The preparation of the *Report on the State of Culture in Spain* (RCS) 2023 aims to accompany the Spanish Presidency of the Council of the European Union during the second half of 2023. Its central theme is dedicated to Spain's cultural presence in Europe with an analysis of its main parameters, lines of activity and forecasts for the future. The report provides data and highlights the presence of Spain’s cultural industries in the EU as a whole. Spanish creation in the multiple fields of culture was also emphasised, as well as the market figures and its expansion into the digital economy.

Fundación Alternativas has extensive experience in this type of study. In addition to participating in European working groups to address issues such as the European artist statute or the role of culture in the green transition, at the behest of the European Commission it has also been part of a consortium that has developed a new method to measure the presence of culture in the European economy, including the digital economy. This is the 10th edition of this report, which since 2011 has provided an in-depth study of different cultural aspects and issues, making the RCS the annual culmination of the many activities of the Observatory of Culture and Communication.
REPORT ON THE STATE OF CULTURE IN SPAIN 2023

SPAIN’S CULTURAL PRESENCE IN EUROPE

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Communication and Culture
FUNDACIÓN ALTERNATIVAS
2023
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Every year, Fundación Alternativas publishes the *Report on the State of Culture in Spain*. We understand that this subject deserves an in-depth study, as it is related to the idea of beauty, without which it would be very difficult to live and coexist. Frank Wilczec, winner of the 2004 Nobel Prize in Physics, asks whether the world embodies beautiful ideas, whether the world is a work of art, like music, painting or sculpture, or science.

We can well integrate all these realities into what we call culture, the set of ideas or knowledge acquired through the development of the intellectual faculties. Also, ways of life, as defined by UNESCO.

If we look at culture from a creative or productive perspective, it is possible to call it a cultural industry. Fundación Alternativas holds a regular Cultural Industries Forum because this is the priority approach to culture that we believe should be developed within a think tank. This is the essential focus of Fundación Alternativas’ annual reports.

Culture has an inextricable relationship with individual and social well-being. It is difficult to quantify, but recent studies carried out in British museums show the economic—though surely not conscious—benefit of consuming cultural goods.

It is precisely through culture and its ability to go beyond the subjective sphere and the national environment that contemporary thought transcends the merely individualistic Enlightenment.

This moment and its description has been one of the explanatory purposes of the successive *Reports on the State of Culture in Spain*.

In 2022, the report focused on the impact of the transformations experienced by the audio-visual industry in Spain and its orientation towards sustainable and diverse growth.

This 2023 report cannot fail to take into account the fact that it is the year of Spain’s 5th presidency of the Council of the European Union. For this reason, we wanted to dedicate it to the influence of Spanish culture in Europe, in different manifestations: cultural diplomacy; feminist audio-visual literary creations; the internationalisation of Spanish pop music and its actors; the video game industry; the social impact of the cultural and creative industries; Spanish architecture; the visual arts; and the European markets for translation into Spanish.

Spanish companies have a turnover of one out of every five euros generated by the cultural industry in the European Union: €40,000 million euros according to Eurostat and 400,000 employees. Only France and the Netherlands have more companies in the arts and entertainment industry.

The cultural industries’ power is unquestionable. All the data—which we will not reproduce in this foreword—point to it.

Naturally, a study of the influence of the Spanish cultural and creative industry in Europe has to start from the assumption that there is a European culture. One that is multidimensional in nature.
Culture is valued and protected, as shown by its relevance in the Treaty on the Functioning of the European Union (TFEU). Article 167 states:

1. The Union shall contribute to the flowering of the cultures of the Member States, while respecting their national and regional diversity and at the same time bringing the common cultural heritage to the fore.

2. Action by the Union shall be aimed at encouraging cooperation between Member States and, if necessary, supporting and supplementing their action in the following areas:

   • improvement of the knowledge and dissemination of the culture and history of the European peoples;

   • conservation and safeguarding of cultural heritage of European significance;

   • non-commercial cultural exchanges;

   • artistic and literary creation, including in the audio-visual sector.

3. The Union and the Member States shall foster cooperation with third countries and the competent international organisations in the sphere of culture, in particular the Council of Europe.

4. The Union shall take cultural aspects into account in its action under other provisions of the Treaties, in particular in order to respect and to promote the diversity of its cultures.

   In short, European citizenship has a nature that would be incomprehensible and weak without the component of the Union’s culture and values.

   Culture will play a prominent role in the programme of the Spanish Presidency of the Council of the European Union in the second half of 2023. The cultural programme is made explicit in several dimensions: culture in the territory; digital cultural creation; and international projects.

   Independent Spanish foundations and think tanks, such as the progressive Fundación Alternativas, have a special role to play in promoting Spanish culture in a united Europe.

   This report aims to do so through its reflections and recommendations.
INTRODUCTION

Inmaculada Ballesteros

The Report on the State of Culture in Spain turns 10 in 2023, and it does so in the greatest possible way as part of the agenda of the Spanish Presidency of the Council of the European Union. This marks the first decade of monitoring cultural policies and raising awareness about the actual situation of this strategic industry.

The first report, produced in 2011 coordinated by Enrique Bustamante, was an innovative and necessary proposal that filled a gap in the critical analysis of cultural data. It also followed in the footsteps of other reports by Fundación Alternativas: the Report on Democracy and the Report on the European Union. All of them have been very well received by researchers, experts and the media. However, the Report on Culture was born with its own personality and with a clear objective set from the outset: ‘to create, from the public and private sectors, the optimal conditions for the creative and innovative capacity of Spanish-language culture to be powerfully deployed’, in the words of Nicolás Sartorius and Fernando Rueda, who signed the prologue. Twelve years later, we are still on the same path, although with some new insights that are worth highlighting.

For Enrique Bustamante, the need for this report lay in the scenario that was beginning to emerge. A time of profound transformation was coming, accelerated by digitalisation and accompanied by the consequences of climate change. These fundamental factors were associated with a profound social transformation that made rethinking the legal frameworks to face the imminent future necessary. This transformation has already engulfed us and, as Hegel would say, we have gone from facing easy social contradictions to having to resolve much more difficult ones.

The principles that have underpinned this report in all its editions have been diversity and independence. From these pages we have defended the recognition of the value of culture and the accompaniment of public policies adapted to the reality of our country that leave no one behind. We should not forget the severe crisis in 2011 and the effects for culture in its policies and budget allocation. Between 2008 and 2011, the general state budget for culture fell from €1,220 million to €789 million. This impact was felt most in decentralised culture in the hands of the autonomous communities, whose budgets were cut by around 70%. Today the figures are quite different: the 2023 budget for cultural policies exceeds €1.8 billion. Of that, 296 million comes from European funds channelled through the Recovery, Transformation and Resilience Plan.

AN ELECTION YEAR

Although budget figures have improved, the industry still has a long way to go to be socially recognised as a backbone of society. Two thousand twenty-three is also an election year that has allowed the political parties’ different proposals to be made known. Discussions on culture have taken place throughout the first half of the year. The Fundación Alternativas organised the first of these at the Madrid Athenaeum (Ateneo de Madrid) with the participation of all parties except for Vox, which excused itself at the last minute.
Although there has been debate in the industry, and electoral programmes on culture have been more extensive and detailed than in the past, it has not yet managed to gain a significant presence in the broader public policy debates. However, culture has also been a mobilising agent of the progressive vote, through the publication of manifestos, articles and declarations that have encouraged the electorate with a clear reaction at the ballot box.

As usual, an election year tends to paralyse activity at all levels, and in culture it is no different. Some important projects have been put on standby, such as the draft Law on Cinema and Audio-visual Culture. The creation of the Spanish Copyright and Related Rights Office, which was already in committee awaiting a ruling, has also been shelved. The same goes for the draft law on artistic education, and to the bills on sponsorship and historical heritage.

At the time of writing, the government resulting from the 23 July elections has not yet been formed. Negotiations and parliamentary juggling will shape the cultural policy of the coming years. Let us hope that the recovery initiated at the end of the last legislature will continue.

SPAIN IN EUROPE

It is against this background that the content of this report has been developed. As we mentioned at the beginning, we wanted to accompany the Spanish Presidency of the Council of the EU by analysing the presence of our country’s culture in Europe. Although our references for the regulatory and policy framework have always included the EU, there were some aspects that we had not yet explored. Traditionally we have looked to the Americas to identify what our strengths and opportunities were. Looking at our immediate surroundings, Europe, has been neglected in many areas of cultural research. For this reason, the research team has worked to show an updated picture of the different areas of culture created in our country and its dialogue with our European neighbours.

To begin this journey we have chosen our common language, Spanish. Oscar Loureda, who works at the University of Heidelberg analysing these issues, takes us through the current presence of Spanish in Europe and the policies to promote the language. We continue with a chapter that analyses the social impact of culture, one of our main challenges; Pau Rausell and Jordi Sanjuan, from the University of Valencia, examine the various dimensions of well-being that culture brings to European regions. Ana Gallego Cuñas, from the University of Granada, talks about the presence in Europe of Spanish fiction with a gender focus and a vision of feminist, trans and queer proposals.

We also wanted to discover whether the translation of literature in Spanish has continued to grow in the benchmark countries of France, Germany and Italy. For this chapter, we called Gustavo Guerrero, who in addition to his important editorial work at Gallimard, is a professor at the CY Cergy Paris University. To conclude the first part of the report, we analyse Spain’s presence at European literary fairs; Fernando García Naharro, from the Complutense University of Madrid, has investigated the results of the different cultural diplomacy strategies in this area, and how they have benefited our country’s image.

The second part of the report analyses more specific aspects of industries such as video games, one of the most promising in culture. The author of this chapter was Víctor Fernández, who in addition to working in the industry is a member of the Innovation in Video Games and Artificial Intelligence Unit at the University of the Balearic Islands.
We also examine the pop music industry with Isabelle Marc of the Complutense University of Madrid to find out whether the success of Spanish-language music is also a European phenomenon. The visual arts and their presence in the main European centres of creation is the chapter by Salomé Cuesta from the Polytechnic University of Valencia; we are interested in finding out whether the arts-science-technology field is a reference for Spanish creation in the European framework. Another aspect analysed in the second part is architecture. Sol Candela Alcover, from the Arquia Foundation, studies the presence of Spanish architecture in Europe and our professionals’ fame. We end this section with an analysis of AI in Spanish and its future possibilities with the collaboration of Nuria Lloret from the Polytechnic University of Valencia.

The final section of the report is our traditional survey of industry professionals, which Patricia Corredor has been conducting since 2011. This year’s conclusions are fairly positive, considering that we are coming from the cold freeze caused by Covid-19 and the cold shower of the invasion of Ukraine when we were just starting to see the signs of recovery. This year’s score was 5.3, two tenths above 2020, before the effects of the pandemic made their appearance. What stands out most is the professionals’ recognition of the EU’s effort to boost recovery from the health crisis through technology. Questions related to digitisation receive the highest scores in the table. The opportunity to drive growth in this way has been realised, although many challenges remain.

The other side of the coin is cultural cooperation policies, which are the lowest rated. This has been a recurring issue since the first edition of the RCS in 2011. In 2020, we dedicated the report to a review of Spain’s foreign cultural intervention system with proposals for a new approach. However, this review of strategies that do not deliver the expected results has still not been carried out. The professionals surveyed consider that cultural cooperation policies are not effectively promoting Spain’s image abroad. The beginning of the current legislature is the right time to rethink this issue and to start taking steps to improve cultural policies of promotion and cooperation.

THE EUROPEAN FRAMEWORK FOR DIGITAL TRANSFORMATION

One of the core issues of the work of the Observatory of Culture and Communication is the cultural industry’s digital transition. Europe has accelerated its progress along the path towards a digital transformation that will affect all areas of society. This transformation implies a cultural shift, not only because of the use of new technological tools, but also because many aspects of society will change. We have an amazing opportunity to improve people’s lives, but we also face risks that need to be addressed. The rights that may be affected in the digital age is an area that needs to be worked on.

In the coming months, possibly during the Spanish presidency, the European act on artificial intelligence, which at the time of writing is in the trilogue phase, is due to be approved. This is one of the most important regulatory challenges, as it is necessary to protect the rights of citizens and creators and also to allow for the development of the technology, one that can bring so many benefits.

The advent of generative AI has raised concerns in the cultural and creative industries. The potential for this technology to feed on IP-protected data poses a risk to ensuring rights-holders’ fair remuneration. However, a debate has begun with those who believe that this is a false alarm. The main argument of those wary of the technology is that AI-generated content will never reach the quality of
human-generated content. There are also positions that argue that using copyrighted content is not always piracy. There is a big difference between watching a film over a royalty-free portal and using internet content as inspiration to create something different. When this happens, the rights-holder does not have to expressly give permission for his or her work to be used once it has been made public and is circulating over different channels. If by looking at a work of art in a museum someone is inspired and creates something new from that idea, he or she is reproducing the chain of creation in the history of art. Picasso was inspired by African art for his bull’s head made from a bicycle seat. Many of his great works borrowed from the ancient classics and I don’t think that anyone begrudged him that. Why should AI ask for permission to be inspired by content it has accessed legally?

Throughout this debate, there have been calls for AI to pay creators for the content it uses to train algorithms. That isn’t what happens when people are inspired by works by other authors. There are some companies that have been transparent about the images they use to train their algorithms. This is the case of Stable Diffusion,\textsuperscript{1} which has stated that it is fully committed to transparency in its developments. The issue is that by showing the databases they use, even though they are generally Creative Commons, some authors who have been listed have asked to be removed. Deleting them and deleting their images seems simple enough but the problem is that you cannot undo what the algorithm has learned from your work. AI is not prepared to unlearn what it has already learned. That is why transparency is currently more of a problem than a solution.

In Europe, the largest associations of creators and rights-holders, including IFPI and GESAC, have proposed to the European Parliament\textsuperscript{2} that the future AI regulation include a transparency obligation for databases that train algorithms. These associations, whose mission is to protect creators from piracy, want to prevent AI from being trained on content that is obtained illegally, i.e., they use pirated content to generate their development. They propose “requiring accurate records be kept” of the data used from the start of development to the end of the complete chain of use. This would allow rights-holders to identify their works and demand remuneration for them. However, this would back up forward progress in the industry if every time an AI development project were to be launched, all permissions would have to be applied for. Once the sources have been identified, if each author has to give his or her consent for an infinitesimal contribution to the result, deadlock would be inevitable. On the other hand, if this were done after the fact, we have seen that the algorithm cannot unlearn what it has already done with a given piece of information. It seems that AI will also be needed to develop a system to resolve this mess.

In the case of the visual arts, the databases used to train the algorithms are composed of millions of images of works that are in internet repositories. Stable Diffusion worked with 12 million images from different artists, eras and styles. The most frequently appearing artist accounts for 0.0015% of the total database. It must be understood that AI works in different dimensions than humans and that the weight of each creator’s work in the content generated by this technology is quite minimal.\textsuperscript{3} We might say that it is basically a question of scale.

\textsuperscript{1} Stable Diffusion Public Release - Stability AI
\textsuperscript{2} European creators and rights-holders call for meaningful transparency obligations on AI systems to ensure lawful use of copyrighted content - Promusicae
\textsuperscript{3} Critics of Generative AI Are Worrying About the Wrong IP Issues - Center for Data Innovation
PROTECTING THE RIGHTS OF THE CULTURAL AND CREATIVE INDUSTRIES

To protect creators’ rights, you have to determine who owns the rights to AI-generated works. The U.S. Copyright Office has created a guide for registering works that have been generated using AI tools.\(^4\) Faced with a massive influx of requests for the registration of visual, audio and written content generated with AI technologies, the U.S. office has decided to establish a set of rules. In 2018 they received an application for a visual work that had been created autonomously by a computer. The record was rejected because no human interaction was observed. Work has also been received that combined AI tools with human work; this is the case of a graphic novel whose text had been written by a person and the images generated by AI. That time the registration was accepted, although the images alone could not be protected. In the American case, the dilemma is resolved because both the Constitution and the Copyright Act explicitly state that non-human-generated works are excluded. They are treated in the same way as photographs, which are created by a machine but require the involvement of a person.

Europe agrees with the American regulator not to license works when there is no human intervention. However, other issues are gradually coming to light. In March 2022, the European Commission published a report on copyright and new technologies which gathered the testimonies and recommendations of the cultural and creative industries.\(^5\) Throughout this process, there have been questions such as: Is there a need for more incentives (in the form of royalty-like rights) to use artificial intelligence tools to create cultural products? Should investments related to AI solutions be protected by an exclusive right or simply promoted through funding? Are there issues of authorship or ownership?

It should also be noted that the scope of the reproduction right is still under consideration by the European courts, especially when it comes to copies that serve as algorithmic training. The moral rights of authors and performers, on the other hand, have not been harmonised in the EU. This implies that there will be different national interpretations of AI’s use of protected works. The study referred to above concludes that a specific right for AI-only creations would not be accepted by the cultural industry. The possibility of protecting the style of an author or performer is also ruled out, and the mandatory reporting of the use of AI tools in artistic creations is not seen as necessary, as it is understood that it would limits creators’ artistic freedom. However, the amendments made by the European Parliament to the draft of the future regulation include the obligation to mention the use of AI tools. How this will eventually turn out is yet to be seen.

As George Steiner would say, ‘a scientific revolution is an act of motion. The mind leaves one major door of perception, one great window, and turns to another. The landscape is seen from a fresh perspective’.\(^6\) We stand at that window, peering into the future and trying to guess how it will affect our lives. New disciplines will emerge and new avenues for innovation will open up, and artistic creation will reflect this transformation, as it has always done.

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4. [2023-05321.pdf](govinfo.gov)
5. Study on Copyright and New Technologies.
FIRST PART
OVERVIEW OF SPAIN’S CULTURAL PRESENCE IN EUROPE
SPANISH IN EUROPE TODAY: SOCIAL DYNAMICS, LINGUISTIC SPACES AND BASIS FOR POLITICAL ACTION

Óscar Loureda

The following pages quantify the Spanish-speaking population of Europe, describe its main features and show its most important dynamics, which are explained by the vitality of migratory flows and by the effects of the teaching of Spanish as a foreign language. A population study of Spanish speakers in Europe is presented, which allows us to approach the social and linguistic reality of Spanish on that continent and to plan policies in terms of culture, education and promotion of the language on an international level.

Key words: spanish language, spanish-speaking migration, demolinguistics, spanish as a heritage language, spanish as a foreign language.

INTRODUCTION

Spanish is not a language exclusive to the Spanish-speaking states because it is clear that its knowledge and use have spread beyond their borders. This process of internationalisation is based on factors that have not been imposed, such as cultural prestige, language teaching, the intensification of supranational contacts, migratory flows and the population’s virtual communication, all factors derived from a more interconnected society. These factors also include the interventions abroad of Spanish-speaking countries in areas such as culture, education and migration. Its evaluation must be based on knowledge of the realities in which Spanish is spoken.

The Spanish-speaking community in Europe is relatively unknown, which is partly due to the complexity of a continent made up of almost fifty fully recognised countries inhabited by more than 710 million people and made up of diverse cultural, linguistic and social spaces. This paucity of knowledge contrasts with the growing research on Asia (Lynch 2019; Méndez Santos and Galindo Merino 2022) and the already extensive information on the United States, the other major space in which Spanish develops outside Ibero-America (Hernández and Moreno Fernández 2018). To correct this information deficit, this article quantifies the number of Spanish speakers in Europe and distinguishes different demographic and linguistic profiles within this group, describes the educational and migratory dynamics behind the formation and expansion of the group and, finally, makes recommendations for interventions abroad in culture, education and migration.

THE SOCIAL AND LINGUISTIC REALITY OF SPANISH IN EUROPE

To understand the context in which Spanish is used in European societies, there are several
options. One of them consists of quantifying the potential users of the Spanish language and explaining how this community has been formed. Both tasks are the subject of linguistic demography or demolinguistics. A demolinguistic study looks at the composition, structure and dynamics of a population characterised by the knowledge or use of a language or variety (Moreno Fernández 2014, 2023). Among many other possible applications, demolinguistic studies are essential for the analysis of how spaces of reception and circulation of cultures are created, how the study of a language progresses abroad and under what conditions intergenerational linguistic transmission by migrants speaking a given language takes place.

Quantifying, describing and explaining the social and linguistic reality of Spanish in Europe is no easy task. Linguistic information is often not part of censuses or official statistics and when it does exist it is often fragmentary. It is also not easy to conduct territory-wide studies or cross-country analyses due to the how much of the data is processed differently. The task is somewhat daunting if, in addition to quantifying speaker populations, the aim is to determine their communicative ability according to their socio-demographic profiles. The only way to fill out the difficult puzzle described above is to combine different kinds of statistical sources from different places to reconstruct a picture as close as possible to Spanish’s true situation (Álvarez Mella, Blattner and Gómez-Pavón Durán 2023; Loureda, Álvarez Mella and Blattner 2021; Loureda, Gutiérrez, Álvarez Mella and Blattner 2022). Scientific grumbling about the lack of a European linguistic and language use census are not new, but remain unheeded (most recently in Adler 2020; Leeman 2023).

With the available data it is possible to estimate that the group of potential users of Spanish in Europe is almost 90 million people, slightly less than 15% of the world’s Spanish-speaking community, 596 million in round numbers (Instituto Cervantes 2022).

Within this group, two large groups can be discerned: those residing in Spain and those residing in other European countries, which is the specific topic studied by this paper.

Unlike the estimates for Spain—because there is some data on knowledge and use of the language in national and regional surveys (Spanish National Statistical Institute (INE) 2016, 2021)—calculating the potential users of Spanish in the rest of the continent is not a simple matter either from a demographic point of view or from the point of view of the possible assessment of the speakers’ command of Spanish. According to recent figures, there are more than 42 million Spanish speakers in Europe, of which the majority, some 31 million, are non-native (Instituto Cervantes 2022, 9–10) and more than eight are still learning (ibid, 14–15) (Table 1).

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1. On Spanish in Europe there is some approximate data in the Instituto Cervantes yearbooks (https://cvc.cervantes.es/lengua/anuario/default.htm) and partial information, especially on Spanish language teaching (Méndez Santos and Galindo Merino 2018 and 2022). Recently, various research studies have been published in the Observatorio Nebrija del Español (Nebrija Spanish Research Centre) (https://www.nebrija.com/catedras/observatorio-nebrija-espanol/) and in the collection of monographs on the situation of Spanish in European countries (https://cvc.cervantes.es/lengua/espanol_europa/).

2. Throughout the document, approximate figures are provided for ease of reading. The exact data can be found in the graphs, figures and tables in the text as well as in the sources cited, all of which are publicly available.

3. A Spanish speaker is considered to be a person who knows or uses the Spanish language in any of its varieties and who resides in the countries of Europe. Speakers can be classified according to their degree of language proficiency. Proficiency is understood as the ability to use a language in a manner appropriate to its form and communicative context, manifesting itself at the different levels along which the language learning process occurs. The maximum level of proficiency is that of a native speaker. Anything else means that one has a lower capacity to communicate, a limited command of a language or variety, although this
Among the 42 million Spanish speakers in Europe, there is a large group of 5.4 million people with a migrant background (Loureda, Gutiérrez, Álvarez Mella and Blattner 2022). As a result, at least 36.6 million European citizens have learnt Spanish as part of the education system and are able to communicate in Spanish with varying degrees of proficiency. This amount of people makes it worth considering Spanish-speaking migrations and the presence of Spanish in educational systems in detail and one-by-one.

The macro-structural data indicated above allows for an initial reflection. In Europe, the majority of native speakers are people with a migrant background, especially first-generation. It is clear that although they are the great demolinguistic driving force behind Spanish, the formal educational systems and their alternatives (language schools, schools for adults, Spanish language programmes abroad, assistantships, language academies, etc.) are not yet in a position to enable most students to achieve native proficiency in the language. The current dynamics are good for increasing the number of Spanish speakers, but they are not yet optimal for training Spanish speakers with a greater command of the language that will enable them to face the challenges of emerging professions. The goal of a significant number of European citizens acquiring advanced levels of Spanish is far from being realised due to the limited presence of Spanish in educational systems and the dire lack of coordination of the educational offering abroad (Fernández González, Fernández Vítores, Gutiérrez Rivilla and Serrano Avilés 2023; Lamo de Espinosa and Badillo 2021). This is supported by the following analysis.

### SPANISH-SPEAKING MIGRATION IN EUROPE

Among the Spanish speakers with a migrant background residing in Europe there are very different profiles: first-generation migrants, people from Spanish-speaking countries who have acquired European nationality, descendants of immigrants and European immigrants who have returned after a migration experience in Latin American countries. Their quantification can be seen in Table 2; the keys to interpret this data are given immediately below.

**Europe is a priority destination for Spanish-speaking migration.** There are 1.6 million people from Spanish-speaking Latin American countries living in Europe (excluding Spain). This is a significant group despite its apparently modest size: these Spanish speakers account for only 5% of the Old Continent’s migration, but Europe is their first global destination if they do not move to the United States or between countries in

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Table 1. Europe and its Spanish speakers: place of residence and language proficiency (2022)

<table>
<thead>
<tr>
<th>Region or country of residence</th>
<th>Potential users of Spanish</th>
<th>Native language</th>
<th>Limited proficiency</th>
<th>Beginners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>47,474,649</td>
<td>43,273,009</td>
<td>4,071,640</td>
<td>130,000</td>
</tr>
<tr>
<td>Rest of Europe</td>
<td>42,239,525</td>
<td>2,778,741</td>
<td>31,186,414</td>
<td>8,274,370</td>
</tr>
<tr>
<td>Total</td>
<td>89,714,174</td>
<td>46,051,750</td>
<td>35,258,054</td>
<td>8,404,370</td>
</tr>
</tbody>
</table>

Sources: prepared by the authors based on national, Eurostat, UN and Instituto Cervantes data (2022).
Ibero-America (Loureda, Gutiérrez, Álvarez Mella and Blattner 2022). One can reasonably assume that their proficiency, regardless of education level, is equivalent to that of a native speaker because they acquired Spanish as a child in interactions with their family and members of a community or through the various possibilities offered by national educational systems. The attribution of a native command of the Spanish language to these people is made regardless of whether Spanish is their mother tongue or even their main language of use, as in the case of bilingual migrants from autonomous communities in Spain or from non-monolingual countries in Latin America.

Although the differences have tended to narrow over the last five years, more than half of this Spanish-speaking migration in Europe comes from Spain: 54%, some 900,000 people. This is due not only to geographical proximity, which reduces the costs of the decision to move, but also to the ease of population movement and citizens’ rights, which minimises risks (Alonso and Gutiérrez 2010; García Delgado, Alonso and Jiménez 2012). The majority of Latin American migrants come from Peru, Colombia and Ecuador. Ninety per cent of transatlantic immigration comes from nine countries, including Mexico, Chile, Argentina, the Dominican Republic, Cuba and Venezuela. If we consider the relationship between origin and destination, we see that countries such as France, Germany and the United Kingdom show a high degree of diversity in the composition of the group of migrants, while others show a high concentration of origins, as is very evident in Italy, where 68% of Peruvian nationals in Europe, 73% of Ecuadorian nationals, 53% of Dominican nationals and 45% of Cuban nationals reside (Figure 1).

**Spanish-speaking migration in Europe presents a high territorial concentration** because three out of four people reside in the four biggest countries from a population, political and economic point of view: the main destination is France (26%), followed by Italy (20%), Germany (16%) and the United Kingdom (12%) (Bayona-i-Carrasco, Pujadas Rúbies and Avila Tàpies 2018; Loureda, Moreno Fernández, Álvarez Mella and Scheffler 2021). Switzerland is also a relevant destination (7% of migration), both currently and in the recent past (Kabatek, Henriques Pestana, Blattner and Defrance 2022). The importance of this concentration is even more significant when considering large urban centres: five cities with a population of more than 500,000 (Milan, London, Paris, Berlin and Zurich) attract 30% of Spanish-speaking migration.

More than half of Spanish-speaking migrants live in countries where the official language is a Romance language. French is the

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Table 2. Spanish-speaking groups in Europe (2020)

<table>
<thead>
<tr>
<th>Total</th>
<th>5,428,170</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spanish-speaking immigrants</td>
<td>1,655,109</td>
</tr>
<tr>
<td>Descendants of Spanish-speaking immigrants</td>
<td>1,151,462</td>
</tr>
<tr>
<td>Spanish-speaking immigrants naturalised in Europe (excluding Spain)</td>
<td>786,599</td>
</tr>
<tr>
<td>European migrants returning from Spanish-speaking countries</td>
<td>1,835,000</td>
</tr>
</tbody>
</table>

Source: prepared by the author based on Eurostat (2023a) and INE (2022) data.
language Spanish-speaking migrants are most likely to come into contact with (30%), followed by Italian (almost 20%). Germanic languages constitute the second area of contact: 17% of Spanish-speaking immigrants reside in the United Kingdom and 15% in Germany, to which we should add 2.7% residing in German-speaking Switzerland (Loureda, Moreno Fernández, Álvarez Mella and Scheffler 2021; Kabatek, Henriques, Blattner and Defrance 2022). This means that the majority of Spanish-speaking immigrants live in places where they can use Spanish with other people who have the same linguistic origin or with large groups of population from their same country, can communicate in English or can communicate in languages from the same family as Spanish. This is not a large number of languages in contact, languages which are, moreover, present in the educational systems of Spanish-speaking countries, especially Spain. This context should be used as an opportunity for partnership policy measures to strengthen the Spanish language skills of the descendants of migration and the use of several languages in the first generation of migrants, which would facilitate their personal development and increase their professional options.

The Spanish-speaking migrant base is vital for the development of Spanish culture and language. Spanish-speaking migration

Figure 1. Concentration of Spanish-speaking migration in Europe (excluding Spain) and main origin–destination relationships

*Argentina, Chile, Colombia, Cuba, Ecuador, España, México, Perú, República Dominicana y Venezuela son procedentes del 90% de la inmigración hispanohablante

Source: prepared by the author based on national, Eurostat, UN and Instituto Cervantes data (2022).
constitutes the immediate presence in Europe of the cultures and societies of origin, is responsible for its demographic growth and is a substratum that drives the study of Spanish among non-Spanish speakers. The latter can be seen in the fact that the main destinations of Spanish-speaking immigration to Europe coincide with the places with the most Spanish learners. According to estimates by the Instituto Cervantes (2022), 84% (7,080,306) of Spanish learners in Europe in 2020 will be in France, Germany, Italy and the United Kingdom, countries which, as indicated, account for 3/4 of Spanish-speaking immigrants. These reasons are sufficient to demand that the cultural and educational policies of Ibero-American countries support this group—and not just one part, the Spanish part—with specific and more coordinated actions.

**Spanish-speaking descendants tend to have a limited command of Spanish.** In Europe, at least 1.1 million descendants of Spanish-speaking immigrants can be assumed to exist, a conservative estimate based on demographic birth data (Loureda, Gutiérrez, Alvarez Mella and Blattner 2022, Eurostat 2023a). When the acquired language, be it the family’s or part of the family’s language, is not the vehicular or predominant language in a given country, the phenomenon of *heritage languages* appears. This is not a special kind of language, but a way of acquiring and using a language from one’s background in which oral interaction skills are equal to those of native speakers but in which written interaction skills do not develop or develop later in school contexts. The heritage language assumes different functions as an instrument of family communication, a mark of one’s origins or as cultural identity, which coexists with the acquisition of the majority or vehicular language in the social environment in which it develops (Potowski 2018; Montrul and Polinsky 2021; Barley, Li and Preston 2022).

The group of speakers of Spanish as a heritage language is young because they are mostly descendants of migrants who arrived in Europe in the last ten years: in Germany, for example, 46% of second-generation descendants are under 18, a percentage that rises to 65% among descendants of Latin American immigration. These people usually learn Spanish at an early age, at home and in the family environment, and only study it at school as a foreign language, usually starting when they are 14 or 16 because Spanish, except in certain countries (France, some German states and Portugal, for example), is mostly the third or fourth foreign language of choice in secondary school. As a result, language skills develop late at best and with certain limitations.

There are specific educational projects to promote the learning of Spanish among migrants. These include Spanish sections, European schools and Aulas de Lengua y Cultura Españolas (Spanish Language and Culture Classrooms, or ALCE): Spanish sections are programmes that offer a bilingual track in which Spanish is, in addition to being a subject, the vehicular language for certain subjects, especially in the humanities or social sciences; European schools, created jointly by Spain and the governments of EU member states, may include bilingual sections in which most subjects at the kindergarten and primary stages are taught in Spanish; and ALCE consist of complementary language and culture classes at different levels for descendants of Spanish emigrants.

The value of these actions is unquestionable, as is their obvious room for improvement. For example, the ALCE, specifically aimed at heritage speakers, are too limited. According to estimates by Loureda, Moreno Fernández, Álvarez Mella and Scheffler (2021) for Germany, the ALCE programme covers less than 15% of the population of
Spanish-speaking migrant descent in the country; Kabatek, Henriques, Blattner and Defrance (2022) found that in Switzerland, the country with the largest presence of the programme in the world, there were under 4,500 students. Spanish sections around the world teach 15,000 students, a figure that can be better understood comparatively: similar programmes by France have 522 French schools in 139 countries teaching 370,000 students (France Diplomacy 2023).

In short, the offering for all Spanish speakers and their descendants in general is not differentiated from Spanish as a foreign language, and how it is distributed geographically is highly random and in many cases uncoordinated with local educational systems. It is also aimed exclusively at people of Spanish origin, excluding more than 45% of the potential target group and substantially limiting the growth of Spanish speakers in Europe, especially those with the greatest ability to use the language.

To correct the current weaknesses, Spanish language conservation policies are needed that respond to the countries’ migratory realities, which, incidentally, we are still largely ignorant of. A first way of approaching the situation of these speakers is to assume favourable and unfavourable spaces based on the combination of several criteria: the use of Spanish as a language to communicate within the family, the characteristics of the social and linguistic environments, the position of Spanish in the educational system and the existence of specific educational projects for descendants of migrants (Moreno-Fernández and Loureda 2023; Loureda, Moreno-Fernández and Álvarez Mella 2023; Álvarez Mella, Blattner and Gómez-Pavón Durán 2023). The most favourable space is provided by the positive combination of these criteria, as is paradigmatically the case in Germany (Loureda, Álvarez Mella and Blattner 2021, 73–77).

Countries with comparable structures are assigned an intergenerational maintenance rate of 30%. The other countries, with more precarious educational programmes, with more limited communication spaces in Spanish and with small Spanish-speaking communities, are assigned lower maintenance and are therefore identified as spaces that are unfavourable for the preservation of Spanish (Figure 2, below).

According to our estimates, in European countries favourable to the intergenerational preservation of Spanish, there are approximately 300,000 descendants of immigrants with a native command of Spanish; in those that are unfavourable, around 31,000. The remaining 800,000-plus people with a Spanish-speaking migrant background are assigned a limited proficiency in Spanish. This is not positive, per se, as it means that two out of three people with a Spanish-speaking migrant background are at risk of losing the language.

In light of the data, it seems clear that there is a need to develop specific policies for this large part of the population by creating new measures but above all by better coordinating and planning those already in existence, which have great potential. These policies must be by all for all: reaching out to the descendants of all Spanish-speaking people in Europe through actions taken by most Ibero-American countries. Measures must be organised flexibly according to the location. In this regard, the fact that this population is relatively concentrated is key. This concentration makes it easier for people with a migratory background to maintain the language: the size and density of the Spanish-speaking population in these places, as well as the symmetry of their relationships, traceable to a common origin or shared socio-demographic characteristics, are factors that create linguistic and social environments in which the language is used. For this reason, the nec-
necessary proposals should be aimed primarily at these urban destinations that are the most important centres of social, cultural and economic exchanges in today's Spanish-speaking migrations. These are located, as seen above, in Italy, France, Germany, the United Kingdom and Switzerland. Other countries that should attract strategic action are Portugal and the Netherlands, as well as Belgium, Sweden, Poland and Austria.

Spanish-speaking migrants are a linguistically diverse group, their communicative practices will change in future generations and they will contribute to the formation of the Spanish language of the future. The composition of migration and the host society, as well as their relationships, influence
the spaces in which Spanish is spoken and the language itself used in communication. The grouping of migrants and naturalised persons according to their macro-dialectal areas of origin can be seen in Figure 3. The data indicates the existence of a relatively diverse set in terms of the variety of Spanish used by its speakers (Moreno-Fernández 2007; Moreno-Fernández and Ueda 2018).

Figure 3. Migrant and naturalised dialect macro-zones, 2020

Source: prepared by the authors based on Eurostat data (2023a).

This linguistic situation is a dynamic one in relation to various factors. The reality invites us to consider a horizon of greater variation-al diversification because immigrants from Latin American countries have increased in the last decade (Álvarez Mella 2019; Loureda, Gutiérrez, Álvarez Mella and Blattner 2022). It is therefore likely that European Spanish will not coincide with a specific variety and that it will be built on a complex base, with contributions from the languages spoken in the host countries, as has happened in other places and with other languages (e.g., English or French). In short, Spanish will contribute to the construction of Europe because it is a language spoken by more than 12% of its population, but Europe will also, in all probability, contribute to the construction of the future of the Spanish language. For this reason, the adoption of a pan-Hispanic language and education policy as well as the integration of language institutions and experts under a Spanish language research centre in Europe is to be aimed for.

LEARNING SPANISH IN EUROPE

Apart from migratory movements and their effects, learning Spanish as a foreign language is the great multiplier of the Spanish-speaking community in Europe. The different stages of the educational systems, the offering of extracurricular classes, the cultural initiatives and the institutions dedicated to promoting Spanish abroad are the main instruments used to grow Spanish language learning. As a whole, they make up an offering that is highly sensitive to the situations in each country, which is why multi-local action is necessary, combining common state policy objectives with specific actions in the regions.

The situation of Spanish in European education has its ups and downs. On the positive side, the Eurobarometer 2018 data (European Commission 2018) shows that 35% of young Europeans mention Spanish as the first of the foreign languages they would like to learn, but this same data reveals that Spanish is the main language that is still not yet spoken or mostly spoken with limited proficiency. This context should favour the creation of a policy of alliances with European countries for cultural and linguistic exchange that strengthens the study of Spanish in Europe and, in reciprocity, opens up the offering of foreign languages in Spain and in Latin American countries, especially in areas with significant
contact between populations. This would be dually beneficial in that the high demand for Spanish abroad would be better fulfilled and, at the same time, the deficits in foreign language skills, particularly in Spain, shown by opinion polls and education indicators would be corrected (Eurostat 2023b).

The study of Spanish has grown significantly in Europe but this growth’s quality will be of insufficient without clear support policies. Almost 39 million people speak Spanish as a foreign language after having learned it to varying degrees. In this century, the number of speakers who have learned Spanish has grown by more than 63% since 2000, from 23.6 million to 38.6 million (estimate based on Eurobarometer data from 2000 and 2012). The data also indicates that slight progress has been made in the acquisition of the language at higher levels for several reasons: the existence and extension of professions directly or indirectly related to the language (translation, teaching, mediation, publishing, content creation for digital communication, etc.), the expansion of the presence of Spanish in cultural markets (Álvarez Mella 2021, Instituto Cervantes 2022), the improvements in teacher training and the progress made in offerings in higher education. Despite this dynamic, less than 25% of these people attain advanced proficiency in Spanish, which means that three out of four speakers of Spanish in Europe have intermediate or basic skills.

Spanish learning in European educational systems is highly concentrated in a few countries. A total of 87% of graduates from educational systems offering Spanish are in France, Germany and Italy (Eurostat 2023a). This means that there is ample room for policy to extend the presence and choice of Spanish in European educational systems: this should be a policy priority. Access to the study of Spanish depends on a number of factors: the age at which the language is offered, the number of years Spanish can be studied, the conditions of eligibility of Spanish in relation to other languages, the availability of the Spanish offering according to different types of schools and orientation (vocational or general) and the curricular structure in which the language offering operates (for example, whether it can be studied in all tracks or only in some, such as humanities, with fewer students in most countries). The only possibility of increasing Spanish studies and adapting them to the demand detected is to carry out multilateral negotiations so that countries encourage the study of Spanish.

The offering of Spanish in European education is very limited. In 2019, almost 130,000 children were learning Spanish in European primary education (Spain excluded). Although in less than 10 years there has been a growth of almost 40% in enrolments—which undoubtedly favours later access to the language up to advanced levels—the enrolment quota is not even 1% of the student community. For the sake of comparison, suffice to say that this share is three times lower than French’s, five times lower than German’s and miles from English’s, which is the choice of nine out of ten primary school pupils (Eurostat 2023b).

At this stage of education, Spanish’s presence is not similar in all countries. The highest number of enrolments are in Sweden (48% of the total), France (17%) and Italy (11.3%). Its geographic distribution does not coincide with that of Spanish-speaking immigration in Europe: it depends on the country’s language education policy favouring the maintenance of immigrant and heritage languages. This argument is supported by the observation that the countries with the highest increase in enrolments are those where studying foreign languages has been made more flexible at an early stage and where a second language has
been introduced before the age of 10 (Sweden, Malta, the Netherlands, Finland, Poland and Bulgaria).

In primary education, the option of choosing Spanish as a foreign language is limited to very few countries, which in addition, with the exception of France, have a limited migratory relationship with the Spanish-speaking world. This means that the migrant-descendant population, a natural target of primary school Spanish, is largely neglected. In countries with more Spanish-speaking migration (Italy, Germany, Great Britain and Switzerland), Spanish for young children is offered through Spanish initiatives (ALCE, International Schools) and for the most part are private and not public. The capacity of these projects to meet the real needs of migrants is limited, all the more so because they only target descendants of Spanish nationals. In countries with less migration, the situation is even worse because public intervention is anecdotal (Méndez Santos and Galindo Merino 2018).

Spanish in secondary education in Europe is improving its position but is showing the first signs of slowing down. Secondary school is the most favourable educational stage for studying Spanish in Europe; it is also the one that needs the most political support due to the unequal conditions for study across the continent.

There are currently more than 7.3 million students between the ages of eight and 18 studying Spanish. This number has increased by almost 30% since 2000. A full 90% of Spanish enrolments are in the four largest Western European countries: France (45%), the UK (27%), Italy (11%) and Germany (7%) (Figure 4).

Spanish is the fourth most studied language, with 10.5% of enrolments, behind English (60.7%), French (13.9%) and very close to the figures for German (10.7%). These four languages account for more than 95% of foreign language enrolments in secondary education. Trends indicate that in a very short while Spanish will become the third most studied language on the continent, overtaking German: between 2013 and 2019 the number of Spanish learners leapt up by 29% while the number of German learners decreased by 1.4% (Figure 5).

This data needs to be considered in more detail to avoid drawing triumphalist conclusions. The number of Spanish students is higher in lower secondary education than in upper (= baccalaureate): 2.9 million students in lower secondary education and 2.4 million in upper. It should be noted that these 2.9 million early-stage Spanish enrolments occur in a context with 28.7 million total foreign language enrolments (less than 10%) and that in the final stages of secondary school, the 2.4 million enrolments reach 12% of the total (20.3 million students, not including UK data). Spanish's position could be improved in the early stages and policies should be put in place to ensure that Spanish is offered as an option among the second foreign languages. In Germany, for example, the states that offer Spanish as a second foreign language have higher enrolment figures than the national average, and even in some large urban areas Spanish is right behind English in enrolments.

Spanish today is studied later, for fewer years (fewer hours) and by students in specific tracks (humanities) or who take Spanish to meet their foreign language requirements (as an elective, for instance). This is a quantitative and, above all, qualitative ceiling for the acquisition of advanced knowledge. Students who leave secondary education and enter the labour market mostly do so after studying Spanish for a maximum of four years, which means that they do not achieve intermediate levels of proficiency in Spanish or only
do so through personal investment. Failure to correct this situation means having more Spanish speakers but with a rather limited command of the language. Studying Spanish is growing even in contexts where the school population is falling or holding steady, as opposed to other languages that are more sensitive to demographics. This education data has a double positive reading: even if the number of enrolments in a country decreases, Spanish declines less than other languages and if a state registers an increase in enrolments, Spanish absorbs a larger share of this new space (e.g., in Germany, one of the countries with the most Spanish enrolments, with 20%). This means that Spanish has established itself in secondary education, strengthening its position in overall numbers and taking a larger share of enrolments in contexts where the school population varies, which is an indication of a dynamic of its own based on high motivation to study the language. (The Eurobarometer data concurs with this diagnosis).

