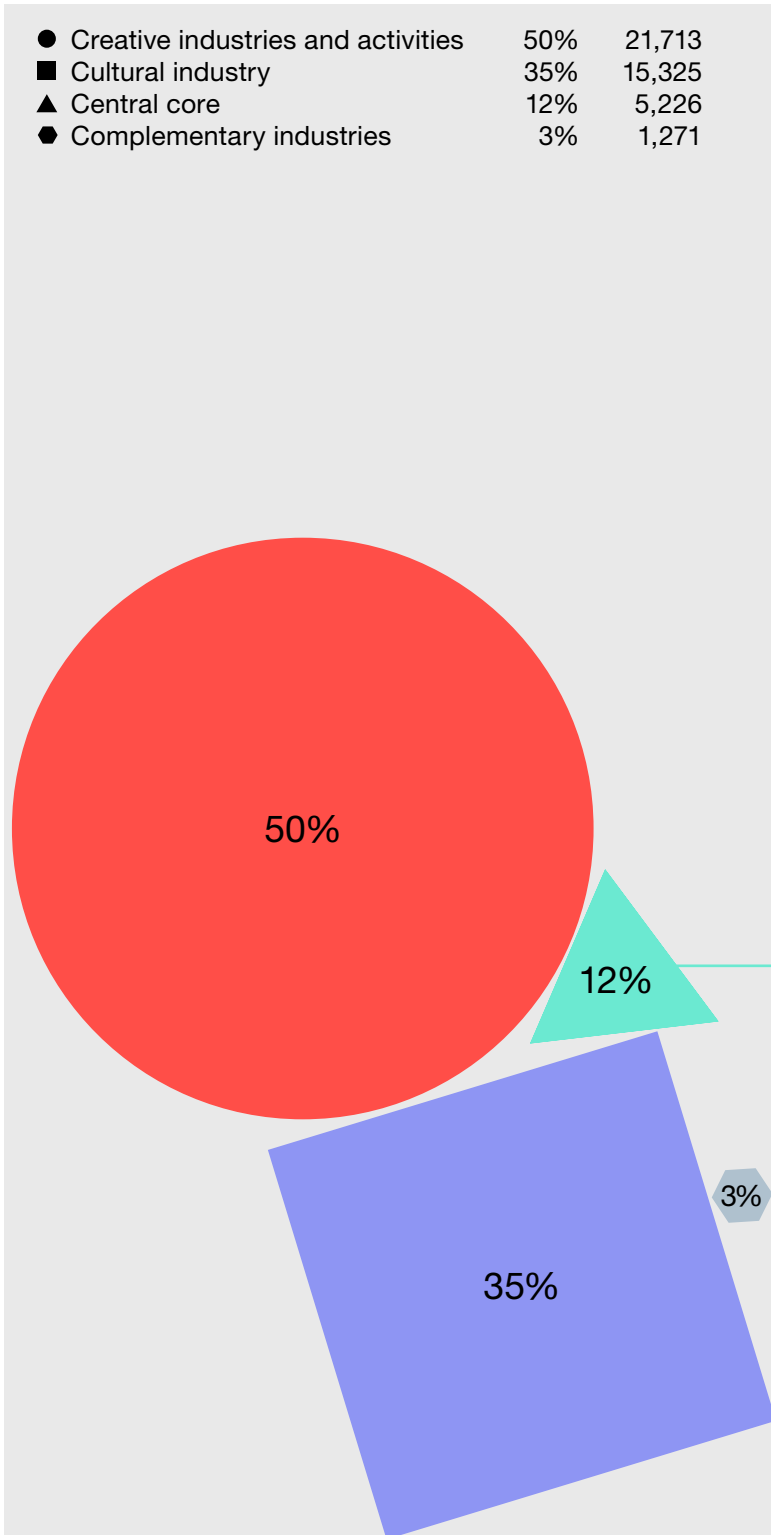


# Employees by segment

The **Central Core** represents 14% of all Barcelona's CCI employees. Nearly 80% of these employees work in performing arts and the rest in heritage (14%) and visual arts (7%).

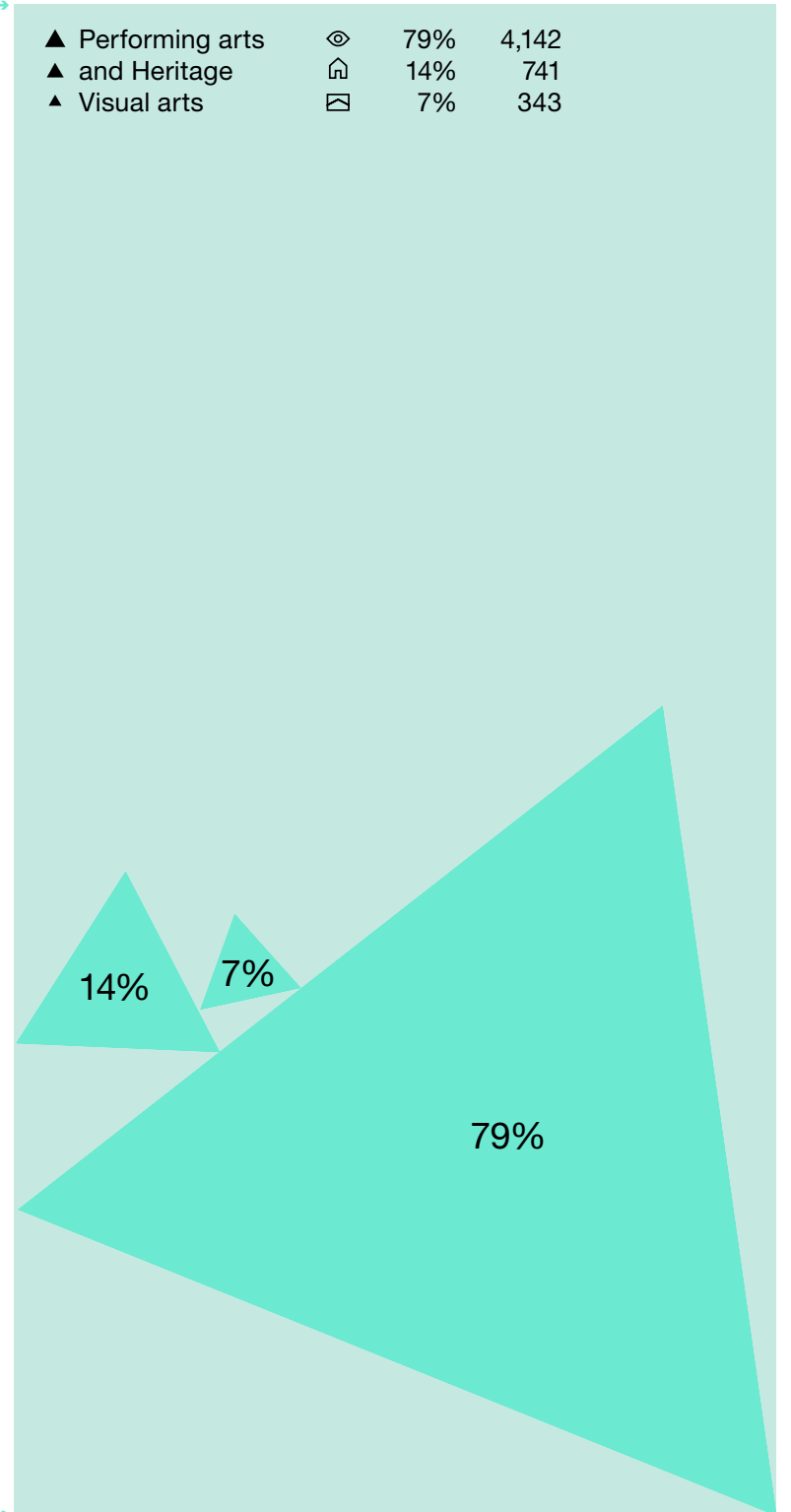
## GENERAL DISTRIBUTION

● Creative industries and activities	50%	21,713
■ Cultural industry	35%	15,325
▲ Central core	12%	5,226
● Complementary industries	3%	1,271



## CENTRAL CORE

▲ Performing arts	👁️	79%	4,142
▲ and Heritage	🏠	14%	741
▲ Visual arts	🖼️	7%	343



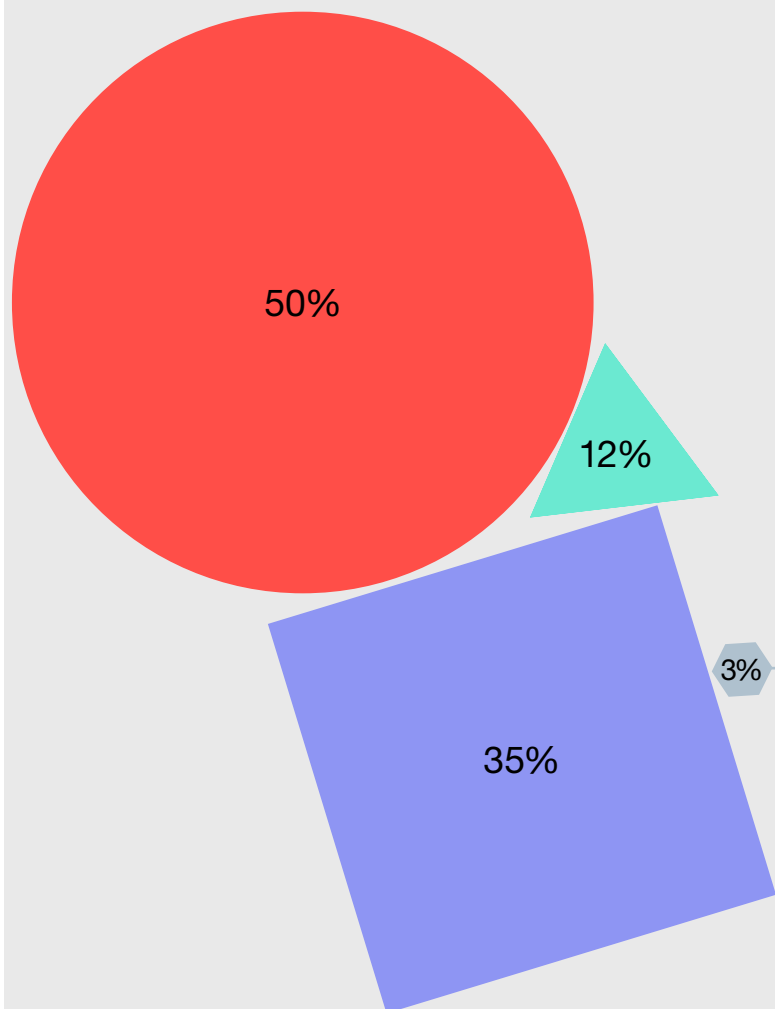


# Employees by segment

**Complementary Industries** represent only 3% of all jobs in Barcelona's CCIs, where 60% of employees are in information services and the rest (40%) in representation services.

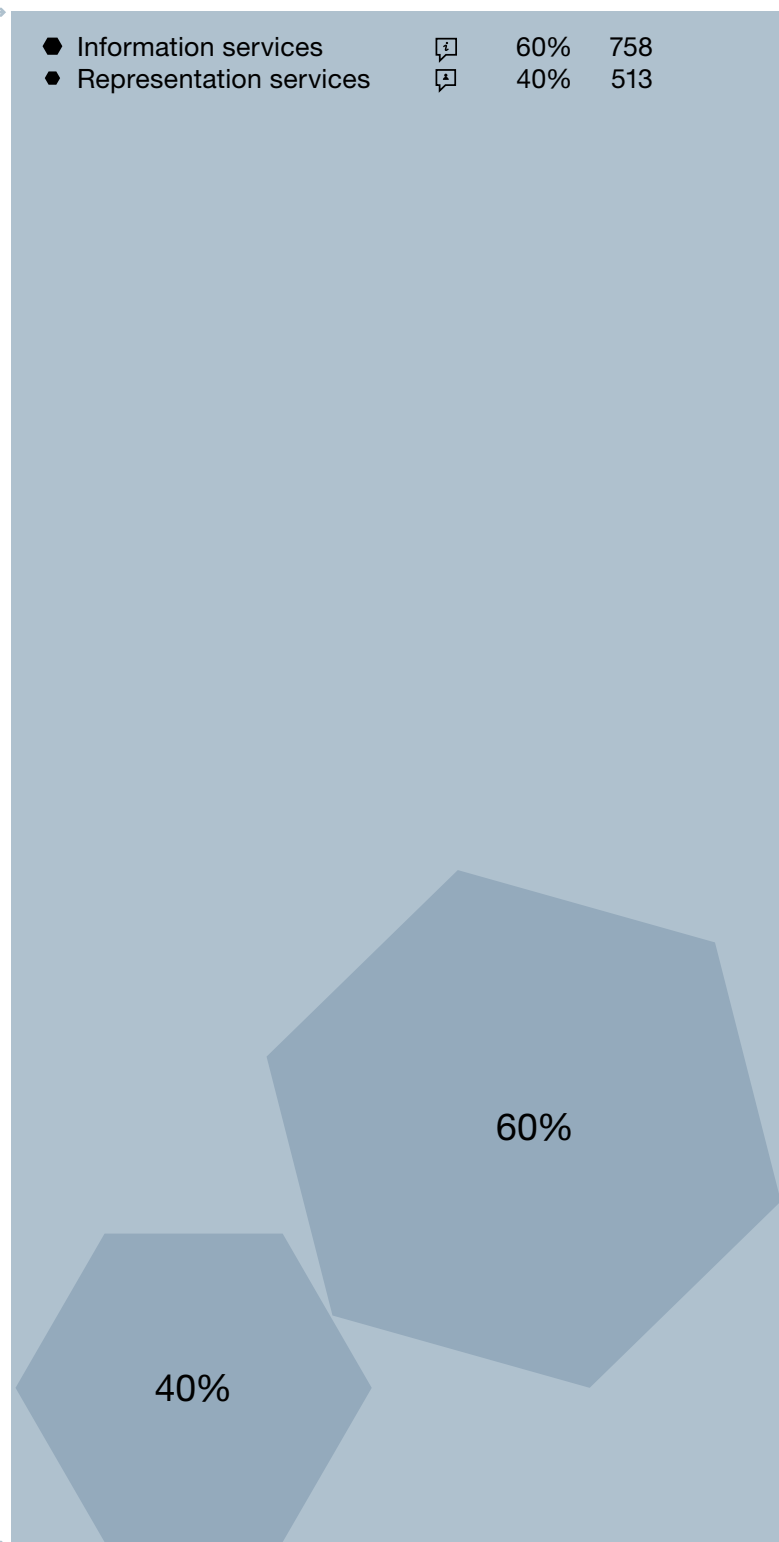
## GENERAL DISTRIBUTION

● Creative industries and activities	50%	21,713
■ Cultural industry	35%	15,325
▲ Central core	12%	5,226
● Complementary industries	3%	1,271