The strategy to consolidate Spanish in secondary education must take into account the new space (e.g., in German, one of the countries with the most Spanish enrolments, with 20%). This means that Spanish has established itself in secondary education, strengthening its position in overall numbers and taking a larger share of enrolments in contexts where the school population varies, which is an indication of a dynamic of its own based on high motivation to study the language. (The Eurobarometer data concurs with this diagnosis).
that the sands are shifting. More spaces have opened up for foreign languages in the educational system and Spanish is coming out strong. However, it must prepare for other school contexts with more languages, with more learning modalities, with less school population—unless there are compensatory migratory flows—but with more Spanish students. How schools are organised will have to adapt to these circumstances and this requires a large-scale effort, politically, economically and in negotiations.

In the near future there will be more non-national languages on offer due to migratory contacts and the development of cultural contacts. Languages will be offered not only as foreign languages but also as heritage languages to facilitate, in migration contexts, the integration of the different realities of people’s origin and destination. Spanish is still mostly a foreign language in the educational system with low representation in bilingual projects that work towards the enhancement of cultural and linguistic heritage. Structures aimed at heritage speakers and at the development of the limited skills of the majority of speakers must be strengthened.
Spanish does not have an adequate position in European educational systems although it is in growing demand. It is clear that all foreign languages not created equal when it comes to choice. Some languages are strongly consolidated in educational systems by bilateral agreements (e.g. between Germany and France) or by cultural substrata, the result of past and present political relations (e.g. the presence of Russian in large areas of Eastern Europe, German in the Balkans or French in Romania). Among the languages left by the wayside by these agreements or traditions is Spanish. Existing programmes (e.g. the lectorado (assistantship) programme or the auxiliares de conversación (conversation tutors) programme, both run by Spain) have a limited impact on speaker training because of their lack of coordination and patchy planning as programmes. The data indicates that there is a disruption of home language learning between childhood (around age 6) and adolescence (around age 14) and that this disruption is only bridged by individuals and families making major compensatory efforts. For this reason, it makes sense to take actions aimed at strengthening the offering in primary education, especially in migratory contexts, and to favour continuing study of Spanish, extending the possibility of choosing Spanish among the second foreign languages.

The offering in secondary school is insufficient. This fact can be seen in the large number of enrolments in Spanish courses offered in the non-formal educational, or extracurricular, space, both to learn Spanish and to build on previous skills: in Germany 20 per cent of people who study Spanish do so at language schools and in Switzerland that percentage is 48. It is therefore reasonable to organise an extracurricular training offering that meets society’s demand, by strengthening and coordinating programmes and content, or by integrating the Instituto Cervantes’ activity with universities’ to support from the institutional level Spanish in at least three ways: the ongoing training of Spanish language teachers and updating of curricula, the certification of acquired knowledge and the creation of structures to improve the quality of teaching at schools.

The situation of Spanish in universities is hard to decipher. It is very difficult to obtain a current view of how Spanish is studied in European universities to also be able to compare across countries. The limited existing data indicates modest growth in the number of students, which reflects a process of transformation in the profile of graduates: the number of enrolments is decreasing in language and literature studies, mainly directed towards teacher training, and increasing in interdisciplinary programmes (area studies on the social and cultural realities of Ibero-America) or professionalising programmes (communication studies in Spanish or Spanish with other social science disciplines). In other countries, especially in Western Europe, the study of Spanish for teaching and translation is quite vibrant and compensates for the lack of secondary education with professional training in Spanish and with courses in Spanish as a foreign language.

The lack of data is an expected consequence of the lack of state dialogue, which hampers possible action. Fernández González, Fernández Vítores, Gutiérrez Rivera and Serrano Avilés (2023) express this idea with extreme clarity: 'The competence of Spanish institutions in tertiary education abroad—especially in the field of Spanish as a foreign language and its presence in universities—lacks structured dialogue and effective tools for action. Consequently, it is either

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addressed from angles distant from formal university education (through the AECID assistantships at different universities or, in several cases, the Cervantes Classrooms also located at several universities) or it simply lacks capacity and room to manoeuvre. The university level remains the most fragmented and unstructured level of Spanish as a second language intervention from the Spanish state abroad (manuscript, 9). Their recommendation, with which we fully agree, is that 'it would make sense for the current Ministry of Universities to have competence in actions related to projecting the presence of Spanish teaching in foreign universities that do not yet offer it and even to support and improve undergraduate and postgraduate programmes in Hispanic Studies and/or increase the offering of Spanish in other courses or degrees in foreign universities. To the extent that the scope of the Ministry of Education and Vocational Training is practically limited to primary and secondary education, there are no instruments to create university departments of Spanish in countries without a Hispanic tradition or professors; in other words, at the university level Spain lacks the tools to take Spanish where it is not already. It is only able to support it when it already exists' (ibid).

**Foreign interventions in the teaching of Spanish languages and cultures needs to be better coordinated and adapted to national contexts.** Educational action in relation to Spanish depends mainly on the Spanish government and is supported by programmes in which Spanish is the language of instruction (the Spanish sections or the European schools) or the language of learning for heritage speakers (the Spanish Language and Culture Classrooms, ALCE). The activity of these and other initiatives reveals that they are parallel programmes, run by different ministries and with operational weaknesses (see also Fernández González, Fernández Vítores, Gutiérrez Rivilla and Serrano Avilés 2023).

The presence and distribution of European schools and Spanish sections does not seem to depend only on the needs of Spanish migration in each country but also on other factors such as the availability of resources, the existence of local support, personal initiative, etc. In Germany and Belgium, for example, the European schools compensate for the low presence of Spanish sections. There are many more schools, programmes and students than in other comparable countries, so their demand and possibilities for preserving Spanish find their first point of support there (Table 3).

In non-formal, or extracurricular, education Spanish is better positioned thanks to the combined presence of different national (language and private schools) and international (Instituto Cervantes) actors, as well as exchange and mobility programmes. This is supported by the development of new forms of access to language skills, such as online courses and language learning apps, where Spanish occupies a growing share of the market. According to a report by Duolingo, a language learning platform with more than 500 million users, Spanish is the second most used language, even the first in 34 countries, most of which where English is the official language.5

The Instituto Cervantes meets part of the demand for Spanish courses at its 35 branches in 22 European countries, just over half of which are in Germany (5), France (4), Italy (4), the United Kingdom (3) and Poland (2). The concentration of this instrument of foreign educational action is consistent with the distribution of Spanish pupils in secondary education described above (see Figure 4).

There are currently 42 million speakers of Spanish in Europe, a fact whose social and linguistic analysis has been presented in this article. The arguments should invite neither optimism nor pessimism, but rather action through state policies. More planned political, cultural and educational action is needed to extend the study of Spanish and to favour the integration of Spanish-speaking migrants. This action should consider different needs:

1. that of strategically coordinating all Spanish-speaking countries to act in accordance with the historical unity of their linguistic space and the natural diversity of its parts;

2. that this area should be more closely associated with other linguistic areas, creating a “two-way” dynamic based on interventions to promote the language, culture and European countries;

3. that of respecting the plurality of the linguistic and cultural reality of the Ibero-American countries, supporting, without contradicting the above, the position of Spanish as a common tongue;

4. that of implementing migration and education policies by taking advantage of transnational networks and institutions;

5. and that of targeting and adapting promotion and coordination actions to the specific profiles of each group of speakers: native speakers, limited proficiency learners and beginners.

There are other possible instruments, but one that seems fitting is the “New Language Economy” project within the strategic projects for economic recovery and transformation (PERTE), as it could be an opportunity to take advantage of the potential of Spanish and Spain’s other co-official languages as a
lever for economic growth and international competitiveness.

The recommendations are based on data that seem to indicate that the focus of the future of Spanish should not be on the number of speakers, but on promoting a better command of Spanish. The acquisition of advanced levels of Spanish by a large number of Europeans is a goal that is far from being realised due to the limited presence of Spanish in educational systems and the dire lack of coordination of the educational offering abroad. Supporting descendants of Ibero-American migrants in the preservation of their Spain is also an urgent task.

Spanish in Europe depends on migratory flows and, above all, on the teaching of Spanish. Both processes interweave and recreate the Spanish-speaking world socially and linguistically. The Spanish language is becoming increasingly everyone’s due to the confluence of several events that are occurring on the European continent, although they are not exclusive to it: the coexistence of different linguistic varieties of Spanish in the same spaces—not only physical but also virtual—, the gradual diversity of Spanish-speaking immigration, the development of Spanish as a foreign language and the intergenerational transmission of a more delocalised language.

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THE SOCIAL IMPACT OF CULTURE IN EUROPE. RECENT CONTRIBUTIONS

Jordi Sanjuán Belda and Pau Rausell Köster

The idea that culture plays a central role in development processes is increasingly accepted both at the academic level and by public administrations and supranational institutions, especially the European Union. From the field of knowledge and research, more and more solid and convincing evidence is coming out that establishes causal links between culture and creativity and multiple impacts on social and economic variables. This chapter synthesises the main results of a study that analyses the impact of the cultural and creative sectors in European regions on various dimensions of well-being, including income, jobs, education, health and sense of community through novel and complex causal machine-learning techniques. The results confirm that both in Europe and in Spanish regions in particular, the effects are positive in most dimensions for most regions. This shows the potential of culture and creativity to activate regional development processes and improve the well-being of European citizens.

Key words: cultural and creative sectors, social impact, well-being, regional development.

WHERE WE ARE IN THE EVIDENCE ON THE ROLE OF CULTURE IN TERRITORIAL DEVELOPMENT?

The role of culture in development processes is an idea that is now fully accepted by most social actors and has become a consensus that has been incorporated by most global organisations. From the Ibero-American Charter of Culture of the OEI (Organization of Ibero-American States) (2006) to the UNESCO Hangzhou Declaration (2013), through the OECD documents on culture and local development (2005, 2018) or the numerous documents by the European Commission since the ‘Green Paper–Unlocking the Potential of Cultural and Creative Industries’ (2010), confirm and reaffirm this idea.

This global consensus, however, is less precise when it comes to specifying the causal trajectories of these connections. We already know that the cultural experiences provided by the cultural and creative sectors trigger numerous processes of transformation and change that ultimately have an impact on economic and social variables, but neither the theories in all their complexity nor the appropriate methodologies to measure and evaluate these transformation processes have yet been fully developed.

In general, this consensus shares the idea that a rich cultural life has social and economic benefits in the territories where it occurs. Culture has transformative effects from the individual and collective point of view with specific as well as general impacts. Art and culture catalyse changes and push towards new and better relationships in communities and between people, and these changes are connected to the great challenges of twenty-first century societies such as inequality, climate change, health, well-being, identity-
building, sensitivity, social resilience and the role of technology and beauty.

In the European context and at the level of political declarations, the recent EU Work Plan For Culture 2023–2026 explicitly states that ‘culture, including cultural heritage, plays a crucial role in our democracies and in the lives of individuals. Participation in culture and cultural heritage, creativity and the arts has a positive impact on people of all ages and backgrounds; it enhances people’s quality of life, and improves the health and overall well-being of individuals and communities. Cultural participation facilitates social and territorial cohesion, while fostering respect for cultural and linguistic diversity and providing a platform for open dialogue within civil societies’. From a scientific point of view, evidence has already been consolidated to establish that there is a causal relationship between the size of a territory’s cultural sectors and its per capita income and the productivity of its economic system (Boix-Domènech, De-Miguel-Molina and Rausell-Köster 2022).

This evidence, however, does not unravel all trajectories of transformation, since the relationship between symbolic production, economy and society is complex and multidimensional. We have only clarified some of these more obvious relationships, such as the fact that the cultural density of a territory attracts tourist flows (Cuccia, Guccio and Rizzo 2016; Plaza, González-Casimiro, Moral-Zuazo and Waldron 2015) and affects innovation through multiple mechanisms (Rausell-Köster et al. 2012).

Other studies confirm that ‘cultural capital’ has a multiplier effect on human capital, generating greater impacts on growth processes and productivity improvement (Sacco and Segre 2009). Human talent must be connected to the territory—this is only made possible by culture—to apply its knowledge to the symbolic material attributes of these geographical spaces, leveraging on their potential.

In short, there is already a theoretical corpus and incontrovertible evidence which, although fairly recent, relates the dimension of the cultural and creative sectors to the dynamics of economic development of spaces at different territorial scales, and the ‘state of knowledge’ is showing us that people’s cultural experiences and the corresponding projects, programmes and policies capable of supporting them are catalysts that set off complex social processes that ultimately effect the well-being of the community in general through mechanisms that go far beyond the economic dimension.

**THE RELATIONSHIP BETWEEN CULTURE AND WELL-BEING. RECENT CONTRIBUTIONS**

So we entered a new phase in which we identified that the real processes of change do not materialise only through economic impact but through social transformation, and we started to pay attention to the relationship between the cultural and creative sectors and other social variables such as education (Mecocci and Bellandi 2022) and, through cultural participation, on other aspects such as well-being or health (Fancourt and Finn 2019; Zbranca et al. 2022), civic engagement (Campagna, Caperna and Montalto 2020), social cohesion (Otte 2019), the environment (Burke, Ockwell and Whitmars 2018) and life satisfaction (Wheatley and Bickerton 2019).

We are therefore beginning to unpack this black box between culture and creativity and variables that directly affect our well-being. It should be borne in mind that culture, as a producer of symbolic content, is the essential tool for transforming our ideas and values, which can be converted into changes in attitudes and behaviour, so necessary in the
double transition that the European Union is pursuing.

It is in this context that the study ‘Cultural and Creative Industries and the Well-being of Regions’ appears, the first to address the effects of the cultural and creative sectors (CCS) at the regional level over a broad set of dimensions of well-being using data modelling techniques originally developed with artificial intelligence and machine learning.\(^2\)

The work presented is, in fact, one of the first applications of these methods to the study of the regional impact of culture and creativity and also provides quantitative evidence for their causal inferences.

Based on data available from 209 European regions, empirical evidence of the effects of culture and creativity on well-being is modelled and assessed in two ways: first in aggregate and then region-specifically. The following well-being indicators are used, which are derived from the regional version of the OECD’s Better Life Index (2018) (\textbf{Table 1}).

The results corroborate that for most of the socio-economic variables considered, cultural and creative activity has significant effects. It should be borne in mind that the results obtained are not simple correlations; following year, deriving the time structure from the results of the Granger causality test. The statistical technique used is causal forest (Wager & Athey, 2018), a novel and sophisticated technique that combines machine learning with causal inference.

\begin{table}[h]
\centering
\begin{tabular}{|l|l|}
\hline
\textbf{Dimension} & \textbf{Indicator} \\
\hline
Access to services & Households with broadband (\%) \\
Civic engagement & Voter turnout (\%) \\
Community & People who believe they can rely on a friend in case of need (\%) \\
Education & Level of education (\%) \\
Environment & Particulate matter (PM\(_{2.5}\)) in air (\(\mu g/m^3\)) \\
Health & Life expectancy (years) \\
Housing & Number of rooms per person \\
Income & Net disposable income per capita (euros in purchasing power parity) \\
Jobs & Employment rate (\%) \\
Life satisfaction & Satisfaction with life (0–0) \\
Safety & Homicide rate (per 100,000 inhabitants) \\
\hline
\end{tabular}
\caption{Well-being KPIs (OECD Better Life Index, 2018)}
\end{table}

\footnotesize{Source: OECD (2018). Note: In health and jobs, the most appropriate indicator has been selected as there was more than one.}

1. Doctoral thesis recently presented and pursued under the framework of the European project H2020 MESOC.
2. A database of 209 regions in European OECD countries was used, with data from 2008 to 2019. The employment data on CCS are from the labour force survey (Eurostat), and the list of industries included in CCS follows the classification proposed by the project ‘Measuring CCS in the EU’ (Vilares et al. 2022). The 11 dimensions of the OECD’s regional Better Life Index are used. The database is completed by a number of additional variables that act as controls in the statistical models, from a variety of sources, but mostly official agencies. The different models have been specified on the basis of previous academic literature, theoretical reasoning and empirical evidence. They analyse the impact of the percentage of jobs in CCS in one year on the indicator in the following year, deriving the time structure from the results of the Granger causality test. The statistical technique used is causal forest (Wager & Athey, 2018), a novel and sophisticated technique that combines machine learning with causal inference.
they imply causality because of the techniques used (causal forest) and the causal models that underlie them.

The joint effects of culture and creativity on well-being are shown in Table 2. They should be interpreted as the increase that an indicator of each dimension would experience in the following year (in its corresponding unit) in case of a 1 per cent increase in the share of CCS employment. For example, if a region moves from 2 per cent to 3 per cent CCS employment, its net disposable income would increase by 348 euros (in purchasing power parity, PPP) per capita for the whole population.

Overall, these results indicate that the CCS have clear positive causal effects on education, health, income and jobs. This is also true for housing and sense of community, although with less statistical significance because the models do not reach the maximum required in terms of reliability. On the contrary, there is no clear evidence that the CCS have any statistically significant effect on access to services, civic engagement, safety or life satisfaction.

However, these conclusions are difficult to generalise to all territories and at all times, given the heterogeneity that characterises regions and that can make the impacts of culture and creativity in one substantially different from or even opposite what is measured in the whole. For that reason, an interactive web-based tool called SICCRED has been developed to make region-specific estimates of the impacts of the CCS regionally.3

Table 2. Joint effects of culture and creativity on well-being

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Effect</th>
<th>Signif.</th>
<th>Quality of the model</th>
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<tbody>
<tr>
<td>Access to services</td>
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<tr>
<td>Civic engagement</td>
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</tr>
<tr>
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<tr>
<td>Environment</td>
<td>-0.193</td>
<td>**</td>
<td>Mean</td>
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<tr>
<td>Health</td>
<td>0.081</td>
<td>***</td>
<td>High</td>
</tr>
<tr>
<td>Housing</td>
<td>0.014</td>
<td>*</td>
<td>Low</td>
</tr>
<tr>
<td>Income</td>
<td>348.135</td>
<td>***</td>
<td>High</td>
</tr>
<tr>
<td>Jobs</td>
<td>1.309</td>
<td>***</td>
<td>High</td>
</tr>
<tr>
<td>Life satisfaction</td>
<td>-0.001</td>
<td></td>
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</tr>
<tr>
<td>Safety</td>
<td>-0.001</td>
<td></td>
<td>Very low</td>
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</tbody>
</table>

Source: Prepared by the authors. Notes: Signif. codes: ‘.’.1 ‘*’0.05 ‘**’0.01 ‘***’0.001. The quality of the model is assessed on the basis of its goodness-of-fit measures. In environment and safety, which use inverse indicators (reflecting pollution and crime levels), the signs have been switched for ease of interpretation.

3. Available: https://www.mesoc-project.eu/resources/SICCRED
4. The regional results presented below may differ from those of the SICCRED platform, as the latter are only for 2019 and here we are presenting the average effects
SOME RESULTS FOR EUROPEAN REGIONS

Impact on health

If we focus attention on some of the variables where the models work with high levels of confidence, we can see that in the case of health, measured through years of life expectancy, by simply increasing the number of people employed in the cultural and creative sectors by 1 per cent, the effects are notable, extending life expectancy by up to three months (in Luxembourg) or shortening it by up to two months (in Andalusia). We can see that in most regions the effect is positive, and the regions where negative effects materialise are those that already start from high life expectancy combined with relatively poor economic variables (high poverty and social exclusion rates, low income, low education levels or low employment rates). That is, in contexts of high longevity, cultural experiences are not enough to compensate for the health effects of worse economic status. But the effect is also not positive in regions with high employment rates (e.g., Bavaria or other regions in southern Germany and Switzerland) because we assume that leisure time is necessary for the impacts to materialise. The impact is also negative in some regions with high poverty rates and high levels of environmental degradation (e.g., in eastern Polish regions such as Lublin) (Figure 1).

Impact on income

The effect of the increase in CCS on income is practically general across all European regions and ranges from €379 less net available income...
income per capita in Vorarlberg, Austria to €738 more in Zurich. The main positive effects are concentrated in Spain, Portugal, Greece, the United Kingdom, Ireland, Iceland and Denmark, while they are predominantly negative in Austria, Belgium and Estonia (Figure 2).

Regional distribution of impact

Although some territorial patterns have already been observed in a couple of dimensions, it remains to be found which regions benefit most from the effects of CCS on their overall well-being. A detailed analysis for each region is, of course, not possible within the limits of this paper. Instead, we will outline in which regions positive effects outweigh negative ones and vice versa, counting the number of dimensions in which the impact is positive and negative, without going into the intensity and composition of that impact. However, for concrete and rigorous regional diagnoses, a more detailed analysis would be desirable, as the effects can be very different between neighbouring regions, even with opposite effects in different dimensions.

Overall, there are more positive than negative effects in the vast majority of regions (174 out of 209). Still, a first point to note is that there is only one single region (Malopolska in Poland) where the effects are beneficial for each of the eleven dimensions. CCS are not, it can be seen, a magic solution to all problems and may generate adverse effects that will differ from context to context and should be monitored. Six other regions follow with positive effects on 10 out of 11 well-being dimensions: the East of England, Espace Mittelland and the Lake Geneva region in Switzerland, Pomerania and Western Pomerania in Poland and Western Greece.
Conversely, even in those regions where negative effects predominate, there are several dimensions that experience positive effects. In these contexts, therefore, CCS can also contribute to certain aspects of well-being. Only 35 regions are in this situation. But among them, the majority (26) are on the borderline, with five dimensions with positive effects compared to six with negative. The worst performing regions are Drenthe, the Netherlands and the Lisbon metropolitan area, with only three dimensions where CCS have positive effects (compared to eight with negative). They are followed by Berlin, Bremen, Luxembourg, Vienna, the Ionian Islands, the North Aegean, Trøndelag in Norway and Alentejo in Portugal, with four dimensions with positive effects compared to seven negative. If we also add the regions with five dimensions with positive effects, we see that quite a few of them are concentrated in the Netherlands and Norway.

The majority, on the other hand, rank in the medium and medium–high range in terms of the number of dimensions with positive effects. Almost 80 per cent of the regions (161 out of 209) have between six and nine dimensions in which the CCS generate positive effects.

Disparities between regions can have multiple causes: firstly, differences in the internal composition of activities within the CCS; secondly, the structural characteristics of the regions (economic, socio-demographic, political, etc.), which influence the impact and can intensify or moderate it; and finally, and partly as a result of the previous two, the ways in which CCS interrelate with their environment vary from region to región (Figure 3).
SO WHAT ABOUT THE SPANISH REGIONS?

Most of the 19 Spanish autonomous communities and cities experience positive effects in most dimensions of well-being. All, in fact, except Cantabria, Catalonia, Asturias and Murcia, where the CCS have positive effects in five dimensions and negative effects in the remaining six. At the opposite end are Andalusia and Extremadura, with eight dimensions with positive effects (compared to only three with negative); the rest are between six and seven. In 15 of the 19 regions, therefore, positive effects are predominant, although not necessarily in the same dimensions.

The effects on education, income and jobs are the most notable. In these dimensions, the average effects of the CCS, in addition to being higher in Spain than in OECD Europe as a whole, are positive for all regions. In particular, the Valencian autonomous community stands out for the effects on education, the Basque Country for income and Andalusia for the effects on jobs. Access to services and civic engagement also show mostly positive effects in 14 and 10 regions, respectively. In the other six dimensions, the effects of CCS are negative in most regions. In 11 of them, for community and environment, and in 13 regions for the rest (health, housing, life satisfaction and safety). In any case, these are variables for which the regions have fairly high standards, so culture’s potential effect is quite limited.

As can be seen, the ranking of impacts among the different regions goes beyond which regions start from a better position in the corresponding well-being indicator, or which have more CCS. For example, in education, a pattern can be observed, given that the regions benefiting from greater impacts are generally those with relatively lower education indicators (Valencia, Murcia, the Canary Islands, Andalusia and Castile-La Mancha), while the regions on the tail (Basque Country, Madrid and Catalonia) are just the opposite. Faced with this backdrop, CCS could contribute to narrowing regional inequalities in education. Income effects, on the other hand, do not follow as clear a pattern. The impact of CCS is particularly high in high-income regions such as the Basque Country and Madrid, but other high-income regions such as Catalonia and Navarre are among those with more moderate effects. In turn, other regions with low income levels such as Andalusia and Extremadura also occupy the top positions (Table 3).

The results confirm that CCS, as catalysts of innovation and generators of cultural experiences, have important effects on a wide range of dimensions that determine the community’s well-being. These effects, although disparate, are mostly positive, both in the Spanish regions and in the rest of Europe. In particular this is true in education, income and jobs, three fundamental dimensions that determine people’s development capacities and their material conditions.

Spain’s regions have ample room for harnessing and maximising the impact of culture on the well-being of their citizens and improving the conditions of the foundations of well-being. It would be a waste of resources not to seize this opportunity.

SOME CONSIDERATIONS FOR POLICY MAKERS AND OTHER ACTORS IN THE CULTURAL ECOSYSTEM

It is clear that CCS-oriented policies have become central to all public policy worldwide. This is not an issue exclusive to Western countries; emerging countries such as Brazil and China have significantly transformed the vision of the cultural and creative field in large-scale development processes. In 2010, the Chinese government decided to promote
cultural industries as a key economic sector in its 12th five-year strategic plan, which offers the industry abundant opportunities (Jianfei 2011).

Cultural policies oriented towards the cultural and creative sectors are becoming central areas of public policy overall, and this makes all of us who participate in the cultural ecosystem (creative agents, cultural mediators, cultural institutions, researchers, etc.) take on greater responsibility and points to the need to equip ourselves with and use a greater measure of intelligence and to deploy more effective and efficient strategies and tactics. Platitudes and bombastic declarations are no longer doing the trick. Now is the time to use the full arsenal of resources, knowledge and creativity we have available. The opportunity cost is very high.

In Europe as a whole, however, there is another important reason. Cultural and creative activity is seen as one of the strategic elements that make Europe socio-economically attractive and underpin its global geo-strategic competitiveness in a world that is redefining its polarities. This is no longer merely

<p>| Table 3. Ranking of Spanish regions according to the effects of CCS on different dimensions of well-being |
|-------------------------------------------------|-------------------------------------------------|--------------------------------------------------|
| <strong>Education</strong> | <strong>Income</strong> | <strong>Jobs</strong> |
| 1 | Valencia | 1 | Basque Country | 1 | Andalusia |
| 2 | Murcia | 2 | Andalusia | 2 | Balearic Islands |
| 3 | Canary Islands | 3 | Extremadura | 3 | Canary Islands |
| 4 | Andalusia | 4 | Madrid | 4 | Murcia |
| 5 | Castile-La Mancha | 5 | Castile and Leon | 5 | Catalonia |
| 6 | Balearic Islands | 6 | Murcia | 6 | Extremadura |
| 7 | Extremadura | 7 | Castile-La Mancha | 7 | Valencia |
| 8 | La Rioja | 8 | Melilla | 8 | Asturias |
| 9 | Melilla | 9 | La Rioja | 9 | Castile-La Mancha |
| 10 | Cantabria | 10 | Balearic Islands | 10 | Castile and Leon |
| 11 | Galicia | 11 | Galicia | 11 | La Rioja |
| 12 | Aragon | 12 | Ceuta | 12 | Aragon |
| 13 | Ceuta | 13 | Canary Islands | 13 | Navarre |
| 14 | Navarre | 14 | Valencia | 14 | Ceuta |
| 15 | Castile and Leon | 15 | Navarre | 15 | Basque Country |
| 16 | Asturias | 16 | Asturias | 16 | Cantabria |
| 17 | Catalonia | 17 | Cantabria | 17 | Madrid |
| 18 | Madrid | 18 | Catalonia | 18 | Melilla |
| 19 | Basque Country | 19 | Aragon | 19 | Galicia |</p>
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<thead>
<tr>
<th>Access to services</th>
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## Environment

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## Life satisfaction

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**Source:** Prepared by the authors. **Note:** A dark green background indicates that average effects are positive and light green that they are negative. The dashed line indicates where the Spanish average is located between two regions, while the solid line indicates the same for the overall average of European OECD countries. The double line indicates that both averages coincide between the values in the same two regions.
cosmetic. It concerns the very foundations on which the future of the European project rests. One good example of this conviction on the part of the European institutions is the European Commission’s shift in funding for community cultural policies, raising it by 63 per cent with respect to the previous programming period, as well as the development of programmes linked to the CCS through the Next Generation funds, the Horizon and CERV programmes, etc.

As the new 2018 European agenda for culture pointed out, heritage and the dynamism of the cultural and creative sectors reinforce European identity and create a sense of belonging. Culture fosters active citizenship, common values, inclusion and intercultural dialogue in Europe and around the world. It brings people together, including newly arrived refugees and other migrants, and helps us to feel part of communities. Culture and the creative sectors also have the power to improve lives, transform communities, create jobs and generate growth, and create spill-over effects in other economic sectors.

As is evident from the above, culture and creativity are establishing themselves as a kind of broad-spectrum antibiotic to therapeutically address the various social and economic challenges facing the European Union, including the ‘twin transitions’. The conceptualisation of culture and creativity as a keystone and driver of European competitiveness is here to stay. This process finds its ultimate expression in the formulation of the diffuse New European Bauhaus project embedded in post-pandemic recovery programmes. In her State of the Union speech at the end of 2020, the President of the European Commission, Ursula von der Leyen, stated, ‘I want NextGenerationEU to kickstart a European renovation wave and make our Union a leader in the circular economy. But this is not just an environmental or economic project: it needs to be a new cultural project for Europe’.

As we have seen, CCS have enormous potential to improve quality of life and well-being in European OECD regions, in dimensions as diverse as education, income, jobs, health and community building. They should therefore be placed as a strategic piece in public policies and specific plans should be developed to promote them, given their far-reaching economic and social profitability. With the right objectives and well-designed intervention tools, CCS interventions can be a very effective tool for regional development. Moreover, the well-being returns of these policies appear quite quickly and, in some dimensions such as education, health, income and jobs, they are also very long-lasting.

This view does not overlook the fact that the real objective of a cultural policy is to protect cultural rights. The strategic and integral activation of symbolic resources in the processes of urban and territorial development finds its source of legitimacy in the cultural rights of citizenship, the effective realisation of which in turn determines the real possibilities of people to achieve those goals that allow them to lead a dignified life (Ramos Murphy 2021).

CONCLUSIONS AND RECOMMENDATIONS

1. As pointed out in the recent MESOC Declaration ‘Deepening the Transformative Impact of Arts and Culture through Evidence-based Approaches’, we are at a turning point. We must seize this unique and invaluable opportunity to deepen the relationship between culture, arts and cultural heritage, and the transformation of society.

5. The statement can be found at [https://www.change.org/p/mesoc-declaration](https://www.change.org/p/mesoc-declaration)
It is time to propose common and concerted protocols and procedures so that new cultural policies are evidence-based and truly pursue social transformation goals. This requires certain commitments from the agents interacting in the cultural ecosystem. These include, as noted in the statement:

- Explicitly and concretely highlight in cultural projects, programmes and policies the social, economic, cultural or other objectives pursued by the implementation of such projects or programmes;

- Allocate in the design of cultural projects, programmes and policies the necessary resources to develop evaluation and monitoring processes; and

- Deepen the collaboration among all the agents of the cultural ecosystem, to generate indicators, connected to specific objectives but also to key enablers, as well as new sources of data and methodologies to capture all the relevant dimensions of culture.

We need to convince and engage practitioners through intensive data analysis and, where possible, artificial intelligence, that culture is at the heart of many of the big questions around humanity’s societal challenges. And we also need to push for more official statistical institutions to be sensitive and responsive to the demands of the cultural ecosystem.

Intervention in the fields of culture and creativity, due to their wide-ranging impact, is becoming the next frontier of public policies with the intention of transforming society, especially for Europe. And this new acumen for social transformation requires more and more reliable information, more experimentation, more intelligence, more resources, more public attention, more responsibility on the part of all its agents, more political determination and more community involvement. In short, cultural and creativity-oriented policy must move, with determination and responsibility, from the periphery of public action to the central space it deserves.

REFERENCES


6. The recommendation in the Declaration is that at least 5 per cent of cultural programme and project resources be earmarked for evaluation, without jeopardising cultural financing. That would mean adding 5 per cent to cultural programme and project financing to ensure their evaluation.


Ramos Murphy, A. ‘*Análisis de la función de los espacios culturales en la redefinición de las políticas culturales de las ciudades. Un estudio de los casos de las áreas metropolitanas de Las Palmas de Gran Canaria y Santa Cruz de Tenerife-San Cristóbal de la Laguna.*’ (PhD diss., Universitat de València, 2021) https://roderic.uv.es/handle/10550/79817.


GENDER, DISSIDENCE AND FICTION
IN SPANISH CREATION AND ITS IMPACT
ON EUROPE

Ana Gallego Cuiñas

The aim of this study is to analyse the relationship between Spanish creation and gender(s) in the last decade (2012–2022) within the publishing and audio-visual sector, and its impact in Europe, using a transdisciplinary methodology that combines quantitative and qualitative tools. Two complementary issues have been studied: i) modes of creation: study of the presence of women and the trans community in the book industry (literary fiction and essays on feminist and queer themes) and in the audio-visual industry (cinema and series); ii) means of production: focus on the place of enunciation and the prevalent formats for publishing and audio-visual production and distribution of these fictions. With the data obtained, an assessment and a proposal are made for public policy for the development of an egalitarian and inclusive creative industry in Spain.

Key words: spanish fiction, audio-visual, gender, trans, feminism, dissidence, creative industry.

CREATIVE INDUSTRY, GENDER AND DISSIDENCE IN SPAIN

Culture means our identity, our sentimental education and our interpretation of the world. It is therefore essential to pay attention to the way in which cultural creations are presented in each era and society as they articulate frameworks of intellection and meaning that influence our vision of the real and especially our gender ideology. An ideology that conforms to the power relations between subjects, which historically have been marked by the imposition of patriarchal, mesocratic, heterosexual and colonial imaginaries, which fiction—the exceptional mass medium in the construction of subjectivities—has been reproducing or subverting over time.

For a little over two decades, feminist movements, such as Ni Una Menos and Me Too, and LGBTQ+ movements have programmatically and globally made visible through grass-roots organisations and academia the biases, discriminations and violence suffered by women’s collectives and dissident subjectivities. To this must be added the passing of laws in Spain such as the equality law (2007), the transsexuality law (2007) and the trans law (2023), which has led to a greater concern for the cultural representation of women and gender marginalised subjects, as well as for the promotion of their participation in the creative field. However, as several studies have shown (i.e., Baranda and Montejo 2002; Sangro and Plaza 2010; Arranz 2010; Marc 2021 and 2022) the public discourse in support of equality and against exclusion has so far not been translated into effective measures and more equitable data. What has changed is the number of fem-
inist, trans and queer fiction, which has experienced an exponential development, both in book and audio-visual format, and which crystallises the empowerment of women and the resignification of traditionally devalued non-binary ways of life. We can call this phenomenon the ‘transfeminist turn’ of the Spanish creative industry, as it takes place in both directions, feminist and trans, approaches that do not usually converge in studies of this kind and which are necessary to reflect, from the perspective of all genders, on the present and the future of our cultural production.

There has also been a growing interest in the economics of creativity and the social role that the cultural industry plays in the development of cities and states. The value of culture and the arts sector (music, literature, dance, advertising, design, visual arts, opera, film, etc.) as an economic resource has, over the last quarter of a century, de facto enhanced local cultures and strengthened social capital (Throsby 2001). This has led to a sort of boom in cultural fairs and festivals (Gallego Cuiñas 2022), organised through public–private partnerships, which aim to promote national creative products on an international scale. These spaces for the festivalisation of culture have become not only emblematic for commercial exchange but also agents for the appraisal of the symbolic and economic value of the cultural artefacts of states at the global level.

In view of these events, we might affirm that in the third decade of the twenty-first century we are witnessing an authentic age of transfeminist cultural productions worldwide, where the Spanish industry occupies a notable place in the fictional construction of feminist and queer imaginaries, as we will see through its presence in European fairs and festivals. The aim then of this study is to analyse the relationship between creation and gender(s) in the last decade in our country (2012–2022) within the publishing and audio-visual sector, and its impact in Europe. I will focus on two complementary issues: i) modes of creation: study of the presence of women and the trans community in the book industry (literary fiction and essays on feminist and queer themes) and in the audio-visual industry (cinema and series); ii) means of production: focus on the place of enunciation and the prevalent formats for publishing and audio-visual production and distribution of these fictions.

The methodology I have put into practice is transdisciplinary, the result of my dual training as a Spanish philologist and social and cultural anthropologist, which combines quantitative (collecting information from databases and publications and then statistically processing it) and qualitative tools (critical and transfeminist analysis of the results obtained). The transversal variables that I have applied in the filtering and processing of the information collected are: gender (feminised and trans subjects), geopolitics (the place of enunciation highlights the lack of equal opportunities in Spain as a whole) and the materialistic point of view (the importance of the material conditions of production and of the formats, depending on whether they are large conglomerates or independent). This empirical and critical research will provide us with the keys to the current state of the transfeminist fictional dispositif in Spain.

1. I prefer to use the Spanish reappropriation of the English word ‘queer’ (in English in the original, trans. note), which is very widespread in the South on both sides of the Atlantic (cf. David and Lopez 2010).
2. Here we follow the postulates of Sayak Valencia (2010), which agree on the need to go beyond the gender distinction between men and women and include non-binary and dissident subjectivities.
3. I include series in this study not only because of their high viewership, but also because they have achieved aesthetic, moral and intellectual legitimacy, as proven by their inclusion in festivals such as the Berlinale and Cannes. It is today considered the great art of the twenty-first century.
GENDER, THOUGHT AND FICTION

The scarce presence of women creators and the analysis of the role they play in the cultural industry has attracted the attention of recognised organisations such as SGAES, ICAA, CIMA and AMEIS. The reports they have published in the last decade make it clear that in the cultural industry there is also a sexual division of labour that results in women having no leadership positions, less stability, lower pay and less recognition at work (Fundación SGAES 2019, 259).

In the Spanish audio-visual industry women are a clear minority (15 to 20 per cent), except in care-related occupations such as wardrobe, make-up and hairdressing. In the publishing industry, although Spaniards are less egalitarian than the French and Germans (Marc 2022), women have a greater presence and occupy 30 per cent of positions. The material conditions of production explain why more women participate in the book sector than in audio-visual due to the lack of professionalisation in writing: a cheaper profession than filmmaking. This would also explain why this group is more gender-sensitive than publishing given that discrimination in positions and salaries is more pronounced.

The predominance of androcentric Spanish fiction has led to the creation of new textual and filmic imaginaries that include not only more women but also a feminist perspective. A movement—the so-called ‘her-story’—has been launched in institutions, universities and the cultural industry to rescue women’s stories that have been silenced. In addition, more and more directors and writers are publishing both essays and fiction, receiving awards (e.g., Almudena Grandes, Cristina Morales, Isabel Coixet and Josefina Molina) and participating in national and international fairs, festivals, congresses and workshops.

Likewise, a ‘new batch of clearly feminist-inspired media’ (Marc 2022, 11) has appeared in their themes and modes of production, rethinking the way of publishing thought and fiction from dissidence. Houses such as Traficantes de Sueños, Dos mustaches, Continta Me Tienes, Torremozas, Amor de Madre and Gafas Moradas have prepared a feminist editorial praxis. Magazines such as La Pikara and Las críticas have opened up a mass space for dissent. And the bookshops dedicated to gender (i.e., Libre Mujeres, Prólogo, Cómplice, Mujeres & Compañía, Berkana, Lila de Lilith, Louise Michel Liburuak) and the feminist book club La Tribu are also well known. However, as we shall see, the participation of women and feminist issues in the overall publishing and audio-visual industries remains low (Marc 2022, 22–23).

Feminist publications and women writers in Europe

Feminism is everywhere: it has become a form of activism, a political agenda and a market. In addition to the need to fight against patriarchal ideology and to promote equality, intersectional approaches such as those based on race, social class and religion have been included to fight stereotypes and hegemonic power relations that have been imposed on our societies for centuries. There has been a remarkable proliferation of feminist books in Spain in the last decade (2012–2022) that denounce this situation, as illustrated by the 494 works published in that time frame.

4. In 2020 CIMA published that only 19 per cent of Spanish films were directed by women that year. In terms of literary fiction, only 30 per cent of the novels published in Spain are written by women (Marc 2022, 46).
5. The word ‘feminism’ was the most searched word on Google in 2017 (Marc 2021, 1).
6. For this analysis I have worked with the Spanish ISBN Agency’s database. The search terms focused on the semantic field of ‘feminism’ and ‘gender’. See: https://www.culturaydeporte.gob.es/cultura/libro/isbn/base-de-datos-de-libros.html
leaning much more heavily towards essays than fiction. Twenty twenty-one was the year with the most works on this subject, with 164 titles, and the least was 2014, with only three, although if we had to choose a significant cut-off year it would be 2020, which clearly marks the upward growth of Spanish feminist publications, which was affected by the COVID-19 pandemic (Figure 1).

Four hundred and thirty-six of the authors of these feminist works in the decade under study were women and 81 were men. This is 84 per cent and 16 per cent respectively, which leads us to argue that feminism is still an issue that concerns more women than men (Figure 2).

As for the origin of the authors of feminist works, the cities with the greatest number were Madrid at 22 per cent, Barcelona at 18 per cent, Valencia with 5 per cent and La Coruña with slightly less than 5 per cent. As a result, the southern half of Spain is under-represented, indicating a less developed publishing industry, one which both in the case of large conglomerates and independent imprints is mostly located in Madrid and Barcelona (Figure 3).

Another of the fundamental categories for symbolically and materially apprehending feminist essays in Spain is that of the publishing houses that produce them. In total, 236 publishers have published 494 feminist works in these ten years of study, with the Madrid-based Catarata publishing house accounting for nearly 6 per cent of the total. Next, Cátedra—also located in Madrid—has published more than 3 per cent of the total, the Catalan Bellaterra and the Valencian Tirant Humanidades, slightly less than 3 per cent each, Editorial Galaxia, Universitat de Valencia, Ediciones B and Icaria, with around 2 per cent each, Planeta, Renacimiento, Trabe, Dykinson and Menades Editorial, with around 1.5 per cent each, and Comares, Destino, Libros.com, Península, Plan B, Punto Rojo Libros and Universidad de Navarra,

**Figure 1. Feminist books published by year**

![Graph showing the number of feminist books published by year](source: Prepared by the author)
with 1 per cent of the total each. The remaining publishers account for less than 1 per cent (Figure 4).

When we break down the data by year, we find that the publishers that have published the most are: Catarata, in 2012, with 29 per cent of titles; B de Bolsillo, in 2013, with 20 per cent; Arcibel Editores, in 2014, with 33 per cent; Cátedra, in 2015, with 50 per cent; Fundamentos, in 2015, with 17 per cent; Cátedra, in 2017 and 2018, with 14 per cent and 18 per cent respectively; and Catarata, in 2019, 2020 and 2021, with 16 per cent, 8 per cent and 5 per cent respectively.

Finally, to gauge the impact of feminism and of Spanish women fiction writers in Europe, we will take as a measurement—as we mentioned above—their circulation in literary
festivals and book fairs in Europe, the main gatekeepers of the production of national economic and symbolic value. Of all the European book fairs and literary festivals, the Frankfurt Book Fair has been the one with the highest proportion of Spanish women. In 2022, the year in which Spain was the guest of honour, there were a total of 63 women; and in 2021, 23 women authors. Barcelona was guest of honour city at the Paris Book Festival in 2013 and six Catalan women took part: Maite Carranza, Mercè Ibarz, Imma Monsó, Carme Riera, Alicia Giménez Bartlett and Berta Marsé.