## COMPLEMENTARY INDUSTRIES

● Information services	60%	758
● Representation services	40%	513



# Other players and initiatives

Some examples

## Foundations and associations

### VISUAL ARTS

- AFP, Professional Photographers Association of Spain
- PAAC, Catalan Artists' Assembly Platform
- Art Galleries of Catalonia
- Foto Colectania Foundation
- The Artists Foundation
- New Art Foundation
- Eart
- Interarts
- Suñol Foundation
- Glòria Soler Foundation
- Photographic Social Vision

### CINEMA AND VIDEO

- Catalan Film Academy
- AADPC, Catalan Association of Professional Actors and Directors
- PAC, Catalan Audiovisual Producers
- Proa, Federated Audiovisual Producers
- Proanimats
- Proficció
- Pro-Docs
- Pro-TV

### PERFORMING ARTS

- Catalan Association of Circus Professionals
- ARC, Association of Representatives, Promoters and Managers of Catalonia
- ADETCA, Catalan Association of Theatre Companies
- ACET, Association of Theatre Schools
- Atecat, Catalan Association of Show Technicians
- Ciatre, Catalan Association of Professional Theatre Companies
- Romea Foundation for the Performing Arts
- FAETEDA, State Federation of Dance Company Associations
- Teatronika

### MUSIC

- Xàfec, Catalan Music Festival Network
- FMA, Music Festival Association
- CIMA Foundation, International Centre for Early Music
- Bachcelona Foundation
- Ferrer-Salat Music Foundation
- Symphony and Chamber Music Private Foundation
- Ribermúsica Private Foundation
- Contemporary Music Foundation
- Palau de la Música – Orfeó Català
- Gran Teatre del Liceu
- Orfeó Martinenc
- Taller de Músics
- Xamfrà, El Raval Centre for Stage and Music

## Foundations and associations

### BOOKS AND THE PRESS

- APIC, Professional Association of Catalan Illustrators
- Editors.cat
- Mercè Rodoreda Foundation - Institute for Catalan Studies

### VIDEO GAMES

- DeviCAT

### ARCHITECTURE

- Arquin-FAD
- Architects for Architecture
- COAC, Architects' Association of Catalonia
- CAATEEB, Barcelona Association of Quantity Surveyors, Technical Architects and Building Engineers
- Catalan Association of Interior Designers and Decorators

### ADVERTISING

- ADCE, Art Directors Club of Europe
- Advertising Business Association
- Catalan Association of Marketing and Communication

### FOOD DESIGN

- Food Cultura
- Viure el Mediterrani Foundation

### DESIGN

- FAD, Fostering Arts and Design
- Moda FAD
- ADI-FAD
- ADG-FAD
- A-FAD
- BCD, Barcelona Design Centre
- ADP, Professional Designers' Association
- APDI, Association of Professional Lighting Designers
- Catalan Graphic Design Association
- Palo Alto
- FHD, History of Design Foundation
- FAAOC, Catalan Federation of Professional Artisan Associations
- Association for Furniture Studies

### OTHERS

- Barcelona Tech City
- Design for all Foundation
- Catalan Foundation for Research and Innovation
- Catalan Culture Foundation
- Barcelona Institute of Humanities
- Society and Culture Foundation
- Federation of Catalan Athenaeums
- TresC
- Poblenou Urban District
- SGAE
- CEDRO
- VEGAP
- EGEDA
- AGEDI

## Research centres

- BIST, Barcelona Institute of Science and Technology
- CETT Foundation
- Elisava Research
- FabLab Foundation
- Gracmon, History of Contemporary Art and Design Research Group
- Gredits, History of Social Design and Transformation Research Group
- I+ED Lab

## Other organisations

- Barcelona Supercomputing Centre
- Club Marketing Barcelona
- Corporació Catalana de Mitjans Audiovisuals
- Ramon Llull Institut
- Makea tu Vida
- MATERFAD, materials centre
- MOB, Makers of Barcelona
- Mobile World Capital Barcelona
- PIMEC
- TheCreative.net

## Clusters

- Catalan Audiovisuals Cluster
- Design Cluster. Barcelona Design Centre
- Digital Cluster
- Catalan Book Chamber
- Foodservice Cluster
- Leather Cluster Barcelona
- Modacc

## Technology centres

- Eurecat

## Guilds

- Catalan Publishers' Guild
- Catalan Booksellers Association
- Catalan Graphics Industry and Communication Guild
- Catalan Films Guild
- Barcelona Bars and Restaurants Guild
- Catalan Music Publishers' Guild
- Barcelona City and Province Discotheque Entrepreneurs' Guild

## Hubs

- Disseny Hub Barcelona
- Grafic Hub
- HacTe, Art, Science and Technology Hub

## Initiatives

- Design the restaurant experience
- Design 4 Innovation
- Bonus Cultura
- Premis Barcelona Scholarships
- Creation factories
- Inspired in Barcelona
- MidTalent
- Starting Lab – UPF

## Infrastructures and spaces

### VISUAL ARTS

- Arts Santa Mònica
- CCCB
- Fabra i Coats
- Miró Foundation
- Vila Casas Foundation
- Hangar
- Ideal
- La Escocesa
- La Virreina. Centre de la Imatge
- MACBA
- Picasso Museum
- Piramidón

### CINEMA AND VIDEO

- La Bonne
- Filmoteca de Catalunya

### BOOKS AND THE PRESS

- Biblioteques de Barcelona
- Institute for Catalan Studies

### PERFORMING ARTS

- Ateneu Popular de Nou Barris
- BArts
- Barcelona community centres
- Gran Teatre del Liceu
- Graner
- Escenari Joan Brossa
- La Caldera
- La Central del Circ
- Nau Ivanow
- Sala Beckett
- Teatre Lliure
- Teatre Tantarantana
- TNC, Teatre Nacional de Catalunya

### DESIGN

- Fira de Barcelona
- Acid House
- Canòdrom
- Casa Seat
- Palo Alto
- Roca Gallery Barcelona
- Disseny Hub Barcelona
- Museu del Disseny
- Il·lacions, design gallery

### ARCHITECTURE

- Enric Miralles Foundation
- Mies van der Rohe Foundation
- COAC

### MUSIC

- Old Estrella Damm Factory
- L'Auditori
- Fira Barcelona
- Poble Espanyol
- Fòrum Park

## Fairs, festivals and awards

### VISUAL ARTS



- Ars Electrònica
- Art Photo Barcelona
- Art Futura
- ADG Laus
- Barcelona Gallery Weekend
- Barcelona Visual Sound
- DocField
- ISE, Integrated Systems Europe
- Kronos Art Barcelona
- Loop Barcelona
- Premis Lux
- Mira, Digital Arts Festival
- ArtsFAD
- Photo Forum Fest
- ISEA, International Symposium on Electronic Art Barcelona
- Ciutat de Barcelona Awards

### PERFORMING ARTS



- Grec Festival
- Quinzena Metropolitana de la Dansa
- Escena Poblenou
- Píndoles Festival
- Sant Martí Circ Festival
- MAC, Mercè Arts de Carrer
- Hop Festival

### TV AND RADIO



- Serializados
- Miniput

### MUSIC



- Primavera Sound
- Sònar
- AMFest
- Bachcelona
- BBF, Barcelona Beach Festival
- Barcelona Jazz Festival
- Barcelona Independent Sessions
- Barcelona Obertura
- Barcelona Psych Fest
- Brunch in the Park
- Cruïlla
- Curtcircuit
- De Cajón
- DGTL
- El Festival
- Eufònic
- Inauditus
- Jardins de Pedralbes Festival
- Grec Festival
- Guitar Festival
- OffLEM
- Mas i Mas
- Mil·leni Festival
- Mutek
- MMI Festival
- LEM Festival
- Rock Fest
- Share Festival
- Tradicionàrius
- Tomorrowland

### VIDEO GAMES



- Gamelab Barcelona

## Fairs, festivals and awards

### CINEMA AND VIDEO

- Americana
- Asian Film Festival
- B'Ars
- BCCN
- Sant Jordi Film Fest
- BCN Sports Film
- Barcelona Visual Sound
- Craft Film Festival
- Choreoscope
- D'A Film Festival
- Dart
- Docs Barcelona
- Jewish Film Festival
- Films and Human Rights Festival
- El Meu Primer Festival
- Ficab
- Fire!
- In-Edit Festival
- Inclús
- La Gran Pantalla
- L'Alternativa
- Loop BCN
- International Women's Film Festival
- Mecal
- Non Stop
- OFFSide
- Ohlalà!
- Reteena
- Rueda
- Sala Montjuïc
- Suncine
- Subtravelling
- U22

### BOOKS AND THE PRESS

- Barcelona International Comics Fair
- Arts Libris
- Flic
- Graf
- Liber
- Literal
- Manga Fair
- 42
- Món Llibre
- Catalan-Language Book Week
- Sant Jordi / St George's Day
- Old and Modern Second-Hand Books Fair

### ARCHITECTURE

- 48h Openhouse Barcelona
- Arq4design
- Architects, not Architecture
- Architect@work
- Barq
- Lightecture
- Mies van der Rohe Foundation
- Barcelona International Biennial of Landscape Architecture - Rosa Barba Award
- FAD Awards
- Architecture week
- UIA Capital of Architecture

### FOOD DESIGN

- Food Fòrum
- Foodture
- Independent Barcelona Coffee Festival
- Tast a la Rambla
- Passeig de *Gourmets*

## Fairs, festivals and awards

### DESIGN



- ADCE Festival
- ADI Awards
- Algodonera Market Lab
- Anuaria
- Barcelona Knits
- Blanc!
- Design Market Barcelona
- Diagonal
- Barcelona Design Week
- Ei! Elisava design and engineering awards
- Expohogar
- Enjoia't Awards
- Fira Joya
- Festivalet
- Llum Barcelona
- Off Llum Barcelona
- The Future of Advertising
- Grrr
- Gaudeamus Projecta
- Jump the Gap
- Interhotel
- Catalonia Ecodesign Award
- Palo Alto Market
- Poblenou Open Day
- Poblenou Open Night
- FAD Awards
- OFFF
- Service Design Days
- Catalan Crafts Week
- Maker Faire
- Handmade Festival

### FASHION






- Barcelona Bridal Fashion Week
- Barcelona Fashion Summit
- Barcelona Fashion Film Festival
- DrapArt
- Flea Market
- The Shopping Night Barcelona
- Moda.es
- 080 Fashion Week
- Moritz Feed Dog
- My Barrio
- Moda-FAD Awards
- Rec.0

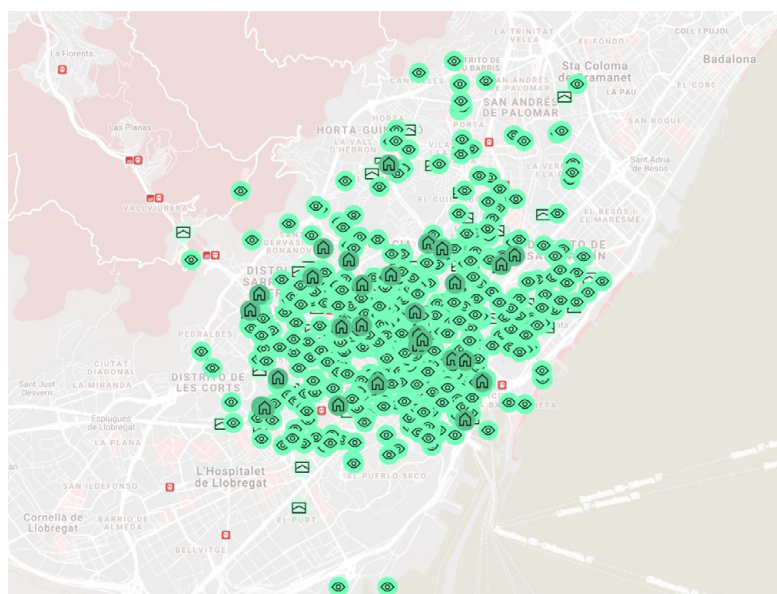


# Analysing localisation patterns in the region





Georeferenced mapping of 4,675 creative industry companies in Barcelona.