The authors who have travelled the most to European festivals and book fairs have not been those who penned the feminist essays we have analysed, but writers of fiction: **Rosa Montero** (Turin International Book Fair 2012; Frankfurt Book Fair 2021 and 2022; Paris Ne Finit Jamais Literary Festival 2022), **Almudena Grandes** (Turin International Book Fair 2012; Festival Lit Cologne 2013), **Alicia Giménez Bartlett** (Turin International Book Fair 2012 and 2021; Paris Book Festival 2013), **Carmen Riera** (Paris Book Festival 2013; Frankfurt Book Fair 2022), **Clara Sánchez** (Turin International Book Fair 2012 and 2019; Berlin International Literature Festival 2014), **Irene Vallejo** (Paris Book Festival 2022; Frankfurt Book Fair 2022) and **Cristina Morales** (lit.Cologne 2022; Frankfurt Book Fair 2022). As we can see, most of them are also residents of Madrid or Barcelona, except for Irene Vallejo, from Zaragoza, who also won the 2020 National Essay Prize for *El infinito en un junco*. It should be stressed that the impact of Spanish feminist books in Europe is practically non-existent and that it is women writers of narrative fiction—with a greater commercial impact—who have been the focus of attraction in Germany, France and Italy. All of them have also been published by major publishing conglomerates, have won major prizes and predominantly produce detective and/or historical novels. The only case that does not meet this aesthetic premise is that of Cristina Morales, whose appearance at German festivals and fairs came after winning the Herralde Novel Prize and the National Narrative Prize with *Lectura fácil* (2018), a feminist, inclusive and dissident work.

**Feminist audio-visual creations and presence at European festivals**

We are living in the golden age of audio-visuals. First it was film and then, between 2008 and 2020, series: a renaissance of European fictional television, a consequence of the rise of streaming and on-demand services that have changed our consumption habits (Gallo González 2022, 15 and 16). In this sector, female and feminist representations have also grown enormously (Sangro and Plaza 2010), focusing on exposing situations of male violence, new forms of subjective and sexual empowerment, actions of sorority and ‘minor’, invisible and biographical stories. Even at the last 2023 Goya Awards gala, the presence of women, awards to women and feminist claims set the tone.

In the last ten years, **98 feminist-themed films, series and/or documentaries** have been shown at major European festivals and book fairs, including sidenotes:

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7. In many cases, the full programme or all the programmes of the festivals were unavailable. In several cases, information on the presence of Spanish women authors was obtained through the national newspaper websites or the Instituto Cervantes, which include some fairs, festivals and other activities with the presence of authors from Spain and Latin America or related to literature in Spanish.

8. Nor have we found any data on translations of these books into other official languages of the European Union.

9. In this decade, films and documentaries on great female figures such as Concepción Arenal, Carmen Amaya, Remedios Varo, Cristina Hoyos, Joana Biarnés, Margarita Xirgu, Ana María Moix, Isabel Muñoz, Isabella Bird, Antonia Santiago Amador, Encarna Hernández, Matilde Coral, Mary Kingsley and Maria Moliner stand out.
been released.\textsuperscript{10} Twenty-twelve is the year with the least titles—three—, while 2022 was the most fruitful year with 22 (Figure 5).

Of the 116 we collected, 65 of the directors were women, i.e. 56 per cent, and 51 were men, i.e. 44 per cent of the total (Figure 6).

If we break this data down by year, we see that the same thing happens here as in the publishing industry: as the decade progresses, fewer men and more women direct feminist works. As for the origin of these authors, the pattern of centralisation at the capitals and the marginalisation of the provincial cities,

\textsuperscript{10} To extract this data we used the Institute of Cinematography and Audio-visual Arts (ICAA) and the Spanish Film Catalogue’s databases in open access on the Ministry of Culture and Sport’s website: https://www.culturaydeporte.gob.es/cultura/areas/cine/mc/catalogodecine/descargas-catalogo.html.
less industrially developed, is also repeated, so that most directors are from Barcelona, 31 per cent, and Madrid, 20 per cent. Seville and Valencia have a lower percentage, with 5 per cent each, Bilbao, 4 per cent, and Alicante, Granada and Biscay, 3 per cent each. Unlike with books, feminist audio-visual production has a greater representation from the south, although the east and the north continue to take the lion’s share (Figure 7).

If we now look at the material support, we find that 150 production companies have participated in making this feminist audio-visual material. Spanish Public Radio and Television (RTVE) appears the most, with just over 9 per cent of the total. This is followed by Movistar Plus+, with 6 per cent, ICAA, with 4 per cent, Avalon P.C. with 3 per cent, and Atresmedia Televisión and TV3 (Televisió de Catalunya), with just under 3 per cent each (Figure 8). Once again, Madrid and Barcelona are at the centre of the production and distribution of creative artefacts in our country.

Furthermore, it should be added that of the 98 films we have collected, 16 were co-produced between Spain and another country: four Spain-France co-productions, three Spain-Germany, one Spain-Argentina-France, one Spain-Argentina-Portugal, one Spain-Cape Verde, one Spain-Cuba, one Spain-France-Bulgaria, one Spain-Mexico, one Spain-UK, one Spain-Switzerland-France and one Spain-Greece.

To conclude this section, it should be pointed out that although we have feminist films that have made a strong critical impact in this decade winning a number of awards in Spain—Snow White (2012), Carmina y Revni-
enta (2012), La novia (2015), Carmen and Lola (2018) and Cinco lobitos (2022)—it was Las niñas (2020) that won a prestigious international award at the Generation Berlinale Section of the Berlin International Film Festival. Moreover, we must bear in mind that to date there are few feminist festivals in Europe, where these products have their own, much broader coverage: Paris Lesbian and Feminist Film Festival; the Nyansapo Fest’ – European afro-feminist festival in Paris; Berlin Feminist Film Week and the Bande de Femmes in Rome.

TRANS FICTIONS IN SPAIN

Trans issues have also gained an ample amount of visibility in the media, on social media and in Spanish politics and culture since the debate on the trans law began in 2020,\textsuperscript{12} which ended with its—controversial—passage on 16 February 2023. This visibility has been reflected in the presence of trans actresses such as Daniela Santiago and Jedet who won an Ondas Award and closed the Malaga Festival in 2020.

This phenomenon began in the late 1980s and early 1990s, when fictions about the trans political subject became popular in Europe, mainly in audio-visual format and under the grotesque sign of the ‘spectacle of otherness’ (Gallo González 2022, 15).\textsuperscript{13} In our country, trans cultural recognition began earlier, at the end of the seventies, in the wake of the post-dictatorship \textit{La movida} movement and Almodóvar’s films (Vegas 2019), which linked trans to the eccentric and extravagant. Then came the cult documen-
tary \textit{Vestida de azul} (1983), on the problems of prostitution and the social exclusion of the trans/travestite subject, which opened the doors to trans fictions anchored in victimhood, social stigmatisation and voyeurism. A consequence of this is the spectacularisation of transgender people on television in the 1990s.

In the twenty-first century, with the advances in the political and social consideration of the trans subject, other representations such as that of the ‘good trans person’ have been promoted;\textsuperscript{14} a depoliticised and easily consumable image, which manages to easily integrate into heteronormative and neoliberal society. This is the case of international series such as \textit{Transparent} (2014)\textsuperscript{15} and \textit{Pose} (2018) and in books such as \textit{Las malas} (2019) by the Argentinean Camila Sosa Villada (trans. \textit{Bad Girls} 2022). This media hyper-visibility of transgender people has not led to an improvement in their quality of life, because it makes other discriminatory issues such as race and class invisible. That is to say: trans’ intersectional gaze is barely approached from the symbolic, while feminism makes more and more analyses that integrate decolonial, race and social class studies with gender studies. As we will see below, global trans fictions continue to sideline geopolitical human rights alliances and demands that denounce gender, class and race discrimination, material instability and the vulnerability of trans lives.

Trans publications and impact in Europe

The imaginaries of femininity, masculinity and non-binary genders vary over time, and the publishing industry has reflected this well. In the last half century we have witnessed a dissident

\textsuperscript{11} I use here the category of ‘trans’ in a broad sense to refer to any non-normative gender identity, along the lines of the notion of queer.

\textsuperscript{12} I am referring to the Spanish law for the real and effective equality of trans people and to guarantee LGTBI rights of 2023. The previous Transsexuality Law was enacted in 2007.

\textsuperscript{13} One only need remember the appearances on Spanish reality TV shows of the time of La Veneno in \textit{Esta noche cruzamos el Misisipi} and Carmen de Mairena in \textit{Crónicas marcianas}.

\textsuperscript{14} As in the case of other minorities: the good gay or the good black person.

\textsuperscript{15} In the case of series, I am only putting the year they were released in brackets.
turn in Spanish fiction production, which deconstructs the dominant moral values through the use of genres such as testimony, autobiography and autofiction. Elizabeth Duval’s *Reina* (2020) is a prime example of this, a hymn to aesthetic, political, moral and sexual dissidence.

If we focus on the decade under study (2012–2022), there were 126 books with trans themes, both fiction and essay. The year in which the most trans-related titles was published was 2021, with 27 works. The year with the least publications was 2014, with only three (Figure 9).

Of the 105 we found, 46 of the authors were male, 33 transgender and 26 female (Figure 10). These are 44 per cent, 31 per cent and 25 per cent respectively. So the male point of view remains dominant, even if trans authors are publishing more and more books, especially starting in 2019.16

Most of the authors are from Barcelona, Madrid and Gran Canaria: 25 per cent, 15 per cent and 9 per cent, respectively. The rest of the writers are distributed in capitals such as Valencia, 7 per cent, Seville, 6 per cent, Malaga, 5 per cent, Murcia, 4 per cent, Burgos, Cordoba, Granada, Pontevedra and Toledo, just over 2 per cent, and Cáceres, Castellón, Ciudad Real, La Coruña, El Hierro, Gerona, Huelva, Huesca, Lérida, Mallorca, Badajoz, Oviedo, Tarragona, Zamora, Zaragoza, just over 1 per cent (Figure 11).

We found a total of 68 publishing houses that put out these trans/transvestite-themed books. The two publishers with the largest number of titles are the Catalan publisher Bellaterra and Egales, based in Madrid and Barcelona. A gay and lesbian publishing house, with 21 per cent and 19 per cent of the

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16. For this second part of our research we continue to use the Spanish ISBN Agency’s database as a source. On this occasion, the search terms were: ‘trans’, ‘transvestite’ and ‘queer’.

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Figure 9. Trans/transvestite-themed books published by year

Source: Prepared by the author
total respectively. Other publishers include Anagrama, with 7 per cent, Dos Bigotes and Planeta, with 6 per cent each, Continta Me Tienes and Hidroavión, with just over 4 per cent each (Figure 12).

We did not find any trans authors or works at the above-mentioned major literary festivals in Europe. Not even of our country’s most famous trans writer, Elizabeth Duval, whose work—despite having lived in Paris—has not yet been translated into other languages.

**Trans audio-visual creations and presence at European festivals**

Since the legalisation of transgender people in Europe in recent decades, there has been a greater public interest in their lives, especially since 2014, which is when the audio-visual industry started producing the most trans fiction (Gallo González 2022, 10). As we said above, the queer political subject was shown on television and in film in the first decade of the twenty-first century from a perspective of refutation, reinterpretation and adoption of the North American paradigm of the ‘good trans subject’, which in the case of Spain is embodied by the character of Angie, who came on to the scene in 2018 on the well-known television series *Cuéntame cómo pasó* (2001) and later in *Aquí no hay quien viva* (2003) and in *La que se avecina* (2007). In the last five years, however, the way has been opened for fiction that depathologises the trans subject, as in *Paquita Salas* (2016) and *La Veneno* (2020), which explicitly denounces the symbolic and material violence exercised against this community, while criticising their instrumentalisation by the media, politically and socially. Directed by Ambrosi and Calvo and produced and broadcast by Atres Player.

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17. The series ultimately falls into the epistemology of sex change surgery (Gallo González 2022, 87).
This series shows a trans-intersectional fiction—which transcends the testimonial format, although it is based on the memoirs of Cristina Ortiz ‘La Veneno’—that questions the media’s representation of dissident subjectivities.

If we now focus on our period of study, 2012–2022, we see that a total of 42 trans/transvestite films, series and/or documentaries have been released. We found two years with only one title, 2012 and 2013. The year with the most titles was 2022, with nine (Figure 13).

In terms of the gender of the directors, of the 52 directors, 31 were male, 60 per cent of the total, 20 were female, 38 per cent, and 1 was transgender, 2 per cent. Male directors, much more markedly than in the publishing industry, dominate the modes and means of audio-visual production, access to which—due to lack of training and resources—is much more difficult for trans subjects, whose educational and professional discrimination as a social class is an indisputable fact. Male domination of the audio-visual industry is such that in the first four years of our study, in 2012, 2013, 2014, 2015 and 2021, 100 per cent were men. In 2016, 54 per cent were female, 28 per cent male and 14 per cent transgender, the only year with a transgender director and more female directors (Figure 14).

If we focus on the cities of origin of these directors, 26 per cent of them are from Barcelona, 17 per cent from Madrid, and 6 per cent from Cantabria. In smaller percentages, Bilbao, Cordoba, Murcia and Valencia, represent slightly more than 4 per cent each and La Coruña, Granada, Donostia-San Sebastián, Huelva, Jaén, Salamanca, Seville, Tarragona, Bilbao, and Zaragoza, 2 per cent each (Figure 15).

Of the total of 42 production companies that we collected from the ICAA and the Spanish Film Catalogue, the one that appears most often is the Madrid-based Suma Latina, which accounts for 7 per cent of the total, led by Javier Ambrossi and Javier Calvo, with an alternative and dissident profile. The production companies Adrián Silvestre Films, Atresmedia Cine, Atresmedia Televisión, Avalon P.C., Institute of Cinematography and Audio-visual Arts (ICAA), IZAR Films, Media Pro, Objetivo Family Producciones and Testamento PCT each had around 5 per cent. And the rest just over 2 per cent (Figure 16).

One of these films is a Spain-Cuba co-production. The Divergenti Festival Internazionale di Cinema Trans held every year in...

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18. The data in this section are also taken, like with feminist and gender audio-visual fiction, from the ICAA and the Spanish Film Catalogue.
Figure 13. Trans/transvestite-themed movies released by year

Source: prepared by the author

Figure 14. Gender of directors of trans/transvestite films (per cent)

Source: prepared by the author

Figure 15. Origin of directors of trans/transvestite films (per cent)

Source: prepared by the author
Bologna deserves mention, although it has not awarded any Spanish trans audio-visual production in recent years—some of them critically acclaimed, such as 9trans (2018), Me llamo Violeta (2019), Ellas (2020), Veneno (2020), Yo, Sirena (2021) and Rosa (2022)—and only has in its archive the aforementioned documentary Vestida de azul.

ASSESSMENT AND PROPOSALS

What is the relationship between gender, creativity and dissidence in the Spanish cultural field? In light of the data used in this research, we might affirm that feminist and dissident creation is enjoying good health in Spain, although there are European countries that have achieved higher quotas of equality in the creative sector (such as Germany) and others that have more feminist publishing and audio-visual productions (such as France) that circulate in different European languages, fairs and festivals (Zobl and Drüeke 2012).

In the case of Spain, it has become clear that it is fiction written by women, and not essays, that has had the greatest impact in the last decade in Europe through women authors’ participation at book fairs and literary festivals. Our publishing industry has more international reach than the audio-visual industry, whose presence at festivals is considerably smaller. The reasons have already been explained: there are more women in positions of responsibility in the book industry than in the audio-visual industry, and this influences the production and distribution of feminist and dissident fiction. The formula is clear: the more women managers there are, the more women published or produced. Something similar occurs with trans fiction, only in reverse: the production of dissident audio-visual works is in the hands of men who belong to the LGBTIQ+ community, such as Ambrossi and Calvo, who are the ones who are promoting and producing. Women have been left behind in this area. In fact, both in Spain and in Europe, the trans issue continues to be represented based on the (male) archetype of the trans woman—in the same way that in homosexual representations the male point of view prevailed—something that will probably change in the coming years, as has the treatment of this political subject in recent decades. For this reason, these dissident fictions currently have more visibility (more local than transnational), although not legitimacy, as shown by their scarce presence in large conglomerates, fairs and global festivals, which are the ones that appraise the world value of fiction.

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19. The festival opened in 2008, but was interrupted for a few years by the death of Luki, the festival’s artistic icon.
From a materialistic point of view, we have seen that the big conglomerates (Bertelsmann and Planeta) are the ones that guarantee impact in Europe, given that they are the ones that have published the fiction—historical and detective novels, in most cases—of the Spanish writers who have been translated the most and who have participated the most in fairs and festivals in Germany, France and Italy. The independent labels (Catarata, Dos Bigotes, Bellaterra and Egales) have published more feminist and dissident essays, but their distribution is local. In the audio-visual field, most films and series are produced on mainstream Spanish platforms that participate in the global neoliberal market (Atresmedia, Movistar+, RTVE), although alternative platforms are growing, led by the production companies Suma Latina and Adrián Silvestre Films. The state should introduce policies to support independent initiatives, both in the book and audio-visual fields.

As far as the geopolitical variable is concerned, we can see that in the last decade Madrid and Barcelona continue to be the catalyst poles of the creative industry: both in terms of authors/directors and in terms of production and distribution devices. In feminist works, Madrid is the centre that attracts the most production, while Barcelona is the centre of dissident works. This shows the need to think about public policies in the creative sector not only at the national but also at the regional level, which in some ways offset the inequalities of centre/periphery that the Spanish state suffers from. All fiction, like all knowledge, is situated, so if we aspire to an intersectional transfeminism, we must encourage the inclusion of ‘other’ sites of state enunciation.

Other public measures to be taken to ensure equality and inclusion in the creative industry include:

1. Transfeminist research centre in the creative industry, attentive to the participation of women and trans subjects there and to the imaginaries that are projected in the works.

2. Increased support for creative production by women and transgender people with a gender perspective.

3. An increase in the financial allocation to associations such as CIMA, AEMIS and MUJERES DEL LIBRO to promote networks of sociability, meeting forums, group awareness and the study of material and symbolic practices in the industry. More associations for LGBTIQ+ creation should also be promoted.

4. Increased financial support for the visibility of the artistic creation of women and transgender people through prizes, competitions and contests, especially in audio-visual.

5. Support for alternative production companies and independent publishing houses, which are the first to support dissident creation.

In conclusion: fiction creates a model of society, in which all minorities should be included. But not because fiction has to be a mirror or a window to the world, as is often said, but because it is driver of social change, i.e., for education in equality and inclusion. And for this we need to develop state policies that encourage the creation of feminist and/or dissident fictions, since these are the ones that make the alternative, non-hegemonic identities and sensibilities of our society visible. After all, fiction always tells, or should tell, the truth.
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THE TRANSLATION OF HISPANIC LITERATURE IN EUROPE, 2000–2022: FRANCE, GERMANY AND ITALY

Gustavo Guerrero

Starting with a brief historical overview of the genesis of the international translation market, this article examines the current situation of Hispanic literature in the three main translation markets of the European Union: France, Germany and Italy. This analysis takes into account the data provided by the different organisations in the book industry in these three countries, as well as the data provided by the digital tool recently launched by the Instituto Cervantes: the World Map of Translations.

Key words: translation, international translation market, Spanish, Hispanic literatures, European Union, France, Germany, Italy, twenty-first century.

INTRODUCTION

Translation is a cultural practice that has played a decisive role in the long history of the formation of a European consciousness from very early on. While it is true that the idea of Europe stems to a large extent from the religious unity imposed by Christianity during the Middle Ages, it is no less true that this idea was nourished for several centuries by the need to make exchanges of all kinds more fluid and continuous in a vast continent marked by linguistic diversity. As L.D. Reynolds and Nigel Guy Wilson show in their renowned monograph Scribes and Scholars: a Guide to the Transmission of Greek and Latin Literature (1991), the intellectual networks constituted among the European literati of the late Middle Ages, and which represent the main breeding ground from which Humanism emerges, are circuits in which the practice of translation is not only a frequent phenomenon but also a specific and specialised activity.\(^1\) Spain played a decisive role in this chapter of European history through the so-called Toledo School of Translators which, between the twelfth and thirteenth centuries, circulated accessible versions of texts by influential Greek philosophers such as Aristotle, thus favouring the convergence between the Judeo-Christian tradition and the ancient thought that laid the foundations for Renaissance culture.

The international translation market as we know it today in Europe comes from that early scene and in a way remains faithful to many of its principles, even if since the invention of the printing press and the mass production of the printed book it has been increasingly governed by political and economic interests. Let us remember that, in the sixteen and seventeenth centuries, Spanish literature was, together with Italian literature, one of those that contributed the most and the best to struc-


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turing exchanges in this market since Spain’s well-known hegemony on the European scene at that time had as a cultural correlate an unprecedented distribution of its authors and their works throughout the continent. Translations of Don Quixote and Cervantes’ works, of mystical and baroque poetry, of the theatre of Lope and Calderón, and of the picaresque and pastoral novels cross borders and languages and unequivocally influence, through their different versions, the construction of many modern European literatures.

After a decline of two centuries, Hispanic literature once again became one of the most widely disseminated contents on the international translation market approximately one hundred years ago in those turbulent times of the historical avant-garde, which gave rise to figures of world renown today, such as Federico García Lorca and Pablo Neruda. Our authors were again the undisputed protagonists somewhat later, in the second half of the 20th century, with the famous boom of the Spanish-American novel which, in the 1960s and 1970s, put the names and works of Gabriel García Márquez, Mario Vargas Llosa, Julio Cortázar and Carlos Fuentes into circulation all over the world. A second boom must be added to the first: the Spanish novelists who in the eighties and nineties flooded the European markets with their stories and were bathed in success, as was the case with Arturo Pérez-Reverte, Eduardo Mendoza and the recently deceased Javier Marías.

Twenty years later, it is worth asking what remains of those booms and what the current situation of Hispanic literature in the international translation market in Europe is. To try to answer these questions, in our brief report we will examine the presence of Spanish translations in the three countries on the continent that currently translate and publish the most foreign works and authors, namely France, Germany and Italy. We will use the data provided by the national book industry organisations in each of them to support our analysis, but at the same time we will make use of the World Map of Translations, the brand new digital tool created by the Instituto Cervantes.² Presented on 29 March in Cadiz during the 9th Congress of the Spanish Language, this platform constitutes a gigantic database constructed from the catalogues of the national libraries of different countries and other similar sources, such as the WorldCAT and the UNESCO’s Index translationum. It aims to provide a broad overview of the translation of Spanish-language literature worldwide between 1950 and 2021. For the time being, only 10 languages have been chosen in a first stage: English, French, German, Italian, Russian, Swedish, Mandarin, Japanese, Arabic and Portuguese. But the goal of the project is to add new languages in the years to come.

The transcendence of the appearance of this digital humanities tool, unique in the world, at a time when, at different Spanish institutions and in light of Spain’s presence as a guest at the Frankfurt Book Fair in 2022, the issue of the translation of our writers is once again being discussed and evaluated among academics, publishers, journalists, cultural agents and public policy makers, should be highlighted.³ The inauguration of the Cervantes platform is an irrefutable sign of this new concern and fruitfully feeds into the conversation on the subject as it not only compiles and shows the number of works translated from Spanish into different languages but also makes it possible to analyse trends, mapping the trajectory of our authors, the work of translators, the orientations of

3. See, for example, the event ‘Cartografía europea de la literatura española’ (European Cartography of Spanish Literature), the colloquium of European translators and publishers organised by the Formentor Foundation in Gran Canaria in September 2022: https://www.fundacionformentor.es/259566-2/
publishers and other relevant data. The World Map of Translations offers indispensable information for international publishers when acquiring rights to translate a given work and for public policy makers when designing and implementing translation subsidies or promotion programmes and for researchers and academics who want to study the actors and modalities of Spanish translation processes on a global scale.

THE TRANSLATION OF HISPANIC LITERATURE IN FRANCE

France has traditionally been one of the markets that most translates and disseminates foreign literature in Europe and one of the international showcases that has most frequently welcomed Spanish-language works and authors. According to the latest data from the Bureau International de l’Édition Française (BIEF) and the Syndicat National de l’Édition (SNE), around 18 per cent of French production, estimated at 109,480 titles between new releases and reprints for 2021, are translations. The contribution of translation would be some 19,706 titles per year with an average print run of 5,000 copies. These figures do not, however, reflect the full extent of the importance attached in France to the publication of foreign works and authors. First of all, let us remember that within the French publishing landscape not only have many of the major and most prestigious houses had vast international collections for many years—Galimard, Grasset, Le Seuil, Christian Bourgois, Alban Michel, Stock, Calman-Levy, Belfond and Actes Sud, among others—but also that in recent decades we have seen the emergence in Paris and in several provincial cities of a handful of publishing houses dedicated exclusively

to the translation and publication of works and authors from other languages and other latitudes—Editions Métailié, Zulma, l’Olivier, Gallmeister, le Sous-sol, le Bruit du Monde, les Argonautes… There is also an additional fact that allows us to measure the significance of the foreign section: the very strong presence of novels translated from other languages at the most commercially significant time of the French publishing year: the famous autumn rentrée. In 2021, for instance, the share of these novels amounts to 27 per cent of the offering with 142 titles out of a total of 521 novels. Finally, mention must be made of the weight of the French state’s public policy through the Centre National du Livre (CNL), which grants annual subsidies totaling €1,300,000 to French translation projects by large and small publishers in France.

According to the latest SNE data, Spanish continues to occupy a prominent position among the most translated languages in France in the first decades of the twenty-first century. Indeed, 3 per cent of the production of translated works is from Spanish, which, with some 590 titles in 2021, ranks fifth behind English (60 per cent), Japanese (19 per cent), German (4 per cent) and Italian (4 per cent) (Figure 1). The presence of Spanish and Hispanic literature is also felt in the main French publishing catalogues and in the prizes and awards won by its authors: Manuel Vilas won the Fémina prize in 2019 for his novel Ordesa, Juan Gabriel Vásquez won the prize for the best foreign book in 2022 for Una retrospectiva and, in 2023, Mario Vargas Llosa becomes the first Hispanic to be admitted to the Académie Française.

However, the position of the Spanish language in this very important market may be more fragile than it seems at first glance since, as the specialised magazine Livres Hebdo already pointed out in 2019, the translation of Hispanic novels contracted by 9 per cent between 2014 and 2018, showing a general downward trend over the last three years and which was particularly acute in 2020 with the health crisis caused by the COVID epidemic. Spanish is losing ground in France not only to English and Japanese, boosted by manga fever, but also to German and above all Italian, which has come to occupy a prominent place, to the point that Italy was the guest country at the Paris Book Fair in 2023.

The data provided by the World Map of Translations partially confirms this tendency of Spanish’s position to erode: the difference between 2004, with 144 translated literary works, and 2020, with only 72, is a drop of almost 50 per cent. However, these results should be qualified, because, as mentioned, 2020 was the year most French publishers had to cancel and reschedule foreign titles due to the pandemic. Let us add that this problem of a drop in the volume of translated works not only affects Spanish but is a more general trend that affects all foreign literature publishing. In 2018, the aforementioned magazine Livres Hebdo reported on this phenomenon in a dossier called ‘Littératures Étrangères: envies d’ailleurs’. The decline—down 8 per cent in volume—is analysed in these pages by several publishers who point to various causes to explain it. These include the overproduction of titles, the concentration of demand on a few authors, the emergence of a range of new publishing houses, the costs of translation, low sales and the difficulty of making unpublished voices known. As regards Spanish specifically, the problem mainly concerns the renewal of the French reading public, which remains loyal to the writers they already know, such as Pérez Reverte and Javier Cercas, but which, with very few exceptions, does not appear to be very curious about or have interest in younger figures or more recent authors, despite the support they often receive from critics and the media.

THE TRANSLATION OF HISPANIC LITERATURE IN GERMANY

The situation of the translation of Spanish literature in Germany is very different from in France. The volume of translated works, their percentages and the recent evolution of the German market certainly have little to do with what is happening with foreign literature in the French Republic. However, in Germany, as in France, the translation and publication of authors and works from different

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languages and cultures has a long-standing tradition. The major press and media groups (including several multinational giants), the imprints and medium-sized houses and even small independent publishers are participating in this common effort to broaden the horizons of world literature. Houses such as Fischer and Rowohlt, part of the Holtzbrinck group, publishers such as Penguin-Random House, out of the Bertelsmann group, and Piper and Berlin Verlag, out of the Bonnier group, have large collections of foreign literature and are the publishers of some of the most important authors in the Spanish-speaking world, such as Javier Marías and Isabel Allende. Translations are also published by major independent publishers such as Aufbau, Hanser and Suhrkamp. Finally, mention must also be made of small and medium-sized independent publishing houses such as the prestigious Wagenbach and the feminist publishing house Aviva. Scattered throughout Germany and its various states (Länder), foreign publishers of literature in Germany, unlike in France, are decentralised in a vast array of cities—Berlin, Munich, Hamburg, Stuttgart, Cologne, Frankfurt and Leipzig—and in many of them they can also promote authors from other countries thanks to the network of Literature Houses (Literaturhaus) that criss-cross the country.

Out of an annual production of approximately 70,000 new titles, 9,164 translations are published in Germany, i.e. 13.3 per cent of all new titles. According to data from the German Booksellers’ Association, by 2021, Spanish was, at 1.7 per cent, in seventh place of the most translated languages, behind English (62.6 per cent), Japanese (10.8 per cent), French (10.3 per cent), Italian (2.5 per cent), Swedish (2.3 per cent) and Dutch (1.8 per cent). Our percentage improves if we only take the data on the translation of novels, since there we are in fifth place, with 70 novels per year and a percentage of 2.3 per cent of the total production of fiction, behind English (2,144 novels and 69.4 per cent), French (246 novels and 8 per cent), Swedish (107 novels and 3.5 per cent) and Italian (92 novels and 3 per cent) (Table 1).8

This is a relatively stable position when viewed over the time span of the last century: in the 2000 statistics, Spanish already represented 1.7 per cent of the overall translations, and although it reached some important heights in 2002 (2.7 per cent), 2006 (2.8 per cent) and 2008 (2.6 per cent), it has never managed to break through to 3 per cent, according to data from the Booksellers’ Association. More worryingly, the association’s statistics simultaneously highlight a steady decline in the number of translations in Germany, an important trend that goes hand in hand with an overall reduction in the production of new titles from around 93,000 titles in 2013 to only 70,000 today.

In this context, Spain’s presence as a guest country at the Frankfurt Fair 2022 could not come at a better time. The programme drawn up by the Ministry of Culture and Sport (MCD) and Acción Cultural Española (Spanish Cultural Action, or AC:E), in collaboration with the Federación de Gremios de Editores de España (Federation of Spanish Publishers’ Professions), entailed various ways of promoting Hispanic literature, such as sending a good number of writers to different cities in Germany, organising meetings between Spanish and German publishers, launching a specific portal for the sale of rights—Books from Spain—and an ambitious increase in the subsidies for translation that the Ministry’s Department of Books and Reading has been offering since 1984. Indeed, the budget for these subsidies increased

and with different orientations, faithful to the principle of defending bibliodiversity.

It is too early to take stock of the results of this unprecedented effort in Germany and in the other four markets mentioned. But the information provided by the Department of Books and Reading indicates that in 2022, the year when Spain participated as Guest of Honour at the Frankfurt Book Fair, 135 new Spanish titles reached the German-language market (including Germany, Austria and Switzerland). Of these, 56 received translation grants, either from AC/E or the MCS, which represents 41.5 per cent of the total.

At the same time, the same information highlights that in 2019–2022 support was given to the translation of 142 works into Italian, followed by German (106), English (78), French (60) and Dutch (36). Outside these five markets, the Bulgarian (39), Serbian (35), Croatian (25), Arab (20) and Japanese (19) markets were also of note in terms of the number of grants awarded.

As regards the type of works and literary genre, most of the aid granted to foreign publishers (around 66.7 per cent) was to translate narrative works, followed by poetry (9.7 per cent) and then essays (8.27 per cent). Comic strips accounted for 5.7 per cent of the grants awarded, while 4.64 per cent went to plays, 3.6 per cent to children’s and young adults’ literature and 1.3 per cent to picture books.

THE TRANSLATION OF HISPANIC LITERATURE IN ITALY

The Italian market is currently the one with the most positive and promising data not only in terms of translation and publication

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of foreign authors and works, but also, and in particular, as we have just seen, in terms of Spanish and Hispanic literature. According to recent reports by the Associazione Italiana d’Editori (AIE), translated fiction increased its market share 7 per cent in 2022 and even surpassed Italian fiction, which only increased by 4.9 per cent.¹¹ Not surprisingly, among the top ten bestsellers in Italy last year, five were translated novels, one of them from Spanish: Violeta by Isabel Allende. Our language also occupies an important place among the most translated languages, ranking fourth, accounting for 4 per cent of all translations, behind English (62 per cent), French (16 per cent) and German (7 per cent). In 2022, an estimated 521 titles were translated from Spanish and, like in France and Germany, most of them were works of fiction. It should be noted that the interest of the reading public did not just hold steady, but was growing, as shown by the volume of translated works: 210 in 1997; 360 in 2010. Spain’s invitation as guest country to the Turin Book Fair in 2012 is certainly not unrelated to this good run.

Hispanic authors and works are now present all over the Italian publishing landscape and in the most diverse catalogues. If until the end of the twentieth century only two major houses were in charge of translating most of our authors—Feltrinelli and Einaudi—from the new century onwards there has been a notable diversification and a growing interest among readers, to the extent that the publishing house Gran Via appeared in 2006, dedicated almost exclusively to the translation and publication of Hispanic authors, and in 2011, the publishing house Sur was founded, which brought out translations of our modern classics, including Adolfo Bioy Casares, Guillermo Cabrera Infante, Julio Cortázar, José Donoso, Jorge Ibargüengoitia, Tomás Eloy Martínez, José Lezama Lima and Octavio Paz. At the same time, a handful of houses of different sizes and ambitions promote great contemporary voices: Guanda’s catalogue includes Almudena Grandes, Luis Sepúlveda, Javier Cercas, Elsa Osorio and Fernando Aramburu; Nuova Frontiera’s catalogue includes Mercé Rodoreda, Julio Ramón Ribeyro, Silvina Ocampo, Benito Pérez Galdós, Guadalupe Nettel, Emiliano Monge and Sara Mesa; Adelphi’s catalogue includes all of Borges and all of Bolaño; Sellerio includes Manuel Vázquez Montalbán, Sergio del Molino, Alicia Jiménez Barlett, Carlos Fonseca and Rosa Chacel; and Tropea, which organises an annual Hispanic literature festival in Asti, Piedmont, includes Arturo Pérez Reverte, Paco Taibo, Leonardo Padura Fuentes and Daniel Chavarría, among others.

This remarkable and very dynamic presence of Hispanic literature in Italy, undoubtedly comparatively greater than in France and Germany, must, however, face the difficulties that publishing in Aldo Manuzio’s homeland is currently experiencing and which were well described in the latest Associazionne Italiana d’Editori (AIE) report. Like in the other two countries analysed, there has been a drop in production, from 85,571 titles in 2021 to 76,575 in 2022, including new books and reissues. There has also been a decline in the number of copies sold in the same period for the 100 most commercially successful, including, of course, literature and fiction in translation.

SOME CONCLUSIONS AND A FEW RECOMMENDATIONS

As we have seen, Spanish and Hispanic literature continue to hold a prominent place in the three main translation markets of the European Union at the beginning of the twenty-

first century. It should be stressed, however, that in all three countries there is currently a clear downward trend in production, which will surely only be accentuated in the years to come, as the reports of the AIE and the SNE indicate. The rising cost of supplies due to inflation and the implementation of sustainable publishing policies, in line with EU commitments, are likely to entrench and accelerate this trend. The translation and publication of our authors, like that of the whole area of foreign literature, may be impacted in the short term and may in turn experience a decline such as the one which is already beginning to emerge in France. With this in mind, private and public efforts by the different actors in the industry should be combined to preserve the Hispanic share of the translation market. We recommend:

1. Maintaining and extending public policies to support translation by distributing subsidies according to the data that allows us to evaluate the position of our authors in different markets on an annual basis.

2. Trying to standardise translation grant programmes within the European area between Spain and Latin American countries that also offer subsidies for Spanish, such as Argentina’s SUR programme or Mexico’s Pro-Trad.

3. Sustaining and increasing the presence of Spain and Hispanic literature at the main international fairs and occupying the space of social media with specific communication campaigns that accompany our authors’ publication in the different countries where they are translated.

4. Continuing to make it possible for authors to travel and live abroad, as has been done through the Instituto Cervantes, and expanding their presence locally by organising meetings in bookshops that bring writers and their readers closer together in each country.

5. Periodically organising meetings between the different actors in the international sector (authors, agents, translators, publishers, scouts, public policy makers) to analyse the situation of Spanish in the European markets and implement the necessary programmes and actions to preserve and increase the presence of Spanish literature.

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IMAGE OF SPAIN, BOOK FAIRS AND CULTURAL DIPLOMACY: SPAIN AS GUEST OF HONOUR

Fernando García Naharro

The strategic importance of modern book fairs goes beyond their nature as a meeting place where 'book people' exhibit their products and show themselves in public, make transactions, exchange information and establish new contacts. These national and international events are now also physical and virtual spaces for the internationalisation of the publishing sector and cultural promotion for countries. This paper reports on this phenomenon through an analysis of Spain's participation as 'Guest of Honour' at book fairs in Europe. This programme functions as an international impact platform for the guests and with which we will see the potentialities and contradictions of Spain's image when it operates abroad, and it does so, moreover, within the specific framework of these influential events in the publishing field that move between the love of literature and economic profit.

Key words: book fairs, cultural diplomacy, literature, country image, impact abroad.

STILL A POTENTIAL POWER?

'Spain is not a great cultural power yet, but it has all the ingredients to become one. With these words published more than twenty years ago today Guillermo Adams (CEO of Nearco) summed up his argument that Spain was a potential cultural powerhouse. He based this assertion on what Spain had—in terms of historical heritage, language community and cultural influence—as well as on everything it still could exploit; for example, he said, the opportunities offered by Europe, which the country was still far from knowing how to take advantage of.1 Today, more than two decades later, Spain is a medium-sized power with specific weight in the European Union: the fourth largest economy in the Eurozone with a global language. It is a country fully engaged in advancing a European policy agenda that is also in line with its own objectives. In this regard, on the occasion of the Spanish Presidency of the Council of the European Union (1 July–31 December 2023), Pedro Sánchez (president of the Spanish government) has reiterated Spain’s commitment to seek new partners for the Union, especially among those countries with which we share values. The EU–Community of Latin American and Caribbean States (CELAC) summit, which will be held during the Spanish presidency and which has not met since 2015, as well as the planned summit focused on the Southern Neighbourhood are examples of this intention to forge new alliances that will benefit both the EU and the 450 million European citizens.2

2. European tour in preparation for the Spanish presidency of the Council of the European Union (https://www.lamon...
This dual leadership between America and Europe marks Spain’s particularity in its international policy. However, during the Spanish presidency of the Council, stimulating Europe’s open strategic autonomy will also be a priority, with a road map based on four areas: energy, health, the primary sector and emerging technologies. These key areas are also present in the exercise of exploring Spain’s future possibilities that the National Office of Foresight & Strategy out of the Spanish Presidency published in 2021. The report Spain 2050. Fundamentals and Proposals for a Long-Term National Strategy identified nine major labour market, social and environmental sustainability challenges that Spain should address to consolidate its position among the most advanced countries in Europe. The report also highlighted Spain’s current achievements and strengths, placing it at the forefront—at the European and even world level—of quality of life and the competitiveness of its tourism sector but also in the number of monuments and World Heritage Sites, making Spain an influential cultural power globally. According to data from the Elcano Global Presence Reports, Spain’s ‘soft’ exchanges (mainly based on tourism but also in the areas of culture and science) have shown the greatest vitality over the last two decades. Despite the contraction experienced between 2020 and 2021, Spain’s cultural dimension continues to appear in these reports as an asset among the country’s channels to produce impact abroad.


ones. Others, on the other hand, consider, as Elizabeth Duval does in her personal reading of the *Spain 2050* report, that to overcome this supposed generalised gloominess, the key may lie in ‘ceasing to resemble the image that others have built of us and that we ourselves have contributed in some ways to spreading.’

In this exercise of rethinking and repositioning Spain’s image, in the pages below we will analyse the country’s cultural impact in specific high visibility events with a major social and economic impact: book fairs. We will specifically analyse those European book fairs that have the figure of the ‘Guest of Honour’ country, a cultural and economic showcase where writers, publishers, translators and artists become spokespersons and ambassadors of the country’s brand image. The aim of this report will be to describe and evaluate the image(s) or idea(s) of Spain that are articulated and then conveyed in these cultural events of spectacularisation and commodification of the book.

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**SPAIN IN EUROPE: POTENTIAL OF THE SPANISH BOOK INDUSTRY**

Undoubtedly, culture has played—and continues to play—an essential role in the whole process of building the identity of nations. Popular concepts such as ‘emotional elective affinity’ (Jessica Gienow-Hecht) or ‘soft power’ (Joseph Nye) remind us that everything from travel stories to sports and music can provide explanatory clues to the old story of international relations. Even so, the word culture is still surprisingly absent (or adjectivised as corporate, lobby, entrepreneurial or influence culture) in the final product—also motivated by the Spanish presidency in the second half of 2023—of the project *Ecosistema y cultura de influencia de España en Europa (Spain’s Ecosystem and Culture of Influence in Europe)* by the Elcano Royal Institute: the book *La influencia de España en Europa (Spain’s influence in Europe)*. In this publication, ‘hard power’ once again eclipses ‘soft power’ despite the fact that in practice...
culture, tourism, education and sport (with men’s professional football as king) are Spain’s most recognisable strengths in the world.

If Real Madrid is the most cited Spanish institution outside Spain, the names of Rosalía (winner of two Grammy Awards for Best Latin Alternative Album), Quevedo (first Spaniard to reach number one on Spotify Global), Rodrigo Sorogoyen (winner of the French Film Academy’s César), Carla Simón and Sofía Otero (winners of the Golden Bear and Silver Bear at the Berlinale, respectively) are today also assets in Spain’s impact abroad, in the world and in Europe. Alongside these and other classic examples of ‘illustrious ambassadors’ of the Spanish brand, the Spanish publishing sector continues to spearhead Spain’s modest cultural industries as a whole. The flagship of Spanish culture—in the words of Manuel Gil and Manuel Ortuño—which annually shows its potential both in overall production figures (with an upturn in 2021, reaching 92,722 books published and 90,379 first editions (Anuario de Estadísticas Culturales (Yearbook of Cultural Statistics) 2022 | Book, 338) as well as in linguistic richness, with publishing production in Catalan generally more focused on ‘Children’s and Young Adult’s Books’ and ‘Social Sciences’ and ‘Humanities’ than on ‘Literary Creation’, as is also the case with publishing in Basque and Galician, where textbooks play a predominant role.

In global terms, Spain remains the leading market for Spanish-language content and the main market publishers from other languages turn to when approaching Spanish. Foreign recognition of Spanish publishing and literary production continues to be boosted by the translation grant programmes run by central and regional bodies (Dirección General del Libro y Fomento de la Lectura, Acción Cultural Española (AC/E), Institut Ramon Llull, Xunta de Galicia, Institut Etxepare, Institut D’Estudis Balears and Generalitat Valenciana) and by the international circulation of authors who, as we shall see, are the main attraction at Spain’s cultural programmes as ‘Guest of Honour Country’ at book fairs.

However, the Spanish publishing world has also suffered from the upheavals of the historic times we have lived through: during the 2008–2013 crisis, the sector suffered a marked recession from which it only slowly recovered with the help of the Organic Law for the Improvement of Educational Quality (LOMCE) and the sale of textbooks. In this regard, the statistical publications of both the Federation of Spanish Publishers’ Professions (FGEE) and the National Statistics Institute (INE) and the Ministry of Culture show that according to the overall data on publishing in Spain by 2019 the figure for book production in all media had not recovered its numbers of a decade ago (Figures 2 and 3).

Then came the COVID-19 pandemic and, against all odds, the book sector held up, even ending 2020 with a 0.8 per cent increase in domestic trade figures. These figures, however, have not been matched in the foreign market, which has been strongly conditioned by the drift of the Latin American markets to which Spain is closely tied. In terms of the

export of bibliographic content, Spain consolidated its position in the 1990s as the main supplier of books throughout Latin America, exporting mainly books classified as ‘Generalities’ and books on ‘Religion’ and ‘Education’. However, in the last decade and at a global level, subjects such as ‘Literature’ and ‘Social Sciences’—or, more recently, ‘Scientific and Technical Books’ and ‘Children’s and Young Adult’s Books’—have been occupying the top positions in book exports, mainly to Latin America, the United States, Portugal and France. In this way, European markets have also become loyal customers, while the growing importance of Spanish in the US
market opens a window of opportunity yet to be exploited (Figures 4, 5 and 6).14

Figure 4. Spain: percentages of global book exports by subject matter (2019)

![Percentage of Global Book Exports by Subject Matter](image)

<table>
<thead>
<tr>
<th>Subject Matter</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Literature</td>
<td>15.74%</td>
</tr>
<tr>
<td>Children and YA</td>
<td>8.13%</td>
</tr>
<tr>
<td>Non-university education</td>
<td>11.26%</td>
</tr>
<tr>
<td>Social sciences</td>
<td>10.83%</td>
</tr>
<tr>
<td>Law and economics</td>
<td>6.41%</td>
</tr>
<tr>
<td>Popular</td>
<td>2.69%</td>
</tr>
<tr>
<td>Self-help</td>
<td>1.24%</td>
</tr>
<tr>
<td>Religion</td>
<td>1.24%</td>
</tr>
<tr>
<td>Dictionaries and encyclopaedias</td>
<td>4.13%</td>
</tr>
<tr>
<td>Comics</td>
<td>0.23%</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>0.41%</td>
</tr>
</tbody>
</table>

Source: Comercio exterior del libro 2019 (Foreign book trade 2019), FEDECALI, 2020

Specifically for the European area, France continues to represent the main destination; the country where most exports are to of subjects such as ‘Social Sciences’, ‘Literature’ or ‘Non-University Education’, which are also the main subjects sent to other export hubs such as Portugal, Italy and the United Kingdom—which, despite its leaving the European Union (31 January 2020), continues to be an important destination for Spain in the European area. In the German case, however, the low penetration of ‘Non-University Education’ shows very different percentages from other European countries. In the last decade, around 80 per cent of the Spanish production exported to Germany were ‘Literature’ and ‘Social Sciences’ books, with a strong presence of Spanish language learning books: according to data from the Association of Spanish Book Chambers, at least from 2009 to 2018 around 80 per cent of the ‘Social Sciences’ books shipped were Spanish language learning books. In the case of 2018, this figure was 87 per cent.15

However, learning a language and reading literature are two very different things. Among German schoolchildren, perhaps the best-known contemporary Spanish writer is still Manuel Rivas. The brevity of his novel *A língua das borboletas* (1995) and the existence of a film adaptation of the text may explain its persistence in the German school system. Outside of the classroom, the names of Javier Marias and Carlos Ruiz Zafón are today among the most recognisable, alongside those of Arturo Pérez-Reverte, Rosa Montero and Almudena Grandes.16 Other names such as Jesús Carrasco, Fernando Aramburu and Antonio Muñoz Molina were also on the lips of German visitors at the last Frankfurt Book Fair before the pandemic17 and were later on the list of authors invited by the organisers of Spain’s literary programme as Guest of Honour at the Frankfurt Book Fair 2022. A propitious event—as pointed out in the Report on the State of Culture in Spain 2021—to showcase the potential of our book sector, but not only. It also projected a certain image of the country in Europe on the occasion of the 31st anni-

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versary of Spain’s emblematic participation as a guest at the fair in 1991.

CULTURAL DIPLOMACY: SPAIN’S PRESENCE AT EUROPEAN FAIRS

‘What better place than the Frankfurt Book Fair to demonstrate the communicative importance that books have acquired throughout history as a vehicle for the social and cultural identity of a country’.\(^\text{18}\) This is how Federico Ibáñez Soler, the then Director General of Books and Libraries, justified Spain’s ambitious bid to be the guest country and thematic focus at the prestigious

German fair in 1991. It was ‘La Hora de España’, as the slogan of the fair put it, and the fair represented a magnificent international showcase to standardise the country’s image abroad. However, the new realities of a nation that looked to Europe from the democratic experience of freedom did not translate directly into renewed images of the country: the Spanish pavilion was then decorated with red curtains which, in combination with the sand that covered the floor of the hall, contributed to evoking prototypical images—that of the beach and the bullring—among the attendees and accredited media who, however, according to the reports, received with greater enthusiasm the portrait of Francisco de Quevedo that served as the official logo.

In the set of images and perceptions linked to Spain, both the sun and the beach and the historical (be it real or distorted), literary and heritage legacy of the country retained—and still retain—enormous specific weight, making the latter symbolic and cultural elements the main substratum of the expressive aspect of the country’s image. In terms of exhibitions, Spain offered in Frankfurt a journey through the different historical periods of Spanish literature through a bibliographic exhibition—Letras de España—with representative literary titles from the Middle Ages, Baroque, Enlightenment, Modernism, Avant-garde, War and post-war, Democracy and Spain today. These volumes were intended to function as a mirror of the literary wealth that this immemorial Spain had contributed to universal culture, but also of the rich variety of titles that the Spanish publishing industry of the early 1990s had to offer. An example of this was the 80 Spanish writers—mainly narrators and novelists—chosen to come to Frankfurt, whose selection was based on whether they already had a work translated into German or were being translated. Many of these authors, such as Rafael Alberti, Eduardo Mendoza and Juan Goytisolo, were published in Germany by Suhrkamp through Michi Strausfeld, who, together with Walter Haubrich, the correspondent for the Frankfurter Allgemeine Zeitung in Spain, was an expert adviser to the Spanish candidacy.

Broadly speaking, the model of the Frankfurt exhibition experience has been replicated in subsequent years of Spain’s presence at book fairs: bibliographic displays accompanied by travelling exhibitions and explanatory panels together with a representation of renowned Spanish authors and creators. A mixture of tradition and modernity which, together with the use of the dichromatic scheme—red and yellow—typical of the national flag to decorate the pavilions and stands, have largely shaped the aesthetic appearance of Spain at these fairs, where books have served as a source of content at the service of national (self-)representation. Both living books and culturally marked archetypal resources and symbols have travelled with Spain from fair to fair, although it is true that the economic investment and logistical efforts made by the country in each of them—as well as the size of the exhibition spaces available to Spain as ‘Guest of Honour Country’—are far from the same from one fair to the next.

The above table shows that Spain participated more as ‘Guest of Honour’ in European book fairs in the first decade of the twenty-first century. Among the most notable presences was Spain’s participation in the 42nd Bologna Children’s Book Fair (2005), the most important fair of its kind internationally, where the leading role was played by the
different adaptations for children of Miguel de Cervantes’ masterpiece, which gave shape to Don Quixote for children, yesterday and today. A bibliographic exhibition of more than 100 titles which, in that ‘year of Don Quixote’ (4th centenary), shared space at the Spain stand with the exhibition Ilustrísimos: Panorama de la ilustración infantil y juvenil en España (Illustrious: Overview of illustration for children and young people in Spain), where the most recent work of 73 Spanish illustrators (or living in Spain) in children’s and young adult’s books was shown. A year later and in the wake of the recent presence of Spain as guest of honour at the 13th Budapest International Book Festival (2006)—a year in which Jorge Semprún was awarded the Budapest Grand Prize—the Spanish Ministry of Culture and the Directorate General of Books, Archives and Libraries organised, in this case in the exhibition hall of the Instituto Cervantes in Budapest, the Exhibition History of the Spanish Book, a 32-panel journey through the history of the book in Spain, from the 11th century codices to the advent of the digital book, including a monographic section devoted to the 400 years of editions of Don Quixote.

In 2007, Spain was presented at London’s Earl’s Court as a ‘Market Focus’ at the London Book Fair (England), one of the major professional fairs on the European scene. There, Spain once again opted to base its cultural image on its rich literary heritage: on this occasion, the exhibition Letters from Spain

Table 1. Spain as guest of honour at book fairs in Europe (2005-2022)

<table>
<thead>
<tr>
<th>Book Fair</th>
<th>Dates</th>
</tr>
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<tbody>
<tr>
<td>42nd Bologna Children’s Book Fair</td>
<td>13 to 26 April 2005 (Italy)</td>
</tr>
<tr>
<td>13th Budapest International Book Festival</td>
<td>20 to 23 April 2006 (Hungary)</td>
</tr>
<tr>
<td>37th London Book Fair</td>
<td>16 to 18 April 2007 (England)</td>
</tr>
<tr>
<td>14th International Book Fair and Literary Festival Book World Prague</td>
<td>24 to 27 April 2008 (Czech Republic)</td>
</tr>
<tr>
<td>La Comédie du livre Montpellier</td>
<td>22 to 24 May 2009 (France)</td>
</tr>
<tr>
<td>15th Göteborg Book Fair</td>
<td>24–27 September 2009 (Sweden)</td>
</tr>
<tr>
<td>19th Bookfest International Book Fair Bucharest</td>
<td>9 to 13 June 2010 (Romania)</td>
</tr>
<tr>
<td>39th International Bande Dessinée Festival de Angoulême</td>
<td>26 to 29 January 2012 (France)</td>
</tr>
<tr>
<td>25th Turin International Book Fair</td>
<td>10 to 14 May 2012 (Italy)</td>
</tr>
<tr>
<td>43rd Brussels Book Fair / Foire du Livre de Bruxelles</td>
<td>7 to 11 March 2013 (Belgium)</td>
</tr>
<tr>
<td>17th Non/fiction International Book Fair</td>
<td>25 to 29 November 2015 (Russia)</td>
</tr>
<tr>
<td>73rd Frankfurt Book Fair</td>
<td>19 to 23 October 2022 (Germany)</td>
</tr>
<tr>
<td>38th Slovenian Book Fair</td>
<td>22 November to 4 December 2022 (Slovenia)</td>
</tr>
</tbody>
</table>

Source: Prepared by the authors based on reports from the Instituto Cervantes and the Spanish Ministry of Culture and Sport’s Book Fair Programme.
configured its itinerary on the basis of ‘photographs of the EFE Agency from the beginning of the twentieth century to the present day, structured in four sections: “Books and Readings”, “Twentieth Century Literature”, “Literature of Today” and “Anglo-Saxon Hispanists”’. At the same time, from the 89 m² stand decorated in the colours of the national flag, the professional visitor to the fair could watch an audio-visual summary of the main cultural attraction of the Spanish programme: the exhibition of printed books and manuscripts *Anglo-Hispanic: Cinco siglos de autores, editores y lectores entre España y el Reino Unido (Five Centuries of Authors, Publishers and Readers between Spain and the United Kingdom)*, located outside the exhibition centre, in the Old Hall of Lincoln’s Inn, and curated by professor Fernando Bouza. In it, the section ‘Myths and Themes’ once again recovered those ‘great characters created in Spain—stated Rogelio Blanco Martínez, the then Director General of Books, Archives and Libraries of the Ministry of Culture—or in the United Kingdom, but definitively established in the collective imagination, such as Don Juan, Don Quixote, Lazarillo, La Celestina, the picaro, Hamlet, Ossian, etc.’. Recognisable symbols and themes, as well as major milestones and consolidated literary values are once again the basis of an exhibition which, however, also took into account in its programme of events what was happening at the time on the cultural scene in Spain.

‘At this year’s fair you can create your own impressions of what’s happening in Spain at a cultural level, away from the tourist traps and myths of the remote, isolated and picturesque country of bullfighting and flamenco’. With these words, Ken Benson, Professor of Spanish at the University of Gothenburg, encouraged visitors to the *15th Göteborg Book Fair (24–27 September 2009, Sweden)* to attend the programme of seminars which, on the occasion of the presence of Spain and the Spanish language as guests of honour, took place at this important cultural event which, ironically, opened with a flamenco show by the group Arte flamenco accompanied by Sevillian dances and Spanish wine. On this occasion, in addition to the traditional exhibition of new books at the Spanish stand (240 m² on this occasion) and the participation of 30 Spanish authors—Olvido García Valdés, Rosa Montero, Rafael Chirbes and Javier Marías, among others—and eight Latin American authors, visitors to the fair also had the opportunity to see two exhibitions of illustrations related to Spanish books: *De imágenes, libros y lecturas (On images, books and readings)* and *Ilustrísimos: Panorama de la ilustración infantil y juvenil en España.*

In terms of publishing genres, the most notable presence of Spanish comics took place in 2012 at the *39th International Bande Dessinée Festival de Angoulême (France)* with the exhibition *TEBOS: una España de viñetas (COMICS: A Spain of cartoons)*, curated by Álvaro Pons. An exhibition with original drawings by artists such as Rubén Pellejero, Bartolomé Seguí, Juanjo Guarnido and Paco Roca was also on display at the *43rd Brussels Book Fair (2013)* when Spain was ‘Guest of Honour’—the second guest country in the history of the fair—with a line-up of writers with names like Carmen Posadas, Rosa Montero and Javier Cercas (guest of honour at the fair)
and a literary programme in keeping with the fair’s annual theme—on this occasion, mysteries—in which, perhaps to give the people what they want, one could also find ‘a round table on the ethics of bullfighting with the participation of the philosopher Fernando Savater’.  

Two years later, several videos of the exhibition Tapas. Spanish Design for Food organised by Acción Cultural Española (AC/E) served as a pairing for the exhibition of nearly 40 books on Spanish cuisine that Spain brought to Moscow—together with the at this point well known Ilustrísimos and Bibliografía española en imágenes—on the occasion of the 17th Non/Fiction International Book Fair (2015), one of the most important events on the Russian Federation’s publishing scene. On this occasion it was not Spain that was the guest, but ‘a whole language and the kaleidoscope of its literatures, as guest of honour’, coinciding with the celebration of the Dual Year of the Spanish Language in Russia and the Russian Language in Spain. Then, at the 35 m² stand dedicated to Spain in the joint pavilion ‘Spanish Language and Literature in Spanish’, around 350 books were exhibited, including novelties, award-winning works and titles by the nine Spanish authors invited—including Ángeles Caso, Fernando Marías and Juan Madrid—together with the latest editions of Don Quixote and various books on Cervantes. 

In recent years, these have continued to be the usual scaffolding used to construct the image of the country to be conveyed at these events, where literary, cultural, economic and political interests converge. In this respect, however, Spain’s recent participation as ‘Guest of Honour’ at the Frankfurt Book Fair 2022 has been a real turning point. Despite the climate of war in Ukraine and the dying embers of the pandemic, being ‘Guest of Honour’ in Frankfurt was a great opportunity to show Europe and the world—in the words of its commissioner, Elvira Marco—‘the pillars of Spain’s project’: the importance of the country’s linguistic plurality, as well as its diversity and its firm commitment to values such as gender equality, sustainability and the fight against climate change. Pillars, all of them, behind a visual and conceptual identity—which was translated into the slogan ‘Spain, overflowing creativity’—and a project on which work had been underway since 2019 under the direction of the Spanish Ministry of Culture and in coordination ‘with the book sector and with all the institutions dedicated to the promotion of Spanish language and culture’. 

We are talking about a trade fair ‘with 93,000 professional visitors, 87,000 private visitors, 4,000 exhibitors from 95 countries, 6,400 media representatives and 104,000 users of its website (buchmesse.de)’. If the success of Spain’s presence as ‘Guest of Honour Country’ at the Frankfurt Book Fair 2022 can be measured only by its activity as a media product, first of all, it would be necessary to look at the content that Spain generated for the media: a volume of information that, according to estimates for October 2022 and translated into market prices, would be around €60.8 million. But it could also be measured in the 104 Spanish titles translated into Ger-

man between 2019 and 2022—with the support of the translation programmes launched or bolstered due to the Spanish presence in Frankfurt—or in the warm welcome given by both media and attendees to the more than 180 invited creators, members of a Spanish delegation that brought together, once again, established names (such as Rosa Montero, Antonio Muñoz Molina, Eduardo Mendoza and Enrique Vila-Matas) and highly translated ones (such as Arturo Pérez-Reverte),—some of them honoured, such as the dearly departed Javier Marías, Almudena Grandes and Carlos Ruiz Zafón—accompanying the new voices—such as Elvira Sastre, Cristina Morales, Irene Vallejo and Jesús Carrasco—often chosen from among those with more recent translations.

A creative and digital Spain, multilingual, inclusive, diverse and sustainable, which, although it fly the flag of gender equality, avoided resorting to the national two-colour in favour of an abstract polychrome reflected in the aesthetics of the 2,000 m2 of the pavilion and in the ‘S’ of Spain itself—in translation or as if it were read from abroad—which served as the official logo. New sensibilities to represent a Spain that looks to the future ‘with several languages, that unites towns and cities; its people’ and that, as its Manifesto #Generacióndel22 (#Generationof22) stated, ‘connects with Latin America’ with which it shares a language and a common project to make the ‘Spanish Language’ an economic power as well.\(^1\) Values defended in Frankfurt through institutional presences at the highest level—the King of Spain, Felipe VI, the Minister of Culture and Sport, Miquel Iceta, and the First Vice-President of the Government and Minister of Economic Affairs and Digital Transformation, Nadia Calviño—and which, as could not be otherwise, are fully in line with the European and national political agenda that Spain will defend during the Spanish Presidency of the Council of the European Union.

**CONCLUDING REMARKS (AND PROPOSALS)**

The above shows how, beyond the role that the major international book fairs—as well as the rest of the ecosystem of national, regional, local or specialised fairs—play in publishing and in the book value chain,\(^2\) these polysemic events also deserve to be observed from the perspective of the cultural policies that are deployed in them. Culture has long since ceased to be a trivial issue and has become a strategic value in a country’s interventions abroad.

1 **Book fairs as platforms for promoting culture**: the model of entertainment that has prevailed for decades in the world of the cultural and creative industries also demands that book fairs increasingly become places of entertainment where people go to buy and sell. At many of these fairs, which today are already ‘hybrid’ (with their classic face-to-face aspect but also with sophisticated online developments) and ‘intelligent’ (where triggering emotions is an integral part of their promotion and sales model), the figure of the ‘Guest of Honour’ country has become a valuable cultural promotion tool available to countries both to present themselves internationally and to open up new

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markets. However, as we have seen, not all fairs are the same nor are the economic investments and logistical efforts made by Spain the same from one fair to the next. For this reason, and to have a continuous and balanced presence abroad, they must be analysed and a plan of action at fairs should be drawn up under the same strategy of cultural interventions abroad. This requires greater fluidity—and transparency—in the flow of information between the institutions with responsibilities in this area (ministries, embassies, AC/E, Instituto Cervantes, etc.). At the same time, a decision must be made, and fast, about what image of Spain is to be conveyed and how to deal with the persistent sun&sand stereotypes and clichés of the past. To a large extent, the achievement of the goal will depend on the diagnosis and follow-up.

2 Conjugate Spain’s plurality in its impact abroad: In Spain, regional/sub-state characteristics are decisive. This maxim makes it essential to integrate this diversity so that the global image of the country has these nuances clearly marked when it comes to projecting itself to the outside world. In theory, this seems to have been taken to heart: the Culture 2020 Plan (March 2017) was based on the premise of taking Spain’s multicultural richness as the starting point for strengthening its image abroad. At the same time, when Spain was still taking its first steps to prepare its participation in the Frankfurt Book Fair (originally planned for 2021), it presented itself at the 2019 fair under the slogan of ‘Spain, A Country of Multitudes’. Then, from a small space attached to the stand of the Federation of Spanish Publishers’ Professions (FGEE), the Spanish representatives put together a programme of activities based on commemorations—the 70th anniversary of the lecture given by José Ortega y Gasset in 1949 at the Freie Universität Berlin and the 80th anniversary of ‘Philosophy and Poetry’ written by María Zambrano in her exile in Morelia, Mexico—and thematic focuses dedicated to feminism, the environment and the challenges of translation and contemporary publishing. Then, as we know, the COVID-19 pandemic changed everyone’s plans and Spain decided to postpone its visit to Frankfurt until 2022. However, one year before it was launched, the opening table of the Pressekonferenz zum Ehrengastauftritt of 2021 was made up of the writer and journalist from Cádiz Elvira Lindo, the writer from Gasteiz Karmele Jaio, the Spanish writer of Moroccan origin Najat El Hachmi and Rosa Montero herself, all of them interviewed by the Radio Nacional journalist (RNE), Laura Barrachina. It was certainly a statement of intent of what was to come.

3 Need to take risks. Working on the visual identity and the presentation of Spain’s stand or pavilion as ‘Guest of Honour’ country should always be done in accordance with the programme and with the image of the country to be (re)presented but also in tune with the sensitivity of an era that makes managing visibility a key issue: renew and differentiate yourself or die. However, as this report reflects, Spain’s usual trend has been just the opposite; that of opting for traditionally safe and recognisable values—not free, however, from their own connotations—even in terms of the aesthetic configuration of national presences at book fairs abroad. This is an idea that, although it has been consistent along its his-

tory, has not been entirely in keeping with the goal of showing a more up-to-date image of the country. Without denying, by any means, the legacy of Don Quixote—the most translated work written in Spanish in the world, adapted into 140 languages—and Spain’s literary heritage, Spain already has established literary authors and important figures in the world of contemporary Spanish culture whose international impact should serve as a stimulus for other names beyond those of Cervantes, Dalí, Lorca and Machado to be heard abroad. In this sense, the ‘Spain, Overflowing Creativity’ project has been a breath of fresh air. Only time will tell how the visual and conceptual identity created for Spain will fare at the Frankfurt Book Fair 2022. After the Spanish presence as ‘Guest of Honour’ at the 38th Slovenian Book Fair (22 November to 4 December 2022) and at the 46th Kolkata Book Fair (31 January to 12 February 2023, India), which will return to smaller exhibition spaces and the traditional book display—300 to 500 books and cultural magazines representative of current Spanish publishing—even, it will be in 2024, with the presence of Spain as ‘Guest of Honour’ at the 37th Guadalajara International Book Fair (30 November to 8 December 2024, Mexico), when we will be able to test the true weight and strength of the Spain of the Generation of ‘22 and of its cultural horizon as a country.

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SECOND PART
INDUSTRY AND CROSS-CUTTING PERSPECTIVES
VIDEO GAMES IN SPANISH AND THEIR PRESENCE IN EUROPE

Víctor Fernández Fernández

Video games are one of the largest entertainment industries, with a global turnover that in 2021 will have outpaced cinema and music—$175,000 million according to a study by the specialised consulting firm Newzoo—and the first option for audio-visual leisure internationally. Only the growth from 2017 to 2021 is comparable to the total size of the music industry. And the future looks even brighter. The Spanish government forecasts that by 2024 that figure will hit €2,300 million, according to data offered by eleconomista.es in February. A very general description of video games is that they are an interactive entertainment-oriented application that allows simulated experiences on an electronic device through the use of certain controllers or controls. It is interactive because it requires the active participation of a user/player and is a resource of unquestionable value for enhancing education and culture through any number of applications. In the field of education, it encourages students to communicate, to work on teams, to embark on scientific, technological and/or artistic careers, and it is a very effective tool particularly in the dissemination of languages. In this report we will take a closer look at the Spanish video game industry, which is turning heads in Europe thanks to its creativity, talent and quality with a wide variety of projects. We will also take a look at the current European landscape and identify the challenges it faces by looking at the CEFR (Common European Framework of Reference for Language) countries’ best practices.

Key words: video games, culture, identity, social impact, community, gamification, representation, diversity.

ANALYSIS OF THE CURRENT LANDSCAPE OF THE VIDEO GAMES INDUSTRY IN SPAIN

The digitalisation of the video game sector and the adaptation of new business models in Spain has meant constant growth in recent years. However, it is still a young and developing industry that lags far behind Poland and France. The latter two, together with Italy, are the European centre of creation with a plethora of ideas, tools, resources and development capacity.

According to data published in the Libro Blanco del Desarrollo Español de Videojuegos 2022 (White Paper on Spanish Video Game Development 2022), the Spanish video game market, in 10th place internationally in sales volume, is the 5th largest in Europe, a region that increased its player base by 8.3 per cent from the previous year (Figure 1).

This ranking is close to the fourth position of Spanish as most used language according to the Instituto Cervantes in its El español en Europa (Spanish in Europe) collection, with 8 per cent of native speakers, after German (20 per cent), French (15 per cent) and Italian (13 per

cent), excluding the United Kingdom, ‘with which English accounted for 13 per cent’. France, Germany and Italy are the countries with the most students of Spanish in Europe, five million people across the continent.

The predominant language in video games created in Spain is English (100 per cent), followed by Spanish (eight points less at 92 per cent). The internationalisation of video games in a global market means that the ma
majority of productions are available in other languages to facilitate the entry of games in all countries, eliminating a possible language barrier, as is the case of French and German with 59 per cent and 56 per cent respectively (Figure 2). Special mention should be made of video games localised and translated into the different official languages of Spain, with Catalan (25 per cent) being the second language most used after Spanish according to data published by DEV.

Since 2020 the number of companies in Spain has increased by more than 15 per cent. There are currently 760 studios, 605 legally established and constituted (445 of which are active) and 315 that are developing a project but are not yet constituted according to the latest published report of the White Paper on Spanish Video Game Development 2022 by the Spanish Association of Video Game Development (DEV). Most of these companies are in the autonomous communities of Catalonia, Madrid, Andalusia and Valencia.

Although we are still far from reaching the sales Spanish studios achieved in Europe pre-2013 (Table 1) and, despite how hard it is to find concrete data, there has been a noticeable increase in turnover of 20 per cent since 2020, hitting €1,326 million in 2022. According to DEV’s annual survey of Spanish studios, the forecast for 2022 is around 1,618 million, 1,941 million in 2023 and some 2.3 million in 2023.

As the number of companies and turnover increases, there has also been an increase in both direct employment (10,616 if we include freelance contracts) and indirect employment (4,912). And the most important and significant thing is that these jobs are not only skilled—only 3 per cent are workers who lack formal training—but also young, since more than half of the new workers, 52 per cent, are under 30. Perhaps due to their youth, only 32 per cent have been with the company for more than seven years.

As stated by the Minister of Industry, Trade and Tourism in the Introduction to the Spanish Video Game Association’s Yearbook 2021 La Industria del Videojuego en España en 2021 (The Video Game Industry in Spain in 2021), ‘the Government and the Ministry of Industry, Trade and Tourism is aware of the importance of the sector, which in Spain is a powerhouse of the digital content industries. Its strategic nature has been included in the Recovery, Transformation and Resilience Plan under component 25 Spain Audio-visual Hub of Europe ‘Spain AVS Hub’, an ambitious agenda to position Spain as an international nexus for audio-visual content production, as well as in the video game industry from a broad and integrating perspective, which therefore includes video games and digital creation’.

Since its creation, a series of initiatives have been presented to stimulate the video game and esport industry, such as open meetings with professionals and investors, informative talks on grants and funding, etc., which have garnered interest in the industry and are gradually beginning to bear fruit. Activision’s purchase of Digital Legends, which opens the door to Spanish development of mobile versions of Call of Duty, is one such example.

We are also witnessing new launches that have become success stories in Europe, some of which previously came from crowdfunding campaigns, one of the funding sources (Figure 3) chosen by Spanish studios.

Titles such as Blasphemous, Mika, Gris, Castlevania Lords of Shadow, RIME, Metroid Dread, Metroid II: Return of Samus, Commandos and Commandos 2: Men of Courage, to name just a few, have been bestsellers and admired by the critics not only in Europe but worldwide, and have even been distributed by
major top international publishers. In other cases, such as *Castlevania Lords of Shadows* or *Metroid Dread*, or *Metroid II*, we are talking about IP owned by Nintendo and Konami, who invested in the Spanish studio to launch the new episodes of two of the most representative sagas in video game history.

Part of this success is also due to the advice offered to companies and businesspeople by the different specialised incubation or acceleration programmes (although some are generalists) which are developed over several months and, in addition to accompanying the development of projects, sometimes offer financing through associated investment funds. These programmes also encourage the creation of new companies and help to position professionals in the industry (Table 2).

### Table 1. Sales of Spanish Video Games in Europe

<table>
<thead>
<tr>
<th>P.</th>
<th>Título</th>
<th>Año</th>
<th>Estudio</th>
<th>Ventas</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>España</td>
</tr>
<tr>
<td>1</td>
<td>Deadlight</td>
<td>2012</td>
<td>Tequila Works</td>
<td>4.900.000</td>
</tr>
<tr>
<td>2</td>
<td>RiME</td>
<td>2017</td>
<td>Tequila Works</td>
<td>4.000.000</td>
</tr>
<tr>
<td>3</td>
<td>Imagina Ser Diseñadora de Moda</td>
<td>2007</td>
<td>Virtual Toys</td>
<td>2.810.000</td>
</tr>
<tr>
<td>4</td>
<td>Metroid Dread</td>
<td>2021</td>
<td>MercurySteam</td>
<td>2.740.000</td>
</tr>
<tr>
<td>5</td>
<td>Blasphemous</td>
<td>2019</td>
<td>The Game Kitchen</td>
<td>2.257.917</td>
</tr>
<tr>
<td>6</td>
<td>Castlevania: Lords of Shadow</td>
<td>2010</td>
<td>MercurySteam</td>
<td>2.107.000</td>
</tr>
<tr>
<td>7</td>
<td>Commandos: Behind Enemy Lines</td>
<td>1998</td>
<td>Pyro Studios</td>
<td>2.008.000</td>
</tr>
<tr>
<td>8</td>
<td>YouTubers Life 2</td>
<td>2021</td>
<td>U-Play Online</td>
<td>2.000.000</td>
</tr>
<tr>
<td>9</td>
<td>Commandos 2: Men of Courage</td>
<td>2001</td>
<td>Pyro Studios</td>
<td>1.587.000</td>
</tr>
<tr>
<td>10</td>
<td>YouTubers Life</td>
<td>2016</td>
<td>U-Play Online</td>
<td>1.400.000</td>
</tr>
<tr>
<td>11</td>
<td>Imagina Ser Veterinaria</td>
<td>2007</td>
<td>Virtual Toys</td>
<td>1.040.000</td>
</tr>
<tr>
<td>12</td>
<td>Aragami</td>
<td>2016</td>
<td>Lince Works</td>
<td>1.000.000</td>
</tr>
<tr>
<td>13</td>
<td>Moonlighter</td>
<td>2018</td>
<td>Digital Sun Games</td>
<td>1.000.000</td>
</tr>
<tr>
<td>14</td>
<td>GRIS</td>
<td>2018</td>
<td>Nomada Studio</td>
<td>1.000.000</td>
</tr>
<tr>
<td>15</td>
<td>Commandos 3: Destination Berlin</td>
<td>2003</td>
<td>Pyro Studios</td>
<td>941.000</td>
</tr>
<tr>
<td>16</td>
<td>Commandos: Más allá del deber</td>
<td>1999</td>
<td>Pyro Studios</td>
<td>822.000</td>
</tr>
<tr>
<td>17</td>
<td>InviZimals</td>
<td>2009</td>
<td>Novarama</td>
<td>790.000</td>
</tr>
<tr>
<td>18</td>
<td>Commandos: Strike Force</td>
<td>2006</td>
<td>Pyro Studios</td>
<td>700.000</td>
</tr>
<tr>
<td>19</td>
<td>PC Fútbol 6.0</td>
<td>1998</td>
<td>Dinamic Multimedia</td>
<td>600.000</td>
</tr>
<tr>
<td>20</td>
<td>Annie Amber</td>
<td>2016</td>
<td>Pantumaca Barcelona</td>
<td>509.000</td>
</tr>
<tr>
<td>21</td>
<td>Temtem</td>
<td>2022</td>
<td>CremaGames</td>
<td>500.000</td>
</tr>
<tr>
<td>22</td>
<td>PC Fútbol 7</td>
<td>1998</td>
<td>Dinamic Multimedia</td>
<td>360.000</td>
</tr>
<tr>
<td>23</td>
<td>PC Fútbol 5.0</td>
<td>1996</td>
<td>Dinamic Multimedia</td>
<td>305.000</td>
</tr>
<tr>
<td>24</td>
<td>PC Fútbol 2005</td>
<td>2004</td>
<td>Gaelco</td>
<td>170.000</td>
</tr>
<tr>
<td>25</td>
<td>PC Calcio 7</td>
<td>1998</td>
<td>Dinamic Multimedia</td>
<td>170.000</td>
</tr>
<tr>
<td>26</td>
<td>InviZimals: La otra dimensión</td>
<td>2010</td>
<td>Novarama</td>
<td>155.000</td>
</tr>
<tr>
<td>27</td>
<td>Zack Zero</td>
<td>2012</td>
<td>Crocodile Entertainment</td>
<td>150.000</td>
</tr>
<tr>
<td>28</td>
<td>PC Fútbol 4.0</td>
<td>1995</td>
<td>Dinamic Multimedia</td>
<td>140.000</td>
</tr>
<tr>
<td>29</td>
<td>Summer in Mara</td>
<td>2020</td>
<td>Chibig</td>
<td>100.000</td>
</tr>
<tr>
<td>30</td>
<td>InviZimals: Las Tribus Perdidas</td>
<td>2011</td>
<td>Novarama</td>
<td>100.000</td>
</tr>
</tbody>
</table>

Source: Prepared by author with data from Devuego.
THE VIDEO GAME CULTURE INDUSTRY AND EUROPE. SYNERGIES AND PARTNERSHIPS

To talk about video games in Europe is to talk about France, Germany, Italy and the United Kingdom as key regions. In the last two years, Eastern European countries like Poland have also had to be taken into account. As we mentioned when analysing the industry’s situation in Spain, our country is in 5th place, although with a turnover five times lower than Finland’s.

In 2021 the European market was estimated at €23,300,000,000, with a growth of 22 per cent from 2019. In 2022 we would be talking about an even bigger market, with more than 124 million players 6 to 64 years old according to the latest data published by ISFE (Figure 4).

There was a very significant increase in jobs and companies registered from 2020 to 2022. In 2020 Europe provided employment for some 98,219 people (74,000 in the EU), of which only 20 per cent were women (although this percentage is almost 50 per cent in the case of female gamers), and had more than 4,900 registered studios. In 2021 there was a significant growth of companies and employees, and in 2022 they clocked in at 6,591 and 107,239 respectively (only taking into account the main European countries), as can be seen in the graph below (Table 3).

On 10 November 2022 the European Parliament adopted a resolution on esports and video games (2022/2027(INI)) which ‘calls on the Commission and the Council to acknowledge the value of the video game ecosystem as a major CCI with strong potential for further growth and innovation; calls for the development of a coherent, long-term European video game strategy, which should benefit all actors involved fairly and adequately, while taking into account esports and the current dependence on imports and building on exist-

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2. European Parliament resolution of 10 November 2022 on esports and video games (2022/2027(INI))
### Table 2. Programas de incubación o aceleración especializados

<table>
<thead>
<tr>
<th>Seed accelerator</th>
<th>City</th>
<th>Programme</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lanzadera</strong></td>
<td>Valencia</td>
<td>Corporate PlayStation Programme. Together with EDEM Escuela de Empresarios (EDEM Entrepreneurship School) and the investment company Angels, it forms part of the Marina de Empresas entrepreneurship centre, an initiative of Juan Roig’s located in the Valencia Marina, whose mission is to train, advise and finance the entrepreneurs of today and tomorrow, constituting a commitment to the creation of wealth, jobs and the promotion of the culture of entrepreneurship.</td>
</tr>
<tr>
<td><strong>Berriup</strong></td>
<td>San Sebastian</td>
<td>It helps entrepreneurs market launch their projects with a clear focus on sales and internationalisation. They offer a four-month Acceleration Programme where entrepreneurs are mentored and given funding support through the EASO VENTURES Fund.</td>
</tr>
<tr>
<td><strong>GameBcn</strong></td>
<td>Barcelona</td>
<td>Promoted by the Catalanian government and the Barcelona City Council, it helps video game studios to professionalise their production and maximise their business opportunities.</td>
</tr>
<tr>
<td><strong>PSTalents</strong></td>
<td>Madrid</td>
<td>PlayStation’s programme for developers to assist in the completion and publication of their video games.</td>
</tr>
<tr>
<td><strong>Madrid in Game. Entrepreneurship Programme</strong></td>
<td>Madrid</td>
<td>Training programme, mentoring, access to investors for video game entrepreneurs, gamification and esports. It lasts six months and is supported by the Madrid City Council.</td>
</tr>
<tr>
<td><strong>Level Up</strong></td>
<td>Barcelona</td>
<td>Annual pre-incubation programme for independent teams that want to develop a demo (vertical slice) of a video game to find investment or a publisher.</td>
</tr>
<tr>
<td><strong>La Brújula XR</strong></td>
<td>Malaga</td>
<td>Initiative of the Malaga Chamber of Commerce and the INCYDE Foundation in collaboration with the Polo Nacional de Contenidos Digitales (National Digital Content Pole) of Malaga. It drives start-ups and companies digitally transforming, related to the metaverse, VR and AR.</td>
</tr>
<tr>
<td><strong>La Mina Games</strong></td>
<td>Linares</td>
<td>It is part of the technology incubator of the Linares Chamber of Commerce. They welcome junior professionals who have studied programming, illustration or game design for one academic year.</td>
</tr>
<tr>
<td><strong>Billete Cohete</strong></td>
<td>Malaga</td>
<td>From the developers of Blasphemous, this incubator is specifically aimed at teams of junior developers who are taught how to develop game ideas that have more commercial possibilities.</td>
</tr>
<tr>
<td><strong>Emprenbit. Bit Foundation</strong></td>
<td>Palma</td>
<td>Support programme for the creation of tech companies financed by the government of the Balearic Islands. It offers infrastructure and services for innovative start-ups and is located in Parc Bit (Parc Balear d’Innovació i Tecnología de les Illes Balears).</td>
</tr>
</tbody>
</table>
Figure 4. Average age of video game players in Europe (2022)

- **25%** 25-64 years old (vs 24% in 2021)
- **18%** 6-14 years old (vs 17% in 2021)
- **21%** 15-24 years old (vs 22% in 2021)
- **19%** 24-34 years old (vs 20% in 2021)


Table 3. Number of companies in major European countries

<table>
<thead>
<tr>
<th>País</th>
<th>Empresas</th>
<th>Empleados</th>
<th>Facturación (millones de €)</th>
<th>Facturación por empresa (millones de €)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Francia</td>
<td>700</td>
<td>19.000</td>
<td>3830</td>
<td>5,5</td>
</tr>
<tr>
<td>Alemania</td>
<td>717</td>
<td>10.906</td>
<td>3600</td>
<td>5,2</td>
</tr>
<tr>
<td>Reino Unido</td>
<td>1.528</td>
<td>20.975</td>
<td>3.220</td>
<td>2,1</td>
</tr>
<tr>
<td>Finlandia</td>
<td>215</td>
<td>3.550</td>
<td>3.200</td>
<td>14,9</td>
</tr>
<tr>
<td>Suecia</td>
<td>785</td>
<td>7.944</td>
<td>2.713</td>
<td>3,5</td>
</tr>
<tr>
<td>España</td>
<td>445</td>
<td>8.833</td>
<td>1.281</td>
<td>2,9</td>
</tr>
<tr>
<td>Polonia</td>
<td>439</td>
<td>12.110</td>
<td>969</td>
<td>2,2</td>
</tr>
<tr>
<td>Países Bajos</td>
<td>501</td>
<td>3.736</td>
<td>430</td>
<td>0,9</td>
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<tr>
<td>Dinamarca</td>
<td>168</td>
<td>911</td>
<td>424</td>
<td>2,5</td>
</tr>
<tr>
<td>Rumanía</td>
<td>228</td>
<td>6.700</td>
<td>293</td>
<td>1,3</td>
</tr>
<tr>
<td>Rep. Checa</td>
<td>135</td>
<td>2.329</td>
<td>290</td>
<td>2,1</td>
</tr>
<tr>
<td>Irlanda</td>
<td>60</td>
<td>2.000</td>
<td>150</td>
<td>2,5</td>
</tr>
<tr>
<td>Serbia</td>
<td>130</td>
<td>2.200</td>
<td>125</td>
<td>1</td>
</tr>
<tr>
<td>Italia</td>
<td>160</td>
<td>1600</td>
<td>90</td>
<td>0,6</td>
</tr>
<tr>
<td>Bélgica</td>
<td>85</td>
<td>726</td>
<td>83</td>
<td>1</td>
</tr>
<tr>
<td>Eslovaquia</td>
<td>60</td>
<td>879</td>
<td>74,2</td>
<td>1,2</td>
</tr>
<tr>
<td>Islandia</td>
<td>18</td>
<td>518</td>
<td>70</td>
<td>3,9</td>
</tr>
<tr>
<td>Noruega</td>
<td>15</td>
<td>433</td>
<td>51</td>
<td>3,4</td>
</tr>
<tr>
<td>Austria</td>
<td>90</td>
<td>500</td>
<td>25</td>
<td>0,3</td>
</tr>
<tr>
<td>Letonia</td>
<td>57</td>
<td>296</td>
<td>24</td>
<td>0,4</td>
</tr>
<tr>
<td>Portugal</td>
<td>55</td>
<td>1093</td>
<td>22</td>
<td>0,4</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>6.591</td>
<td>107.239</td>
<td><strong>20.964,2</strong></td>
<td><strong>57,8</strong></td>
</tr>
</tbody>
</table>

ing national strategies in order to support EU actors and EU start-ups in these sector’.

Furthermore, ‘to create a European Video Game Observatory to support and provide decision-makers and stakeholders with harmonised data, assessments and concrete recommendations with a view to developing the sector; considers that such a European Video Game Observatory could also be utilised as a knowledge network to support dialogue for a more integrated sector’.

In recent years a series of synergies have been established between European countries and institutions to promote collaboration and competitiveness, understood positively. Economic, labour, equality and academic connections are also important (Table 4).

THE FUTURE OF VIDEO GAMES IN THE CULTURAL INDUSTRIES

The concept of cultural industry is not new but it has adapted to the different ways of producing, distributing and enjoying cultural products and included new meanings with, for example, the addition of a term like ‘creative economy’. From this merger came the concept, first in Australia and then in the UK, of ‘creative industries’. According to the UNESCO’s ‘Re|Shaping Policies for Creativity’ (2010) these are ‘sectors of organised activity whose principal purpose is the production or reproduction, promotion, distribution and/or commercialisation of goods, services and activities of a cultural, artistic or heritage-related nature’.

Today, we define them as those that rely on creativity, knowledge and talent to generate economic and cultural value. It is cross-industry and includes fields such as art, music, film, television, fashion and, of course, video games, which are a medium for artistic expression and are considered a form of digital art whose impact on culture and the global economy—as has already become apparent—is growing.

The future of video games in the cultural industries lies not so much in a change of business model but rather in a new social and market model of interpersonal relationships in which personalisation is key and the player/user is the one who decides how to consume the product. This is a challenge that for development studios will entail implementing emerging technologies, creating differential content (incorporating virtual reality, augmented reality and AI to imagine new hitherto unknown worlds) and better data processing to gain a deeper understanding of audiences.

Respect for diversity, inclusion, the defence of equality and accessibility are also key elements whose incursion into these industries influences social cohesion and therefore their dissemination and expansion. Initiatives such as *The Good Gamer* or the *PlayEqual* project, launched by the Spanish Video Games Association (AEVI), are along these lines.

It is very difficult to decouple this shift from the digital, and increasingly physical video games will be restricted to a very specific segment, that of collectors. It should be noted that this digitalisation will spur on the continued growth of the industry by creating jobs, attracting investors and contributing to a productive economy, to the possibility of self-publishing as an alternative to the traditional channel in which the studio develops the project and the publisher markets it, to the dissemination of the cultural identity of each country and, above all, to the creation of synergies between the development companies themselves and with other industries. If we channel this pattern correctly, the future of the industry may very well be guaranteed.