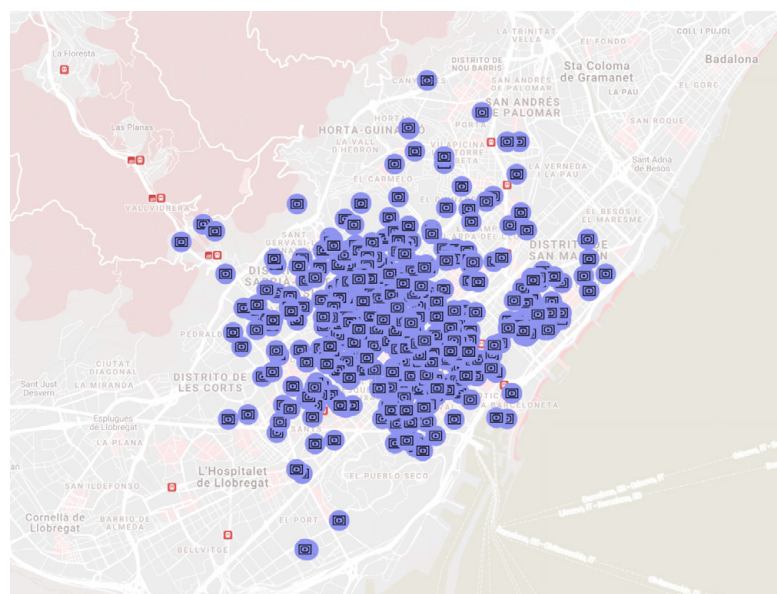
## Central core

-  Visual arts
-  Performing arts
-  Heritage



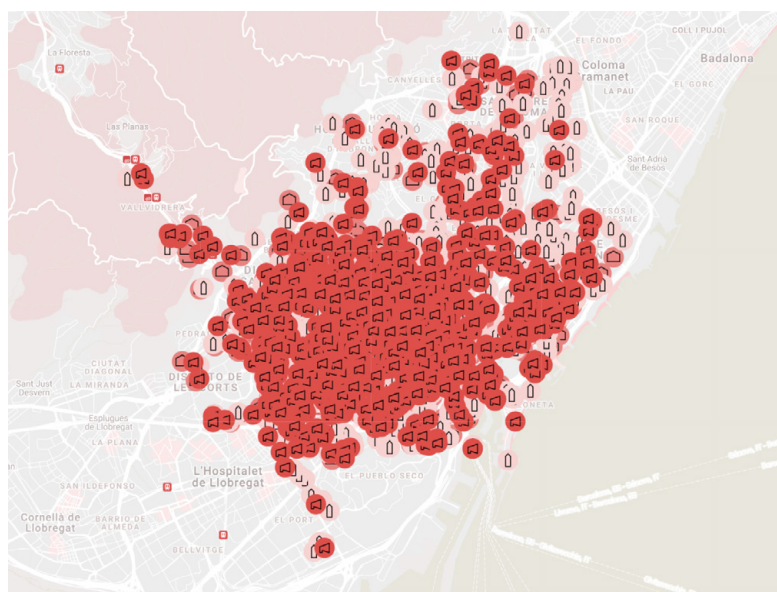
## Cultural industry

-  Films and Video, TV and radio
-  Music publishing
-  Books and the press
-  Video Games





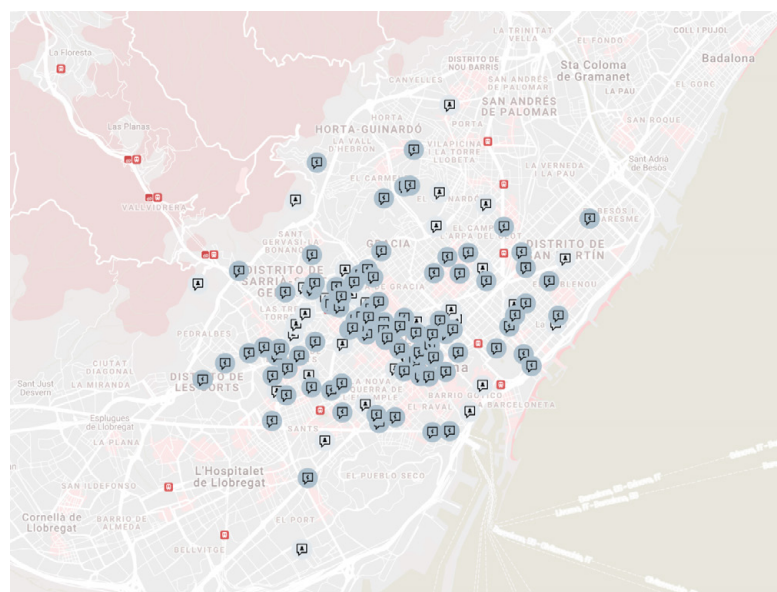
## Creative industries and activities

-  Design
-  Architecture
-  Advertising and communication
-  Food Design

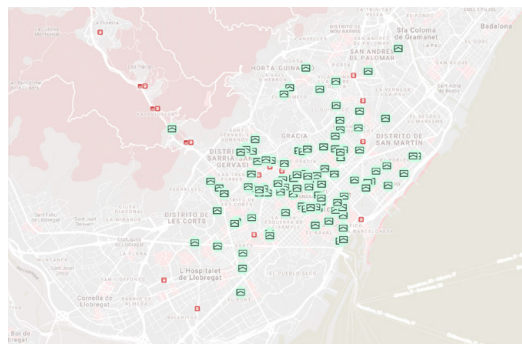


## Complementary industries

-  Representation services
-  Interpretation services

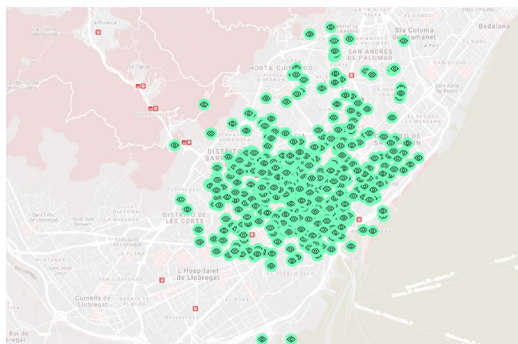


# Central core



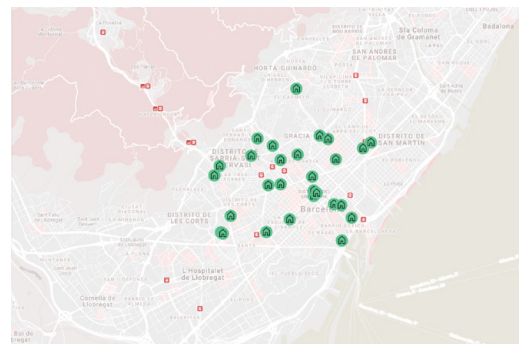
**VISUAL ARTS**

The visual arts industry has a slightly more pronounced density in both Eixample and Sant Gervasi-Galvany.



**PERFORMING ARTS**

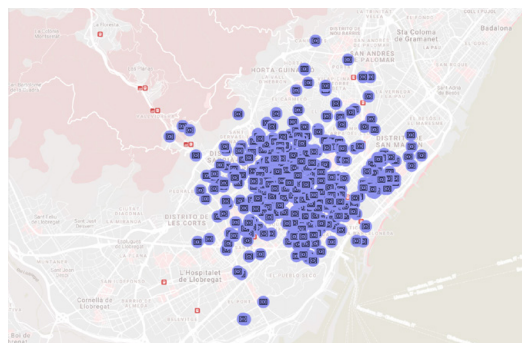
The performing arts segment's companies are located throughout the city, but predominantly in the Eixample, Gràcia and Ciutat Vella (Gòtic) districts, followed by the Diagonal.



**HERITAGE**

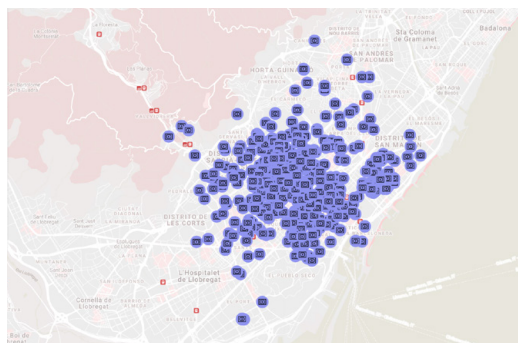
Cultural heritage initiatives are spread evenly throughout Barcelona.

# Cultural industry



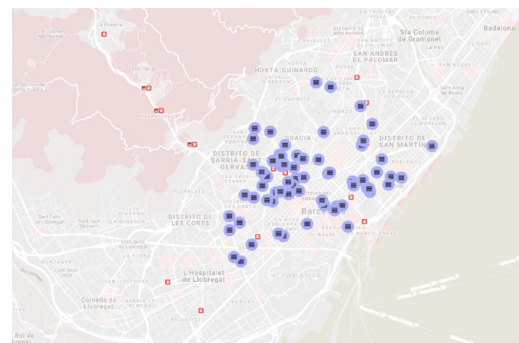
**FILMS AND VIDEO**

Film and video companies are mainly located in the Gràcia, Eixample and Sant Martí districts, especially in the Parc i la Llacuna del Poblenou neighbourhood.



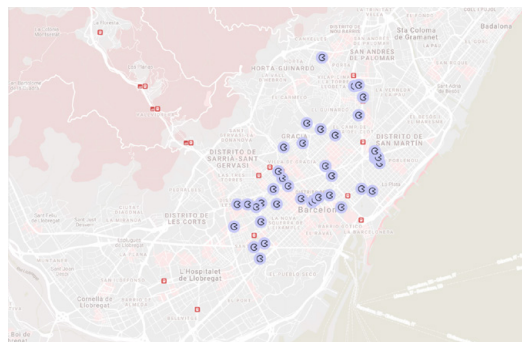
**TV AND RADIO**

TV and Radio businesses are concentrated mostly along Avinguda Diagonal, between the Eixample and Gràcia districts and, to a lesser extent, in Poblenou.



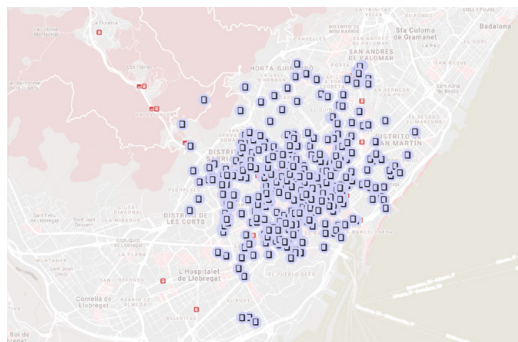
**MUSIC PUBLISHING**

Music-publishing organisations are found above all in Gràcia and Ciutat Vella.



**VIDEO GAMES**

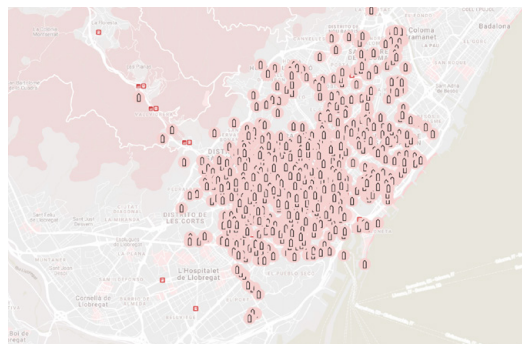
Most video games-related companies are based in 22@ and Les Corts.



**BOOKS AND THE PRESS**

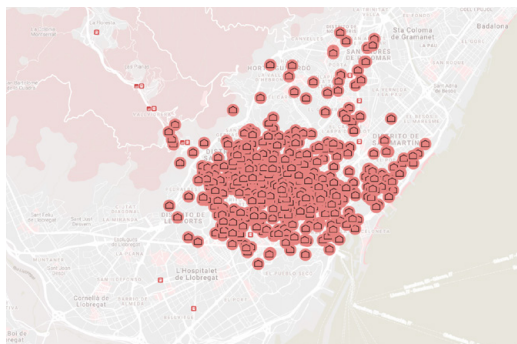
The businesses in the books and press segment are mostly concentrated in Sant Gervasi-Galvany, Vila de Gràcia and Dreta de l'Eixample.

# Creative industries and activities



DESIGN

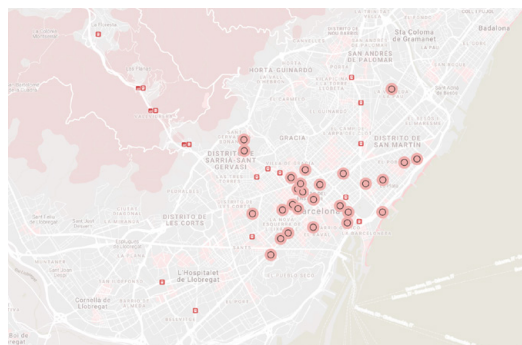
As for the design segment, there is a slight concentration of companies in Parc i la Llacuna del Poblenou, the Antiga Esquerra de l'Eixample and Sant Gervasi-La Bonanova.