<table>
<thead>
<tr>
<th><strong>Programas, colaboraciones y eventos significativos en la industria de los videojuegos</strong></th>
</tr>
</thead>
</table>
| **Partnership in research and development of technology and tools**  
Support programmes for start-ups are included |
| Creative Europe MEDIA Programme. Video games and immersive content development |
| Horizon Europe or Horizon 2020 |
| Audio-visual and Video Games R&D&I Projects: Spanish Innovation and Technological Development Centre (CDTI) |
| European Games Developer Federation |
| Enterprise Europe Network |
| Red.es programme  
It is the driving force behind the Digital Agenda in Spain, developing European Regional Development Fund (ERDF) and the European Social Fund (ESF) initiatives and projects, to which it has recently added managing funds from the Recovery and Resilience Facility (RRF) |
| **Common policies and regulations related to tax incentives, financing and training programmes for developers** |
| New European Bauhaus |
| Digital Markets Act (DMA) |
| **Collaborative programmes that bring together studios from all over Europe to develop independent games and present them to publishers and investors** |
| European Games Co-production Market (EGCM) |
| European New Media, Innovative and Transmedia Projects. 3D Wire |
| **Training and education programmes that instruct in technical and creative skills and contribute to highly competitive job specialisation** |
| European Games Accelerator EVA  
Initiative developed by Spiel Fabrique, with the support of the EU’s Creative Europe Programme (CREA) in which 20 companies from different parts of Europe participate |
| Go2Work programme |
| European Schoolnet |
| Europe Code Week  
Programme aimed at young people where they can participate in the participatory development of video games |
### Funding and support for start-ups through clusters or other cross-country initiatives that bring together companies, academic institutions and governmental organisations to work on industry development in the region

<table>
<thead>
<tr>
<th>Organization</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clúster de Industrias Creativas y Videojuegos de Madrid (Creative Industries and Video Games Cluster of Madrid)</td>
<td>Spain</td>
</tr>
<tr>
<td>Newly created Canary Island Hub</td>
<td>Spain</td>
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<tr>
<td>Capital Games (France)</td>
<td></td>
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<tr>
<td>Nordic Game Program (Nordic countries)</td>
<td></td>
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<tr>
<td>PISMO (Croatia)</td>
<td></td>
</tr>
<tr>
<td>Walloon Agency for Export and Foreign Investments (AWEX) and the Wallonia-Brussels Agency for International Relations (WBI)</td>
<td></td>
</tr>
<tr>
<td>This year, 2023, it has launched an initiative to promote the development of projects that apply animation technologies, video games, esports, immersive experiences and XR and VFX technologies in culture, academia and business in Spain and Belgium</td>
<td></td>
</tr>
</tbody>
</table>

### General reports and guides

<table>
<thead>
<tr>
<th>Report</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pilot project ‘Understanding the Value of a European Video Games Society’ (2022)</td>
<td>It provides information on the many economic, cultural, financial and social impacts that video games have on our society, and how the industry influences various policy areas</td>
</tr>
<tr>
<td>European Games Funding Guide. Report produced by Creative Europe Desks Denmark and Italy</td>
<td></td>
</tr>
<tr>
<td>Game Consoles Voluntary Agreement (GVCA)</td>
<td></td>
</tr>
<tr>
<td>Green Games Guide. Collaboration between Ukie, Games London and the UN’s Playing for the Planet</td>
<td></td>
</tr>
</tbody>
</table>

### International events and trade fairs attended by developers, studios, publishers, investors and other industry professionals. These events encourage networking and knowledge exchange between countries

<table>
<thead>
<tr>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gamescom (Germany)</td>
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<tr>
<td>London Games Festival (London)</td>
<td></td>
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<tr>
<td>Paris Games Week (France)</td>
<td></td>
</tr>
<tr>
<td>Nordic Game Conference (Helsinki)</td>
<td></td>
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<tr>
<td>Game Connection Europe (France)</td>
<td></td>
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<tr>
<td>DreamHack (Valencia, Spain)</td>
<td></td>
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<tr>
<td>Madrid Games Week (Madrid, Spain)</td>
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<tr>
<td>GameLab (Barcelona-Spain)</td>
<td></td>
</tr>
<tr>
<td>Barcelona Games World (Barcelona- Spain)</td>
<td></td>
</tr>
<tr>
<td>Euskal Encounter (Bilbao-Spain)</td>
<td></td>
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<tr>
<td>Fun &amp; Serious (Bilbao-Spain)</td>
<td></td>
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<tr>
<td>Gamepolis (Málaga-Spain)</td>
<td></td>
</tr>
<tr>
<td>indiedevDay (Barcelona-Spain)</td>
<td></td>
</tr>
<tr>
<td>Games Made in Europe (France)</td>
<td></td>
</tr>
</tbody>
</table>
CONCLUSIONS AND PROPOSALS

1 Spanish-language video gaming has had a significant presence in Europe in recent years in terms of development, distribution and video game events; this presence continues to grow and contribute to the European video game industry.

2 But we should not forget that the future of the Spanish industry, not only in Europe but also in the world, depends on joining forces with the government, associations, development companies, publishers, institutions and investors, to name a few, and replicating, for example, public and private support measures that have been rolled out in Germany, Finland and France.

3 As already stated in 2018 in A Manifesto for European Video Games by the Consiglio Nazionale delle Ricerche within the Horizon 2020 Programme, ‘growing the business and culture of video games in Europe should be an economic priority’.

4 The challenges facing the industry include:

- Creating a specific Spanish Classification of Economic Activities (or CNAE) for video game development companies, since at present the corresponding heading is CNAE 58.21—Video game publishing—and it treats studios as publishers and not developers. In the case of Poland, in 2018–2019, WIIG Games was created, and in France, in the ‘Classification des produits français’ (CPF), there is a category 62.01.21—‘Originaux de jeux électroniques’—, associated with NAF 62.01Z—‘Programmation Informatique’—.

- Bringing VAT for video games into line with cultural industry products in Spain and the European average. Although video games are now considered a cultural good, general VAT, i.e., 21 per cent, is still applied depending on where the sale takes place, and not 10 per cent or 4 per cent, in the case of art books related to video games.

- Sales to EU companies are intra-Community trade with the requirement that the recipient is registered in the Registry of Intracommunity Operators and VAT is not applied according to the ‘inversion of the taxable subject’ (art. 6.1.m) RD1619/2012 of 30 November.

- In the case of sales to private individuals in the EU, the first €10,000 of income in the year is taxed in Spain and VAT has to be applied. As soon as 10,000 is exceeded, the taxation is done at the destination and with the VAT for that country. This involves separating each invoice for each country and taxing the VAT through the One Stop Shop (OSS) system with the mention ‘VAT not taxable in territory where tax is applicable and taxable at destination by location rules’.

- Establishing tax incentives to be able to compete with other European countries like France, Belgium and Italy, which have modified article 36 of the Corporate Tax to put the video game industry on the same level as the audio-visual. In France, for example, one of the measures envisaged is to apply a

5. In France, there are two essentially statistical classifications, the NAF, a classification of productive activities, and the CPF, a classification of products.

tax deduction of 30 per cent on production expenditure.

• Implementing social security discounts taking into account the idiosyncrasies of the industry’s professionals, most of whom are interdisciplinary.

• Promoting public–private collaboration to reach partnership and legal advising agreements to attract projects, investors and capital, as has already been done in audiovisual productions, TV series and films. We must keep in mind that the main barrier for start-up studios is covering production costs.

• Within the framework of the Plan to Boost the Audio-visual Sector (Spain Audio-visual Hub), expanding the network of incubators and seed accelerators managed by industry professionals.

• Greater cooperation between the various public administrations in which development studies are listened to, applying the particular needs of the industry and speeding up allocation of aid to prevent small and medium-sized developer indebtedness.

• Recognising video game development companies as innovative businesses in their different areas, not only those that develop their own technology.

• Reinvesting part of the turnover of distribution companies in support of domestic production. As DEV points out in its White Paper on Spanish Video Game Development: ‘the reinvestment of 5 per cent of gross turnover could generate a budget of up to €90 million to be used to produce video games in Spain’.

REFERENCES


THE DISTANT ECHO OF SPANISH POP IN EUROPE

Isabelle Marc

Spanish pop music with a distinctly ‘Latin’ accent seems to be heard increasingly often around the world. But what is the reality of music produced in Spain beyond its world famous stars? Which Spanish artists travel beyond our borders? Which markets are most receptive to Spanish pop and why? What is the role of public institutions in its promotion? This article aims to provide an updated overview of Spanish music in the world - with special interest paid to Europe - based on an analysis of data provided by the industry and public institutions, and of the initiatives of public and private agents to market Spanish pop internationally. The analysis shows the marginal role of Spanish pop in Europe and makes a series of recommendations to support, disseminate and make Spanish musical talent more visible internationally.

Key words: pop music, internationalisation of music, music diplomacy, European market.

SPANISH POP IS INTERNATIONAL POP

Music is a traveller by nature: from one country to another, from one era to another, from one medium to another, history shows us that music, although not universal, has been able to move and be received in very different historical, geographical and cultural contexts. In the last two decades, music’s distribution has intensified exponentially thanks to complex and interrelated phenomena such as digitalisation, economic globalisation, increased migratory flows and cultural cosmopolitanism. As a consequence, musical practices (creation, production, listening) are more frequent, more diverse and also more democratic today than ever before. However, these phenomena do not erase the legal nationality of the industry and of the artists, who continue to compete to gain a foothold in national and international markets. Nor does the symbolic nationality of sound disappear, which continues to function as a tool of influence and soft power.

The history of Spanish music is also a history of travel, transfer and reciprocal influence. The history of Spanish pop music specifically, recorded in Spain by Spanish artists or artists based in Spain, is also a transnational history, which has incorporated and assimilated foreign influences and which, in turn, has produced artists who have become stars outside our country. From ‘Carmencita’, which captivated the United States at the end of the nineteenth century (Mora 2015) to Rosalía’s triumph at Coachella 2023, many Spanish artists have garnered success beyond our borders. Think Raquel Meller and Luis Mariano, who exported an exotic Spanishness especially to France in the first half of the twentieth century. Think also ‘Black is Black’ (1966) by Los Bravos and ‘Oh Lord, Why Lord’ (1968) by the Pop Tops, real international hits. At the end of
the 1960s, Raphael became one of the great international performers of the Spanish romantic ballad. Shortly afterwards, Julio Iglesias became the first truly global Spanish music artist, the first to settle in Miami to penetrate the American market. Figures such as Rocío Dúrcal and Camilo Sesto followed him on his transatlantic adventure. In the 1980s, Spanish pop continued to be exported to Latin America and also to Europe, with the success of Mecano and Luz Casal in France and Los héroes del silencio in Germany a little later. In the 1990s, the global phenomenon of Los del río’s ‘Macarena’ emerged, followed by Las Kétchup. This decade also saw the emergence of Latin music around the world, with hits by American artists such as Ricky Martin and Gloria Estefan, who contributed to making Spanish-language music a global music. In the twenty-first century, ‘Latin music’, a junk drawer of sorts of sounds that includes all music performed in Spanish or Portuguese, has established itself as a major category in the world market. The global sales charts have been filled with ‘Latin’ artists, mainly from or based on the other side of the Atlantic (Shakira, Luis Fonsi and Daddy Yankee, Enrique Iglesias, Bad Bunny, etc.). Artists such as Alejandro Sanz and David Bisbal have also had excellent results abroad, especially in Latin America and the United States. In this global Latin trend, now merged with urban rhythms, undoubtedly loaded with exoticism and stereotypes but also with diversity and innovation, a series of Spanish artists have made a name for themselves beyond their cultural area of influence. Likewise, in recent years, streaming and video platforms, music and trends websites and, of course, social media seem to include more Spanish talents: the global phenomenon Rosalía, Ana Mena’s success in Italy and Quevedo’s records in 2022 could lead us to believe that Spanish music is going through a golden age in terms of visibility and commercial success abroad.

However, beyond this apparent good health, what is the real position of Spanish artists in international markets? This study does not aim to provide an exhaustive overview of the situation of Spanish music in foreign markets but will focus on analysing the place of Spanish pop music in Europe today. This interest is justified by Spain’s privileged relations with its EU partners, not only in the economic and geostrategic area but also in culture. This paper also aims to identify trends and promote discussion on public policies and private sector actions for the internationalisation of pop music as a fundamental part of Spanish culture and economy.

With this aim in mind, recent export data provided by the industry and institutions will be presented first. Then, public and private sector initiatives to distribute and promote pop music abroad will be explored. In the final reflections, some proposals will be put forward to promote and consolidate the distribution of Spanish pop music in Europe.

Before starting the analysis, it is worth reflecting on two important concepts: the nationality of music and Europe as a frame of reference. Following the ICEX’s criteria, Spanish music is understood to be music that is produced by a company whose tax residence is in Spain. However, the term can also refer to creations that are explicitly built around Spanish cultural identity, both musically and linguistically. Overt ‘Spanishness’ of the artists, as in the case of Julio Iglesias or Rosalía, is also a criterion for their inclusion in this category. As for Europe, we will mainly refer to the European Union together with the United Kingdom as a geopolitical region that shares cultural affinities and in which common organisational, legal and economic structures coexist with profound cultural,
linguistic and socio-economic differences. In this respect, it should be noted that from a legal point of view, since the establishment of the common market in 1993 the EU does not represent a foreign market in the same way as the United States or Mexico, with their tariffs and legal access requirements. Differences in market access obviously condition the type of public policies and export strategies.

**Facts and figures in the internationalisation of Spanish pop music**

Empirical information on the export of Spanish pop music is scarce, to say the least, as the data available to us comes from multiple sources and is as such scattered and partial. In fact, unlike in other neighbouring countries such as France or the United Kingdom,¹ there is no public or private organisation that offers an overview of the performance of the music industry either domestically or abroad. Therefore, to carry out this study it has been necessary to resort to data provided by a series of entities linked to the industry, with, quite logically, different interests and topics, and also, to a lesser extent, by public institutions. The interviews granted to me by Isabel Ortega (ICEX), Soco Collado and Carlos García Doval (Promusicae), Rubén Gutiérrez del Castillo (SGAE), Sonia Durán (UFI), Aida Álvarez and Carlos Pastor (AIE) were crucial and I would like to thank them for their collaboration and helpfulness.²

1. In France, the Centre National de la Musique, created in 2019, aims to develop the music industry both in France and abroad. It takes up the work of the Bureau Export, which will be discussed below. Among other data, it publishes export certifications: [https://cnm.fr/wp-content/uploads/2022/04/CNM_Tableau_Certifications-Export-2021_27avril2022.pdf](https://cnm.fr/wp-content/uploads/2022/04/CNM_Tableau_Certifications-Export-2021_27avril2022.pdf).

**More Spanish pop in the world**

Industry sources confirm that Spanish music exports have grown significantly over the last decade. If we take as a point of reference the ‘Libro blanco de la música’ (Music White Paper) published by Promusicae in 2013 with the collaboration of ICEX in 2012, the total revenue generated abroad, without discriminating between formats, was almost €16.5 million, i.e., 17.49 per cent of the industry’s total revenue. It should be noted that these figures do not include a considerable part of the market, as they do not include the profits of the production companies that are members of the Unión Fonográfica Independiente (Independent Phonographic Union, or UFI), nor the revenues received by the management associations, SGAE and AIE, which are not available for that period.

In 2021, according to the latest data provided by Promusicae (January 2023), the total estimated exports of music producers amount to €29.4 million. That means that in ten years the total volume of exports has grown by €13 million. However, the ministry’s figures only include profits from physical sales, which as we know have relatively little weight in the total. In 2021, we do have the management report from the Sociedad General de Autores y Editores (General Association of Artists and Editors, or SGAE),³ which estimates its international income at €22.3 million, a drop from the previous year due to the spandemic and the collapse of the Argentinean peso.

Data provided by the Entidad de Gestión de los Artistas Intérpretes o Ejecutantes de la Música (Musicians or Artists Management Organisation, or AIE) also indicates a very sharp increase in revenues from bilateral agreements, from 1.4

3. I would also like to thank Ana Gómez de Castro, Daniela Bosé and Michaël Spanu for their help and comments. [https://informe-gestion2021.sgae.es/assets/pdfs/INFORME-SGAE-2021.pdf](https://informe-gestion2021.sgae.es/assets/pdfs/INFORME-SGAE-2021.pdf)
million in 2008 to around 5 million in 2022 (all markets included). It should be borne in mind, however, that not all artists represented by AIE are tax residents in Spain, so these figures cannot be added to the overall ‘national’ computation.

Meanwhile, according to the Ministry of Culture’s 2013 ‘Anuario de estadísticas culturales’ (‘Yearbook of Cultural Statistics’), in 2012 the value of exports under the heading ‘CDs, tapes and other recorded sound and image media’ amounted to €7.2 million. In 2021, the figure under this heading amounted to 63 million. However, as they do not differentiate between music and audio-visual (cinema) content and do not include sales/listening in digital format, this data is not significant, although it does confirm the upward trend in exports (Table 1).

Table 1. Export revenues in million euros

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2012</th>
<th>2021</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promusicae</td>
<td>----</td>
<td>16.5</td>
<td>29.4</td>
<td>----</td>
</tr>
<tr>
<td>SGAE</td>
<td>----</td>
<td>----</td>
<td>22.3</td>
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</tr>
<tr>
<td>AIE</td>
<td>1.4</td>
<td>----</td>
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<td>5</td>
</tr>
</tbody>
</table>

Source: prepared by the author based on data offered by the organisations

Concentration of exports in the Americas (North and South) and Europe

The two main markets for Spanish pop music are Latin America and the United States and Europe (the European Union and the United Kingdom). Although global figures are not available, the trend indicates a concentration of exports in America (North and South) and a reduction in other latitudes such as Europe. In 2021, for Promusicae, the transatlantic market will constitute 63.6 per cent of total exports, compared to 52.01 per cent in 2012. The UFI also notes that most of its members’ exports (20 per cent of total revenues) go to Latin America.5 The Instituto Español de Comercio Exterior (Spanish Institute for Foreign Trade, or ICEX) identifies the American continent as a priority, although no official figures are available. The European market is also essential for the AIE, since in 2021 of the €4.7 million generated by global international collection the organisation received around €3 million from Europe, including the United Kingdom, some €700,000 more than in 2017.6 Proportionally, the countries that generated the most revenue are Germany and France. According to the ‘Yearbook of Cultural Statistics’, the bulk of exports under the heading ‘CDs, tapes...’ continue to go to the EU market, which will generate €47.3 million in exports in 2021, compared to €10.5 million in 2012. The SGAE has not provided us with data by región (Tables 2 and 3).

Spanish pop in Europe

Despite the conspicuous absence of institutional data, it is clear that Spanish pop music’s penetration in Europe still has plenty of room to grow. Despite their geographical and cultural proximity and the volume of income generated by music in neighbouring countries, one need only consult the sales charts of the main European markets (from most to least important: Germany, the United Kingdom and France)7 to see that no Spanish artist is among the bestsellers. It should be noted in

6. Data by region have been provided by the organisation. General information on 2021 is available in the 2021 Annual Report: https://www.aie.es/wp-content/uploads/MemoriAIE-2021-BR-PD-3Jun22.pdf
7. On revenues from recorded music in neighbouring countries, see the 2022 Promusicae Report: ‘Radiografía del mercado de la música grabada 2022. Evolución del consumo en los años de la pandemia (2020–2021)’, (Ra-
In this respect that national specificities are unavoidable within the EU. It is clear that German audiences do not listen to the same music or listen to it in the same way as Slovenian or Portuguese audiences. It therefore seems logical that any internationalisation strategy, whether public or private sector, should be based on country-specific market research.

However, there are two big names when it comes to Spanish artists in Europe. The first is Rosalía, now produced by the American label Columbia Records, garnering nearly unanimous praise in the international music press. In France, the Catalan artist has been praised by critics but is far from being at the top of the charts in terms of sales and listeners. In the UK the situation is similar, where ‘Motomami’ topped out at 42nd place on the UK album chart for one week. In the German market, ‘Motomami’ came in at 28th in album sales despite good critical response. In these three countries, the top sales and listening positions are held by local artists, along with a smattering of Anglo-American stars (Taylor Swift, Adele, etc.). Italy is similar. The fifth largest market in the EU, Rosalía’s singles have been successful, especially with her international collaborations, but never at the top of the charts. Underlying the reviews, along with clear admiration, is the Spanish imaginary of eroticised exoticism. Through this lens, Rosalía appears as a brilliant, beautiful and extravagant figure, a rarity, both musically and culturally. The artist is the exception that confirms the rule that Spanish music is largely unknown to Europeans.

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Table 2. Top 10 destination countries for “exports” in 2012

<table>
<thead>
<tr>
<th>Top 10 'Export' Destination Countries in 2012 (the EU taken as a single destination)</th>
<th>Approximate weight in %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>European Union</td>
</tr>
<tr>
<td>2</td>
<td>USA</td>
</tr>
<tr>
<td>3</td>
<td>Mexico</td>
</tr>
<tr>
<td>4</td>
<td>Argentina</td>
</tr>
<tr>
<td>5</td>
<td>Andorra</td>
</tr>
<tr>
<td>6</td>
<td>Colombia</td>
</tr>
<tr>
<td>7</td>
<td>Japan</td>
</tr>
<tr>
<td>8</td>
<td>Chile</td>
</tr>
<tr>
<td>9</td>
<td>Costa Rica</td>
</tr>
<tr>
<td>10</td>
<td>Venezuela</td>
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</tbody>
</table>

Source: Promusicae 2013

Table 3. Top 10 destination countries for “exports” in 2021

<table>
<thead>
<tr>
<th>Top 10 'Export' Destination Countries in 2021 (the EU taken as a single destination)</th>
<th>Approximate weight in %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>USA</td>
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<tr>
<td>2</td>
<td>EU</td>
</tr>
<tr>
<td>3</td>
<td>Mexico</td>
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<td>4</td>
<td>Chile</td>
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<td>5</td>
<td>UK</td>
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<tr>
<td>6</td>
<td>Argentina</td>
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<td>7</td>
<td>Colombia</td>
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<td>8</td>
<td>Peru</td>
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<td>9</td>
<td>Canada</td>
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<td>10</td>
<td>Brazil</td>
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Source: Promusicae 2023

10. Available: https://www.offiziellecharts.de/album-details-493865
11. Available: https://www.fimi.it/top-of-the-music/history/k1/#/history
The second most notable recent success story is that of Canary Island artist Quevedo, produced by Argentina’s Dale Play Records, which confirms the tendency to concentrate on the American markets mentioned above. His song ‘Quevedo: BZRP Music Sessions, Vol. 52’ produced by Argentine DJ Bizarrap broke records as the most listened to single on Spotify Global in the summer of 2022\(^\text{12}\) and hit number one in 12 Latin American countries, including Argentina, Chile and Mexico, with strong positions in the United States. However, these excellent results were not replicated in Europe: although the song was number 1 in Italy\(^\text{13}\) and in Portugal,\(^\text{14}\) it was nowhere to be seen on the charts of the main markets.

The reasons for this irregular, intermittent and certainly limited projection of Spanish pop in Europe are complex and have to do with the heterogeneity of European countries, which are very different not only in terms of the structure and economics of the respective markets, but above all very disparate culturally, linguistically and musically. What measures or support strategies could improve the penetration of Spanish music in Europe?

This brings us to our third section, in which we will present the actors involved in the impact Spanish pop music has in international and European markets.

**ACTORS IN THE INTERNATIONALISATION OF SPANISH POP**

There are two related and interdependent perspectives when analysing how music circulates: one that we can call ‘commercial’ and the other ‘cultural-symbolic’. From the first perspective, in which music is fundamentally considered a consumer good, internationalisation is the industry’s responsibility, for whom exporting is a strategic priority and ‘an essential requirement in the development of comprehensive music projects’ (Promusicae 2013, 20). However, we know that music is much more than a product: it is an aesthetic object that provides pleasure and emotions to millions of people and is also a powerful tool to build identities and representations, both individual and collective. From the cultural-symbolic perspective, the international distribution of music is also the responsibility of public institutions as guarantors and promoters of the right to culture. In this sense, it is part of the so-called foreign cultural action, that which seeks both to expand ‘the markets of the Spanish cultural economy’ (Badillo 2014, 63) and to convey ‘a series of values considered positive within its own borders and capable of being perceived as such outside of them’ (Marc 2015). Generally speaking, the relationship between public and private initiative depends to a large extent on the policy perspective adopted, which can be more or less protectionist or free trade oriented (Cheng et al. 2021, 9). In the current Spanish and European context in which public authorities recognise the specificity of cultural goods and their necessary protection, for example, with the European Commission’s initiative Music Moves Europe,\(^\text{15}\) and in line with the proposals set out in the *Report on the State of Culture in Spain 2020* (RCS) (Bustamante 2020), the commercial and the cultural-symbolic approaches are inseparable. How these two perspectives relate to each other in the specific case of pop music is therefore of the essence.

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\(^{12}\) Available: In April 2023, it hit more than one billion plays on Spotify

\(^{13}\) Available: [https://www.fimi.it/top-of-the-music/history/kl#history](https://www.fimi.it/top-of-the-music/history/kl#history)


The complexity of the actors in Spanish foreign cultural interventions has already been pointed out by analysts (Badillo 2014), who also underline the lack of coordination and the problems that entails (Aláez Vascocellos 2020, 33–36). This institutional and organisational framework is also characteristic of foreign interventions in the field of music, as analysed in the study on Spanish musical diplomacy published by the Real Instituto Elcano (Elcano Royal Institute) (Marc 2015). Almost ten years on, although there has been some evolution, the 2015 analysis is still largely valid. Let us now look specifically at the institutions involved in the international distribution of Spanish pop.

Public actors

The Ministry of Foreign Affairs, the European Union and Cooperation, through the Instituto Cervantes and Spanish Agency for International Development Cooperation (Agencia Española de Cooperación Internacional para el Desarrollo, or AECID), is the main organisation responsible for foreign cultural interventions. The Instituto Cervantes, as a fundamental instrument for the dissemination of Spanish and Latin American culture abroad, organises and/or supports concerts by Spanish or Spanish-speaking artists, both at its own venues and at local festivals. The Cervantes centres mainly support classical music, flamenco and jazz events, although they also work with pop artists. As a rule, the centres have a certain degree of autonomy when organising events with local actors, according to criteria on aesthetics and national representativeness. From the annual reports published by the institution it is nigh impossible to know how many music-related programmes have been organised in Europe and around the world. The organisation of the International Flamenco Congress in 2021 and 2022, in Spain, North African countries, the United States and the United Kingdom—but not in the EU—is an example worth mentioning. The concerts organised under the agreement between the Instituto Cervantes and the AIE (AIEenRUTA) are also of note. According to data provided by the AIE, some 80 concerts have been held on the European continent in the last five years as a result of this collaboration. Unfortunately, we have no way of knowing how these concerts were received by local audiences. It can be said that in general the Instituto Cervantes’ musical programming is scarce when compared to its activities related to the book industry, the visual arts and cinema.

AECID, for its part, also has competencies in the promotion of culture and, therefore, Spanish music, but Europe is not part of its scope. In any case, it should be noted that music has been losing its foothold in the programming of Spanish cultural centres abroad, until it disappeared completely in 2020 as a result of the pandemic.

The Ministry of Education, Culture and Sports occupies the second tier of cultural initiatives abroad. As far as music is concerned, the body in charge of promotion abroad is the Instituto Nacional de Artes Escénicas y de la Música (National Performing Arts and Music Institute, or INAEM), with an annual grants programme aimed at subsidising music tours and the participation of Spanish musical artists abroad. However, pop music has de facto been excluded from the repertoire supported by the INAEM, without the selection criteria being clear. Public institutional information is, in any case, very scarce.

The Ministry of Foreign Affairs and the Ministry of Culture together created AC/E, Acción Cultural Española (Spanish Cultural Action), which also aims to promote Spanish culture around the world. In the field of music, the Programa Integral de Cualificación
y Empleo (Comprehensive Skilling and Job Programme, or PICE) enables musicians and professionals from the Spanish industry to participate in festivals abroad, such as BIME Bogotá or Jazzahead, and also finances the participation of foreign influencers, producers and cultural managers in festivals and music fairs in Spain. The PICE grants are usually aimed at jazz, flamenco, early music and contemporary music, although there has been a certain opening up to pop music in recent times. There is no public information on their priorities in terms of specific markets.

The Ministry of Economy is the third pillar of foreign interventions for music through ICEX España Exportación e Inversiones (ICEX Spain Exports and Investments, or ICEX for short), which supports the industry in its export objectives. To this end, ICEX offers information and advice on export markets and aims to facilitate participation in international fairs and festivals. Its priority targets are Latin America and the United States, as it considers that these markets are more difficult to access due to their geographical remoteness and the existence of tariffs or other types of barriers blocking the export of musical content. The European Union is not one of the priority regions targeted in music.

The autonomous communities are also responsible for the promotion abroad of the culture produced in their territory. The work of the Instituto Catalán de las Empresas Culturales (Catalan Institute of Cultural Enterprises), for example, is noteworthy, with support for Catalan artists and companies at international fairs and festivals in Spain (Sonar, Primavera Pro) or abroad, including in Europe (Babel Music, Focus on Wales, Womex). In the Basque Country, the recent Basque District of Culture and Creativity (BDCC) aims to help the cultural and creative industries internationalise. For its part, the Andalusian regional government, through Extenda, also supports professionals in the music sector, organising trade visits to music fairs in Andalusia such as Monkey Week and Soundtracks. It has recently contributed to the creation of the Andalucía Music Forum, which aims to become a model professional music hub for southern Europe. In 2022, the Navarra Music Commission also came into being. The Valencian autonomous community has set up a Valencian Music Office.

There are in this way several public bodies, both national and regional, with competences in the internationalisation of music. It should be noted that none of the state agencies provide specific and complete information on the activities carried out in this field or on the funds earmarked for them. That makes it practically impossible to know the number and type of events held (showcases, travel grants, trade visits, courses, etc.) or the amount of funds allocated, or even what strategies govern the music export policy beyond very general ideas about the benefits of exporting and promoting local talent. This lack of information prevents us from obtaining a clear map of the efforts undertaken by public bodies in Spanish foreign musical interventions in Europe. In short, although public initiative exists, it is fragmented and is not governed by the principle of unity of action.

Compared to the findings of my 2015 report, the only progress is perhaps a greater presence of contemporary/pop music in the programming. Nevertheless, and on the whole, it can still be said that ‘there is no body that coordinates or at least reports on all the actions carried out or programmed by the different institutions. This results in an atomisation of proposals and the absence of a strategic line that standardises actions’ (Marc 2015).

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16. Recently, for example, the Trade Commission of the Spanish Consulate in Miami has published reports on the recorded and live music market in the United States.
The private sector and PPPs

Private initiative is also characterised by its complexity, linked to the multiplicity of actors in the industry. From writers, composers, performers, production and distribution companies to venue managers, promoters and agents, the sub-industries of music have been grouping together in trade associations to promote their activity and defend their interests, also internationally. In the private sector, we distinguish between the individual actions of companies for export (marketing and communication campaigns, positioning on platforms, etc.) and those that are carried out jointly as a sub-industry, which are the ones that interest us here.

All the professionals consulted for this study point to the importance of internationalisation in their strategic plans. Their export initiatives are carried out on an individual basis, as in the case of SGAE’s participation in Eurosonic, BIME and Sonar 2023, with which the institution aims to showcase its artists. They can also focus on collaborations with other international associations, as in the case of UFI, which works with IMPALA, the European association of independent music producers, and WIN, its global equivalent, which provide tools to promote independent production, cultural/musical diversity and advocate their interests before supranational institutions. For its part, AIE points to the importance of improving data retrieval from abroad through bilateral agreements with equivalent companies in other countries.

In the early 2000s, associations of phonographic producers (Promusicae and UFI) and rights managers (SGAE and AIE) attended international music fairs and markets individually as one of their main export tools. Around 2005, the Sounds from Spain (SFS) platform was created at the initiative of the SGAE, which signed an agreement with ICEX to offer an institutional umbrella to the musical artists present at those fairs. Shortly afterwards, Promusicae and UFI joined the platform on the private side, and the INAEM on the public. At present, SFS is made up of those entities together with AIE and A.R.T.E. SFS’ aim as stated on its website is to promote the internationalisation of Spanish music through ‘activities abroad such as participation in relevant international fairs, events and festivals’ (https://www.soundsfromspain.com). SFS thus emerged as a brand, which soon became an easily recognisable formula in its national specificity, even being imitated by other countries such as Australia (Sounds Australia or Sonidos de Chile). It should be noted that SFS has no legal personality and lacks its own organisational chart or registered offices. Its structure is based on an agreement between its different members, piloted by ICEX, which chooses the markets targeted through public calls for proposals. The strategic direction taken by ICEX no longer includes the EU among its priority markets for music, so SFS is absent from European fairs such as Midem (France) and ESNS (Netherlands). Nor is it part of the European Talent Exchange Programme, a programme to stimulate the distribution of European repertoire in which 130 major festivals and 27 European public radio stations (EBU) participate, with the support of the international and European music press. In Europe, SFS only participates in Womex, the world music festival. The only public documents available on SPS are the calls for proposals, but there is no complete account of the actions carried out and the public and private funds available and actually allocated. Given this lack of data and structural consistency, it is very difficult to

17. In January 2023, the annual activity plan was published, confirming the platform’s transatlantic vision, with events in the United States, Canada, Colombia, Mexico and Chile: https://www.soundsfromspain.com/noticias/plan-de-actividades-sounds-from-spain-2023/
evaluate their interventions. It has improved its public image since 2015 thanks to a solid website that also includes the artists and companies represented in the form of a catalogue.

The industry associations consulted (SGAE, Promusicae, AIE, UFI) do not seem to be fully satisfied with the SFS platform’s operation and strategies. All point to insufficient public support and a lack of coordination and strategy, linked to a lack of training and resources. Both Promusicae and SGAE stress the need for action in the European market, the neglect of which they regret. In this respect, it is significant that SFS is not part of the European Music Exporters Exchange (EMEE), a joint initiative of the EU countries’ music export offices.

It is likely that SFS’ scarcity of resources and leadership, combined with its noted neglect of the European market, has led to the emergence of The Spanish Wave, a private initiative for the internationalisation of Spanish music led by Live Nation, which in 2022 alone organised the participation of Spanish artists in 12 international festivals. In fact, in the words of César Andión, its founder, The Spanish Wave was created precisely to promote a more intense and fluid presence of emerging Spanish musicians in the EU, both over digital platforms and live, leveraging on the possibilities of the single market. Both AIE and SGAE have decided to collaborate with The Spanish Wave to strengthen their export performance.

In fact, at the last edition of Eurosonics (ESNS) in January 2023, a ‘Focus on Spain’ was organised with the collaboration of The Spanish Wave to raise awareness of the richness and diversity of the Spanish music industry in European markets. The fair was attended by representatives of the industry and the public sector, including the Director of Cultural Industries of the Ministry of Education and Culture, as well as representatives from regional bodies (Catalan Arts, Navarra Music Commission, Institut d’Estudis Baleàrics, Valencian Music Office).

The appearance of The Spanish Wave and the new regional offices for music highlight two important issues: a gap in the design and development of a coordinated policy for the internationalisation of Spanish pop music and the need and intention to exploit the clear potential of European markets. To respond to the institutional deficit, the professional associations consulted agree on the need to create an office for the export of Spanish music, following on the successful models of other countries such as Sweden, France, Chile, Australia, the United Kingdom and South Korea. With regard to Europe, the associations also agree that there is a need to invest, organise tours, and ultimately explore and exploit European markets.

CONCLUSIONS AND RECOMMENDATIONS

The scarcity of institutional data and studies on the industry means there is no clear picture of the state of Spanish pop in the world and in Europe in particular. Nor do we know for sure what is being exported, how much is being exported, where to, or how much public resources are being invested in promoting these exports. However, in light of the above analy-

18. ‘The EU market is our next goal, and that’s one of the reasons for The Spanish Wave’s existence; we are European, and Spanish artists should tour Europe more often and on a regular basis. There is a huge circuit in continental Europe, a massive market that is super open-minded to discover other countries’ acts. We are all European, and supporting more platforms, pledges, initiatives (public or private) really enrich our union—something I believe in strongly as a unionist. A vision where young artists can tour, sell music and do PR across our EU easily!’ https://esns.nl/en/ESNS/News/ESNS-editorial-Cesar-Andion-live-nation-spain-the-spanish-wave-amf-gives-us-the-latest-word-from-spain-come-and-experience-our-festivals-its-just-different-here/?mc_cid=03ef62d594&mc_eid=cd51b27700

19. See the analytical synthesis of the different models of institutional support for exports in Chen et al. (2021, ch. 6).
sis, several conclusions can be drawn. Firstly, we note a greater presence of Spanish musical artists abroad, linked to globalisation and more democratic, cosmopolitan and omnivorous cultural practices, with greater exposure to music, clearly linked to digital formats. The Spanish music industry is aware that exporting is both inevitable and necessary, and the expressions ‘born global’ and ‘export ready’ have become commonplace in the industry. This digital revolution has a major impact on the internationalisation of artists who, a priori, have unlimited access to international markets. However, behind the utopia of immediate accessibility to the global market there are complex processes, in constant technical and legal evolution (Spanu 2023), which give rise to uneven distribution, concentrated in a handful of names and companies that are, in fact, international, as the cases of Rosalía and Quevedo demonstrate. The symbolic value of these successes is unquestionable, but their strictly commercial value is not. In this changing, complex and increasingly competitive environment, the Spanish music industry does not necessarily fare well.

Secondly, in terms of geographical distribution, Spanish music is listened to most in those regions where Spanish is understood or spoken, i.e. Latin America and the United States. By contrast, in Europe, despite the geographical and cultural proximity and the single market, little Spanish pop is listened to, and even the most international of Spanish artists do not top the European charts. This uneven distribution can be explained by cultural, linguistic and historical reasons, but, as we have seen, it is also due to a manifest neglect of European markets by public actors in the industry.

Thirdly, from the point of view of sound, those with the best international results are the trap, tropical, copla, flamenco, and reggaeton sounds, i.e., those that construct a cultural identity marked as Spanish or Latin, clearly differentiated from Anglo-American culture. Similarly, the language used is mainly Spanish. This taste for Latin music benefits the diversity of the global music scene but may perhaps have the opposite effect within the Spanish market, limiting the repertoire to ‘Latin’ genres.

We can see that there are currently a number of Spanish artists linked to the global phenomenon of Latin music sung in Spanish who obtain good, and sometimes excellent, results abroad, especially on the other side of the Atlantic. Undoubtedly, their success generates a kind of symbolic reward and a form of soft power, invaluable from the point of view of foreign interventions. However, as we have seen, not even these names are capable of topping European lists, let alone the rest of Spanish talent, which simply goes unnoticed by our European neighbours.

In light of the above, the sounds of Spain do not appear to be particularly audible in Europe, where they are still linked to an exotic imaginary, occupying an eccentric position both quantitatively and qualitatively. Given the importance of relations between Spain and its European partners and the specific weight of EU markets, the outlier status of Spanish pop in Europe is, without any exaggeration, a missed opportunity.

Below we propose a series of recommendations to support, promote and accompany

20. According to IFPI’s Global Music Report 2023, music revenues originate from streaming (67 per cent) and other forms of digital consumption (downloads, syncing, social media); physical sales worldwide account for only 17.5 per cent of the total: https://www.ifpi.org/wp-content/uploads/2020/03/Global_Music_Report_2023_State_of_the_Industry.pdf
21. The ICEX just launched a programme to support the digital positioning of music created in Spain https://www.icex.es/es/todos-nuestros-servicios/visitar-mercados/agenda-de-actividades/visor-actividades.a214000050szzgau.act00020304
22. The success of Spanish pop and indie bands in some Latin American countries such as Mexico is a major exception. It should be stressed, in this respect, that ‘Spanishness’ in this case travels through language. Thanks to Michaël Spanu for his comment on this.
the sounds of Spain in their travels within and beyond our borders.

1 Promote the creation of Spanish music content in the public audio-visual sector and specifically on RTVE a la carta, and also position it on streaming, video and social media platforms, including the new ‘Audio Space’ announced by the Ministry of the Economy and Digital Transformation.

2 Promote the inclusion of a minimum of 35 per cent of Spanish artists at music festivals held in Spain, taking into account diversity and inclusiveness.

3 Draw up a multi-annual ‘National Plan for the Internationalisation of Music’ as part of the foreign cultural intervention strategy in which all the competent institutions participate both at the national and regional level as well as representatives from the private sector and researchers from independent bodies (think-tanks, universities, foundations).

4 Within this Plan for the internationalisation of music, convert Sounds from Spain into an office for music export, with its own structure and mandate, following other models such as the Australian, Chilean or French. Its functions would include:

- Pooling support and grants according to a strategic plan and clear and transparent resources, in agreement with all actors in the industry (public and private).

- Providing complete and transparent information on its actions and on the industry in general, acting as a digital showcase for music in Spain.

- Designing specific programmes to promote and distribute Spanish pop music in Europe, differentiated by regions and countries, and implemented by the new SFS.

- Strongly supporting the production and distribution of independent music in Europe.

- Actively participating in European programmes such as Music Moves Europe.

- Encouraging the training of professionals specialised in the internationalisation of cultural industries.

REFERENCES


THE SPANISH VISUAL ARTS SYSTEM IN THE EUROPEAN FRAMEWORK

Salomé Cuesta Valera

We will address the presence of the visual arts in the Spanish system with respect to European initiatives that consider artists as catalysts for change and innovation to highlight the collaborations between European institutions and the recognition of Spanish artists in these initiatives over the last ten years. By reviewing European reports, documents produced by the creative and cultural industry and by national institutions, we will propose a brief diagnosis comparing resources at the intersection of arts-sciences-technology in 2003–2023. Based on the above, a few public policies are presented which are being worked on by different ministries in our country and which could help the industry to improve and move closer to alignment with the European framework.

Key words: visual arts, arts-sciences-technology, creative and cultural industries, Renaissance 3.0.

THE VISUAL ARTIST AND THE ART SYSTEM: DEFINITION AND DIAGNOSIS

Multiple reports and writing on the situation of the visual artist in Spain have over the last twenty years pointed out similar demands regarding the needs of the cultural and creative industry. When artists’ collectives ask themselves ‘who is a professional visual artist under Spanish law?’ it becomes clear that the legislation offers neither a definition nor a distinction, proof of which is that at the tax level the heading of the visual artist is assimilated under the professional profiles of musicians, writers and dancers; as a consequence of this lack of definition, it becomes difficult to: 1) analyse the economic dimension of the visual arts; 2) obtain specific data through the Cultural Statistics Yearbooks; 3) identify emerging areas that should be considered strategic in the creative and cultural industry.

Regarding the first point, in 2017, *The Economic Activity of Artists in Spain* was published, a report based on the testimony of 1,100 artists. Through the data provided in an exhaustive survey, the report offers relevant information about how artists live and work in our country, what relationships they maintain with the art system and that artists who work with traditional media (painting, sculpture, drawing, engraving) earn more than those who work with emerging technologies.

The first analysis of the magnitude and characteristics of the economy in the visual arts in Spain was carried out in 2006 by the Associació d’Artistes Visuals de Catalunya. Under the title *The Economic Dimension of the Visual Arts in Spain* the study shed light...
on the relations that this industry establishes with social realities, both technological and economic. The study helped to accurately delineate the economic system; the work put in helped to form an accurate picture of the industry. At the methodological level, given that this was a pioneering study, the concept of ‘visual arts’ had to be defined, a key point when it came to demarcating the identification of the agents that carry out activities within the visual arts system. That’s why when it came to demarcating such a broad and complex industry they discarded the concept of ‘plastic arts’ or ‘fine arts’ and adopted the concept of ‘visual arts’, given that their definition considers both fine arts disciplines and new disciplines: photography, multimedia and digital art.

During the professional meetings held, a number of aspects relating to professional skills in the industry came to light that directly pointed to shortcomings or room for improvement in the area of training, production and public administrations, some of which we highlight below as they could still be considered valid today:

• The training of artists is inadequate for the current conditions of production.

• Social problems artists have: low income, disadvantaged tax and legal status, lack of social coverage, precarious employment.

• New artists develop projects that are a response to the limitations of the industry: they are collaborative, in contact with the public and use emerging technologies.

The diagnosis they carried out reveals the importance of the training processes for artists and points to the need to implement profound transformations in Fine Arts departments in the face of social, technological and environmental challenges. In the words of José Luis Brea, given that ‘art works with ideas embodied in an order of visuality, and any device capable of registering them is for that purpose suitable’, the artist should acquire ‘conceptual tools that provide a critical knowledge of the contemporary world, which is necessary so that this insertion into the fields of the new industries of the collective imaginary does not dilute the artist’s function down to that of a mere entertainer, but rather reinforces his or her potential for symbolic production in the training for the development of self-reflection and criticality’.

The generation of artistic, cultural and heritage content developed by visual artists with emerging technologies reveals the dual nature of the industry: on the one hand the generation of values, meaning and identities (the political, social and symbolic dimension), and on the other, the generation of wealth and jobs (the economic dimension). These aspects were pointed out by numerous studies at the beginning of the twenty-first century. We would like to highlight some of the reports that constituted a reference for the formulation of the creative industries: Beyond Productivity: Information Technology, Innovation and Creativity (2003); and Truth, Beauty, Freedom, and Money: Technology-Based Art and the Dynamics of Sustainability (2003), and finally, Creative Industries Mapping Document (1998–2001). In 2013, the European Union published a definition of the cultural and creative industries in Regulation [EU] no. 1295/2013, which has been taken as a reference and visualised in different documents as concentric circles (Figure 1) that delimit art (visual arts, performing arts and heritage) at their central core and radi-


4. Available: https://tinyurl.com/pwmxm38f
to the extraordinary new possibilities that the scenario of electronic technologies provides and will provide in the very near future.\(^5\)

In 2003, the ACT group of experts, created at the suggestion of the Humanities Commission of the Spanish Foundation for Science and Technology (FECYT) and led by José Luis Brea, pre-identified the resources at the intersection of arts-sciences-technology in play in our country. Thirty-six resources were identified (Figure 2) classified into five categories:

- Application of emerging technologies to the popularisation of heritage
- Archiving and processing of information
- Production of artistic-technological projects and research
- Dissemination of electronic art production
- Comprehensive initiatives, simultaneously targeting production and dissemination

This first screening also included information on the institution that promoted it, the place and the type of ownership (public, private or mixed) and was an initiative that sought to provide information on the resources existing in our country and recommended that in subsequent phases an exhaustive catalogue should be drawn up through a questionnaire filled out by the centres or institutions.

Based on the elaboration of the census of resources at the intersection of arts-sciences-technology, the creation of a ‘network’ that aimed to promote communication between its members and the public was also pro-

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posed. At that time, the technological resources of cultural institutions were scarce, so the creation of a 'network dissemination channel' would lead to improvements both in archiving processes and the popularisation of heritage, as well as in the production and dissemination of artistic and cultural activities.

Two decades on, where do we stand now? FECYT has luckily incorporated into the 2022 action plan a new line of action to review and update the Libro Blanco de la interrelación entre Arte, Ciencia y Tecnología en el Estado Español (White Paper on the Interrelationship between Art, Science and Technology in Spain) based on the work it started in 2003. This update, together with other recently created initiatives such as the launch in Barcelona of the science, art and technology HUB6 (Hac Te)7 which also promotes the creation of the ACTS Network through geographic nodes in Barcelona/Catalonia, the Basque Country, Madrid and Valencia, we hope to soon have a map to make the different active agents (institutions, associations, collectives, curators, artists, scientists, engineers, etc.) visible. Given that it is an incipient network that will be built horizontally, by the actors involved themselves, who will be responsible for diagnosing the industry’s issues to define and share working dynamics, when the results will be available is hard to say.

To develop a comparative evaluation in relation to the resources pre-identified in 2003, we have turned to projects and meetings that have been implemented by institutions and spaces in which renowned experts such as Karin Ohlenschläger, Remedios

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6. Available: [https://tinyurl.com/m78nh68b](https://tinyurl.com/m78nh68b)
7. (Hac Te) aims to explore and develop the intersections between art, science and technology to strengthen soci-
Zafra, Juan Luis Moraza, Mónica Bello, etc. have participated.

In 2015, the Ministry of Culture and Sport launched the Culture and Citizenship programme to promote citizen participation in culture through meetings, research and debates. To date, three mappings have been done showing the different agents that have participated in the meetings organised by the programme, which is open to participation, since its webpage mentions that new proposals can be incorporated using a form as long as the projects meet the established criteria.

The LabMeeting 2015 Madrid was also organised in 2015 by Karin Ohlenschläger at Medialab Prado to exchange experiences and knowledge about the spaces for dialogue between art, science, technology and society created in our country since the 1980s, both in cultural centres and in other institutional areas. One of the aspects addressed was the stagnation and even disappearance of spaces that were once quite dynamic.

Taking as a reference the meetings organised by the Ministry of Culture and Sport and Medialab Prado, we have drawn up a new census (Figure 3) that follows the classification criteria of the register of resources started by FECYT’s ACT Group in 2003 to understand and analyse the transformations that took place 2003–2023.

The first fact to be taken into consideration is the permanence of publicly owned spaces (ten), highlighting the role of the universities (six) which through their research groups promote the production of artistic projects and research. Secondly, there has been a change in trend in the promoting institutions, given that in 2023 there are more proposals promoted by city councils and regional governments, demonstrating a greater commitment to the local. Thirdly, comprehensive initiatives increased in 2023, simultaneously aimed

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8. Available: [https://tinyurl.com/whe3rxru](https://tinyurl.com/whe3rxru)

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**Figure 3.** (Partial) identification of resources in Spain. State of the Arts-Sciences-Technology system (2023).

Source: prepared by the author.
at the production and dissemination of activities as a result of the development and improvement of the services and infrastructures of the promoting institutions.

Based on these conclusions, institutions should carry out an in-depth study of the resources available in our country to meet the needs of the visual arts industry, a creative industry involved in the digital revolution, with particular relevance for the role they are going to play in the new European movement known as Renaissance 3.0. Since artists and scientists—as Peter Weibel argued—use similar tools in the digital age, which opens up a multidisciplinary knowledge base that is shared, from biochemistry to genetic engineering, unconventional computing and neuroscience:

In the 21st century, there is a new basis for the convergence of the arts and sciences. Artists and scientists share a common ‘pool of toolbox’. Tools that dentists use, for example, small cameras that illuminate the oral cavity, are also used by artists. The same computers and screens are used by artists and scientists, as are algorithms and data networks. Mathematical equations slide over into genetic entities, both for physicists and artists, and geometric entities and fluid objects transform into data, into data curves, both in science and in art.\textsuperscript{10}

VISUAL ARTS AND INNOVATION IN SPAIN

In our country, initiatives in art, science and technology have been timidly maintained and developed in some institutions as we have seen in the identification of resources (Figures 2 and 3). Some of these centres deserve special recognition given they are committed to implementing new forms of transdisciplinary knowledge production despite not having defined support policies at a national level. These proposals have never been a priority area, not in cultural policies, not in the strategies of the scientific and research field; however, they have managed to be part of different European public calls for tenders to develop interesting proposals. An example of this is the Fundación Zaragoza Ciudad del Conocimiento (Zaragoza City of Knowledge Foundation or Etopia)\textsuperscript{11} and LABoral Centro de Arte y Creación Industrial (LABoral Art and Industrial Creation Centre).\textsuperscript{12} Both centres are part of the European Digital Art and Science Network (EDASN).\textsuperscript{13} This network was launched by Ars Electronica in 2014, with the participation of several cultural institutions, the two aforementioned Spanish entities and Center for the Promotion of Science (CPN) (Belgrade, Serbia), DIG Gallery (Košice, Slovakia), GV Art London, Kapelica Gallery/Kersnikova Institute (Ljubljana, Slovenia), Science Gallery Dublin at Trinity College together with leading spaces in scientific research such as CERN,\textsuperscript{14} ESO,\textsuperscript{15} ESA\textsuperscript{16} and Fraunhofer MEVIS.\textsuperscript{17} For three years, the European network offered residency programmes to integrate artists into the scientific laboratories that were part of the programme to encourage dialogue between the arts and science, combining scientific themes with creative and innovative approaches to digital art.

Under the framework of this programme, the Zaragoza City of Knowledge Foundation (Etopia) presented the exhibition ‘Reverberadas - Reverberations: Explorations about

\textsuperscript{10} Available: https://tinyurl.com/mapm4nm9

\textsuperscript{11} Fundación Zaragoza Ciudad del Conocimiento. https://www.fundacionzcc.org/
\textsuperscript{12} LABoral Centro de Arte y Creación Industrial. Available: http://www.laboralcentrodearte.org
\textsuperscript{14} CERN, European Organization for Nuclear Research.
\textsuperscript{15} ESO, European Southern Observatory.
\textsuperscript{16} ESA, European Space Agency.
\textsuperscript{17} Fraunhofer MEVIS, a global network of clinical and academic partners focused on developing software for screening, diagnosis and image-based therapy.
Science and Art’ (2016) which asked the question of how science can be a source of inspiration for art and how art can appeal to the exploration of the next frontiers of science, and in 2017, the project ‘Bioaesthetics’, which through a programme of artistic residencies, workshops, conferences, etc. and the exhibition ‘Postnature’ focused on the biotechnological revolution and the scope of its impact.

The LABoral Centro de Arte y Creación Industrial also organised an extensive programme of seminars, workshops and exhibitions about artistic and scientific practices, such as the exhibitions ‘Materia Prima’ (2016) and ‘Los Monstruos de la Máquina’ (2016), which examined the role of women in art and science, paying homage to Mary Shelley’s Frankenstein to reflect on the challenges and concerns of society in the face of scientific and technological advances in the twenty-first century.

Both LABoral Centro de Arte y Creación Industrial (Gijón) and Etopia (Zaragoza) are two examples of centres in our country that share a common vision, that of fostering creativity, innovation and the exploration of new forms of art and technology, and of doing so in an environment of collaboration and interdisciplinary dialogue. We could also highlight the work carried out in Hangar (Barcelona), a centre dedicated to artistic research and production that supports creators and artists and which has collaborated on the following projects: MOB: Mobility, Art, Technology and European Cities within the framework of the Culture Programme of the European Commission; Soft Control funded by the European Commission under the Culture Programme; and Iterations, a European project committed to the future of artistic collaboration in digital and networked contexts. It has led Biofriction, a Creative Europe project, developed with the Bioart Society, Cultivamos Cultura and Kernnikova Institute, organisations committed to supporting bioart and biohacking practices.

This type of artistic proposal that combine art, science and technology finds a place to exhibit their results in the European contemporary art centres, such as the Centre Pompidou (Paris), which since 2017 has been organising an annual Creation and Innovation Laboratory called ‘Mutations/Creations’; the event’s exhibitions are articulated around a programme of meetings and workshops to turn the museum into an ‘incubator’, a place for live prototype demonstrations and artistic experiences, to decompartmentalise the scientific, artistic and cultural worlds. In one instance of this approach, the ZKM (Karlsruhe, Germany), which began to record, support and collect digital works when it was inaugurated in the 1980s, just opened the exhibition ‘Renaissance 3.0 A Base Camp for New Alliances of Art and Media in the 21st Century’ (2023) as an example of bridging the ‘two cultures’.

We might think after this brief diagnosis that artistic practices in the European context, and specifically the visual arts interested in the digital revolution and its implications, have sufficiently articulated institutional support and recognition at a political and social level. However, there is a tension between these artistic proposals and the art world, as Christiane Paul argues in her article ‘New Media in the Mainstream’:

‘Apart from historical baggage, the reasons for the continuing disconnect between new media art and the mainstream art world lie in the challenges that the medium poses when it comes to 1) the understanding of its aesthetics,

18. BIOFRICTION. Disponible en: https://tinyurl.com/4sbpcurl

2) its immateriality (a key element of the medium’s aesthetics), 3) its preservation, and 4) its reception by audiences’.

Perhaps the challenges mentioned by Christiane Paul constitute the argument for or justification of why artistic practices that require technology have found it more difficult to normalise their presence through exhibitions or forming part of collections in our country’s museums. In the twenty-first century, digital culture has introduced major changes in the modes of production, distribution and reception of works of art that should be addressed by both cultural and educational institutions.

However, we are seeing the proliferation of events that, supported by emerging technologies and as immersive exhibitions with sensorial or virtual reality rooms, dedicated to artistic movements, famous artists or commemorations, aim to show the general public new ways of enjoying art in a fun way. New spaces that are advertised as ‘the ideal scenario for art, science and technology to meet’ is how MAD- Madrid Artes Digitales, installed in 2022 in Nave 16 of the Matadero as a Immersive Experience Centre, defines itself on its website. The organisation of these kinds of shows was already announced by Elena Vozmediano in her article ‘De centro de residencias a barraca de feria’ (‘From Artistic Residence to Fairgrounds’) published in 2021 and has also been questioned by art critics because of its for-profit nature or as simple ‘Instagram infrastructure’ and an art thirst trap. The debate raised by immersive exhibitions as experiences that play on the edge of culture and entertainment calls to mind José Luis Brea’s reflection: Do we want the new industries of the collective imagination to dilute the role of the artist down to a mere entertainer? Or to develop tools for self-reflection and criticality, as a catalyst for change and innovation?

**VISUAL ARTS AND INNOVATION IN EUROPE**

In recent decades, both in the Spanish visual arts system and in the European, we have observed a special interest in the strategic potential at the intersection of art, science and technology. This approach has been demonstrated through a number of actions, the most important of which is the STARTS initiative developed within the EU’s research and innovation programme, which has been successful in creating a stable framework for collaboration between artists, scientists, engineers and researchers, with the aim of developing more creative, inclusive and sustainable technologies. The programme has been developed through various calls for proposals such as the Re-FREAM residencies and the S+T+ARTS prize, actions supported by and linked to leading European organisations, focused on the analysis of the digital revolution that address major questions for our future: What do emerging technologies mean in our lives? How do they change the way we live and work together?

Anne Nigten in *A Theory of Change. S+T+ARTS Prize, Evaluation 2017–2019* carried out a detailed assessment of the S+T+ARTS prize, interviewing the prize winners, studying the jury’s statements and applying the indicators developed by the European Commission and published in the *ICT Art Connect* studies (2014 and 2015). The starting point of the...
S+T+ARTS call is to define artists as catalysts for change and innovation; Nigten tries to show through the study of the works awarded that the following indicators are met: the results present a critical approach to technology; are socially innovative; create emerging technologies; develop new formats for education; design tools for visualising information; improve scientific communication; introduce innovation into research; create innovative artistic practices for the digital single market; rapidly produce nearly marketing phase ready results.

Of the more than 300 projects selected from 2016 to 2022, are there any Spanish artists who have received recognition with a S+T+ARTS prize? In 2021 the grand prize in the Innovative Collaboration category was awarded to the project ‘Remix el Barrio, Food Waste Biomaterial Makers’ developed at IaaC Fac Lab Barcelona and in 2019, in the same category, the project ‘Ciutat Vella’s Land-use Plan 300.000 Km/s’ was recognised. In 2022, honourable mention went to Joana Moll and in 2020, to the project ‘The Wrong’. Other nominees include D-CENT and the Foundation Dyne and artists such as the duo (uh513) formed by María Castellanos and Alberto Valverde, and Antoni Abad, who in 2006 won the Golden Nica Ars Electronica, the world’s most important prize for digital art. The assessment of award-winning artists, or those who have participated in the S+T+ARTS programme and have been selected, is positive, putting our country on the awards map (Figure 4), which are presented every year coinciding with the Ars Electronica Festival.

The S+T+ARTS initiatives mentioned above have set out to harness the potential

25. Available: https://tinyurl.com/ymam9a6w
of art to contribute to innovation, innovation which is often perceived by many organisations as inherent or restricted to technology. However, we need a broad definition of innovation as the limitation hinders the potential of Europe’s creative and cultural industries.

If we take a closer look at the European Community’s regulatory framework, we find numerous reports and documents that show that the interrelation between culture, creativity and innovation has been one of its priorities:

1. The call HORIZONTE 2020, Information and Communication Technologies, the topic: ‘Boost synergies between artists, creative people and technologists’ (ICT-36-2016).

2. Council Conclusions on cultural and creative crossovers to stimulate innovation, economic sustainability and social inclusion (2015/C 172/04)26 where they encouraged the funding of projects aimed at:
   - supporting multidisciplinary teams of artists, researchers and technologists;
   - better supporting non-technological, social and service innovation;
   - developing transversal skills, such as critical thinking and initiative taking;
   - supporting artistic practice in urban development as part of smart and creative cities;
   - fostering a user-centred approach in modernising public services, e.g. through the application of design thinking;

3. The role of public policy in developing the entrepreneurial and innovation potential of the cultural and creative industries,27 as it explores the role of culture and creativity in the generation of welfare and social cohesion, modernisation and cultural entrepreneurship.

PUBLIC POLICY IN THE CREATIVE AND CULTURAL INDUSTRY IN SPAIN

In the university environment we clearly perceive a drive to promote the ‘3.0 Renaissance’ through public calls such as FECYT’s ‘Grants for the Promotion of Scientific, Technological and Innovation Culture’, which in the 2022 call dedicated a budget item to art, science and technology projects, defined as: ‘Projects that propose synergies between these three areas to answer through research the questions posed by the world in which we live, presented in collaboration with a minimum of: one agent from the field of current national artistic creation and production (artists, museums, foundations, etc.) and another from national scientific research (research centres, universities, etc.).’28

This call, which fulfils the aims and objectives of the Ministry of Science and Innovation, highlights the need to incorporate new cross-disciplinary ways of working between institutions to include ‘art and citizen participation in the way science is done’ as promoted by the OpenSystem research group29 at the University of Barcelona.

The Ministry of Universities in 2022 also launched a working group to democratise the knowledge and science produced in universities together with the Ministry of Science and Innovation as a state strategy.

One of the areas the Ministry of Culture and Sport manages is Cultural Industries and Sponsorship, dedicated to promoting cultural

27. Available: https://tinyurl.com/mryxu6fp
28. Disponible en: https://tinyurl.com/3u5vky4k
29. OPENSYSTEM. Available: https://tinyurl.com/m3n2p5hr
industries through calls for tenders such as ‘Grants for the modernisation and innovation of cultural and creative industries for cultural action and promotion’ and ‘Grants for cultural action and promotion’, and the area of Art Promotion, which works on the ‘promotion of artistic creation through resources aimed at artists, galleries and professionals’. Its functions include managing exhibitions, meetings and workshops, visual arts projects and national awards in the fields of visual arts, photography and fashion. The promotion programme is articulated along two lines of action:

- Grants for the promotion of Spanish art and support for new trends.
- Promotion of the main national fairs, festivals and meetings.

In 2007, Tabacalera Promoción del Arte was planned as the National Centre for the Visual Arts to develop a permanent programme of temporary exhibitions and activities related to photography, contemporary art and the visual arts.

We argue that these public calls, which contribute to social and cultural innovation, offering funding, support and recognition for projects and initiatives that seek to have a positive impact on society, are not sufficiently studied in Cultural Statistics, as mentioned by Marta Pérez Ibáñez: ‘the information provided by the Yearbook on the complex industry of the visual arts is much more deficient than on the other cultural industries included in it’. This is either because there are no adequate indicators adapted to the Spanish regulatory context or because the creative and cultural industry is unknown.

CONCLUSIONS AND RECOMMENDATIONS

There are many European initiatives and documents that place the visual artist at the epicentre of the innovation process, however, it is not yet perceived as a favourable framework in terms of cross-sectoral innovation in our country.

1 Following the analysis of resources for the creative and cultural industry, we can safely say that universities play a key role in the visual arts system, both in training and research, despite the fact that few bachelor’s and master’s degrees are offered at public universities in visual arts and multimedia adopting a critical approach to technologies.

2 In the absence of precise information in the cultural statistics the incidence of practices in the field of visual arts that use technologies in top-tier museum spaces cannot be assessed and whether these institutions have departments to promote and support the production, preservation and custody of digital heritage should be analysed.

3 The support for the creative and cultural industry’s digitisation should contribute to the debate around and questioning of technology in culture; creating immersive or virtual reality shows with cultural or artistic themes is part of the audio-visual industry that generates content but should not be confused with the experimentation done by visual artists.

4 For all these reasons, a strategy should be developed for the visual arts in collaboration with the industry’s associations, which would allow us to move closer to the European policy in the field of innovation in arts-sciences-technology.

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Briefly reviewing the current panorama of the industry in Spain and Europe and the situation in which architects find themselves in general, we can see that in addition to what we could call ‘traditional practice’, we are facing new challenges and challenges resulting from the major contemporary crises, in which the training, knowledge and skills of architecture professionals play a very important role at the global level.

The new environmental initiatives, closely linked to the reorganisation of mobility and territory, as well as to health, require analysis, decisions and actions that architecture can resolve based on its broad technical and humanistic knowledge of the lived-in environment.

Therefore, in addition to adapting the traditional activity of architecture in construction, carefully managing processes and materials, the paradigm of the architect as a single figure must be done away with to give way to cross-cutting and collaborative models in which architecture does not materialise only in a built work but embraces a network of multiple agents in which design, society, city and sustainability are intertwined resulting in projects committed to the present day, and in which the process itself is as important as the result.

These new ways of doing things are already with us and are well known in the industry, but we must spread this polyhedral vision both to the new generations of architects and to society at large, trying to consolidate these practices in the minds of administrations, institutions and schools.

**Key words:** architecture, quality, heritage, sustainability, social commitment, training and diversification.

**A VISION OF SPANISH ARCHITECTURE IN EUROPE**

Spanish architecture is positioning itself bit by bit as a pillar in Europe, with common objectives and programmes. Challenges such as climate change, resource scarcity and the energy crisis are leading us towards Europe’s call to become the first climate-neutral continent by 2050. To achieve this transformation, the EU explicitly addresses the built and lived-in environment as part of a broader strategy. In combination with the New European Bauhaus (NEB), the quality of the built and non-built environment must be at the centre of this transformation.

The future of the construction industry lies in a new culture of conversion. As with the operation of buildings, both the construction and use of materials contribute to greenhouse gas emissions and consumption in transport. The extensive stock of buildings, the urban fabric and infrastructure, both in cities and outside of them, must be rethought, while a new contemporary design language is emerging from the examination of existing ones with the aim of creating the Baukultur of tomorrow. A language that also
appropriates a culture of non-destruction, valuing the resources already invested in the past as an asset, and redefining their use and occupation, respecting the existing heritage.

In this context, it is a well-known fact that Spanish architecture enjoys a notable reputation in Europe, both for the buildings that Spanish professionals erect all over the continent and for the talent exported to European firms. There is also a thriving European interest in knowing what is going on in Spain in relation to the built environment, like with the recently passed Law on the Quality of Architecture. In this sense, and given its topicality and innovative nature, we must begin our overview by mentioning this new law, which only perpetuates the importance of the discipline, making its values more accessible to society, and positioning itself at the forefront in Europe.

Quality of Architecture Law in the European Context

The Quality of Architecture Law declares architecture as a good of general interest and the principle of quality in architecture. This last precept has an inspirational character and mentions ‘essential elements for a twenty-first century society, such as innovation, versatility and ease of adaptation to new uses and ways of life throughout the life cycle, harmony, protection of pre-existing values, optimal management of resources in the context of a circular economy, energy efficiency, promotion of renewable energies, environmental and landscape protection, universal accessibility and hygiene, health and comfort’.

The Quality of Architecture Law was proposed ‘as a necessary legislative instrument to consolidate a new model of economic, energy and ecological transition that promotes greater inclusion and social cohesion’.

It also aligns with European initiatives that seek to preserve Europe’s cultural heritage, both in urban and rural areas, and shape its future, such as the New European Bauhaus (NEB), as well as with others that seek to promote transformative urban and rural policies, such as the actions developed under the European Green Deal to achieve a transition to a clean and circular economy, reduce pollution and emissions and protect biodiversity, and the strategic Renewal Wave to create green buildings for the future, aimed at urban regeneration and renovation.

In addition, the Quality of Architecture Law is an outstanding proposal at the European level and moves forward in line with several of the thoughts set out above:

- In recital 27 of Directive 2005/36/EC of the Parliament and of the Council on the recognition of professional qualifications: ‘Architectural design, the quality of buildings, their harmonious incorporation into their surroundings, respect for natural and urban landscapes and for the public and private heritage are a matter of public interest’.

- Several decisions of the Council of Ministers of the European Union have reiterated since 2007 that architecture, as a manifestation of culture, serves essential purposes of public interest: in social cohesion, in the fight against climate change, and in environmental sustainability, contributing to architectural quality.

- The Davos Declaration, signed in 2018 by the European Ministers of Culture and which Spain has adhered to, which is expressly mentioned in the explanatory memorandum of the law itself, consolidates the concept of Baukultur which includes values such as architectural design, construction and landscaping and the protection of cultural heritage. This is at the heart of sustainable development.
**The Profession Today**

Architecture in Spain has faced a number of challenges and opportunities in recent years. It is inevitable, almost 15 years later, to refer to the economic crisis of 2008, in which construction was one of the hardest hit, leading to a drop in demand for architectural projects and services. However, in the last decade there has been a gradual recovery, especially in urban areas and tourism regions, which has led to an uptick in demand for residential, commercial and infrastructure projects.

Taking housing as an indicator, given that it occupies 66 per cent of total construction, and although the general trend over the last few years has been upwards, we now find a pause in growth, from 107,000 homes built in 2021 to 105,686 in 2022. There was a 2 per cent dip in built square metres compared to the previous year. It should be noted that within the above data there is a considerable increase in renovations to residences compared to new construction, with an increase of 9.3 per cent from the previous year, which represents an extraordinary increase of 42.2 per cent compared to 2019, largely boosted by European programmes and tax rebate policies on renovations.

The year 2022 closed with 50,000 registered architects, Spain being the fourth country in Europe with the most professionals, behind Italy, Germany and Turkey, in that order, with 8 per cent of the total architects in Europe (619,700). Nationally, the number of architects has grown by 2,400, after a sharp drop in 2020, when after years of increase the figure decreased by more than 8,000 professionals.

With a ratio of 1.1 architects per 1,000 inhabitants, of which 53 per cent are men and 47 per cent are women, Spain is in line with the European average on both counts. It is worth noting, analysing the population of the profession, that we are still facing a young scenario, in which 36 per cent of architects are under 40, five points above the average in Europe, although more mature than previous data at the national level.

In terms of employment, architecture in Spain has a very low unemployment rate of around 3 per cent, with 85 per cent working full time and the rest working part time or retired. It is worth highlighting the particularity of the Spanish case in terms of retirement age, as 52 per cent of architects expect to retire after the age of 70, of which 24 per cent plan to continue working permanently.

The main way their work is carried out in almost 50 per cent of cases and well above the European average continues to be that of an architect with his or her own studio, a style that has been growing steadily since 2016. The number of salaried architects is decreasing, while the number of architects working in the public administration remains the same.

There are a total of 13,625 architectural firms or studios in Spain, 67 per cent of which are sole proprietorships, as we saw in the previous paragraph. Almost the entire remainder is occupied by studios with under five people; the number of larger studios is very small.

To stand out in the competitive job market, architects have sought to differentiate themselves through specialising in specific areas of opportunity, often through continuing education and developing new technical skills. Some of the most in-demand specialisations include sustainability, BIM, 3D modelling and visualisations, restoration and conservation of historical heritage, urban planning and town planning, among others.

Spain is at the European average in the design and construction of nearly zero-energy buildings, as well as in the use of BIM to develop projects, addressing the technical and social requirements of current demands.
In the field of large-scale construction, participation in public tenders organised by governmental entities and public bodies is still common among architects in Spain. These tenders offer opportunities to tackle large-scale projects, such as public buildings, infrastructure, urban spaces and urban development plans, and the success rate achieving project implementation is very high compared to the European average, 72 per cent compared to 42 per cent. Even so, architects’ participation in calls for bids has declined by a third in the last six years due to the cost of the work involved in submitting tenders, the tight deadlines, the solvency conditions required and the low fees sometimes offered.

These inadequate fee offerings, together with the legal impossibility of establishing indicative rates for the valuation of the services offered, have an impact on the monetary devaluation of architects’ work, perpetuating a recurring problem in the industry, namely low income. This is a problem that the new Quality of Architecture Law aims to remedy, which includes in its text the creation of an Architecture Quality Council that will be able to advise contracting bodies on estimating fees.

Successive surveys of the profession conducted by the Arquia Foundation, as well as other studies of the industry at the national and European level, show that the problem of low income is widespread, not limiting itself to recent graduates. Although the architecture market in Spain has experienced a spectacular increase of almost 50 per cent in the last two years, ranking 4th in Europe, and contributing to an overall boom in Europe of 23 per cent since 2020, the average income has decreased by 15 per cent, while the European average has grown by 6 per cent, leaving us with an average annual income of €25,600. Germany is the European country whose architects rank highest in terms of income, with an average salary that is twice Spain’s, compared in purchasing power parity indices. Similarly, but looking at the hourly rate charged by architectural firms, the average in Spain is €31 to €41/hour, well below countries such as Austria or Denmark, with averages of around €90/hour, also adjusted to purchasing power parity indices. That said, only 12 per cent of companies choose this pricing model. The most common one is to charge an agreed percentage of the contract value (Figure 1).

![Figure 1. Salary to market evolution](image-url)
This situation, which continues to be affected by the obvious job insecurity that has been dragging on since the construction crisis in Spain, has led to a talent leakage that has become a major challenge for the country. Many architects, especially young ones, look for job opportunities in other countries with more promising job markets or larger projects. This brain drain deprives Spain of potential contributions and creative talents that could enrich local architecture, although it has promoted first hand the internationalisation of Spanish architecture, attributing value, above all in Europe, to the figure of the Spanish architect.

Internationally, the image of the Spanish architect enjoys a very good reputation, mainly due to schools maintaining a holistic training that benefits the skills, creativity and knowledge of the discipline, resulting in a profession with different capabilities to those of other international architects, in which the field is more limited. Spanish architecture is a bellwether worldwide, with highly recognised and award-winning architects, where the fusion of Spain’s rich architectural tradition with avant-garde solutions, the ability to adapt to different contexts and the adoption of sustainable practices have established them as valuable and respected professionals on the European scene.

The internationalisation of Spanish architecture has also been boosted by the participation of architects in large-scale international projects and work done with other European professionals. This integration into the European market has allowed Spanish architects to expand their influence and share their creativity and knowledge throughout the region, also making Spain a very attractive country for the arrival of works by European studios, as well as students who choose to study at our universities.

To support the promotion of Spanish architecture abroad, the administration and institutions must act as active facilitators, with the capacity and tools to facilitate the internationalisation of exporting assets. In this sense, among other relevant aspects, the Arquia Foundation—in its optimistic vision of considering internationalisation not as something forced, but as a springboard or creator of opportunities—is an active facilitator by promoting and facilitating the internationalisation of Spanish architecture and architects, mainly through spreading best practices through publications and the documentation centre, and the arquia/scholarships programme, an Iberian model among students and recent graduates to begin their professional careers in reputed national and international architecture studios.

**Young People in Architecture**

Given the above scenario, there is no doubt that young people inevitably become a highly vulnerable group, with difficulty finding jobs and securing sufficient income. If we take the concept of a young architect to mean someone under 40 years old, we must bear in mind that most of them began their studies in the midst of a period of crisis in construction that foretold a bleak professional future.

This fact, together with the radical technological revolution and the need to adapt to new contexts, has led not only to the aforementioned brain drain, but also to a broadening of horizons that has resulted in a diversification of the profession in which the traditional practice of architecture is no longer the only career option. In addition, young architects in the building industry are excelling by skilfully incorporating the latest digital methods, such as BIM and 3D visualisations, and by showing in their projects a strong commitment to sustainability and social responsibility, including practices and techniques that promote the preservation of
the environment and the well-being of the community.

Nearby Europe is in the focus of the younger segment of architecture, not only because it contains destinations that offer better professional opportunities, but also because it is at the forefront of certain technological systems and has successfully experimented with cases in which the public has been involved in the project process. These lessons, although increasingly present in our country, and projects carried out on the continent, have certain platforms and programmes that support the exchange of knowledge and teamwork, starting with the Erasmus programme, at the training stage.

The **Erasmus programme**, whose success lies in the development of the awareness of being European, allows for first-hand experience of the different ways of doing things throughout the continent, and is not only a magnificent training period for students, but also an opportunity for other countries to recognise the value of future and present professionals, as in the case of Spain. In Spain, the most sought-after Erasmus destinations are in the Netherlands, Germany and Italy due to the iconic examples of urban planning and architecture, a promising job market or a notable historical heritage. It should be noted that in 2020 Spain was the most sought-after destination for European architecture students, and that, as a result of the foreign knowledge of Spanish architecture, our professionals are the most sought-after by studios and companies in Europe.

Another relevant case in the panorama of young European architecture is the **EUROPAN competition**, where our country has become a major player. EUROPAN is a biennial architecture and urban planning competition held in different European countries for architects under 40, which seeks to promote creativity and sustainability in the design of urban spaces. In its 2022 edition, with a range of 40 locations in nine European countries, including Spain, and with a total of 127 prizes, 36 Spanish teams won prizes, 15 of them in foreign locations. In total, 106 young Spanish professionals won a prize in this edition of EUROPAN, which is a first-of-its-kind number for Spanish architecture, in a competition with strong roots in our country, and which is often an extraordinary opportunity to carry out the chosen projects and to start or consolidate a professional career thanks to government involvement.

Another relevant cultural programme in Spain that supports the younger generation of architects is the Arquia Foundation itself, which since 2008 has been holding the biennial **Arquia/próxima** competition for Spanish architects (and Portuguese architects since 2020) in their first ten years of professional practice, offering prizes, publicity, promotion and enhancement of their achievements and principles as professionals. An open, continuous and permanent registry that shows an image of emerging architecture and currently has 5,661 projects by 1,776 different architects. As a result of the profession’s diversification, we speak of projects with the idea of going beyond blueprints and construction to incorporate any intervention carried out by architects within their broad field of action, making visible a professional panorama in which, in addition to the built work and disciplines related to design (graphic, fashion, product, publishing, etc.), there is room for cultural initiatives, urban proposals, research, documentaries, business projects and technological innovation products. From the analysis of the participation data of the 2022 edition we can see that of the 10 per cent of the projects presented by Spanish architects, almost half were in Europe, mainly in Italy, France and Germany, and interestingly this is the first edition in which places from Eastern
Europe or nearby are beginning to make an appearance, with works located in Ukraine, Lithuania, Romania and the Czech Republic. The international character of this initiative is completed by a considerable representation in Latin American countries, mainly Mexico, followed by Argentina, Peru, Chile and Colombia, and a timid but interesting opening towards East Asia.

Although challenges remain, such as job insecurity and market competition, young people in Spanish architecture have shown their resilient attitude and optimism about the future. With their commitment to sustainability, innovation and creativity, young architects in Spain are called to play a significant role in developing architectural and urban solutions to address the challenges of the twenty-first century, contributing to the improvement of the built environment and the well-being of society as a whole.

SPANISH ARCHITECTURE IN EUROPE

Spanish architecture enjoys notable popularity worldwide, and particularly in Europe, where there are numerous buildings erected by Spanish architects and awards for our architects. After the above overview of the profession, it is clear that Europe is a rich platform for knowledge and collaboration to which Spain has much to contribute. Above we saw students and young people making their way in Europe thanks to programmes that encourage mobility and promotion, and the most established architects are constructing the most important institutional buildings across the continent. With skills that appeal to a deep understanding of different places and an extraordinary adaptation to collaborative contexts, examples such as the Rijksmuseum in Amsterdam by Cruz y Ortiz, the Munch Museet (Munch Museum) in Oslo by Estudio Herreros or the MCBA Musée cantonal des beaux-arts (Museum of Fine Arts) in Lausanne by Barozzi Veiga dot the European landscape with flagships designed by Spaniards, receiving countless awards. One cannot overlook here the Spanish architects who have won the Pritzker Prize, the most important architecture award in the world, awarded to Rafael Moneo in 1996 and to RCR Arquitectes in 2017, both with a strong international career that has a direct impact on knowledge of our architecture beyond our borders.

If we were also talking about the singularity of architectural training in our country, this global teaching method has not gone unnoticed in the major European schools, which are increasingly calling for Spanish architects to form part of the teaching staff.

Initiatives to promote and publicize architecture at the national and international level promoted by public bodies, such as the Architecture Biennials, reflect a sort of catalogue of the profession’s achievements and concerns over periods of time defined by current themes, inviting reflection and contemplation of the group’s response to contemporary challenges. In this sense, and at its most European, Spain’s participation in the Venice Biennale of Architecture is the event for the continent, and our country received the Golden Lion, the Biennale’s highest award, in 2016 with Unfinished.

Prizes and awards are important to spread knowledge about Spanish architecture in Europe, and no less important is the broad knowledge of European interventions in general, carried out by architects from all over the continent as promoted by the EU Prize for Contemporary Architecture - Mies van der Rohe Award. This prize, created in 1988 in Spain by the Mies van der Rohe Foundation and awarded by the European Union, exemplifies the national commitment to Europe and its architecture and is now the most important prize on the continent, generating
exhibitions that tour it announcing best practices.

These initiatives, as well as the opportunities given to architects and students in Europe, help to strengthen the links between professionals, institutions and companies and to initiate or consolidate alliances with architecture as a common thread, often essential to start working abroad, most of the time requiring a local partner to help overcome the barriers of an unfamiliar bureaucracy or language.

CONCEPT OF THE SPANISH ARCHITECT. REPORT OF A REPUTATION

We have spoken at length about the figure of the Spanish architect and extolled his or her capabilities compared to architecture professionals from other countries, referring to a holistic training that allows them to cover a wider field of action than professionals from the rest of Europe. To understand why architectural training in Spain differs from that of the rest of the continent, one must go back to the nineteenth century, when a split took place in Paris based on the teaching structure with the creation in Paris of the École Polytechnique (1794) and the École des Beaux-Arts (1806), where architects were trained. Engineering was born, identified with new materials such as iron, glass and cement and focused on resolving new problems and architecture was also born, identified with the past, historicist, concerned with artistic codes and with traditional materials such as stone or brick. This duality lasted throughout the century and influenced all European schools, except the Spanish. In Spain, starting in 1757, the Royal Academy of Fine Arts of San Fernando taught and awarded the official degree of architect. In 1844 the teaching of Fine Arts was reformed, separating out architecture, sculpture, and painting and engraving, giving rise to a Special Study of Architecture, main-

taining drawing, blueprints and mathematics and increasing the scientific and practical subjects, giving the degree a technical character that has endured to the present day.

These peculiarities have meant that professionals trained in Spain are capable of tackling architectural projects in a global way, with a coherent approach to ideas, in which technical and artistic knowledge intervene inseparably. This way of articulating architectural thought continues through to today and makes Spanish architects the avant-garde, since the contemporary challenges facing practice require a creative approach involving various actors and disciplines, the organisation of which is more sustainable and effective based on prior knowledge. Likewise, and due to the cohering capacity and collaborative vision that training provides, architects stand out in other fields that require management skills and a 360° perspective, making them adaptable and resilient professionals as has been demonstrated in times of recession in the industry.

Despite the solid reputation and recognition of Spanish architecture and the consideration of Spanish architects as highly professional and creative technicians when compared to other nationals as demonstrated by the fact that they have a significant presence in teaching, Spanish architects are not always seen as competitive on the global market due to the fact that few firms have enough infrastructure to generate the confidence, solvency and capacity to respond to large commission volumes.

ACTIONS FOR THE INTERNATIONALISATION OF SPANISH ARCHITECTURE AND NEW CHALLENGES

Spanish architecture is a mark of quality abroad and serves as an instrument of cultural diplomacy. For it to continue to reap recogni-
tion, and for these to lead to greater publicity and opportunities for Spanish architects, the internationalisation of architectural services must be taken on as a collective project for the country.

1 **Positioning of our cultural values: architectural heritage and tourism.** Spain is a popular tourist destination because of its rich history and architectural heritage. Tourists regularly visit the most emblematic monuments, and this flow should be used to direct their gaze towards the contemporary architecture of national firms, generating a brand present in advertisements and tourism offices, which will help to increase awareness and promotion abroad. One senses a clear governmental intention, advanced in the Quality of Architecture Law, from the creation of the House of Architecture, conceived as a state museum whose aim is to become a national and international model for the dissemination of architecture.

2 **Sustainability, innovation and social commitment.** Several Spanish cities are implementing policies to promote sustainable construction and reduce the environmental impact of buildings and giving visibility to these practices would put Spanish architecture on the European news boards. Spanish architects are characterised by an excellent knowledge of place, climate and traditional systems of construction and how to achieve comfort. Given the direction climate is going, promoting the exchange of vernacular knowledge and innovations through an active network would provide new contacts and opportunities.

3 **Diversification and competitiveness.** Spanish architecture and architects face a constantly evolving market, where it’s not easy to keep up to date, let alone know what is happening in the field in other countries. To find a niche for job development and to ratchet up competitiveness, a continuous training service should be created that closes up the gap between technology and user, focusing on improving business and team management skills, aspects that are more advanced in the rest of Europe. Similarly, a reliable translation service and mediation to request or find foreign partners would support service exports.

4 **New paradigms.** Spanish architects who do not work in construction know what career paths are available to them in Spain, and Spanish companies and institutions know what to expect from them. This is not the case in the rest of Europe, where new ways of understanding architecture and practising as an architect need to be signalled to be able to export new services that are successfully practised in Spain.

5 **Institutional involvement and monitoring.** The Spanish government supports programmes and platforms that help architecture internationalise, as in the EUROPAN competition, but it must go one step further, reinforcing the European identity of our architecture and architects, monitoring throughout the process of internationalisation. An architect building in Europe is a potential influencer, activating a business network beyond his or her own self, giving international access to firms in the national construction and design industry. It is also important to monitor competitions and how they are publicised, as well as to provide advice on how to apply for European funding.
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AI’S APPLICATION IN THE CULTURAL INDUSTRIES AND ITS CONTRIBUTION TO THE DEVELOPMENT OF NEW FORMS OF CULTURAL CREATION AND MANAGEMENT

Nuria Lloret Romero

Artificial intelligence is on everyone’s lips and appears in the media as the set of technologies that will change the way we live and understand the world. No matter the industry, AI is the great paradigm of our time and the largest disruptive and innovative element for our culture and society. The cultural industries will not remain untouched by this trend. These technologies are naysayed by those who see in them the enemy, a destroyer of jobs and human creativity and championed by those who only see benefits in their use. The truth is that the present and future of technology applied to any industry involves the use of AI and, like any human invention, it has its pros and cons. In this chapter we will attempt to analyse how applying AI can bring benefits to the industry provided it is done ethically and honestly.

Key words: artificial intelligence, technology, cultural industries, creativity, innovation.

BUT WHAT ARE WE REALLY TALKING ABOUT WHEN WE TALK ABOUT THE TECHNOLOGIES INVOLVED IN AI?

The first thing to say is that AI is a set of technologies that have been in the research pipeline for decades and are still being developed, and no self-respecting researcher today can tell where its application will take us or how it will really change our way of life. The first thing to understand is that AI is an evolution in the digitisation processes of our industry, as we move to the era of the development of fully digital cultural products. Artificial intelligence is increasingly present in our lives, and social media, browsers, video games, the recommendations of the platforms that we have been using for many years are all based on AI and machine learning. We need to change the mindset and move away from conspiracy theories focused on the threats posed by AI and try to see beyond and analyse what opportunities cognitive technologies can offer us. Digitalisation has eliminated a number of jobs and AI will eliminate many more but changes in the labour market have been constant through all the industrial revolutions we have gone through generation after generation and if we take the long view, jobs have changed for the better, offering workers optimised working conditions, gradually eliminating jobs with little added value. This 5th industrial revolution in which we find ourselves will be no exception: jobs will change, some will
be eliminated, but others will appear that we could never imagine today. As just one example, management teams are not yet ready to direct robots, people and bots together as if they were all “human” resources. According to Deloitte’s Global Human Capital Trends Report 2022, 41% of managers surveyed from large companies have applied some form of cognitive intelligence and artificial intelligence technology to areas of their businesses, but only 17% believe they can integrate robots or bots into their workforce as an additional resource. This shows that these technologies are now seen more as enablers and work-enhancing tools for teams than as direct replacements for a large part of the workforces of companies. This point will surely evolve, but what we will certainly see is the elimination of the most costly and human resource-heavy tasks by integrating them into these other resources.