ARCHITECTURE

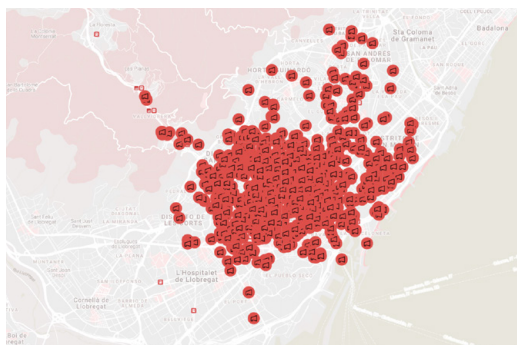
There is a heavier density of architectural firms in the Dreta de l'Eixample, Vila de Gràcia, El Putxet and Farró i Sant Gervasi - La Bonanova neighbourhoods.

The Barcelona district with the highest concentration of creative-industry companies is Eixample, followed by Sarrià-Sant Gervasi. The districts of Sant Martí and Gràcia also have a large number of businesses.



FOOD DESIGN

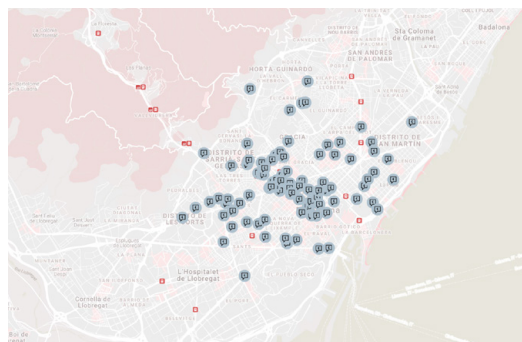
Food design projects are found all over the city, notably in Dreta de l'Eixample.



ADVERTISING

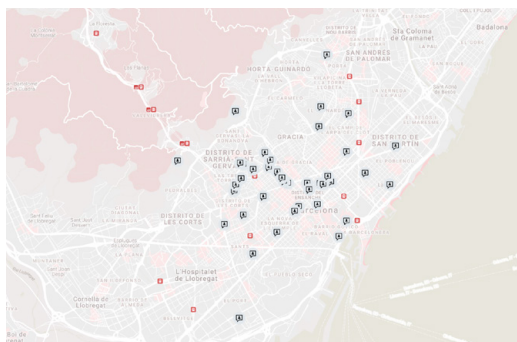
There is a notable concentration of advertising companies in the central part of Diagonal, in the Sant Gervasi-Galvany, Antiga Esquerra de l'Eixample and Dreta de l'Eixample neighbourhoods.

# Auxiliary industries



MEDIATION AND INTERMEDIARY SERVICES

Mediation and intermediary services companies are found all over Barcelona, with small concentrations in the Vila de Gràcia and Dreta de l'Eixample neighbourhoods.



11 12

# Training offers

Some examples

## ARTS VISUALS

- ESDAP
- ESDI
- Faculty of Fine Arts. University of Barcelona
- Antoni Algueró School
- Escola d'art floral de Barcelona
- Groc
- Grisart
- Idep
- Institute of Photographic Studies of Catalonia
- La Salle Ramon Llull University

## CINEMA AND VIDEO

- ESCAC
- EMAV
- CEV
- ENTI
- FX Animation
- ITES
- IPF
- Vive Formació

## PERFORMING ARTS

- Institut del Teatre
- Eòlia
- Col·legi de Teatre de Barcelona
- Sala Beckett. Obrador Internacional de Dramatúrgia (International Workshop on Dramaturgy)
- Èxit
- Platea
- Lazzigags
- ESMUC
- Conservatori Liceu
- Palau de la Música. Orfeó Català
- Taller de Músics

## TV AND RADIO

- Autonomous University of Barcelona
- Pompeu Fabra University

## MUSIC PUBLISHING

- TAI
- IGECA

## HERITAGE

- School of Conservation and Restoration of the Cultural Heritage of Catalonia
- University of Barcelona
- Autonomous University of Barcelona

## VIDEO GAMES

- University of Barcelona
- Polytechnic University of Catalonia
- Pompeu Fabra University
- La Salle Ramon Llull University
- CEV
- Enti
- FX Animation
- IFP
- LCI Barcelona
- L'Idem
- SAE Institute

BOOKS AND THE PRESS 

- Autonomous University of Barcelona
- University of Barcelona
- Pompeu Fabra University

FOOD DESIGN 

- Barcelona Culinary Hub
- Bellart
- Food Campus. University of Barcelona
- CETT
- Culinary Insitute of Barcelona
- Elisava
- Guild Pastry School of Barcelona
- ESHOB
- Espai Sucre
- IED

DESIGN 

- BAU
- EINA
- Elisava
- Escola Massana
- L'Escola de la Dona
- ESDESIGN
- IED
- LCI Barcelona
- L'Idem
- La industrial
- Labasad
- RMIT University

ADVERTISING 

- Blanquerna. Ramon Llull University
- ESERP
- University of Barcelona
- Pompeu Fabra University
- Monlau
- Vive Formación

ARCHITECTURE 

- ETSAB. Polytechnic University of Catalonia
- UPC, Polytechnic University of Catalonia.  
Catalonia Polytechnic Foundation
- La Salle Ramon Llull University
- UIC
- IAAC
- Escola Sert

## OTHERS

- Barcelona School of Creativity
- Harbour Space
- Implika

# Professional profile demand for CCIs

## DISTRIBUTION OF JOB OFFERS IN THE AREA OF CCIS WHICH HAVE REACHED BARCELONA ACTIVA (2019-2021)

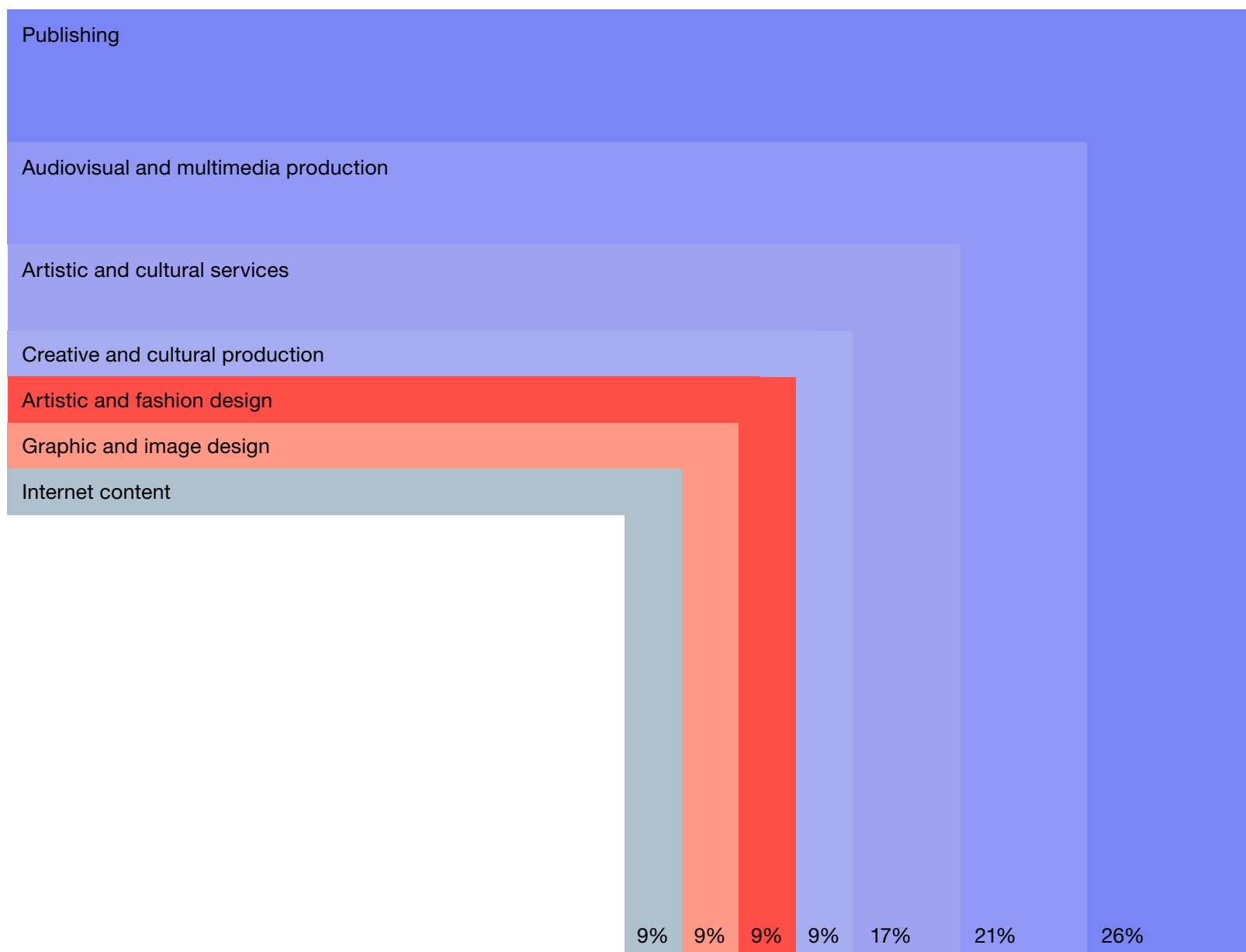
Sub-segments with a greater technological component have a high demand for professional profiles, people who generally find employment before finishing their studies.

Creative profiles in the area of cultural industries, where work is often carried out by project, are usually hired through contacts or self-nomination. Job offers do not reach employment services.

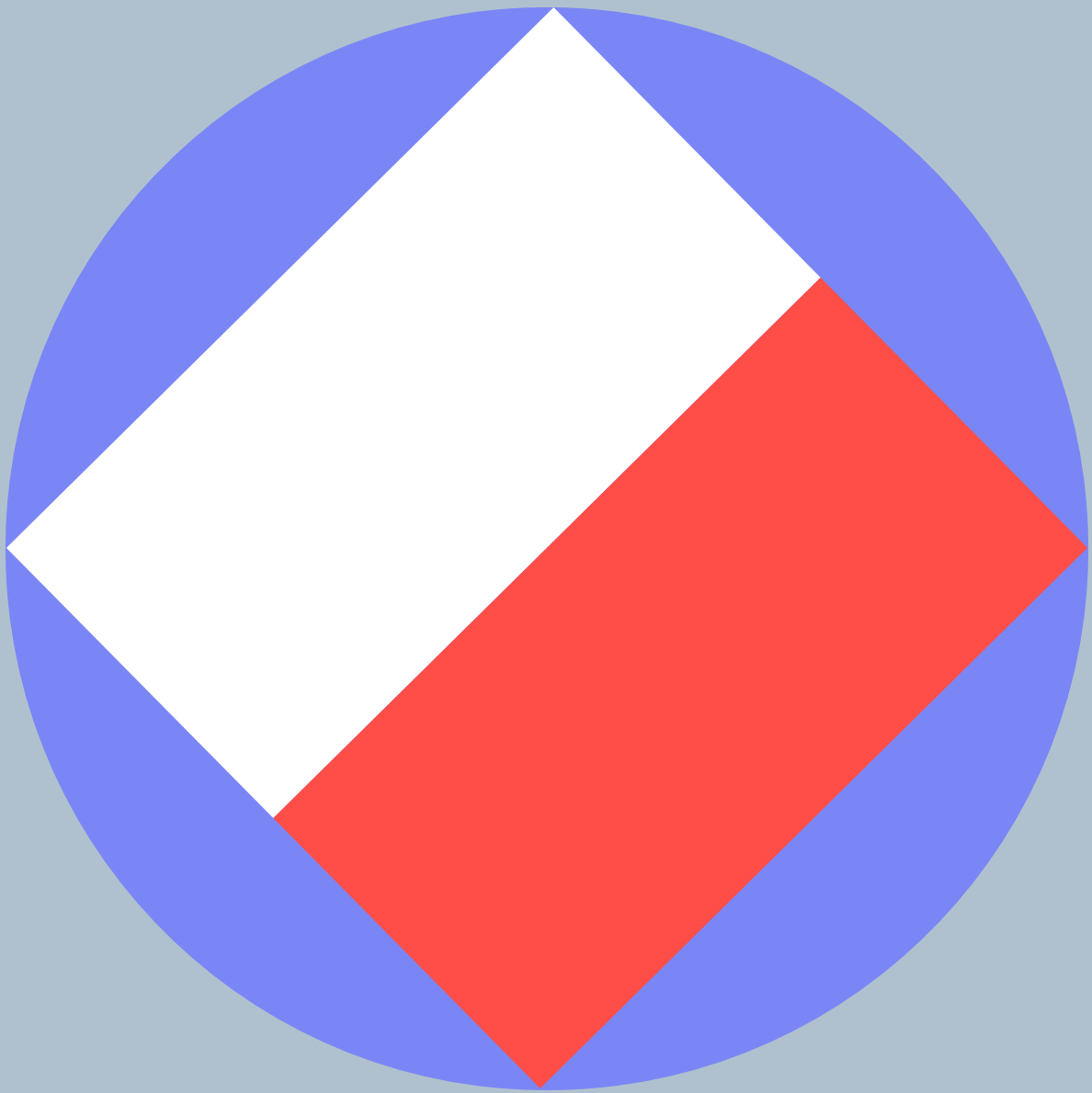
Nor is there a lack of professional profiles identified in CCI support functions either.

Job insecurity is notable in the central core and some of cultural-industry segments.

Only 2% of job vacancies that reach Barcelona Activa's Mediation Service are from cultural and creative industries.

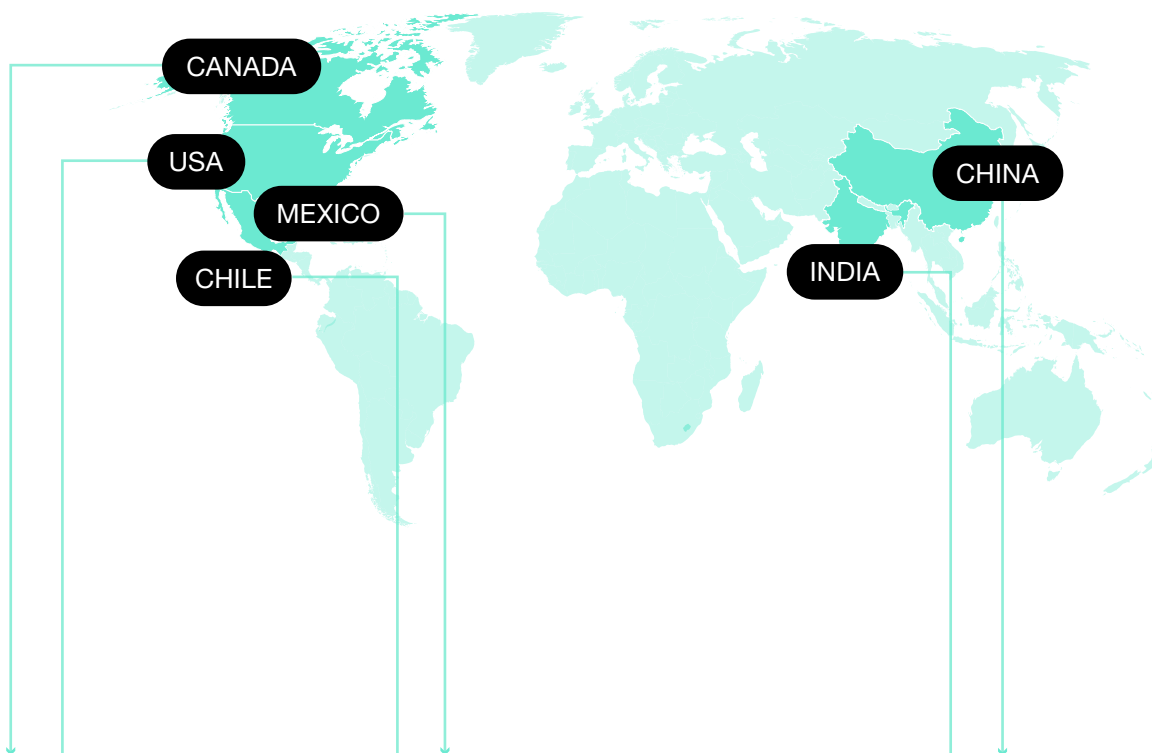



# Reference regions



# Central core



# Global area



**CANADA** 



Montreal is home to the biggest theatre production company in the world: the Cirque du Soleil. In addition, it also has one of the most prestigious circus schools in the world, the École nationale de cirque (National Circus School)

Toronto, on the other hand, is considered to be a benchmark city in Broadway-style performing arts, but at much more affordable prices. The Royal Alexandra is the oldest theatre in North America.

**MEXICO**  


Mexico has the seventh largest number of UNESCO World Heritage Sites in the world: 35. Some sites are of incalculable value, such as the Mayan city of Chichen Itzà, located in the Yucatan.

Mexico City has some 40 theatres and is considered to be a benchmark city in theatre, dance and music creation, production and reproduction.


**CHINA**  

China has the fourth largest number of UNESCO World Heritage Sites: 55. Examples of this great heritage include part of the ancient Silk Road and the Great Wall of China.


Beijing saw the official opening of its Great National Theatre, known as “the egg”, in 2007, presenting operas, music and theatre.

**UNITED STATES** 

The Chicago centre, known as “The Loop” is the headquarters for a large number of cultural venues, such as the Goodman Theater and the Chicago Theater. New York City has the largest number of theatres in the world, roughly 420. World talent in acting, singing, directing and playwriting look to Broadway to showcase their artistic abilities.

**CHILE** 

The city of Valparaíso is a UNESCO Cultural Heritage of Humanity Site and one of the largest concentrations of urban art in the world. Valparaíso has numerous routes for admiring the close to 1,400 works of graffiti distributed throughout the city’s neighbourhoods. In addition, it also happens to be one of the few cities where graffiti and murals are not illegal.

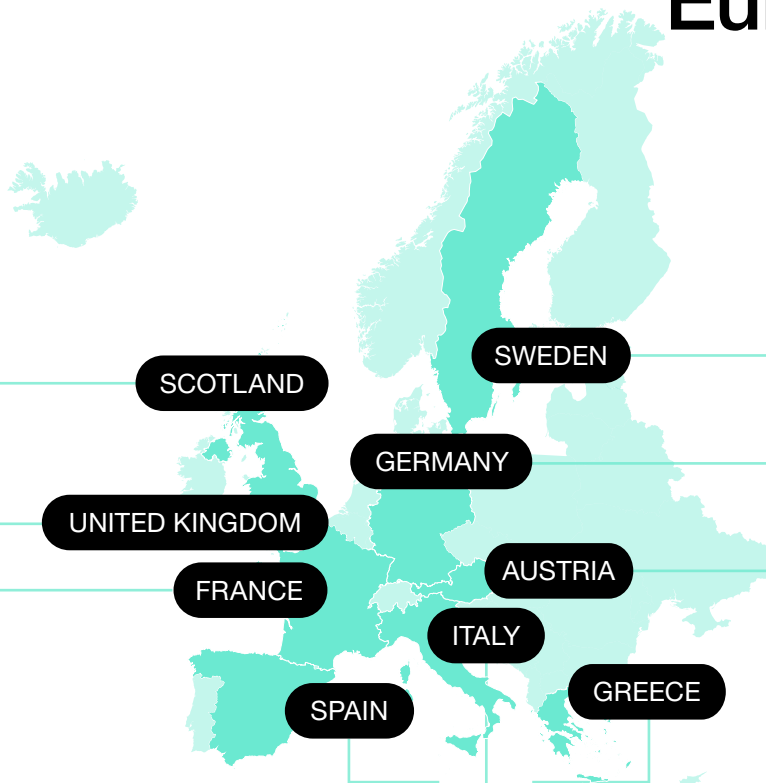
**INDIA** 

India has the sixth largest number of UNESCO World Heritage Sites: 38. The Taj Mahal is one of its most famous sites, though its heritage is much more extensive and includes some of the world’s most impressive temples, such as the Ellora Caves.



# Central core

# European area



**SCOTLAND**

Edinburgh's Fringe Festival attracts hundreds of performers from the world of comedy, music and opera every year.

**UNITED KINGDOM**

London produces the largest number of plays in the world, offering over 32,400 functions a year.

Bristol is regarded as an outdoor museum, with Nelson Street its most popular location, and is the birthplace of Banksy, one of the most famous urban artists.

**FRANCE**

Paris has the second largest number of theatres in the world: 353. Only New York has more theatres. One of its most important venues is the Palais Garnier, known as the Paris Opera House.

**SPAIN**

Spain boasts very extensive cultural wealth, with many monuments and natural locations of great value for the world, such as the Altamira Caves and the Alhambra in Granada. Today it has the third largest number of UNESCO World Heritage Sites: 48.

**ITALY**

Italy's heritage is one of the richest in the world. Mount Etna, located on the east coast of Sicily, and the historical centre of Rome are just a couple examples of its valuable heritage. Italy is currently the country with the largest number of UNESCO World Heritage Sites: 55.

**GREECE**

Athens plays host to the annual "Athens Festival" at the Odeon of Herodes Atticus theatre, known as the Herodion, attracting the world's biggest theatre, music and dance stars.

**SWEDEN**

Stockholm has a deep tradition of music and boasts one of the world's most important music institutions: the Royal College of Music.

**GERMANY**

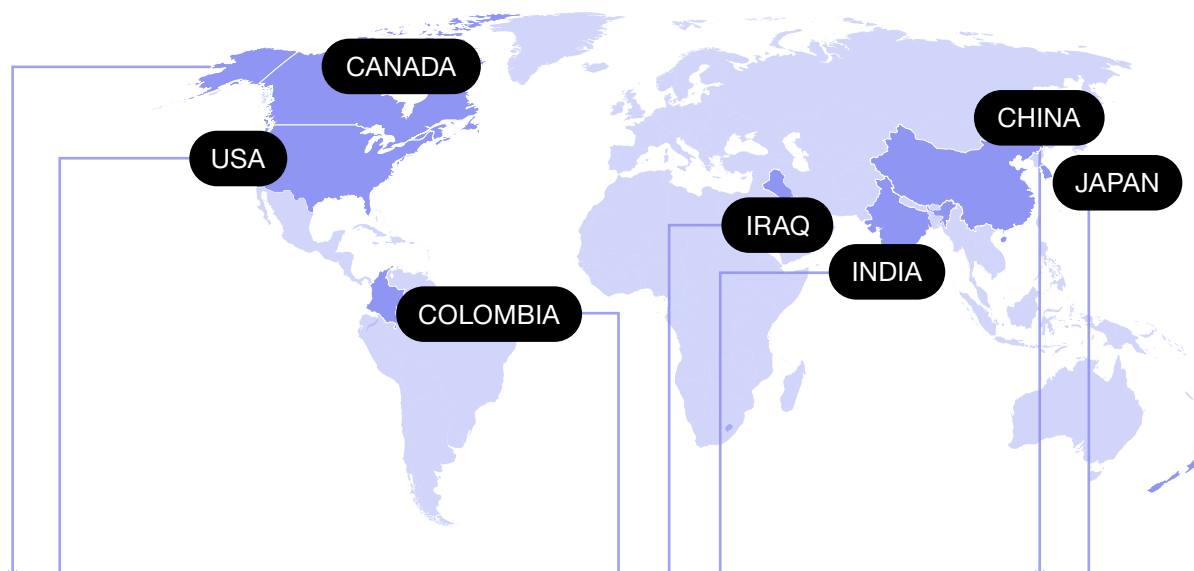
Germany's heritage is one of the highest rated in the world. Impressive churches can be found throughout the country, including Aachen Cathedral and Cologne Cathedral. It has the fourth largest number of UNESCO World Heritage Sites: 47.

**AUSTRIA**

Vienna is home to one of the world's most famous universities for the performing arts: the University of Music and Performing Arts Vienna.

# Cultural industry

# Global area



**CANADA** 🔄

The country's video game industry has become one of the most powerful in the world, thanks to its government's efforts in attracting talent and providing tax incentives for the sector.

**UNITED STATES** 🔄 ▶ 📄

The country is home to companies responsible for some of the world's most famous video games, including Fortnite (Epic Games) and Minecraft (Microsoft), and to well-known video-game studios such as Activision Blizzard and Electronic Arts. Leading events are organised there in the field of video games, including E3 and GDC.

The Hollywood district in Los Angeles is a film-industry benchmark, with major international production companies such as Warner Bros, Universal Studios and 20th Century Studios. California is one of the US states with the biggest tax incentives for making films.

Seattle is classed as the city with the biggest readership in America and with one of the highest rates of literacy in the region. Seattle is the city with the most bookshops *per capita* in the country.

**COLOMBIA** ☰

Bogotá is a creative city famous for its thriving music scene. Its "Festivals in the Park" programme was launched through a public initiative, offering free open-air concerts from local rock, jazz, salsa, hip-hop and opera artists. Bogotá boasts a further 60 or so other annual music festivals as well as 500 concert halls.

**IRAQ** 📄

Baghdad benefits from state-run and local non-governmental literary-research centres and programmes, such as the Union of Iraqi Writers, the House of Cultural Affairs, *al-Mamoon* Translation and Publishing House and Iraqi Poetry House.

**INDIA** ▶

Better known as Bollywood, Mumbai's audiovisual production centre is one of the biggest audiovisual hubs in the world. The highest number of feature films in the world are produced in this centre.

**CHINA** ▶ 🔄

The second largest country in the world in number of feature film productions. Some of the world's best-known production companies also happen to be Chinese, including Alibaba (*Mission Impossible*) and Polybona (*Once Upon a Time in Hollywood*).