If we focus on the basic definition of the term, ‘artificial intelligence is the intelligence developed and displayed by machines’. The definition given by the World Commission on the Ethics of Scientific Knowledge and Technology (COMEST) is that “AI are machines and developments capable of mimicking functionalities of human intelligence” (UNESCO, 2019).

As mentioned above, the term encompasses many technologies, but mainly refers to the development of algorithms that allow complex actions to be programmed more easily by processing huge volumes of data. The progress in AI today is primarily based on the development of data storage and processing tech, as well as 5G networks that have made it possible for data processing to occur at faster speeds than previously possible. Without advances in these technologies, the exponential development of AI research and of AI-based products would have been impossible.

**TECHNOLOGISTS AND CULTURAL INDUSTRY MANAGERS WORKING AS A TEAM**

Although it is said that with AI creativity and human management will no longer be necessary, for now that is completely untrue. Today’s large AI development teams are multidisciplinary and in the case of cultural industries even more so. For AI researchers, creativity, heritage and cultural management are areas with a wealth of possibilities to develop new applications and methods, but to do so they need to work closely with researchers and professionals in the cultural industry. AI can offer valuable tools to generate, access and design new cultural products with high added value for the public. After all, AI relies on analysing the data at its disposal to design patterns, and those patterns can be proposed by cultural managers and creators in a bidirectional way. On the other hand, it is not only about the creation of cultural content, but also about the usefulness of accessing user data to design proposals in line with the interests of our public, improved and more personalised ones, which can also help in real time to improve the user experience in any cultural activity through the learning AI does. It can also help to better understand audiences, and enhance creative practice in the performing, visual and audio-visual arts. Ultimately, it can help connect creators and their work with their potential audiences.

AI should help cultural institutions understand their audiences through data analytics, creating better connections with those audiences and delivering more immersive experiences. When we talk about creation we should note that we are talking about all the profiles involved in it, from the artists themselves to the managers who participate in the creation and management of the final
AI’s application in the cultural industries

cultural product, including, of course, communication with the public, distribution and safeguarding of our cultural products.

IN WHAT AREAS CAN AI SUPPORT THE CULTURAL INDUSTRIES?

Audience Analytics

The analysis of big data is the basis of AI, which allows us to understand behaviour, tastes and interests. The data is from a variety of sources—social media, cultural consumption platforms, and generic web browsing—and all of the data analysed through behavioural patterns (including in real time) can be vital to achieve an almost daily analysis of the tastes and interests of our consumers and improve their cultural consumption experience.

Some companies are already working on what they call ‘cultural listening’, which is about working beyond data and trying to understand how people feel before, during and after consuming a product or service. These are consumer listening marketing techniques but much more accurate because they are cross-checked by a variety of sources, from user feedback to time spent watching or using a platform to user perception levels.

Scenario Simulations

AI can predict future situations by analysing data previously obtained from similar situations or actions. This is predictive analytics. It’s clear that any producer of culture would want to know how a new cultural product is going to work. The predictive analytics offered by AI can provide the right parameters for how an activity might work based on how similar activities have worked in the past. Most importantly, that data need not necessarily be from the organisation’s own experience, but a retrieval of big data from other public organisations can provide fundamental information to design the activity and to gain a more accurate forecast of how it will work once it is on the market. It will allow us to design different simulated scenarios and we will be able to choose the one that suits us best for the product or service we are going to develop.

Development of Plans and Improvements in Processes

The application of AI can identify systemic problems and the consequences they have had in the past and help us to plan more realistically with forecasts that avoid a number of pitfalls. It can help to predict the impact of a plan or project developed and evaluate in real time, allowing us to change the plan we had made to improve our consumer’s experience prior to the final consumption of the cultural product.

Driving Innovation

Unlimited access to knowledge is something we already know from the use of the internet, but with the use of AI, innovation is encouraged. The essence of AI is to answer questions, test solutions and give multiple answers to the same problem and innovation does that too so the use of AI in organisations helps to drive innovation processes in all areas of the organisation.

AI will help innovate: it will see patterns that the human brain cannot. This will also support the creation of multidisciplinary teams since the more technological issues can be tackled by AI and the more value-added functions in innovation can be addressed by people with knowledge of the cultural industries. Collaboration is fundamental on teams and the implementation of AI can help this
collaboration by breaking down the more hierarchical schemes typical of more classical organisations. In-house teams of technical experts implementing AI will need to work closely with the people who are developing the cultural projects, facilitating further learning and setting the stage for more digital disruption. Putting machines and intelligent systems on project development teams is already happening, what is still needed is for people to learn to collaborate with machines and AI systems in a more natural way.

The Cultural Industries’ Customer in the Limelight

One of the advantages we discussed above with the use of AI is the possibility of knowing the interests of the market we want to enter. But it is actually much more useful to work with the customer data we already have to optimise the customer experience. The clearest example of this is the use of chatbots, which are now widely deployed to improve customer relations. Chatbots free up time for employees to focus on activities that have more value-add for customers.

Respect for Diversity

There is a broad debate on the use of AI and the exclusion of diverse groups. While it is true that AI uses data already existing in systems and online and that this data is currently biased and not very diverse, developers are making an effort to design algorithms that rectify this lack of diversity data as much as they can. There are art projects that highlight the underlying racism and sexism in facial recognition systems, whose algorithms, trained on databases composed mainly of white male faces, are inaccurate when it comes to identifying women, diverse people or people of other races. We most certainly need the ability to think differently about data to diminish these differences. The use of AI to personalise communications should be able to reinforce communication from the diverse point of view of each individual.

Ethics as a Basis for AI Development

One of the most important debates about AI is whether or not it will be able to make ethical decisions. If we take emotions out of the decision-making equation as AI could do, we could end up with very serious ethical problems. Having clear values and sticking to those values, even in times of crisis or uncertainty, is the difference between human beings and AI. We cannot yet talk about the possibility of AI making fundamental decisions for humans, but we must be prepared and design systems with this risk in mind, which could be real.

AI AND INTELLECTUAL PROPERTY RIGHTS IN THE CULTURAL INDUSTRIES

One of the most hotly debated points today is how AI creations may or may not respect intellectual property rights. The accessibility of content offered by AI clearly contributes to the promotion of knowledge. Cultural creativity can benefit from the use of these technologies. But what is less clear is how intellectual property rights can be preserved when content is redesigned and recreated using these systems. For the cultural industries, the most precious asset is the authorship of the work and its recognition of the author. But the population also needs access to this content not only through culture but through education and science too. In the field of culture, digital transformation has been an unprecedented driver.

It has meant a creative explosion, which has profoundly changed the way we con-
AI’s APPLICATION IN THE CULTURAL INDUSTRIES

cieve, produce, distribute and consume artistic and creative expressions. But it is not clear how we can preserve copyright against something that is not really original but rather the result of multiple combinations of content from different authors or copyright-free content. This paradigm is another point of study that needs to be explored with creative industry professionals who understand the value of the authorship of their work and how this might damage the economy and the cultural industries’ market. AI is based on texts, sounds and images that through algorithms recreate other content, but its raw materials are always existing items that had intellectual property at one time and that lose their value in the reuse. This is a very complicated issue to answer at this point in time, especially because there are a number of professionals involved, like lawyers, creators, producers and distributors. An in-depth study of what this reuse of content entails is needed to improve the future intellectual property rights of all those authors involved in an AI-generated work. In some countries, digital creation through the use of AI has been allowed in some fields thanks to legislative changes. The United States, China and Australia have revised their laws to allow non-profit use by small start-ups, universities and research centres to support the classification, generation and development of recommendation algorithms. Many of the databases AI pulls from are owned by those who created them, and include content from artists and creators, such as text, music, paintings, photographs, films and even their voices, faces and bodies. And therein lies the problem of how to pay the original authors of the content for its use.

The French national musicians’ association has granted composer status to Artificial Intelligence Virtual Artist (AIVA), an AI-generated music composition tool, removing the barrier for its users to hold copyright on works generated with its help. There are also many AI-based recognition algorithms that are being employed to recognise the use of content without permission or licence granted by the author. Intellectual property rights for the cultural industry are also complicated. For cultural creators in many cases they are an obstacle to monetising their creations. The appearance of non-fungible tokens (NFT), a smart certificate programmed through Blockchain that certifies the authorship and ownership of the work as well as its use and resale, looked like it would support those author’s rights but to date various studies have affirmed that one out of every three NFTs is sold for less than $100 (Parker 2021; Carter 2022). Once the fees charged by their commercial platforms are taken out, that sometimes mean minimal remuneration for the original author. We also should not forget the sustainability problems due to the environmental cost of developing and using these digital products.

HOW WILL THE USE OF AI REALLY INFLUENCE CREATORS?

With the advent of the digital age, AI has also become an important “means” of expression. Pioneering artists such as Nicolas Schöffer, Edward Ihnatowicz and others created works by processing data that mutated according to its continuous generation. Since the 1980s, AI has been used to generate artistic projects with varying degrees of success. Work has been done on the use of data and adaptive algorithms that generate mutant works according to the space and the time they are used. Recent technological developments have also turned AI into an object of cultural expression. We are going to see artists more and more often who will actually be advanced sys-
tems developed by AI without direct human involvement in the process.

The Amper Music app composes, mixes and plays music based on parameters provided by its users. But the true change that emerges from the encounter between AI and culture is the transformation of the social relations that create and support artistic and creative processes.

While it is true that AI will change the relationship between creators and consumers because it breaks down the boundaries between them, it is also promoting a new way of creating and consuming culture on a massive scale that was previously almost impossible to do. UNESCO’s 2022 “Re|Shaping Policies for Creativity” Report and its recommendations on ethics in artificial intelligence recognise the potential, but more importantly the challenges, we face with AI that will have a major impact on culture.

The arts and creative industries currently account for about 6.1% of the world economy, but its greatest value is its ability to express the diversity of the identity of the cultures of the world’s citizens.

The Convention on the Protection and Promotion of the Diversity of Cultural Expressions, adopted by UNESCO member states in 2005, states that “cultural activities, goods and services have both an economic and a cultural nature, because they convey identities, values and meanings” (2005, 2), which serves to formulate cultural policies that can adapt to social changes, one of them being today’s technological changes. AI should above all enhance human creativity by offering tools that foster existing cultural diversity.

AI can transform the processes of cultural creation and production by facilitating innovation in the provision of goods and services and reducing the time creators spend on tasks with less added value for the work.

**DEPENDING ON THE CULTURAL SUB-INDUSTRY WE ARE ANALYSING, AI SUPPORTS THE CREATOR IN DIFFERENT WAYS**

In the audio-visual and visual arts industry it can be used for image search, recognition, retouching or editing. For music, there are many highly technical processes related to sound production and distribution that AI can facilitate. For more technological industries such as video games, it has long been used by developers to design virtual player behaviours according to the reactions and actions of human players.

But the most interesting bit is yet to come. Creators in the cultural industries must be aware of all the possible uses of AI in their daily work, because this will enable them to design new cultural products that they could not currently develop with the means at their disposal. We cannot forget that the digital transformation to date has helped to diversify the channels of dissemination and sale of cultural products with a clear reduction in costs and an improvement in user personalisation; with AI these improvements will simply be increased. The use of AI in distribution and consumption is an important lever of market power for intermediary platforms that can generate massive revenues for the industry. AI-powered platforms enable not only personalised experiences, but also make it easier for audiences to become co-creators. The current problem with these platforms, all of which are already designed with advanced AI systems, is that by becoming large holding companies they are monopolising their areas and concentrating all distribution. Spotify and Apple account for 46% of music sales worldwide; Netflix is nearly a monopoly. They can afford to set the prices and rates of payment to creators and traditional distribution channels, in many cases even demanding exclusivity from
authors, which chains them to this precarious format of remuneration for their creations.

And if we are talking about the use of AI to recommend users on these platforms, we also see how we are chained to the consumption of standardised content with almost no possibility of discovering alternative cultural content we might be interested in on our own.

As we already mentioned, however, thinking about long-term issues in the area is not easy. The relationship between AI and culture in this new and complex context is something yet to be explored, but if the last few decades are any indication, the massive use of the internet has led to an increase in the consumption of cultural content, and it has been AI through its recommendation algorithms and the personalisation of content for the consumer’s use that has managed to build the loyalty of more digital users.

CONCLUSIONS

In the immediate future, to close, we can say that managers in the cultural industries will focus on using these technologies mainly for essential points:

1. Improving personalised online advertising through ML and RS algorithms.

2. Generating new digital business models generated through AI.

3. Predicting consumer interests by using big data processed by AI to create ‘micro-targeting’.

4. Providing consumer services through AI.

5. Designing cultural policies in accordance with consumers’ cultural consumption habits.

6. Using AI to protect copyright and proprietary registrations.

7. How to preserve diversity and ethics in AI-developed products.

8. Developing world agreements on international legislation for the use of works through AI.

Technology has never been good or bad per se, but depending on how we humans use it, it can help us to improve the world we live in or to make it worse and worse. The right decision is in our hands.

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THE STATE OF CULTURE IN SPAIN [2023]: CULTURE OF CREATIVITY, RECOVERY AND RESILIENCE

Patricia Corredor Lanas

To Enrique Bustamante, our much missed life companion and teacher, who fought for the democratisation of communication and culture to the end of his days.

In memoriam.

Key words: culture, cultural policies, communication policies, foreign cultural cooperation, digital culture

INTRODUCTION: 10th SURVEY OF CULTURAL AGENTS

The presentation of our survey of a hundred artists, creators, professionals, researchers and cultural critics is part of the 10th edition of the RSC Report on the State of Culture in Spain, published by the Fundación Alternativas.

After more than a decade of accompanying this long (and symbolic) journey of the RSC Reports series, the survey has become one of its hallmarks, offering a synchronous snapshot of the state of culture in Spain, revealing the view of its social agents at any given time. The sequence of surveys of these cultural actors over a thirteen-year time span (2011–2023) provides an exceptional perspective to test the social and technological transformations in this field and their correlations with the opinions and moods of these symbolic actors. It also provides an unusual showcase for successive crises and their impact on culture: from an initial pride in economic growth to the devastating effects of austerity policies during the Great Recession, in an addition that led to what some authors described as ‘a lost decade for culture in Spain’ (Bustamante, 2018). From cautious optimism at the first signs of subsequent recovery, to unmitigated desolation at the abrupt interruption of cultural activities—hit hard by the closure of public spaces in the pandemic crisis—to renewed confidence in the gradual recovery of the economic and social tone of culture in the context of expansive European policies, the European cultural scene is still at a complex juncture marked by Russia’s war in Ukraine and the inflationary crisis, which poses new challenges for the recovery of cultural consumption, the digital transition and the sustainability of culture in Spain.

All projects have their genesis, and the background to the RSC survey series includes a competitive call for tenders awarded by Spanish Agency for International Development Cooperation (Agencia Española de Cooperación Internacional para el Desarrollo, or AECID) in 2010 to the research team led by Enrique Bustamante, Professor of Audio-visual Communication and Advertising at the Complutense University of Madrid, through the Fundación Alternativas’
Culture and Communication Observatory. The survey carried out expressly for that first RSC Report, published in 2011, aimed to gauge the opinion of the social agents directly involved in cultural processes and phenomena on the state of culture in Spain, with the originality of consulting the world of culture itself, not a common practice, a world accustomed to surveys of companies and users, on supply and demand, which tend to leave in the dark, in a real ‘black box’, the true protagonists of culture who together with citizens build this vital symbolic universe in our society.

We assumed that, without claiming to be representative of a sample that would be infeasible in sociological terms given the enormous and magmatic universe of cultural activities, their opinion could reflect to a large extent the situation of this vital field for the Spanish economy and democracy. The added bonus was that in addition to their knowledge and experience the state of awareness of the actors in a system so rooted in individual personalities was presumably bound to actively influence the directions reality itself takes, giving the results a certain prognostic capacity.

This vocation, in addition to its pioneering nature, continues to be valid in its tenth edition: the valuable sources of statistics on the consumption and turnover of each activity or cultural industry, ongoing surveys of the changing habits and uses of the public, in the print media and increasingly abundant and precise in the digital media, are maintained. However, the new consultation channels that have followed in their wake to give a voice to cultural agents, also based on surveys, have different objectives and themes: surveys of economic expectations, investment, employment and gender, partial studies of specific industries or regional or territorial ones. This is why the 360° universe of the main players in culture, with their singularities by sectors of activity or by social and economic role, continue to encounter significant obstacles and difficulties in finding a platform for their voices to be heard by the rest of society, a lack that urges us to continue our work of finding out what they think and what opinions they have about the state of culture in Spain, through all of its parameters, and to share the results of our study.

Diversity as the main theme

The axial perspective chosen for the RSC survey series, and which guides our work as a permanent compass, is ‘cultural diversity’, a perspective traditionally cultivated by Fundación Alternativas in all its studies on culture but endorsed by the Spanish state itself in its ratification of the ‘UNESCO Convention on Diversity’ (October 2007). ‘Diversity’ as ‘the multiplicity of forms in which the cultures of groups and society express themselves’, as an essential characteristic and ‘common heritage of humanity’. That is, the consideration of cultural goods as ‘cultural activities, goods and services [that] embody or convey cultural expressions, irrespective of the commercial value they may have’ (UNESCO 2005).

This central perspective of cultural diversity must always be compatible with the economic sustainability of its activities. Hence our declination in the survey in terms of cultural diversity and public policies, of economy and industry but also of democracy, of intercultural cooperation and also of export or impact of our cultural creations. Issues such as the sustainability of culture, the role that the state should adopt with it, the difficult digital transition of the cultural and creative industries, fair remuneration of authors and the new social uses in cultural consumption are articulated in an exhaustive questionnaire (54+4 questions) that we submit to the scrutiny of the expert opinion of the cultural professionals and personalities surveyed, and whom we expressly
thank for their interest in our study and their
generous and patient participation.

Our 10th edition of the Survey on the
State of Culture in Spain maintains its origi-
nal intention and premises. And it follows
Enrique Bustamante’s foundational commit-
ment to the democratisation of culture and
communication, a commitment shared by
the Fundación Alternativas’ Observatory of
Culture and Communication, by favouring the
transfer to the community—and for the ben-
efit of the majority of society—of the results
of these analyses to better support democratic
decision making.

ASSESSMENT OF CULTURAL AGENTS

Introduction. A Return to Growth

The 10th Survey on the State of Culture in
Spain, carried out during the first quarter of
2023 among a hundred cultural agents, is
presented in a decisive year, marked by the
regional and municipal and the general elec-
tions. An election year, in short, in which all
the positions of power of our political rep-
resentatives are at stake and which will also
mark the future of culture in Spain in a sce-
nario open to the continuity of the leading
role played by current cultural policies—in the
event of a new progressive coalition govern-
ment—or to a foreseeable break with them if
the alternative led by the Popular Party wins.
Beyond ideological differences, the electoral
proposals of the political parties on culture,
yet to be defined, will reveal the political will
(or unwillingness) to place culture at the fore-
front, at the centre of community consensus
and democracy.

The severe impact of the successive crises
has taught us an important lesson: culture
is not entertainment alone but an essential
springboard for democratic participation and
solidarity. Although forgetfulness and pub-
lic omissions contribute to its loss of force,
worth remembering is the significant role
played by culture in legitimising political cy-
cles, and its vital role in promoting a scenario
of shared values and social cohesion on the
edge of economic recovery.

In the final stretch of this political stage,
our consultation of cultural agents has the
added value of offering an indirect synthesis
of a period of great complexity, aggravated by
events unthinkable at the beginning of the
legislature such as the pandemic crisis brought
about by COVID-19 or the consequences of
the war in Europe, which have shattered quite
dramatically the previous ‘normality’, calling
brusquely into question the expectations and
forecasts of cultural agents.

Along these lines, we believe that the re-
results of the survey we conducted in January
2020—at the same time as the formation of
the new coalition government presided over
by Pedro Sánchez, and prior to the outbreak
of the two successive crises—and the conclu-
sions of the current survey of 2023—prior to
the elections—offer still (and comparative)
photographs that may well act as beacons in
our goal of gauging the state of opinion of
cultural agents at two critical moments, as
well as being revealing of their experiences
during this period, their resilience and their
renewed optimism regarding the progressive
economic and social recovery of cultural ac-
tivity, but also of the strategic role of culture
in our society, of the necessary support from
public institutions and of our cultural wealth.

Overall results [RSC 2023]. Renewed
confidence, greater approval

The survey conducted among a hundred art-
ists, creators, producers, publishers, distribu-
tors, researchers and cultural critics between
February and April 2023 gives an overall aver-
age grade to the state of culture in Spain of
5.3 (Pass), two tenths better than the result from the previous survey in 2020, which had a score of 5.1.

It is also the highest rating given by cultural agents throughout the entire series of surveys of the Reports on the State of Culture in Spain, RSC (Figure 1).

As in all statistical studies, the results of our survey are open to different interpretations. Without going into the legitimacy of this reading, the context of the survey should be highlighted, a framework which, as we pointed out in the Introduction, is associated with the consequences of the successive crises in the economy in general and in culture in particular: the health crisis induced by COVID-19 and the inflationary crisis derived from the war in Europe, which further hinder the industry’s recovery, still as yet unfinished, after the previous major economic and financial crisis and its difficult transition to new digital business models.

Against such a challenging background, the rating of 5.3, a comfortable pass, is certainly a remarkable result, which improves on all previous ratings since recording began (2011–2023) and consolidates culture’s upward path in Spain. It also marks a turning point that abandons the worst omens in line with the behaviour of the previous major crisis and confirms cultural agents’ confidence in future recovery.

In the 2020 survey, we pointed out that in the cultural environment its agents had shown an appreciable recovery of optimism and confidence in the face of symptoms such as the revival of the Ministry of Culture, the unanimity of parliament in supporting the rights of creators and the reinstatement of the lowered cultural VAT for the main offline cultural activities.

After an undoubtedly difficult three-year period, our survey of a hundred cultural agents, representative of the major sectors of activity and their various professional roles, reflects this tough yet positive balance, highly representative of the increased public attention to culture and the improvement of its general diagnosis in all its parameters, after relentless almost frenetic activity towards the end of the legislature, with an increase in the amount allocated to culture in the general state budget and the seeding of European funds for recovery and resilience aimed at the digital transformation of the cultural and creative industries, such as the ‘Spain, Audio-visual Hub of Europe’ plan to drive

<table>
<thead>
<tr>
<th>Year</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>5.1</td>
</tr>
<tr>
<td>2013</td>
<td>4.5</td>
</tr>
<tr>
<td>2015</td>
<td>4.6</td>
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<tr>
<td>2017</td>
<td>4.4</td>
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<tr>
<td>2018</td>
<td>4.7</td>
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<tr>
<td>2019</td>
<td>5.0</td>
</tr>
<tr>
<td>2020</td>
<td>5.1</td>
</tr>
<tr>
<td>2023</td>
<td>5.3</td>
</tr>
</tbody>
</table>
the audio-visual industry. There was new legislation such as the General Law on Audio-visual Communication and the Law on Cinema and Audio-visual Culture and specific actions such as the implementation of the Youth Cultural Voucher were promoted. But also, and above all, the Artist’s Statute regulation was passed, with widespread social consensus among cultural agents, and the Patronage Law, a long-held demand of the world of culture, which was ignored during the governments of the Popular Party despite the clamouring of the sector after the drying up of public budgets for culture and which now regulates private donations and tax benefits for culture, opening up new ways for it to achieve sustainability.

The commitments of the progressive coalition between the two parties signed in 2019 have nevertheless left some unfulfilled promises along the way in their plan for the cultural industries, including ‘promoting a major state agreement for culture’, which already seems implausible in the current political climate. Taking up the proposal for a cross-cutting agreement, a major social agreement, which would reach a consensus and define a coordinated and joint action plan among all levels of the Spanish state, remains a matter of vital importance.

Above all because the improvement of only two-tenths of a percentage point compared to the 2020 result is not enough to start ringing victory bells, and not only because there is a gap of more than three years between the two surveys but also because the impetus does not seem to be enough to suggest the full recovery of an industry that is advancing along the still visible traces of the ravages of the great recession on cultural activities (their financing and sustainability) and especially on SMEs, the self-employed and creators.

Data from official statistical sources and sectoral studies reveal a gradual but still incomplete recovery from pre-pandemic figures. But the turning point, the starting line, was so low due to the abrupt interruption of a significant part of cultural activity and economic uncertainty, that the perception and mood of cultural agents—vacillating between desolation and relief—speaks eloquently of the raised expectations and renewed optimism with which signs of progress in cultural activity are now viewed and interpreted.

Current issues. Highs and lows of Spanish culture in Europe

Each year, the RSC survey incorporates four questions that we call ‘current’ dedicated to contrasting the opinion of cultural agents on aspects that refer to the central theme of the Report on the State of Culture in Spain but also to issues that, due to their actuality, interest and timeliness, were not initially foreseeable and therefore were not included in the questionnaire that serves as the basis for the survey. These questions are not computed in the overall results to ensure consistent and homogeneous analysis between different editions of the same survey and are assessed on a case-by-case basis.

On this occasion, two ‘current’ questions focused on aspects that directly affect the central theme of the RSC 2023 to gauge the opinions of the actors consulted on cultural presence and intervention in Europe. The results positively and negatively represent two complementary sides of this vitally important issue: the ‘evolution’ of Spanish culture in Europe in recent years is perceived positively, while the absence of a ‘clear model’ of foreign action is viewed negatively, which calls for the need to rethink and relaunch a coherent and coordinated strategy to develop the full potential of Spanish culture in Europe (Figure 2).
Respondents gave an average score of 5.7 to the ‘improvement’ of the position of Spanish culture in Europe, which can be understood as an implicit recognition of its greater prominence in economic terms but also in terms of influence, wealth and cultural diversity. Despite the fact that Ministry of Culture sources continue to show a trade deficit for cultural goods, trade flows with the EU are notable, and it remained the largest destination for our exports (65.8 per cent compared to 45.2 per cent for imports) in 2021. However, as some experts have been stressing, the relations of Spanish culture abroad begin in the domestic market itself—in the internal balances and imbalances with foreign cultural products and services—an aspect that cannot be dissociated from the cultural asymmetries between EU countries, the public policies supporting the export and distribution of our goods and services, their tax provisions, and the internationalisation strategies of private groups, which have traditionally been seriously contested.

Much worse, however, is the assessment of the agents surveyed regarding the existence of a ‘clear’ model for cultural policy in Europe, which receives a low fail (3.8). It is precisely the issue of foreign cultural interventions that has been the focus of part of the concerns, reflections and analyses of the RSC Report series, offering an inconsistent image associated with the succession of periods of modernisation and burst of energy and stages of regression and deterioration, such as the years of the great economic and financial crisis, in which development grants and cultural cooperation plummeted to minimal, almost residual, levels. And which reveal, beyond the specific circumstances, the lack of ‘a genuine state policy’ and a ‘zigzagging succession of plans and institutions, the systematic lack of coordination between a multitude of bodies and different levels of public intervention’ (Bustamante 2020).

Considering that Spanish cultural intervention is integrated into and strengthened within the European Union, institutional initiatives such as the coordinated cultural work announced by the Instituto Cervantes and the AECID during the Spanish presidency of the EU, which will run from 1 July to 31 December 2023, as well as the recent approval of the Law on Cooperation for Sustainable Development and Global Solidarity, should be able to propose well-integrated actions that help improve this deficient parameter.

Without leaving the European space, the other two hot topics are the contribution of public measures for cultural recovery (NextGenerationEU funds) and the precariousness and labour mobility of cultural agents within the EU.

The NextGenerationEU funds, the instrument promoted at the European level to mitigate the effects of the COVID-19 pandemic and support digital transformation implemented by the government in culture through components 24 and 25 (‘Revaluation of the cultural industry’ and ‘Spain Audiovisual Hub’, respectively) of the ‘Recovery, Transformation and Resilience Plan’, received a positive assessment from the agents surveyed, who gave it a score of 5.2 for its impact on cultural recovery (Figure 3).
Our previous survey conducted in 2020 included a second emergency survey to gauge the opinion of cultural stakeholders on the effects of the epidemic and the measures and actions taken to mitigate its consequences. We pointed first of all to the traumatic experience undergone by cultural activities in Spain during those 100 days of lockdown and to the profound disappointment of cultural agents at the (lack of) speed and effectiveness of the reaction by the authorities at the three levels of government: central, regional and local. In contrast, the ratings in the second part of the survey on priority tools for a comprehensive public policy for immediate recovery gave high scores to instruments that Spain has traditionally used very little or inconsistently and unsystematically in this field. In addition to the fiscal treatment (a lower cultural VAT) and the approval of the Artist’s Statute, which were both rated with marks nigh on outstanding, cultural agents also pointed to a substantial increase in public spending on culture as the urgent and necessary path to cultural recovery. Three years later, the high pass cultural agents gave this issue confirms the necessary public intervention in this field for the recovery of the lost social and economic fabric, but it also means we can interpret that seeding with European funds is not the only way to achieve the continued and sustainable recovery of culture, which will require a battery of additional measures.

The last current question, concerning guarantees for labour mobility within the EU, may seem an obvious, almost tautological one, but it ties in with a constant concern in all our RSC surveys about the conditions under which artists and creators carry out their professional activity and the difficulties they encounter to be able to make a decent living from their work (Figure 4). The creation of symbolic content is at the heart of cultural activities. Their creative diversity, ideological pluralism and degree of innovation are widely regarded as the core values of a country’s or region’s culture. But the precarious working conditions of a majority of artists and creators call this axiom into question and threaten it. In its report ‘Re|Shaping Policies for Creativity’, UNESCO has sounded the alarm, warning that as a result of the pandemic ‘the situation of many artists has gone from precarious to unsustainable, endangering the diversity of creation’, particularly harming women’s employment.

Although a priori the EU regulatory framework should be a sufficient guarantee for the mobility and professional practice of cultural agents in neighbouring countries, the low score for this question, 4, a failing grade, can be understood to be associated with a feeling of lack of support to engage in cultural activities abroad, the difficulties and systematic obstacles to access mobility grants and the absence of homogeneous working conditions in the countries around us, aspects that call on the Spanish public authorities in their responsibility of guaranteeing viable working conditions for creators and professionals in the different sectors of the cultural and cre-
ative industries as the creators of our identity and cultural diversity. This interpretation, expanded on and contrasted by some of the experts consulted, can be found in section 8, ‘Open comments’, of this survey.

Strengths and weaknesses of culture in Spain

Among the results of the extensive questionnaire sent to the respondents, we would like to highlight in this section the best and worst rated issues by the degree of average polarisation they represent in relation to the overall scores and the degree of unanimity they show across cultural roles and sectors. We believe that these issues, which have the highest and lowest scores, are very consistent with each other and reveal the strengths and weaknesses of culture in Spain.

Top scores

The strengths of culture, which in this 2023 edition correspond to the 11 highest-rated questions in the survey (with a score of six or more), repeat with remarkable consistency the trends observed in previous editions, albeit with some new aspects. The best scores continue to be concentrated around the fate of culture in its relation to the effect and potential of social media and the internet, as well as the constancy of the pluralism and creativity of Spanish culture towards its audiences, almost equally (Figure 5).

Three of the highest scores refer to the direct effect of ICT on creativity or consumption of culture, with the highest scores in the survey, albeit decreasing in number (four out of ten in 2020): Social media allow creators to better connect with their audiences (high score of 7.5), increase artists’ creativity (6.9) and maximise word-of-mouth among users (6.6).

However, enthusiasm for the automatic effects of digital technologies and social media continues to taper off from previous surveys, and issues that once occupied prominent positions such as guaranteeing social media in the ‘democratisation’ of culture and the ‘pluralism’ of creations and voices available to users, the role of social media in the ‘drastic reduction of the costs’ of culture or their ability to induce a ‘massive participation’ from users in cultural creation have dropped out of the top ten.

On the other hand, a new feature in this table of cultural strengths is an issue that refers to public policies in relation to harnessing the potential of disruptive technology, specifically public policy support for the ‘digital transformation’ of culture, which was given a 6.0 (5.4 in 2020). This question, complemented by our current event question regarding the NextGenerationEU funds, highlights how positively perceived the Digital Spain agenda plans were, with repercussions in ambitious initiatives such as ‘Spain, Audio-visual Hub’. In our previous survey we had already drawn attention to the gradual rise of questions about domestic public policy, but they had so far failed to make it to a spot amongst any of our respondents’ top scores.

The remaining top scores refer to the diversity of creators and users, which are also indirectly associated with digital devices and networks: ‘innovative trends and styles’ can reach their audiences (7.2), SMEs play an essential role as ‘innovation incubators’ (6.9), creation expresses the ideological ‘range’ of Spanish society (6.7), users have a ‘great deal of freedom of choice’ (6.2), as well as that the cultural offer ‘reflects’ the diversity of our cultural identity (5.9).

The assessment of cultural diversity related to the role of production/publishing deserves special mention. It enters the top ten in a novel way, with two issues among the
highest rated: producers/publishers make up a ‘plural range’ of voices (6.2) and the ‘decentralisation’ of cultural production reflects the Spain of its autonomous regions (6.1).

Lowest scores
The worst scores continue to accumulate insistently around three parameters: the impact abroad of Spanish culture—whether in terms of cooperation and exchange or export and international footprint—, the remuneration of creators and cultural SMEs to ensure their sustainability, and the traditional media’s support for the creation and promotion of culture and cultural diversity (Figure 6).

Cultural cooperation and impact abroad account for eight of the twelve lowest scores, including ‘sufficient’ impact of SMEs (3.8), ‘sufficient and effective’ public cooperation policies (4.1), ‘fair’ foreign trade (4.3), ‘sufficient and balanced’ trade with the EU (4.3), the commercial strategies of large groups are ‘suitable for foreign expansion’ (4.6), ex-
changes with Latin America that respond ‘sufficiently’ to linguistic and cultural ties (4.6), and public cooperation policies that ‘encourage’ intercultural exchange and diversity (4.6) and ‘promote’ the presence of Latin American culture in Spain (4.6).

The improvement in domestic public policies, which have moved away from the worst positions in the lowest scores, contrasts with these cultural deficits attributed to interventions abroad. This poor assessment of the presence of our culture outside our borders, which has been evident since our first surveys, once again provides a basis for reflection on the subject of this RSC Report, dedicated to the presence of Spanish culture in the EU, and makes the formulation and implementation of new strategies a matter of urgency, as

**Figure 6. Culture’s Weakest Points in Spain 2023**

<table>
<thead>
<tr>
<th>Lowest scores</th>
<th>2020-2023 comparison</th>
</tr>
</thead>
<tbody>
<tr>
<td>05. Creators receive fair remuneration to maintain their work</td>
<td>3.4</td>
</tr>
<tr>
<td>49. The impact abroad of cultural SMEs is sufficient</td>
<td>3.6</td>
</tr>
<tr>
<td>50. There are enough public policies for foreign cooperation and they are effective</td>
<td>3.7</td>
</tr>
<tr>
<td>46. There are enough cultural exchanges with the EU and they are balanced</td>
<td>4.1</td>
</tr>
<tr>
<td>45. Trade abroad is equitable</td>
<td>3.9</td>
</tr>
<tr>
<td>13. SMEs in publishing/production receive sufficient remuneration to be sustainable</td>
<td>3.9</td>
</tr>
<tr>
<td>18. Traditional media promotes cultural diversity</td>
<td>4.1</td>
</tr>
<tr>
<td>19. The media fosters the creation and promotion of culture</td>
<td>4.4</td>
</tr>
<tr>
<td>48. Large groups’ marketing strategies for foreign expansion are successful</td>
<td>4.3</td>
</tr>
<tr>
<td>47. Cultural exchanges with Latin America are at the same level as linguistic and cultural ties</td>
<td>4.3</td>
</tr>
<tr>
<td>51. Public cooperation policies foster intercultural exchange and diversity</td>
<td>4.4</td>
</tr>
<tr>
<td>52. Cooperation policies promote the presence of Latin American culture in Spain</td>
<td>4.6</td>
</tr>
</tbody>
</table>
additionally suggested by two current event questions included in this survey, which positively and negatively reflect the improved evolution of Spanish culture within the EU in contrast to the absence of a clear model of action abroad that balances cultural exchanges, promotes cooperation and improves the impact abroad of Spanish culture.

Concerns about the remuneration that artists receive to make a living from their work as well as the sustainability of cultural SMEs, which make up the majority of the business fabric in Spain, continue to receive low scores. The worst score in the table was for ‘fair remuneration’ of creators and has been holding that position for more than ten years. Its relative position is up by two-tenths of a point from 2020, but it is still receiving the lowest score (3.6). Although this is a complex issue, with multiple causes and diverse derivations, a priori it might be ventured that the benefits associated with the Artist’s Statute do not yet seem to have been capitalised on, whose regulations, approved with a broad consensus—yet to be fully developed—should allow for an improvement in this parameter in future surveys. In the same section, the increase in the rating of the remuneration of publishing/production SMEs is also insufficient for their sustainability (from 3.9 in 2020 to 4.3 in 2023) in the opinion of the respondents.

Another constant throughout a decade of RSC Surveys has been the dissatisfaction shown by cultural agents about the role of the media in the promotion of culture and cultural diversity. Again, these issues appear in the table, and two questions related to this topic receive the worst scores: the first refers to traditional media, whose promotion of ‘cultural diversity’ is penalised with a fail (4.4), and the second concerns the role of the same traditional media in ‘fostering the creation and promotion’ of culture, which also receives an insufficient score (4.6).

Culture as Seen by Cultural Fields

In their assessment of the state of culture in Spain, cultural agents score up to 54 parameters that represent all the major phases of the value chain of culture and the cultural and creative industries, both in their classic analogue version and in their shift to the digital world. This section offers the detailed results of these six differentiated fields that structure the entire survey: Creation, Production and Publishing, Distribution and Marketing, Use and Consumption of Culture, Public Policy, and Impact Abroad and Cooperation (Table 1).

Table 1. Scoring of the fields of the cultural world in 2023

<table>
<thead>
<tr>
<th>Field</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>A) CREATION</td>
<td>6.3</td>
</tr>
<tr>
<td>(B) PRODUCTION, PUBLISHING</td>
<td>5.5</td>
</tr>
<tr>
<td>C) DISTRIBUTION, MARKETING</td>
<td>5.2</td>
</tr>
<tr>
<td>D) USE AND CONSUMPTION OF CULTURE</td>
<td>5.6</td>
</tr>
<tr>
<td>E) PUBLIC POLICY AND TRADE STRATEGIES</td>
<td>5.2</td>
</tr>
<tr>
<td>F) IMPACT ABROAD AND COOPERATION</td>
<td>4.5</td>
</tr>
</tbody>
</table>

The scoring of cultural fields continues to rise. All areas improve their average scores compared to 2020 (between two and three tenths) with the sole exception of ‘cultural consumption’ which, despite occupying the second best rank in the assessment by area, reveals a worrying stagnation (5.6).

The biggest highlight is the rating of the ‘public policy’ field, with its best score in all of the RSC surveys of 5.2, passing for the first time (4.9 in 2020).

Otherwise, score performance has followed the same pattern as in previous years:
‘Creation’ maintains its primacy in the estimates of the cultural fields (6.3), followed by ‘use and consumption of culture’ (5.6), with ‘production/publishing’ (5.5) and ‘distribution/marketing’ (5.2) improving their passing grade, each with an increase of two-tenths from 2020, reflecting greater economic optimism. At the bottom of the table, the lowest scored field remains ‘cultural impact abroad and cooperation’, which continues to clearly fail (4.5), despite a slight increase (4.3 in 2020) (Figure 7).

Creation [Score: 6.3]

As in previous years, creation receives the greatest assessment and consensus among cultural agents. In addition to continuing to top the ranking by field, with a score of 6.3, it improved its position by three-tenths from 2020, in an upward addition of five of the six issues included in this section, with irregular but generalised growth. However, this field of creation records the lowest scoring question in the entire survey, which refers to the ‘fair’ remuneration of creators.

The score for the ability of ‘innovative trends and styles’ to express themselves and reach their audiences has risen significantly by seven-tenths of a point (7.2 from 6.5 in 2020). The view of improvement in ‘creative diversity in the medium term’ (5.9 from 5.4 in 2020) also improves its position significantly, with an increase of half a point. Slightly higher scores (two-tenths) were also given to the expression of the range of ‘ideological values’ present in Spanish society (6.7), the benefit of increased creativity provided by ICT to creators (6.9) and the perception of ‘fair remuneration’ of creators (3.6, up from 3.4 in 2020), which continues to have a decidedly failing grade and has the lowest score of the entire survey.

Finally, the perception that creators are taking advantage of social media ‘to connect
with their audiences’ remains unchanged, although very high (7.5).

Although it is hasty to draw conclusions from these very nuanced developments, they seem to point to a certain stagnation in the previous optimistic opinion of the impact of ICT on cultural creation. They also suggest a still non-existent translation in the form of an improvement in the scoring of creators’ working conditions after the approval of the Artist’s Statute (Figure 8).

**Production/publishing [Score: 5.5]**

Cultural production and/or publishing consolidates its positive appraisals, reconfirms its pass—which it achieved only starting in 2019—and improves its overall score by two-tenths, raising its score to 5.5 (from 5.3 in 2020). There is the particularity that almost all of the issues associated with this field show positive growth compared to the 2020 data, with the exception of two parameters that continue to earn a failing grade.

The most highly rated question refers once again to the essential role of SMEs as ‘innovation incubators’ in Spain, a parameter that only improves by two-tenths of a point from its previous score but is already close to a solid B (6.9, up from 6.7 in 2020).

The worst scores, on the other hand, penalise the ‘sufficient’ remuneration of SMEs for their sustainability as clearly deficient (4.3), despite its significant improvement (3.9 in 2020). The other score that also remains below the pass mark concerns the ‘plural’ range of products and services offered by the major cultural business groups (4.9 from 4.6 in 2020).

Among the biggest increases were the rise of the role of production/publishing in its ability to represent a ‘plural range of voices and interests’ (6.2) and the ‘decentralisation’ of cultural production as a reflection of the Spain of its autonomous regions (6.1), with improvements of half a point compared to their previous scores in 2020. And to a lesser extent, the correspondence between the ‘diversity’ of the offering and our cultural ‘identity’ (6), the ‘balanced’ development of the offering in the languages recognised in Spain (5.1), the possibility of financially diversifying culture and increasing ‘profitability’ thanks to social media (5.3) and the possibility of a ‘sus-
tainable economy’ in the future thanks to the same social media (5) also move up.

In contrast, the appraisal of the five-year improvement in the ‘diversity and profitability’ of cultural production (5.4) is paradoxically stagnant (Figure 9).

**Distribution/marketing [Score: 5.2]**

The distribution/marketing area also improves its overall rating, in this case by two-tenths of a point and consolidates the passing mark it achieved for the first time in 2019, although it was by the skin of its teeth (5).

This average effect is the result of a slight overall increase in eight of the nine questions asked, but also of a slight decline in one of the parameters. The question of ‘sufficient’ diversity of offering over analogue distribution networks increased by seven-tenths of a percentage point (from 4.7 in 2020 to 5.4 in 2023).

Questions referring to the role that the traditional media, public and private, have or should have fostering cultural creation and promotion also improve their performance. The opinions relating the traditional media to the creation and promotion of culture (from 4.1 to 4.3) and to cultural diversity (from 4.1 to 4.4) are up, although both with failing marks. In this battery of questions, however, it is worth noting the improved perception of public media’s compliance in their support for independent production (from 4.7 to 4.9) and the promotion of cultural diversity, which stagnates at 5.4.

The approved forecast of greater diversity and profitability in the medium term due to ‘omni-channel’ distribution (from 5.7 to 5.8), the right of access to culture via social media...
(from 5.4 to 5.6) and the wide user choice among the range of marketed cultural products and services (from 5 to 5.3) are also up.

The rating of the pluralism of creations and voices available to users of social media, however, fell (from 5.8 to 5.6) (Figure 10).