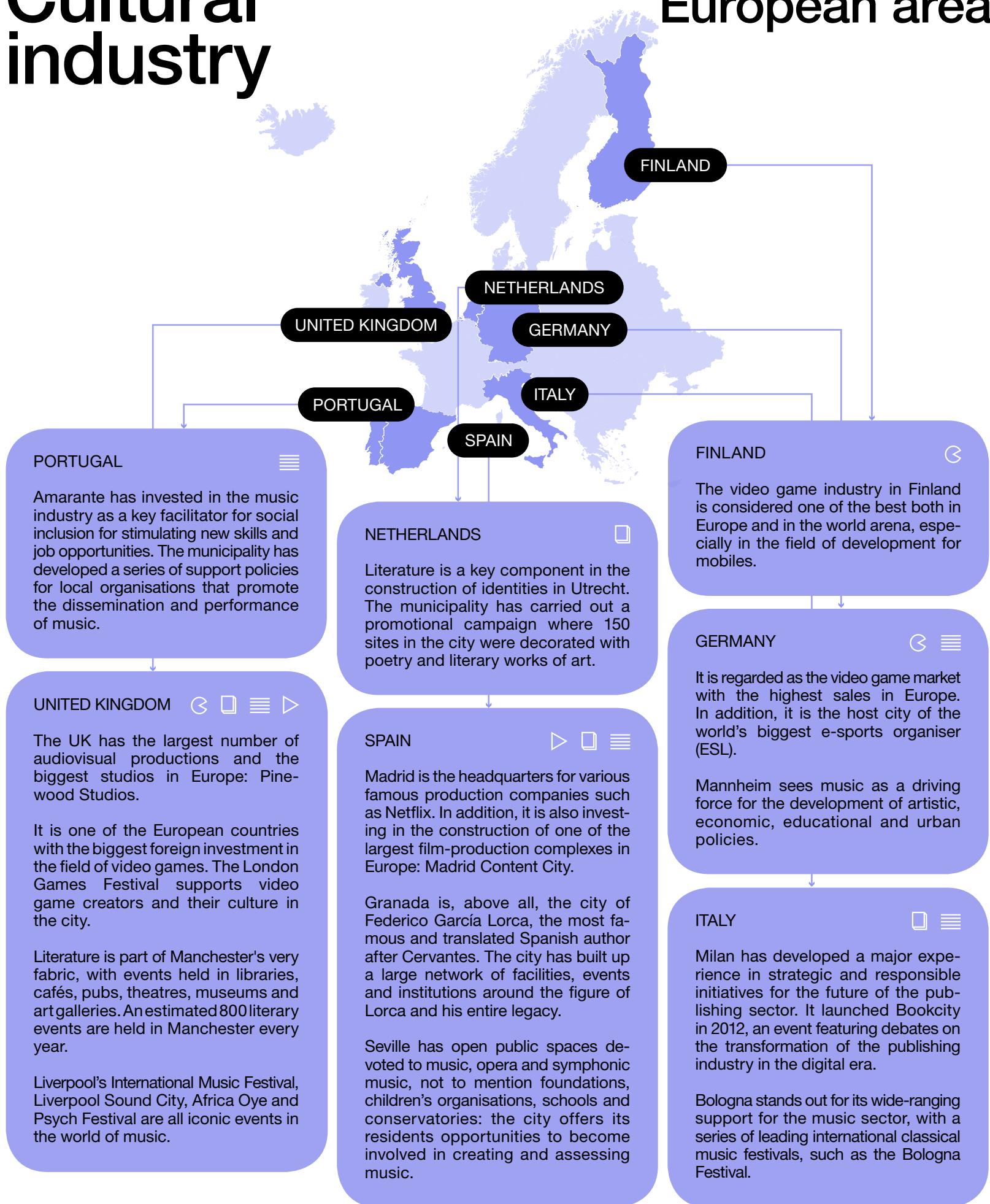
An exclusive e-sports neighbourhood has been developed in Hangzhou. It is the host city for the 2022 Asian Games, which is incorporating e-sports as a new sports discipline.

**JAPAN** 🔄

A benchmark country in video games worldwide, with famous studios such as Nintendo, Sega, Sony and Capcom. There is the otaku culture, which connects people with common interests: video games, anime and comics.

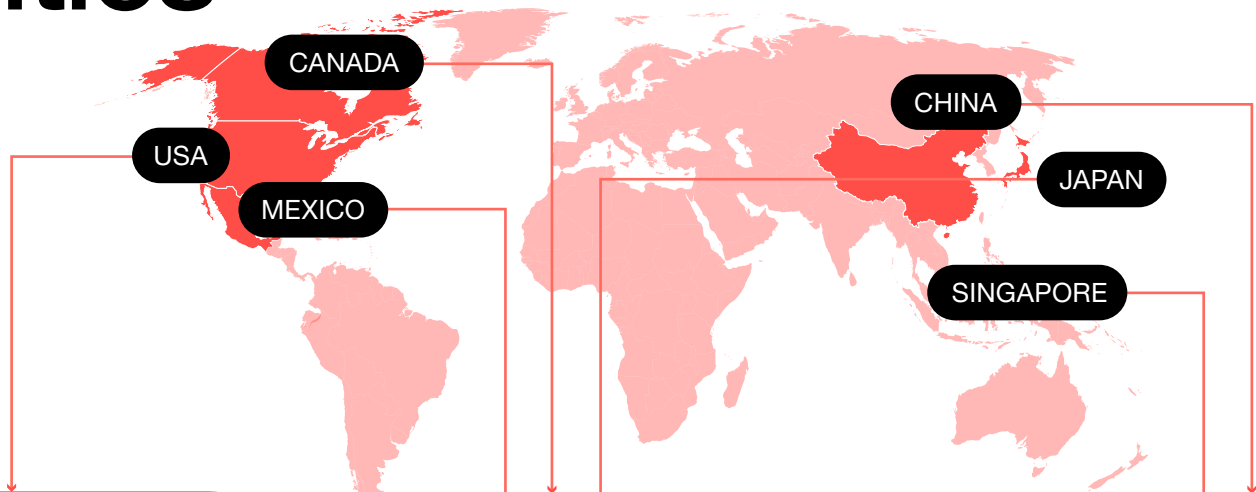
# Cultural industry

## European area



# Creative industries and activities

## Global area



### UNITED STATES



A benchmark country in the communication and advertising segment. It is not only home to the most famous and acclaimed communication agencies in the world (such as McCann, Grey and BBDO), but has the biggest market in level of investment too. In addition, it also plays host to the most important fairs in this field, including the MarTech Conference, the SMX expo, the MozCon and the Social Media Marketing World.

It is the world's sixth largest country in number of Michelin Star restaurants: 187. Six US restaurants are on the "World's 50 best restaurants" list.

New York is one of the benchmark cities for advanced architecture. It is home to some of the most prestigious architecture firms, such as Kohn Pedersen Fox and Perkins Eastman, to name a few. What is more, it is one of the biggest cities in the world in number of certified sustainable buildings (LEED).

San Francisco is the host city for one of the World Design Weeks.

### CANADA



Montreal is a "city of designers" with over 25,000 professionals working in the field. Design-promoting strategies have been implemented over the years, such as ensuring greater recognition for designers, improving access to public commissions for designers, raising awareness of talent and developing their markets. Toronto is the host city for one of the World Design Weeks.

### MEXICO



Mexico City is famous worldwide for its design festivals, including the Mexican Open Design, Design Week Mexico and the Mexrópoli. The design industry currently generates \$41.93 million and provides jobs for 68,254 people.

### JAPAN



The second largest country in number of Michelin Star restaurants: 415. Two Japanese restaurants are on the "World's 50 best restaurants" list.

### CHINA



Fairs such as the Green Architecture and Construction Materials Expo and the China Architectural Design Expo are famous worldwide. It also boasts some of the world's most prestigious universities, such as Shanghai Jiao Tong University, Tsinghua University and Tongji University.

By the end of 2013, Shanghai had 87 creative clusters, over 4,000 innovative design-related agencies and institutions, 283 art institutions, 239 art and cultural community centres, 100 museums, 25 libraries and 743 archive institutions.

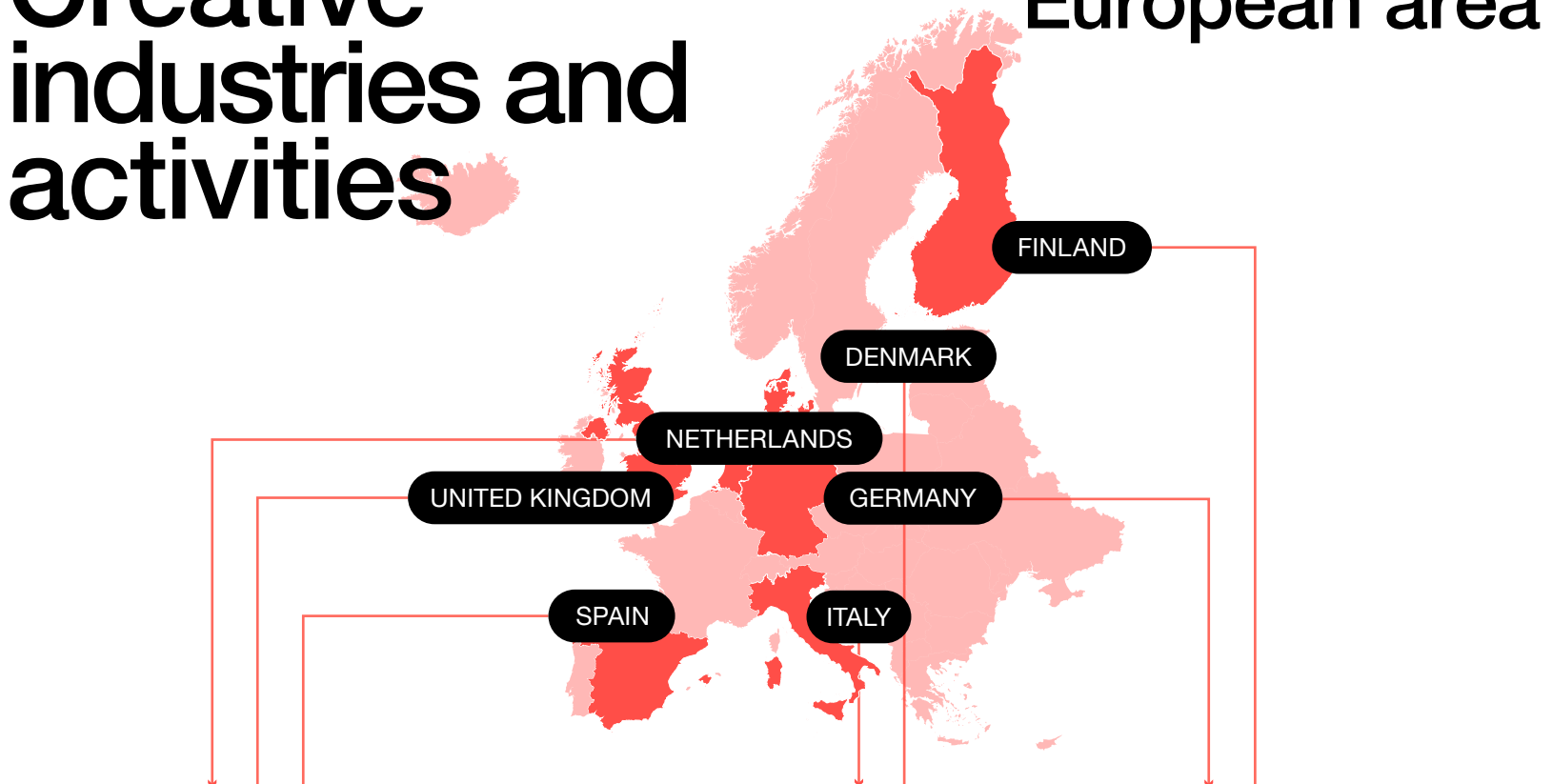
### SINGAPORE



Design continues to be a key driving force for Singapore's local creative economy, providing around \$2.13 million annually to the city's GDP, with an estimated 5,500 active design companies giving work to 29,000 people. Singapore has created a master plan for maintaining its design sector, launched by Singapore Council.

# Creative industries and activities

## European area



### THE NETHERLANDS

A benchmark in design, examples of which can be seen in its Delft University of Technology (TU Delft), which specialises in product design, and the hosting of Design Week in Eindhoven.

### UNITED KINGDOM

The UK is a benchmark region in Advertising, with renowned firms, such as Ogilvy. The country also boasts some of the most prestigious universities in Advertising and Communication, such as De Montfort University in Leicester.

### SPAIN

Thanks to public and private support and social involvement, Bilbao has become a benchmark city in fields such as architecture, industrial and interior design, new technologies, fashion, audiovisuals, video games and crafts.

### ITALY

Regarded as a benchmark in design, it plays host to some of the sector's most important fairs, such as the Salone del Mobile Milano and the Fuorisalone Fair.

In Turin, the promotion of creativity and sustainability, along with the regeneration of urban spaces, make up the core of the city's development. The city is also committed to disseminating design culture under the policies launched by its public authorities.

### DENMARK

This Nordic country is home to some of the most renowned advanced-architecture studios in the world, such as BIG Henning Larsen Architects and 3XN. In addition, several Danish architects have designed architectural icons around the world, such as the Sydney Opera House (Jørn Utzon).

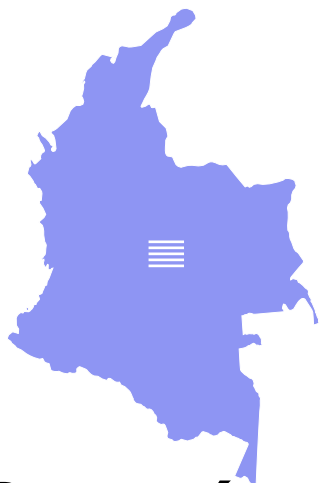
### GERMANY

Some of the most famous architecture firms have their headquarters there, such as J. Mayer H, Gmp and Behnisch Architekten. Furthermore, Germany's architectural training is well positioned, led by the RWTH Aachen, the Technical University of Munich and ABK Stuttgart.

Berlin's open mentality provides an ideal framework for renowned international fairs, festivals and platforms, such as Design Mai, Update, The Berlin Photography Festival and the Berlin Fashion Week, which promote international exchange and support design in the City of Berlin.

### FINLAND

Helsinki prioritises designer creativity for imagining innovative ways of focusing on human needs. The city is therefore proud to state that it has been built and developed through the creativity of its people. Helsinki is the host city for one of the World Design Weeks.



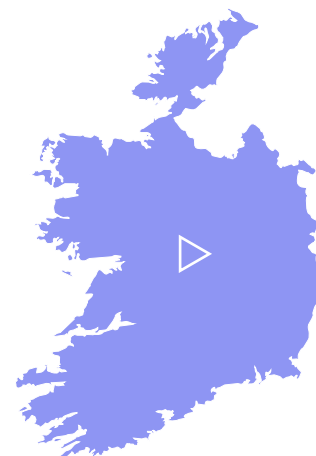
## Bogotá, Colombia

Strategic plan with the aim of aligning and carrying out inter-sectoral coordination for implementing policies in the fields of art, culture and cultural heritage. One of the priority areas is **Music**.



## Italy

Italy's Ministry of Heritage, Cultural Activities and Tourism has devised a plan for promoting a new method for using Italian **heritage** in tourism.



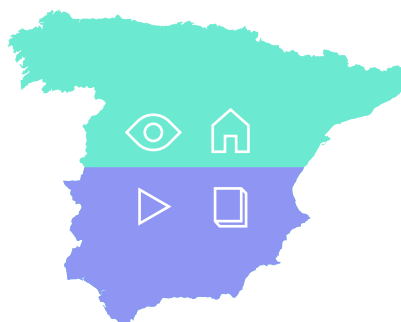
## Ireland

Ireland's Department of Tourism, Culture, Arts, Gaeltacht, Sport and Communication Media published an action plan in 2018, to position Ireland as a global leader for **audiovisual productions**.



## Montreal, Canada

Montreal City Council's Design Office has promoted an action plan making **design and architecture** a key area for Montreal's economic and urban development.



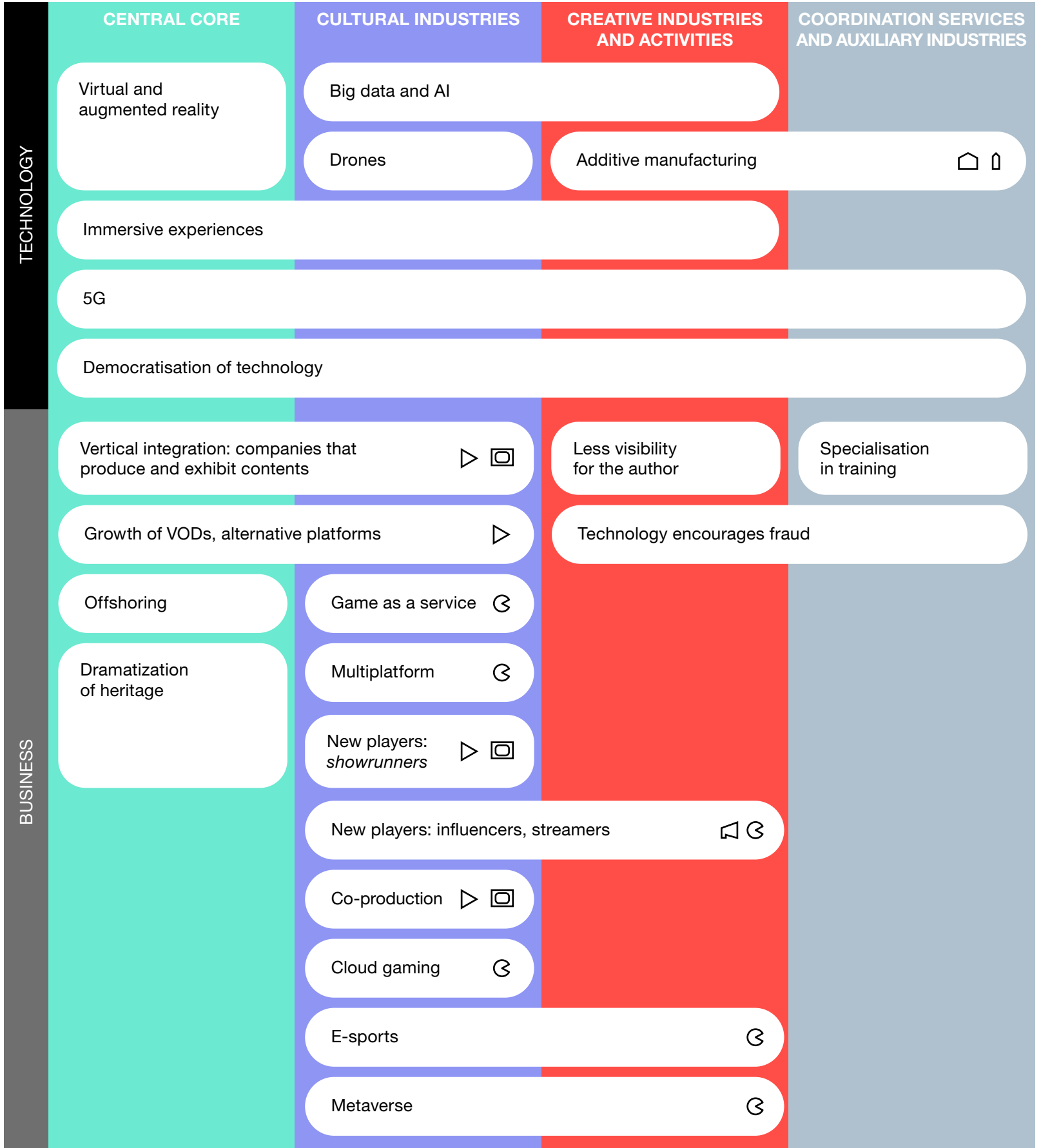
## Madrid, Spain

Madrid City Council's Area of Culture, Tourism and Sport launched a plan with several measures for reactivating the city's culture, in the **performing arts, heritage, cinema, art and the publishing sector**.

# Strategic analysis



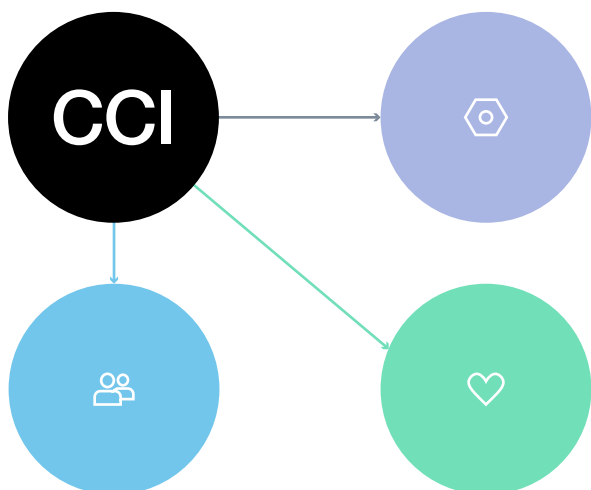
# Related trends







# Possibilities for the creative sector's interaction



## Manufacturing Industry

- Industry-specialised advertising
- Audiovisual content for training workers
- Product design Graphic design
- User Experience/Interface

## Digital Economy / ICT

- Digital animation
- Video games
- Immersive experiences
- Remote working
- Improving user experiences
- Streaming shows
- New business models based on digital platforms

## Health and quality of life

- Use of audiovisual materials for overcoming phobias, slowing cognitive decline, etc.
- Music therapy
- Gamification
- Food design (personalised / adapted nutrition)
- Books for improving quality of life
- Design for all
- Accessible, healthy architecture

## Green and circular economy

- Use of audiovisual materials for training
- Ecodesign
- Design 4 Disassembly
- Circular design
- Nature-based solutions
- Sustainable fashion

## Social and solidarity economy

- Creative and cultural companies with legal forms considered in the Social and Solidarity Economy Act
- Creative and cultural companies that are based on the values of the Social and Solidarity Economy

# SWOT Analysis



## Strengths

Barcelona brand associated with the creative sector.

Outstanding training offers and an extensive pool of technical talent.

Presence of CCI-promotion players.

Favourable areas, infrastructures and facilities for creation.

Favourable geographical conditions for attracting and retaining talent.



## Opportunities

Capacity for developing technologically and generating new digital business models.

High CCI diversity in the city.

Assessment of heritage resources from a contemporary, digital perspective.

Projection abroad.

Funds for economic recovery.



## Weaknesses

Short-term orientation for the sector's coordination.

A fragile, heterogeneous and atomised business network.

Limited inter-entrepreneurial, inter-institutional and public-private collaboration.

Weak connection between knowledge, talent and business.

Low cultural consumption, particularly among new generations.



## Threats

Proximity of other centres of attraction.

New behavioural user models.

Lack of tax incentives.

Economic model highly focused on tourism and heritage.

Latent economic crisis for a sector very dependent on the public.

# Strengths



- 
- |   |                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                         |
|---|-------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | <b>Barcelona brand associated with the creative sector</b>                    | Barcelona's designation as UNESCO City of Literature as well as its recognition as a design and innovation hub, plus the recent announcement of Barcelona as UNESCO-UIA World Capital of Architecture (2026) are all examples of how the Barcelona brand is positioned internationally. And this can be a driving force for creative profiles aiming to develop their professional career in Barcelona. |
| 2 | <b>Outstanding training offers and extensive pool of technical talent</b>     | Extensive and diverse quality training offers relating to creativity and technology. Some of the universities are internationally renowned and attract foreign talent.                                                                                                                                                                                                                                  |
| 3 | <b>Presence of CCI-promotion players</b>                                      | Existence of an association network around cultural and creative industries, as well as public and private bodies aimed at promoting creative industries. Note, however, the occasional overlapping of functions or lack of coordinated action.                                                                                                                                                         |
| 4 | <b>Favourable areas, infrastructures and facilities for creation</b>          | Barcelona boasts unique areas and facilities at the service of the creative and cultural sector, which can help to generate a community around CCIs, increase inter-enterprise and inter-sectoral collaboration and foster the creation of new projects.                                                                                                                                                |
| 5 | <b>Favourable geographical conditions for attracting and retaining talent</b> | Given its strategic geographical position, excellent quality of life and good connectivity with the main regional and national centres of influence, Barcelona offers very good conditions for attracting talent.                                                                                                                                                                                       |
-

# Weaknesses



## 1 Short-term orientation for the sector's coordination

There has been a traditional lack of a long-term shared vision as a cornerstone of Barcelona's cultural and creative sector, a city project that serves as a magnet for bringing together existing assets and attracting companies, investors and creators. There are many unfocused initiatives, some of which are redundant. There is no holistic strategy that covers the whole value chain of creative industries or which helps with interaction between creative industries and city residents.

## 2 A fragile, heterogeneous and atomised business network

The sector is mostly made up of very small companies, with shortcomings in management and marketing, which need to improve their competitiveness. Companies that are not internationalised or which have short-term projects, since the support is focused on creating rather than monitoring companies. This has created a fragmented ecosystem that does not usually cover the entire value chain.

## 3 Limited inter-entrepreneurial, inter-institutional and public-private collaboration

Although there is collaboration between companies in some sub-sectors (such as audiovisual co-productions, joint publishing in the publishing sector), these are traditionally very individualistic sectors, where there have never been any channels or means of collaboration. Inter-institutional, university, artistic-centres, talent, enterprise and public-private coordination and collaboration are also rare.

## 4 Weak connection between knowledge, talent and business

There is a great pool of artistic and technical talent (design schools and university training in the technical arena etc.) unable to find a pathway for continuing their career in the city. There is a major brain drain of talent, whether for better working conditions, in the case of technical talent, or for want of recognised professional careers in the artistic arena.

## 5 Low cultural consumption, particularly among new generations

There is a certain disconnection, in some segments of creative industries, between offers and the new generations, with a need to create new audiences, especially among younger audiences, and to educate people from an early age towards the consumption of cultural services. In addition, language represents a barrier to attracting any public from outside Catalonia.

# Opportunities



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## 1 Capacity for developing technologically and generating new digital business models

Technology is becoming more and more important for cultural and creative industries and Barcelona has the capacity to meet this trend, both through training and its available infrastructures. The capacity for consuming remote culture opens the door to new business models and facilitates growth and internationalisation.

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## 2 High CCI diversity in the city

The existence of companies and organisations in the various CCI segments, as well as the plurality of creative sectors in Barcelona, represent an opportunity to form city strategies that approach creativity from multiple points of view and meet the needs and preferences of several types of public.

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## 3 Assessment of heritage resources from a contemporary, digital perspective

Barcelona has some unique features, such as its Modernisme, which make it unique worldwide. Its wealth of technology-associated heritage is one of the assets that represents an opportunity from an economic and wealth-creation perspective.

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## 4 Projection abroad

There are numerous opportunities for internationalising the sector, partly as a result of technology. Companies therefore need to be accompanied along this process, whether financially or through specific advice. This process can be based on making the best use of the city's own assets or those of the Government of Catalonia abroad (talent, government delegations abroad, etc.) and on twinning agreements with other cities for joint projects.

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## 5 Fund for economic recovery

Although there is still some uncertainty over the distribution of *Next Generation EU* funds, everything would suggest that part of these funds will be allocated to fostering the digitalisation of businesses and to promoting the audiovisual sector.

# Threats



- 
- 1 Proximity to other attraction poles**

Other cities, especially Madrid and Valencia, are competing to be benchmark centres for certain creative sub-sectors (films, video games, food design, performing arts, among other things) which may entail a loss of talent and companies. The lack of big leading companies represents a further problem.
  - 2 New user behavioural models**

The Covid-19 crisis has given rise to a pronounced change in the way people consume leisure and culture based on e-commerce and home consumption.
  - 3 Lack of tax incentives**

Uncompetitive incentives in the region, which make it difficult to compete with other regions at a national and European level (e.g. in the audiovisual sector). There is a lack of a differentiated tax treatment for some segments in creative and cultural industries, such as cinemas and bookshops.
  - 4 Economic model highly focused on tourism and heritage**

Culture and creativity (contemporary trends, above all) are being subordinated to the needs of the tourism sector (especially culture and heritage), as the city's economic driving forces. Tourism should be an ally, a creator of audiences and demand for local cultural and creative products, which must have their own essence and independence.
  - 5 Latent economic crisis for a sector very dependent on the public**

A weak business culture, very little internationalisation, and heavy dependence on the public, with demand tending to fall during periods of economic crisis. Formulas need to be found for stabilising and establishing businesses, once their incubation stage is over, as well as for fostering access to sponsorship channels (crowdfunding, match funding, etc.)
-

# Porter Diamond Analysis

## Demand conditions

An increase in demand for personalised products and services.

Immersive experiences are required in almost any segment (performing arts, video games, films and video, cuisine, etc.)

The demand for digital content is increasing considerably.

A demand that is quite price-sensitive.

Demand falls under conditions of economic contraction.

Some segments, such as theatre and cinema, have a seasonal demand.

## Strategy, structure and rivalry

Business structures are mainly shaped by micro and small companies, many of which are one-person businesses.

Lack of long-term strategies (the sector has a more tactical, project-orientated focus). There is no inter-entrepreneurial collaboration culture.

Little importance is given to location as a competitive advantage for companies.

Professional fraud in certain segments, such as advertising and graphic design, worsened by the democratisation of technology.

## Factor conditions

Extensive, high-quality training in the various CCI segments.

There are numerous events that propel and promote CCIs in several of the city's areas.

Public and private bodies that provide support for the various CCI segments.

Excellent professional profiles, but with a certain amount of job insecurity.

The sector's survival is heavily conditioned by public support (subsidies, incentives, financial aid, etc.)

Existence of a specific Councillor's Office for CCIs.

## Related and support industries

There are a lot of support industries for the audiovisual segment in Barcelona and its Metropolitan Area.

Possible synergies with other strategic sectors in the city (e.g. Health and Digital Economy).

CCIs are a leading sector for others such as tourism, restaurants and bars and shops



# Characteristics of the main segments

## Central core



# Cultural industry

## Films and video



Covid-19 has had a very strong impact on the film sector.

The most commercial cinema is little valued. Screening films does not benefit from the financial aid available to other creative industries.

Cinemas generate business around them (catering, other types of leisure) and are a more accessible, economic form of culture.

Film production is limited in Catalonia, because there are other regions in Spain and Europe that are much more attractive for producers, thanks to tax incentives.

## Music



The ESMUC is a world-renowned centre noted for its cross-cutting training. Barcelona's lack of conservatories and music schools for children, however, is very significant.

An integrated strategy needs to be created that includes training, artist residencies and exhibitions.

Music, especially classical music, is often far removed from the general public, and this needs to change. The general public should come into contact with it through facilities such as civic centres.

# Cultural industry

## Video games



Barcelona has managed to boost an ecosystem of talent and companies that attracts the interest of international investments.

Many local studios are being acquired by multinationals. This is causing the generation of both intellectual property and revenue in other countries.

The challenge is to showcase Catalan creations internationally.

The main challenges are availability of talent and funding and international market access.

## Books and the press



Barcelona is seen abroad as a literary powerhouse, representing over 50% of the production and turnover in Spain's publishing industry.

There are many small publishing companies in Barcelona that are not very professionalised. Barcelona's bookshops are in a similar situation.

The target market for books is small (there are few readers) and the return on book-publication investments is long term. More needs to be invested in promotion.

Writers are in a very precarious situation and relatively few can make a living from their work.

# Creative industries and activities

## Design



Barcelona continues to be recognised internationally for design.

There are a lot of small design studios and in a difficult financial situation. These studios need to be more professionalised.

A brain-drain is occurring given the better economic conditions and professional recognition found in other countries.

If design is to carry more influence in Catalonia, the industry will need to be promoted, above all where it regards design as part of its strategy.

## Architecture



There is a new generation of architects in Barcelona who are bringing new social models into the area of construction and urban planning. The new architecture must focus on sustainability.

The model for public invitations to tender does not encourage innovation in the sector and prioritises competition in pricing.

While construction has a significant weighting in Catalonia's GDP, it is not a benchmark in architecture.

# Main cross-cutting strategic challenges

## Competitiveness



- Professionalisation of the sector.
- Increasing the critical mass by attracting leading companies or promoting the growth of local companies.
- Providing new forms of funding specifically for the creative sector.
- Acting proactively for attracting European funds for socio-economic reconstruction.
- Increasing public-private and inter-entrepreneurial collaboration.
- Favouring collaboration between the creative sector and other strategic sectors in the city.
- Raising awareness of the importance of including design and creativity in business strategies.
- Supporting start-ups along the way, to facilitate their consolidation.

## Positioning



- Structuring cultural offers and opting for benchmark events with an international impact.
- Defining a city strategy for CCIs. Promoting Barcelona as a creative hub.
- Making city residents more actively involved in creativity in the city.

## Talent



- Combating job insecurity in the sector.
- Avoiding a brain drain.

## Market



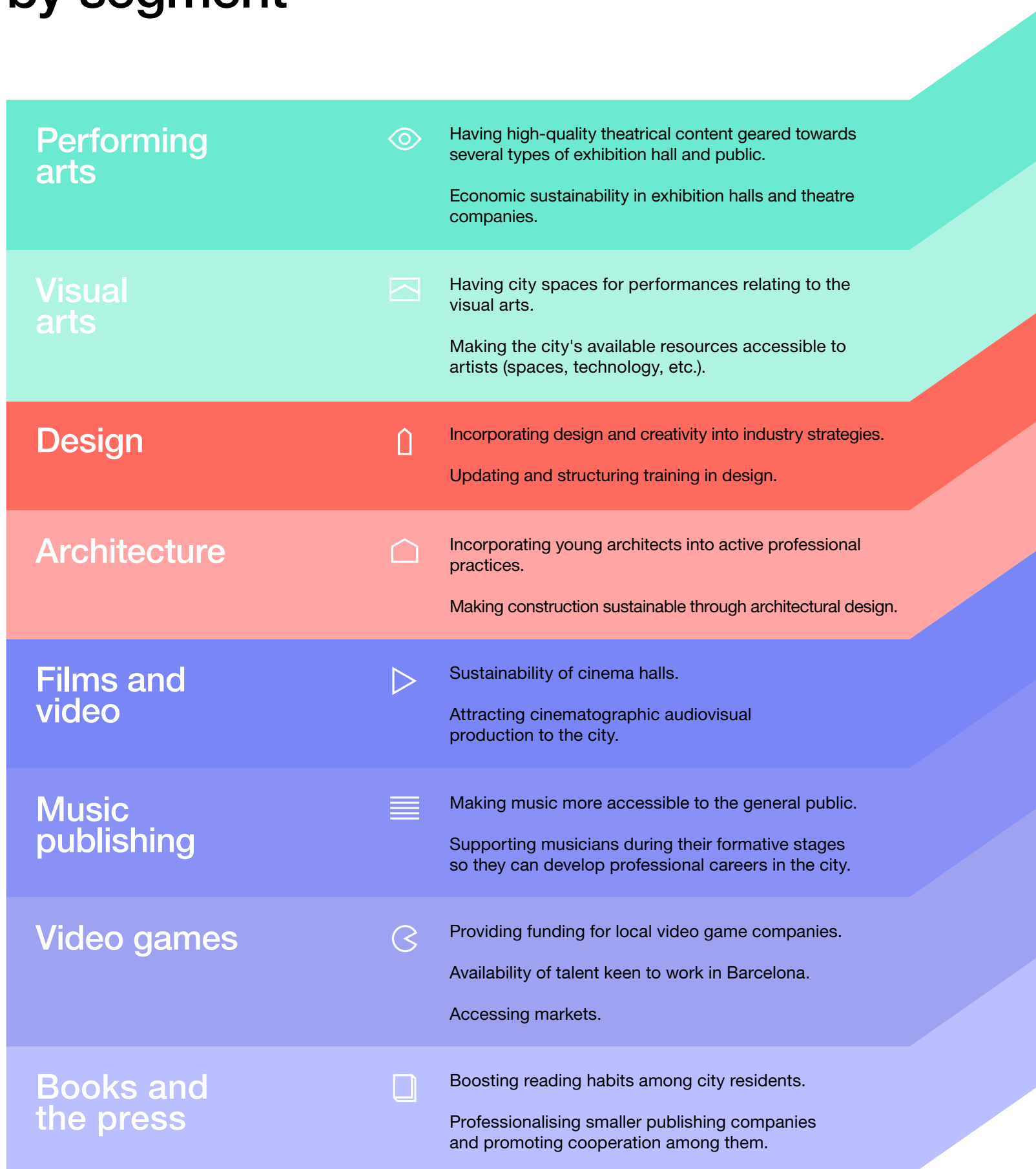
- Increasing interest in cultural consumption from an early age.
- Internationalising the sector's companies.
- Giving more exposure to initiatives such as "Bonus Cultura".

## Business model



- Promoting the design of new business models, also in the digital environment.
- Seeking new ways of monetising CCI products and services.

# Main specific strategic challenges by segment



# Conclusions



# Proposed public policy initiatives

The proposed initiatives aimed at promoting CCIs in Barcelona are divided up into four strategic areas:

## City strategy

Defining a comprehensive strategy for CCIs that includes training, residencies, exhibition, etc.

Creating meeting points among the sector's companies and associations and establishing cooperative networks.

## Venues and activities

Facilitating venues in the city for artistic expressions and creations (concerts, film shoots, performances and so on) and simplifying administrative procedures.

Structuring the offer of festivals around umbrella events, which have a greater national and international impact.

## Promoting CCIs

Creating specific programmes for supporting start-ups and CCI incubation projects.

Favouring the development of benchmark projects in the various CCI areas, with Barcelona City Council acting as a client.

Stimulating cultural demand and consumption by focusing on new generations.

## Funding

Defining a differentiated tax treatment for certain CCI segments (video games, theatre, films, cinematographic production, bookshops, etc.).

Creating specific funding lines for particular segments, such as video games.

Obtaining socio-economic recovery funds, such as the Next Generation EU.





# Acknowledgements

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Martínez Sabina Soler

## WE WISH TO THE THANK THE FOLLOWING INDIVIDUALS FOR THEIR COLLABORATION:

Amílcar Vargas (head of the Casa Batlló World Heritage Site), Anna Lorente (manager at ADETCA), Antoni Arola (head of Antoni Arola Studio), Areti Markopoulou (head of training at the IAAC), Camilo Tarrazón (Chair of the Catalan Film Entrepreneurs' Guild), Clara Vidal Riera (founding member of Ciertu Estudio), Cristina Pérez (Barcelona Activa's expert in CCI companies), Danae Gómez (head of Strategy at NACAR), Daniel Romeo (director of the Palo Alto Foundation), David d'Eboli (director of the Blanc! Festival), David Garcia Uslé (executive director of MODACC), Eugeni Osàcar (research director at the CETT-UB), Gabriele Palma (director of Casa Seat), Gemma Armengol (founder of White Line), Isabel Roig (CEO of the BCD), Isabel Vidal (Chair of the ADETCA), Iván Fernández (founder and chair of Gamelab and Meetaverse), Javier Peña (director of Elisava), Jesús Camas (Barcelona Activa's expert in companies), Joan Sala (director of Comanegra), Jordi Urbea (CEO of OgilvyOne in Barcelona), Lluís Nacenta (director of Hangar), M. Carmen Fernández (head of Innovation and New Businesses at Mediapro), Menno Veefkind (industrial designer at NACAR), Mónica Bonafonte (CEO of FAD), Montse Urpí (head of communication and dissemination at ESMUC), Núria Sempere (CEO of ESMUC), Oriol Pastor (creator of the BCN Mira i Llum Festival and director of the bachelor's degree in Digital Arts at La Salle), Patricia M. Val (CEO, co-founder and co-director of Futura Space), Patrici Tixis (director of corporate communication at Planeta and Chair of the Catalan Publishers' Guild and the Catalan Book Chamber), Pilar Sierra (director of the Catalan Film Entrepreneurs' Guild), Ramon Sanabria (Chair of Arquitectes per l'Arquitectura), Salvi Plaja (Chair of ADI-FAD and director of corporate design at Simon), Sergi Vicente (director of Betevé), Toni Clariana (chair of the Palo Alto Foundation) and Ventura Barba (CEO of Advanced Music).



# Map of creative industries