**Use and consumption of culture [Score: 5.6]**

The use and consumption of culture, a field usually well-treated in the overall ratings of cultural agents, continues to stagnate at a pass (5.6), although it remains the second best-rated field after creation (6).

Beyond the context of the survey, marked by the effects of the inflation crisis and its impact on the cultural habits and practices of the public and, previously, by the stopping short of many cultural activities due to anti-COVID measures, the RSC survey series, traditionally with passes and relatively high opinions even in the midst of the crisis (5.2 in 2017), begins to show a worrying deterioration in this section, without the winds that are in the sails of other fields valued in this same survey that register rising scores.

The very slight improvements in four of the 11 parameters assessed in this field fail to compensate for the setbacks and stagnation in the remaining aspects.

The set of questions referring to the expectations centred on social media and the internet regarding their capacity for 'word-of-mouth, tagging and recommendation’ among
users (from 6.9 to 6.6), their ‘great deal of freedom’ of choice on the internet (from 6.4 to 6.2), the ‘great deal of user participation’ in cultural creation (from 5.7 to 5.5) and the ‘reduction of costs’ and corresponding cultural ‘democratisation’ (from 5.4 to 5.3) are all lower than in 2020, although they maintain their high pass marks. Opinions of increased freedom of choice for users in the medium term (from 5.7 to 5.5) and choice appropriate to national, regional and local cultural identities (from 5.5 to 5.4) also decline.

The dissatisfaction of cultural agents in relation to payment for cultural goods is worth noting: ‘affordable access’ of users to culture stagnates (5.3) while ‘fair price’ for cultural creation, although up one-tenth (from 4.7 to 4.8), is the only parameter penalised with a fail in this field.

Scores on issues such as the wisdom of users in their choice are, on the other hand, up five-tenths of a point (from 5 to 5.5); users’ ‘great deal of freedom of choice’ (from 5.6 to 5.8) and the ‘great deal to choose from’ (from 5.8 to 5.9) (Figure 11).

**Public policies and trade strategies [Score: 5.2]**

The public policy field is above the pass mark for the first time (5.2), an unprecedented result in the long series of RSC surveys. In this way it becomes the fourth highest rated field, on a par with distribution/marketing, with which it shares the same rating. The climate of greater optimism among cultural agents about public interventions promised by the new government, which raised the average rating in this section by one point (4.9) during the 2019–20 period, once again raises its estimate by three-tenths of a point to a clear passing mark, in line with the general average rating for culture in Spain (5.3). Cultural
agents’ consensus and confidence in public interventions that seem to leave behind the chronic collapse of the years 2012–2018 are confirmed, albeit still cautiously.

In this way they pass five of the seven issues raised in this section. Public authorities’ support for digital transformation rises (from 5.4 in 2020 to 6 in 2023), a high pass associated with the boost from the recovery funds, which places this parameter among the survey’s top scores. The scores for their strengthening of the industrial fabric of production (from 5.1 to 5.3), their promotion of diversity of offering and user choice (from 5 to 5.2) and government encouragement of the economic sustainability of culture (from 4.9 to 5.1) are also up. But the assessment of public policies and their encouragement of ‘creative innovation’ stagnates (5.2).

There are also a couple of issues that have risen significantly (half a point) which, although they are still close to a pass, seem to contribute to this change in trend with respect to the greater sensitivity of the public authorities to culture and creators. Particularly noteworthy in this regard are the scores on respect for the autonomy of culture (from 4.4 to 4.9), and even the defence of fair remuneration of the artist (from 4.2 to 4.7), always the most poorly faring of the questions in this section (Figure 12).

*Impact abroad and cooperation [Score: 4.5]*

Despite growing optimism and very moderate increases over the last three years, the impact abroad of our culture and cooperation continues to receive a failing grade (4.5) and remains the worst rated field of the entire RSC series: 3.8 in 2018; 4 in 2019; 4.3 in 2020; and 4.5 in 2023. This very relative improvement is made up of slight increases in ten of the eleven questions asked in this section, all of which were given a failing grade.

Particularly noteworthy are the initial positions, from the fact that trade exchanges are ‘equitable’ (from 3.9 to 4.3) and that public foreign cooperation policies are sufficient and effective (from 3.7 to 4.1) to the fact that Spanish culture occupies ‘its rightful place in the world’ (from 4.6 to 4.9) and that public cooperation policies create new audiences for Spanish culture. More specific issues such as trade with the EU being ‘sufficient and bal-
anced’ (4.1 to 4.3) and that it is in step with ‘linguistic and cultural ties’ with Latin America (from 4.3 to 4.6), and the assessment of the trade strategies of the major business groups (from 4.3 to 4.6) also improve.

The opinion on public policy for interventions abroad itself improves slightly on whether they encourage intercultural exchange and diversity (from 4.4 to 4.6), and the ‘sufficient’ impact of cultural SMEs (from 3.6 to 3.8), the most penalised issue in this section. But it stagnates in promoting the presence of Ibero-American culture in Spain (4.6). And the opinion on the ability of cooperation and trade to generate greater diversity in the medium term worsens (from 5.5 to 5.3), curiously the only parameter to pass but to drop in its score (Figure 13).

**Culture as Seen by Cultural Sectors**

Although all the questions contained in the questionnaire refer, in a general way, to the state of culture in Spain and its impact abroad, the analysis of the average scores of the cultural agents grouped by different cultural sectors offers very revealing results of the general situation but also of the prevailing mood and expectations in the different cultural activities. It is difficult, of course, for cultural agents to abstract their assessments from the context that affects them most directly, personally and professionally.

The distances between the perceptions of the surveyed agents, qualified by cultural sectors, show the dimensions that invite us to reflect on the current situation of each one, (Figure 13).
how affected they are by the successive crises, public support for recovery and digital transformation and changes in cultural consumption habits (Table 2).

In the estimation of cultural sectors, video games and multimedia stand out in particular, which already in 2020 had the greatest rise to the top of the table, and have continued to accelerate their growth rate to reach a score of 6.3 (five-tenths up from the previous figure), one point more than the average assessment of the state of culture in Spain.

The optimistic assessment expressed by cultural agents cannot be dissociated from the privileged conditions that are consolidating the video game sector as one of the cornerstones of digital culture, with double-digit year-on-year increases (software), gaining relative weight in the context of cultural industries and advancing in integration with other artistic dimensions (audio-visual, music, design, etc.). This climate of greater optimism among agents in this sector also seems to be justified by its growing institutional backing, with the inclusion of multimedia and interactive digital content such as video games among the objectives of the Plan to Drive the Audio-visual Sector (‘Spain, Audiovisual Hub of Europe’) or the decision of the Council of the European Union to include the video game industry among the priority European creative sectors.

The performing arts obtain the worst evaluation of the cultural sectors and fails. With a score of 4.5 (four-tenths less than in 2020), the greater pessimism expressed by its cultural agents is revealing of the structural difficulties that live performances are experiencing and their rocky digital transition. On the path of slowed growth, almost stagnation, during the years of the great crisis, the performing arts sector has been one of the hardest hit by the cancellations, restrictions and postponements due to the anti-COVID measures, which leads one to believe that the recovery of its economic and social stride may be perceived as taking more time.

The state of opinion regarding the rest of the sectors, always above the pass mark, declines in terms of greater or lesser optimism, which is also congruent with how affected each sector is by—and its resistance to—the crises and to the energy and public measures for recovery.

Although the sectoral reports speak of an incomplete cultural recovery, which has not yet reached pre-pandemic figures, of note are the positive opinions of the cultural agents in the book sector, with a score of 5.4 (4.8 in 2020), the music and record industry, with 5.1 (5 in 2020) and cinema and audio-visual production, with 5 (4.5 in 2020), scores that undoubtedly reflect the improvements announced in the offering, turnover and consumption data coming out.

The most striking result refers to the perception of the agents linked to the advertising creativity and design sector, one which last year occupied second place and even topped the ranking by sector in the RSC survey series, and which this year has dropped three-tenths of a point in their assessments to 5.2 (5.5 in

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**Table 2. Ranking by cultural sector in 2023**

<table>
<thead>
<tr>
<th>Cultural Sector</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIDEO GAMES AND MULTIMEDIA</td>
<td>6.3</td>
</tr>
<tr>
<td>BOOKS AND LIBRARIES</td>
<td>5.4</td>
</tr>
<tr>
<td>ADVERTISING CREATIVITY AND DESIGN</td>
<td>5.2</td>
</tr>
<tr>
<td>MUSIC AND THE RECORDING INDUSTRY</td>
<td>5.1</td>
</tr>
<tr>
<td>FILM AND AUDIO-VISUAL PRODUCTION</td>
<td>5</td>
</tr>
<tr>
<td>VISUAL ARTS</td>
<td>5</td>
</tr>
<tr>
<td>PERFORMING ARTS</td>
<td>4.5</td>
</tr>
</tbody>
</table>
2020). This is in line with the visual arts sector, which has been gradually slipping down the sector rankings to a score of 5, dropping three-tenths of a point since 2020 (Figure 14).

**Culture as seen by professional roles/type of cultural agent**

This section provides the detailed results in terms of professional role (type of agent) according to the respondents’ cultural division of labour, an aspect that largely determines their opinions and assessments and illustrates their state of mind. This is not only because of the different interests represented in the value chain of cultural activities but also because of experiences that inevitably influence their perspectives (Table 3 and Figure 15).

Artists and creators, who usually offer the least optimistic view of the state of culture

**Table 3. Ranking by professional role/type of cultural agent 2023**

<table>
<thead>
<tr>
<th>Role</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>MANAGERS (PRODUCERS, PUBLISHERS, DISTRIBUTORS)</td>
<td>5.9</td>
</tr>
<tr>
<td>EXPERTS/CRITICS</td>
<td>5.6</td>
</tr>
<tr>
<td>CREATORS</td>
<td>4.3</td>
</tr>
</tbody>
</table>

**Figure 15. Scoring by professional role/type of cultural agent 2023**

<table>
<thead>
<tr>
<th>Role</th>
<th>Score</th>
</tr>
</thead>
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</tr>
</tbody>
</table>
in Spain, become even more pessimistic in 2023 and worsen their previous average rating (from 4.6 in 2020 to 4.3 in 2023), opening a one-point gap with respect to the overall average score (5.3), pushing down the overall rating.

At the other extreme, managers (producers, publishers and distributors) express as usual the most optimism in their responses and improve their average scores more rapidly to 5.9, well above the overall average score (more than half a point), while improving their previous estimate by three-tenths of a point (from 5.6 in 2020 to 5.9 in 2023).

Finally, the experts and critics, who generally act as the tilt on the scales between the above roles, shift their traditional balance of power towards a more optimistic outlook in all the cultural segments evaluated and raise their previous score by four-tenths (from 5.2 to 5.6) (Figure 16).

**Creators: Increased pessimism [Score: 4.3]**

The creators surveyed from all sectors of activity give the state of culture in Spain a rating of 4.3, a failing grade that worsens the 2020 rating. The pessimistic (or realistic, as they see it) view of general culture is expressed in their evaluations as a whole, but takes on its full meaning when they cross-reference them with the cultural fields (Figure 17).

They rate their own creation function with a high pass (5.5), two-tenths above their previous assessment, but below the overall average rating of the rest of the respondents (6.3).

The rest of the cultural fields worsen their previous 2020 scores and decline to various degrees of fails in all their assessments. The greatest penalisation is for the area of use and consumption of culture, which drops sevenths of a point (from 5 in 2020 to 4.3 in 2023), and marks a distance of more than one point from the general average perception (5.6), which is a concerning aspect that we have already noted in other sections of this report.

Nor does it improve its score for production/publishing (from 4.5 in 2020 to 4.4 in 2023) or distribution/marketing (from 4.3 to 4), with downward slides in both cases of more than one point from the average scores for these fields. Closer to the overall average, the perception of the public policy and trade strategy field also declines, albeit less (from 4.6 to 4.5). Its worst rating is for the area of cultural impact abroad and cooperation, which falls two-tenths of a point from its previous rating (from 3.8 to 3.6).
Managers: Still optimistic [Score: 5.9]

The optimism of cultural managers, public and private, is also expressed on this occasion in their positive appreciation of all cultural fields, including their own role in publishing/production and distribution of culture (Figure 18).

They value the field of cultural creation more generously, with a 6.8 (half a point above the general average of 6.5), in an assessment that improves the previous score by three-tenths of a point (from 6.5 in 2020 to 6.8 in 2023). They give themselves a 6.4 for production/publishing (6 in 2020) and a 6 for distribution/marketing (5.6 in 2020), but keep their score for the field of use and consumption of culture the same as in 2020 at 6.1.

In the context of this relative enthusiasm, managers reaffirm their pass for cultural policies and improve their previous scoring for this cultural field by four-tenths of a point (from 5.2 in 2020 to 5.6 in 2023). They also give a pass (5) to impact abroad and cooperation for the first time (4.5 in 2020), a first in the entire series of RSC surveys, where this area had invariably been in the ‘fail’ category.

Experts/critics: Careful optimism [Score: 5.6]

Experts, academics and practitioners, researchers and cultural critics show once again that the behaviour of their scoring of cultural fields is closer to the general averages. The average score of 5.6 for this group is also the closest to the overall average (5.3) of the survey for all questions and respondents (Figure 19).

The greater optimism of the experts surveyed is reflected this year in their better assessment of all cultural fields, whose scores also exceed all the overall average scores, an unprecedented aspect in the study, which recorded large overlap between scores.

The experts rate the area of creation at 6.6 against the average of 6.3, improving by five-tenths of a point on their previous score (6.1 in 2020); they rightly rate production/publishing at 5.6, which is almost the same as the overall average (with a slight increase from 5.3 in 2020) and improve their opinion of distribution/marketing by three-tenths of a point to 5.5 (and a half point increase compared to 2020).

They also improve their score in the area of the use and consumption of culture with a 6 (four-tenths above the average and their 2020 assessment). And they confirm their
rising score for cultural policies, which have remained above passing since the previous survey, rising from a 5 in 2020 to a 5.6 in 2023, thus matching managers’ assessments. But they maintain the fail for the field of cultural impact abroad and cooperation with 4.6 (4.5 in the overall average and in the 2020 assessment).

**Open remarks**

Our survey, necessarily quantitative, articulated on the basis of a series of closed questions, always leaves a space for the opinions, assessments and proposals of our respondents on the state of culture in Spain, along all its variables.
Although meaningful in terms of the influence of the economic and political situation—which obviously frames cultural activities—they are a minority in the broad context of the survey. In particular, expressions relating to public policy, cultural impact abroad and cooperation, obstacles to mobility and job insecurity, and the incidence of recovery funds and their impact on culture, are symptomatic in their assessments. The summary below is based on the main sections dealt with.

**Public policy**

- ‘As long as Culture is not considered a matter of State in Spain, public institutions will not assume their democratic obligation to defend, support and finance Culture in general and Art in particular, which are always the ugly ducklings, despite the fact that they represent considerable wealth in the GDP’.

- ‘Public policy in culture still has two significant problems that derive from the close relationship between public policy and the political leanings of each public administration and from the excessive proceduralism, slowness and bureaucratization of so many of the processes public administrations are involved in’.

**Impact abroad and cooperation**

- ‘Cultural interventions abroad are one of the most notable and evident deficits of Spanish cultural policy in Latin America and Europe. Let alone the rest of the world’.

- ‘Spain will lose influence in key regions like Latin America because of a lack of budget to expand its culture. It’s almost miserly’.

- ‘The exchange in terms of support measures is not fair. We buy many more rights than we sell’.

- ‘Cultural cooperation is colonialist, exchange is unequal’.

- ‘As far as book publishing is concerned, there is no well-resourced plan to encourage the translation of Spanish authors beyond our borders nor is there any measure to encourage and promote the sale of copyright in other markets, unlike other European country policies that promote their own production and do not support translations’.

- ‘Public institutions’ support for music production is clearly insufficient. There are instruments like tax incentives for phonographic productions that have not been approved and which are necessary and key, as demonstrated in other neighbouring countries. Support through grants for the phonographic production of the Spanish repertoire and grants to export Spanish recorded music are key in a context where music in Spanish is in direct competition with music made in Spain’.

**Mobility and job insecurity**

- ‘Public policy should ensure working conditions and the mobility of artists and cultural professionals. Focus on the intergenerational connection’.

- ‘The public policies of the Spanish state do not defend or support its artists abroad. To perform abroad, we artists still have to use our own means and depend on the support of our friends in other countries’.

- ‘The paperwork an independent creator of culture has to go through to apply for in-
stitutional support is still so overwhelming and so demanding in terms of time that the creator, usually one worker by themselves, chooses to not even bother with the grants’.

- ‘The people working in culture in this country are condemned to live in precarious conditions and to have constant anxiety attacks due to lack of personnel, lack of money, lack of time, etc.’.

**Crisis and recovery funds**

- ‘It is unrealistic to assess the real impact of the NextGeneration funds at this stage—we’d have to wait for the end of the programme—but at this stage there is no doubt that they have had a clearly positive impact. We’ll have to wait and see whether this change is here to stay or whether it goes as quickly as it came.

- ‘It’s difficult to recover and balance all that was left undone and all the progress that wasn’t made during the PP government, but we’ve improved in many areas, there’s no doubt about that. Although it may seem like a long time ago, in cultural terms the improvement and consolidation processes are complex and very slow’.

**PRINCIPLES, OBJECTIVES AND METHODOLOGY**

**The sample: Structure and composition**

The surveys carried out so far, included in the ‘Report on the State of Culture in Spain’ published between 2011 and 2022, have had a major impact in the media. This new survey of a hundred agents and experts in the field of culture in Spain seeks to reflect their assessments of its current state and the scenarios for its development, allowing for comparison with previous opinions.

To gauge these opinions, a database of Spanish cultural agents was constructed based on the accumulation of surveys that the RSC has been carrying out for a decade, updated and refined to better combine private activities and public institutions, large companies and SMEs and the self-employed. Based on the experience of nine previous editions, this refined database of agents has reached a total of 238 contacts to achieve the final target of 100 completed surveys (response rate: 42 per cent). A significant proportion of respondents (around 70 per cent) have taken the survey before.

The exhibition has, as always, been chosen in a balanced way between leading cultural agents from all sectors, seeking a harmonious distribution between creators, producers/publishers/managers and academic experts/critics in each sector. This method means the complete sample and the effective responses are not undifferentiated, but rather balanced between productive roles played in culture and between cultural core sectors, not only to gain in representativeness of culture as a whole but also to be able to qualify the results according to the very diverse activities carried out in such a broad and diverse field.

On this occasion in particular, we have endeavoured to seek greater participation from sectoral and general cultural associations of all kinds, which is not always easy either in terms of access or response, without neglecting the representativeness of women in culture and the greatest possible balance between the two great metropolises that have the most cultural offering and the other Spanish communities.

The survey was conducted from 6 March to 13 April 2023. The online consultation method, a professional internet platform (e-encuesta.com), has done the work of collecting and tabulating the results, although it
has also shown, sometimes in real time, the difficulties many cultural agents have dealing with the lengthy questionnaire.

In this way, we have systematically sought to weight respondents into **three broad categories**:

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<table>
<thead>
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<tbody>
<tr>
<td>1</td>
<td>Creators</td>
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<tr>
<td>2</td>
<td>Public and private managers</td>
</tr>
<tr>
<td>3</td>
<td>Researchers and critics</td>
</tr>
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</table>

And we have segmented them in a balanced way among **seven large sectors of activity** that synthesise the major cultural processes in our society (in terms of social impact and economic weight):

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<table>
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<tbody>
<tr>
<td>1</td>
<td>Performing Arts</td>
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<td>2</td>
<td>Fine Arts</td>
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<tr>
<td>3</td>
<td>Music and the Recording Industry</td>
</tr>
<tr>
<td>4</td>
<td>Film and Audio-visual Production</td>
</tr>
<tr>
<td>5</td>
<td>Books and Libraries</td>
</tr>
<tr>
<td>6</td>
<td>Video Games and Multimedia</td>
</tr>
<tr>
<td>7</td>
<td>Advertising Creativity and Design</td>
</tr>
<tr>
<td>8</td>
<td>Cross-cutting experts (managers, researchers)</td>
</tr>
</tbody>
</table>

**Premises of the Questionnaire**

**Logic and objectives**

The same set of 54 questions was used in the 2011, 2014, 2015, 2017, 2017, 2018, 2019, 2020, 2021 and 2022 surveys to enable comparisons over the period. It is an exhaustive questionnaire, intended to be long-lasting so that it can be compared over time, and which therefore aims to cover the main issues affecting the cultural field. But we have added four specific questions on the role of Spanish culture in Europe (central theme of this edition), the contribution of the NextGenerationEU funds to the recovery of the cultural sector and the effectiveness of public policy to promote the mobility of artists and cultural professionals within the EU as a novelty in this RSC 2023.

All the questions in the questionnaire refer to culture in Spain, except for express mention of its impact abroad, and are phrased in positive terms to avoid conditioning respondents. Their scoring was from 1 (strongly disagree) to 10 (fully agree). The questionnaire is common to all cultural activities, although obviously it is answered based on the respondents’ specific experience.

Responses to this questionnaire are completely anonymous and are only reflected in the overall results. The list of respondents, with their names and professional positions, is nevertheless included in the final appendix of our publication as an obligatory guarantee of the reliability and representativeness of the survey (see Appendix III).

To represent all the major phases of the value chain of culture and the cultural and creative industries, both in its classic analogue version and in its translation into the digital world, **six fields** have been delimited that structure the entire questionnaire:
And it has sought to enunciate the questions, orienting them by axial areas of cultural assessment, which should translate into explicit terms their fundamental democratic values and the economic conditions necessary to sustain them, with a flexible number of questions capable of apprehending the fundamental aspects of each area in each field, always from a central perspective based on cultural diversity.

<table>
<thead>
<tr>
<th>1</th>
<th>Creation</th>
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<tbody>
<tr>
<td>2</td>
<td>Production/Publishing</td>
</tr>
<tr>
<td>3</td>
<td>Distribution/Marketing</td>
</tr>
<tr>
<td>4</td>
<td>Use and Consumption of Culture</td>
</tr>
<tr>
<td>5</td>
<td>Public Policy and Trade Strategies</td>
</tr>
<tr>
<td>6</td>
<td>Impact Abroad and Cooperation</td>
</tr>
</tbody>
</table>

**Questionnaire [RSC 2023]**

**1. Creation:**
01. Innovative trends and styles can be expressed and find their audience
02. Cultural creation expresses the range of ideological values in Spanish society
03. Authors are leveraging on technology to enhance their creativity
04. Creators are taking advantage of social media to connect with their audiences
05. Creators receive fair remuneration to maintain their work
06. Creative diversity tends to improve in the medium term (five years)

**2. Production/publishing:**
07. Creator-publishers make up a pluralistic range of voices and interests
08. SMEs have an essential role to play as innovation incubators
09. The cultural offering reflects the diversity of our cultural identity
10. Decentralised cultural production reflects the Spain of its autonomous regions
11. Large cultural business groups offer a wide range of products and services
12. The languages recognised in the Spanish state are developed in a calibrated way in the available offering
13. SMEs in publishing/production receive sufficient remuneration to be sustainable
14. Social media diversify financial sources and increase profitability
15. Social media make the future more economically sustainable
16. Cultural production will increase its diversity and profitability in the medium term (five years)

**3. Distribution/marketing:**
17. Analogue distribution networks offer a sufficiently diverse range of services
18. Traditional media promotes cultural diversity
19. The media fosters the creation and promotion of culture
20. Public media promotes cultural diversity
21. Public media promotes independent production
22. The commercialisation of cultural products and services allows for a wide range of user choice
23. Social media guarantees pluralism of creations and voices available to users
24. Social media ensures the right to general access to culture
25. Distribution through all channels will allow for greater diversity and profitability in the medium term (five years)

4. Use and consumption of culture:
26. Users have a great deal of freedom of choice
27. Users know what they want to choose
28. Users have a great deal on offer to choose from
29. Users have affordable access to culture
30. Social media allows for a great deal of user participation in cultural creation
31. Social media increase users’ word-of-mouth (tagging and recommendation) capacity
32. Social media drastically reduces the cost of culture and democratises it
33. Users have a great deal of freedom of choice on the internet
34. Users pay a fair price for cultural creation
35. Users can choose the culture appropriate to their cultural identities (national, regional, local)
36. The public/consumers will increase their diversity of choice in the medium term

5. Public policy and trade strategies:
37. Public policy regarding culture stimulates creative innovation
38. Public policy strengthens the publishing/production industrial fabric
39. Public policy encourages diversity of supply and user choice
40. Public policy stimulates culture’s economic sustainability
41. Public authorities respect the independence of culture
42. Public policy supports digital transformation
43. Public policy advocates for artists to be fairly remunerated

6. Impact abroad and cooperation:
44. Spanish culture occupies its rightful place in the world
45. Trade abroad is equitable
46. There are enough cultural exchanges with the EU and they are balanced
47. Cultural exchanges with Latin America are at the same level as linguistic and cultural ties
48. Large groups’ marketing strategies for foreign expansion are successful
49. The impact abroad of cultural SMEs is sufficient
50. There are enough public policies for foreign cooperation and they are effective
51. Public cooperation policies foster intercultural exchange and diversity
52. Cooperation policies promote the presence of Latin American culture in Spain
53. Public cooperation policies create new audiences for Spanish culture
54. Cooperation and trade will lead to greater diversity in the medium term

7. Current event issues:
55. Spanish culture has been improving its position in Europe in recent years
56. Spain has a clear model of cultural policies in Europe
57. The budget and the NextGenerationEU recovery instrument to repair the damage done to culture by the crisis
58. Public policies ensure working conditions and the mobility of artists and cultural professionals within the EU

8. Open remarks:
If you wish to add any comments, especially in relation to the current event Appendix, you may do so in this section (maximum 10 lines).
State of Culture in Spain 2023 (1st part)

01. Innovative trends and styles can be expressed and find their audience
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25. Distribution through all channels will allow for greater diversity and profitability in the medium term (five years)
26. Users have a great deal of freedom of choice
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<tr>
<th>No.</th>
<th>Statement</th>
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<tbody>
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<td>4.7</td>
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<tr>
<td>53.</td>
<td>Public cooperation policies create new audiences for Spanish culture</td>
<td>4.9</td>
</tr>
<tr>
<td>54.</td>
<td>Cooperation and trade will lead to greater diversity in the medium term</td>
<td>5.3</td>
</tr>
</tbody>
</table>
## Appendix II. Overall Results [RSC 2020]

State of Culture in Spain 2020 (1st part)

<p>| | | | | | | | | | | |</p>
<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>01. Innovative trends and styles can be expressed and find their audience</td>
<td>02. Cultural creation expresses the range of ideological values in Spanish society</td>
<td>03. Authors are leveraging on technology to enhance their creativity</td>
<td>04. Creators are taking advantage of social media to connect with their audiences</td>
<td>05. Creators receive fair remuneration to maintain their work</td>
<td>06. Creative diversity tends to improve in the medium term (five years)</td>
<td>07. Creator-publishers make up a pluralistic range of voices and interests</td>
<td>08. SMEs have an essential role to play as innovation incubators</td>
<td>09. The cultural offering reflects the diversity of our cultural identity</td>
<td>10. Decentralised cultural production reflects the Spain of its autonomous regions</td>
<td>11. Large cultural business groups offer a wide range of products and services</td>
</tr>
</tbody>
</table>
28. Users have a great deal on offer to choose from.

29. Users have affordable access to culture.

30. Social media allows for a great deal of user participation in cultural creation.

31. Social media increase users’ word-of-mouth (tagging and recommendation) capacity.

32. Social media drastically reduces the cost of culture and democratises it.

33. Users have a great deal of freedom of choice on the internet.

34. Users pay a fair price for cultural creation.

35. Users can choose the culture appropriate to their cultural identities (national, regional, local).

36. The public/consumers will increase their diversity of choice in the medium term.

37. Public policy regarding culture stimulates creative innovation.

38. Public policy strengthens the publishing/production industrial fabric.

39. Public policy encourages diversity of supply and user choice.

40. Public policy stimulates culture’s economic sustainability.

41. Public authorities respect the independence of culture.

42. Public policy supports digital transformation.

43. Public policy advocates for artists to be fairly remunerated.

44. Spanish culture occupies its rightful place in the world.

45. Trade abroad is equitable.

46. There are enough cultural exchanges with the EU and they are balanced.

47. Cultural exchanges with Latin America are at the same level as linguistic and cultural ties.

48. Large groups’ marketing strategies for foreign expansion are successful.

49. The impact abroad of cultural SMEs is sufficient.

50. There are enough public policies for foreign cooperation and they are effective.

51. Public cooperation policies foster intercultural exchange and diversity.

52. Cooperation policies promote the presence of Latin American culture in Spain.

53. Public cooperation policies create new audiences for Spanish culture.

54. Cooperation and trade will lead to greater diversity in the medium term.
## APPENDIX III: LIST OF EXPERTS PARTICIPATING IN THE SURVEY [RSC 2023]

<table>
<thead>
<tr>
<th>Name</th>
<th>Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natalia Abuin Vences</td>
<td>Lecturer at the Universidad Complutense de Madrid (Complutense University of Madrid), UCM.</td>
</tr>
<tr>
<td>Juan Miguel Aguado Terrón</td>
<td>Professor of Journalism at the University of Murcia, UMU. Former Director General of Radiotelevisión de la Región de Murcia (Murcian Regional Radio and Television), RTRM.</td>
</tr>
<tr>
<td>Icíar Alzaga Ruiz</td>
<td>Professor of Labour and Social Security Law at the Universidad Nacional de Educación a Distancia (National Remote Learning University), UNED.</td>
</tr>
<tr>
<td>José Manuel Anta Carabias</td>
<td>Director General of the Federación de Asociaciones Nacionales de Distribuidores Cinematográficos (Federation of National Film Distributors Associations), FANDE.</td>
</tr>
<tr>
<td>Alberto Arenal</td>
<td>CEO of the start-up MusicADN. Researcher at the Universidad Nacional de Educación a Distancia, UNED, and the Universidad Politécnica de Madrid (Madrid Polytechnical University), UPM.</td>
</tr>
<tr>
<td>Antonio María Ávila Álvarez</td>
<td>Executive Director of the Federación de Gremios de Editores de España (Federation of Spanish Publishers’ Professions), FGEE.</td>
</tr>
<tr>
<td>Costa Badía</td>
<td>Cultural mediator at the Tullida Gallery. Independent artist.</td>
</tr>
<tr>
<td>Inmaculada Ballesteros</td>
<td>Director of the Observatory of Culture and Communication at the Fundación Alternativas, OCC-FA.</td>
</tr>
<tr>
<td>Gema Baños Palacios</td>
<td>Asociación Genealogías [Mujeres poetas] (Genealogies Association [Women poets]). PhD in Artistic, Literary and Cultural Studies.</td>
</tr>
<tr>
<td>Sagrario Beceiro</td>
<td>Lecturer at the Universidad Carlos III de Madrid (Carlos III University of Madrid), UC3M.</td>
</tr>
<tr>
<td>Irene Belert</td>
<td>Audiovisual producer. Technical Director of the Acadèmia Valenciana del’Audiovisual (Valencian Audio-visual Academy), AVAV.</td>
</tr>
<tr>
<td>Pep Beltrán Ramírez</td>
<td>Coordinator of the intercultural space Sovint, Cultura y Desarrollo (Sovint, Culture and Development).</td>
</tr>
<tr>
<td>Ángela Bermúdez</td>
<td>Lecturer at the Escola Superior de Disseny de València, EASD.</td>
</tr>
<tr>
<td>Demetrio Enrique Brisset Martin</td>
<td>Photographer. Emeritus professor from the University of Malaga, UMA.</td>
</tr>
<tr>
<td>José María Bullón Torres</td>
<td>Cultural Manager on the Almussafes Town Council. President of GC Gestió Cultural, Associació Valenciana de Professionals de la Cultura.</td>
</tr>
<tr>
<td>Carmen Caffarel Serra</td>
<td>Professor of Audio-visual Communication and Advertising at the Universidad Rey Juan Carlos (King Juan Carlos University), URJC. Former Director of the Instituto Cervantes. Former Director of Spanish Public Radio and Television, RTVE.</td>
</tr>
<tr>
<td>Francisco Campos Freire</td>
<td>Lecturer at the University of Santiago de Compostela, USC.</td>
</tr>
<tr>
<td>Gemma Carbó Ribugent</td>
<td>Director of the Museu de la Vida Rural (Fundació Carulla).</td>
</tr>
<tr>
<td>Name</td>
<td>Position and Relevant Information</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Amparo Carbonell Tatay</td>
<td>Sculptor. Professor of Sculpture at the Universitat Politècnica de València, UPV. Numerary member of the San Carlos Royal Academy. Member of the Consell Valencia de Cultura (Valencian Council of Culture).</td>
</tr>
<tr>
<td>Concepción Cascajosa Virino</td>
<td>Lecturer of Audio-visual Communication at the Carlos III University of Madrid, UC3M.</td>
</tr>
<tr>
<td>Josetxo Cerdán Los Arcos</td>
<td>Professor of Audio-visual Communication at the UC3M. Former director of the National Film Archive. Film director.</td>
</tr>
<tr>
<td>Manuel Chaparro Escudero</td>
<td>Professor of Journalism at the UMA. Former director of the Asociación de Emisoras Municipales y Ciudadanas de Andalucía de Radio y Televisión (Association of Municipal and Citizen Radio and Television Stations of Andalusia), EMA RTV. Lead Researcher of the Laboratorio de Comunicación y Cultura de Andalucía (Andalusian Communication and Culture Laboratory).</td>
</tr>
<tr>
<td>Jesús Cimarro</td>
<td>Theatre producer. President of the Federación Estatal de Asociaciones de Empresas de Teatro y Danza (State Federation of Theatre and Dance Company Associations), FAETEDA.</td>
</tr>
<tr>
<td>Soco Collado Cantos</td>
<td>Director of Institutional Relations and Communication at PROMUSICA (Spanish Music Producers).</td>
</tr>
<tr>
<td>Xavier Crespo i Rico</td>
<td>Creative Director at Dacsa Produccions S.L.</td>
</tr>
<tr>
<td>Mela Dávila Freire</td>
<td>Researcher, writer, curator. Former Director of Public Activities at the Museo Nacional Centro de Arte Reina Sofía (Reina Sofía Art Museum).</td>
</tr>
<tr>
<td>Rocío de la Villa Ardura</td>
<td>Professor of Aesthetics and Theory of the Arts at the Universidad Autónoma de Madrid (Autonomous University of Madrid), UAM. Art critic. Independent curator.</td>
</tr>
<tr>
<td>Manuel de Luque Taviel de Andrade</td>
<td>Executive editor of Reason Why magazine.</td>
</tr>
<tr>
<td>Maribel Domènech Ibáñez</td>
<td>President of Mujeres en las Artes Visuales (Women in the Visual Arts), MAV. Professor at the Sculpture Department at the UPV. Interdisciplinary artist and teacher.</td>
</tr>
<tr>
<td>Raúl Eguizábal Maza</td>
<td>Professor of Audio-visual Communication and Advertising at the UCM.</td>
</tr>
<tr>
<td>María Ángeles Fayos Bonell</td>
<td>Producer. Communications Director of Olympia Metropolitana. President of the Associació d’ Empreses d’ Arts Escèniques del País Valencià (Association of Performing Arts Companies of Valencia), AVETID.</td>
</tr>
<tr>
<td>Jorge Fernández León</td>
<td>Board of Trustees of the INTERARTS Foundation. Member of the Scientific Commission of LABoral Centro de Arte (LABoral Art Centre). Independent consultant on cultural strategies and public policy.</td>
</tr>
<tr>
<td>José Andrés Fernández Leost</td>
<td>Lecturer at the UCM.</td>
</tr>
<tr>
<td>Antonio Fernández Resines</td>
<td>Film and TV actor. Former President of the Spanish Academy of Motion Picture Arts and Sciences.</td>
</tr>
<tr>
<td>Name</td>
<td>Role and Accomplishments</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Antonio Ferreira Martín</td>
<td>Lecturer at the Escuela Universitaria de Artes Tai (Tai Arts University) and the Education Department of the Reina Sofia Museum. Artist, researcher and curator.</td>
</tr>
<tr>
<td>Álvaro Fierro</td>
<td>Lecturer at the Universidad País Vasco (Basque Country University), UPV-EHU. Contributor to the magazines Ruta 66 and Mondo Sonoro.</td>
</tr>
<tr>
<td>Rosa Franquet Calvet</td>
<td>Professor at the Universitat Autònoma de Barcelona (Autonomous University of Barcelona), UAB. President of the Asociación Española de Investigación en Comunicación (Spanish Association of Research into Communication), AE-IC.</td>
</tr>
<tr>
<td>Ana Gallego Cueñas</td>
<td>Dean of the College of Philosophy and Arts at the University of Granada, UGR.</td>
</tr>
<tr>
<td>Nico García</td>
<td>Executive Producer of Catorce Comunicación S.L.</td>
</tr>
<tr>
<td>María Trinidad García Leiva</td>
<td>Lecturer at the UC3M.</td>
</tr>
<tr>
<td>Emilio Gil Cerracín</td>
<td>Creative Director at Tau Diseño. Gold Medal for Merit in the Fine Arts. Academician of the Royal Academy of Fine Arts of San Telmo, Malaga.</td>
</tr>
<tr>
<td>Belén Gil Jiménez</td>
<td>Partner at Una Más Una, cultural management and production.</td>
</tr>
<tr>
<td>Rubén Gutiérrez del Castillo</td>
<td>Director General of the Sociedad General de Autores y Editores (General Association of Artists and Editors), SGAE.</td>
</tr>
<tr>
<td>Jordi Herreruela Salas</td>
<td>President of the Barcelona Music Lab Foundation.</td>
</tr>
<tr>
<td>Concha Jerez</td>
<td>Multidisciplinary artist. Gold Medal for Merit in Fine Arts, National Prize for Plastic Arts and Velázquez Prize for Plastic Arts. Retired lecturer at the Fine Arts Department in Salamanca.</td>
</tr>
<tr>
<td>María Lamuedra Graván</td>
<td>Lecturer at the University of Seville, US.</td>
</tr>
<tr>
<td>Susana Lanas</td>
<td>Photographer. Founder of the cultural platform TIMELESS.</td>
</tr>
<tr>
<td>Tíscar Lara</td>
<td>Director of Digital Transformation and Communication at the Instituto Cervantes.</td>
</tr>
<tr>
<td>Donald B. Lehn</td>
<td>Former director of the circus school Carampa. Former President of the Federación Europea de Escuelas de Circo Profesionales (European Federation of Professional Circus Schools), FEDEC. Member of the Board of Directors of Clowns without Borders. Consultant to the Mighty Jambo Circus Academy.</td>
</tr>
<tr>
<td>Armand Llàcer Llàcer</td>
<td>Director of the Fira Trovam – Castellón.</td>
</tr>
<tr>
<td>Xosé López</td>
<td>Professor of Journalism at the USC. Former Councillor of the Consello da Cultura Galega. Cultural manager.</td>
</tr>
<tr>
<td>Guillermo López García</td>
<td>Professor of Journalism at the Universitat de València (University of Valencia), UV. Co-director of the Official Master’s Degree in New Journalism, Political Communication and Knowledge Society.</td>
</tr>
<tr>
<td>Name</td>
<td>Profession</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Marta Magadán Díaz</td>
<td>Cultural manager. Coordinator of Las Tertulias del Campoamor, Oviedo City Council. Lecturer at the Universidad Internacional de La Rioja (International University of La Rioja), UNIR.</td>
</tr>
<tr>
<td>Judith Martín Prieto</td>
<td>Journalist. Deputy director of ‘Aquí la tierra’ on Televisión Española’s La 1, TVE.</td>
</tr>
<tr>
<td>Inmaculada José Martínez Martínez</td>
<td>Lecturer at the UMU. Member of the Board of Directors of the Red Iberoamericana de Investigadores en Publicidad (Ibero-American Network of Advertising Researchers), REDIPUB.</td>
</tr>
<tr>
<td>Javier Marzal Felici</td>
<td>Professor of Audio-visual Communication and Advertising at the Universidad Jaume I (Jaume I University), UJI.</td>
</tr>
<tr>
<td>Alicia Mateos Ronco</td>
<td>Lecturer at the UPV.</td>
</tr>
<tr>
<td>Sonia Megías López</td>
<td>Composer, multidisciplinary artist.</td>
</tr>
<tr>
<td>Arancha Mielgo Álvarez</td>
<td>Assistant lecturer at the CEU San Pablo University.</td>
</tr>
<tr>
<td>Francesca Minguela Rubió</td>
<td>Honorary President of the Culture and Alliances Association.</td>
</tr>
<tr>
<td>Carles Miralles Pastor</td>
<td>Film producer and exhibitor.</td>
</tr>
<tr>
<td>Manuel Molins</td>
<td>Playwright, stage director, theatre essayist and cultural activist.</td>
</tr>
<tr>
<td>Juan Carlos Monroy</td>
<td>Cultural manager. Creativo Comunicación Director.</td>
</tr>
<tr>
<td>Enrique Morales Corral</td>
<td>Lecturer at the University of Valladolid, UVA.</td>
</tr>
<tr>
<td>José María Moreno</td>
<td>Director General of the Spanish Video Games Association, AEVI.</td>
</tr>
<tr>
<td>Juan Robert Muro Abad</td>
<td>Director of ELMURO, Cultural Consultancy and Management. Founding member and former Secretary General of the Spanish Academy of Performing Arts.</td>
</tr>
<tr>
<td>Ana Isabel Noguera Montagud</td>
<td>Lecturer mentor at UNED (Valencia). Member of the Consell Valencià de Cultura (Valencian Council of Culture). Writer.</td>
</tr>
<tr>
<td>Luis Noguerol</td>
<td>Cultural mediator. Director of Culturama.</td>
</tr>
<tr>
<td>Alfonso Palazón Meseguer</td>
<td>Coordination Presidency of the Filmmakers’ Union. Lecturer at the URJC. Director, filmmaker, producer and scriptwriter.</td>
</tr>
<tr>
<td>Rosana Pastor Muñoz</td>
<td>Actor. Film director. Member of the Consell Valencià de Cultura. Former Member of Parliament.</td>
</tr>
<tr>
<td>Laura Úrsula Pastor Pastor</td>
<td>Cultural mediator. Member of the Escola d’Animació d’ACPV (Valencia Cultural Action’s Animation School).</td>
</tr>
<tr>
<td>Jose Ignacio Pastor Pérez</td>
<td>Founder and Honorary President of the Associació Ciutadania i Comunicació (Citizenry and Communication Association), ACICOM.</td>
</tr>
<tr>
<td>Carmen Peñafiel Saiz</td>
<td>Professor of Journalism at the UPV-EHU. Secretary General of the Basque Association of Journalists and member of the Board of Directors.</td>
</tr>
<tr>
<td>Eduardo Pérez Rodrigo</td>
<td>Lecturer at the UC3M. Consultant, cultural manager.</td>
</tr>
<tr>
<td>David Pérez Rodrigo</td>
<td>Professor in the Fine Arts Department at the UPV. Art critic.</td>
</tr>
<tr>
<td>Name</td>
<td>Title</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Rosa Pérez Vicente</td>
<td>Cultural journalist. Director and presenter of the Radio Nacional de España (Spanish National Radio), RNE, programme ‘Fluido Rosa’ on music and contemporary art.</td>
</tr>
<tr>
<td>Adrián Piera Sol</td>
<td>President of the Instituto de Arte Contemporáneo (Institute of Contemporary Art), IAC. Cultural manager, gallery manager, curator.</td>
</tr>
<tr>
<td>Emili Prado</td>
<td>Professor at the UAB.</td>
</tr>
<tr>
<td>Pau Rausell Köster</td>
<td>Director of ECONCULT.</td>
</tr>
<tr>
<td>Francisco Reyes Sánchez</td>
<td>Lecturer at the UCM. Director of the programme ‘Ritmo Urbano’ (La 2 on TVE).</td>
</tr>
<tr>
<td>Giovanna Ribes</td>
<td>Director, producer and scriptwriter. CEO at Tarannà Films.</td>
</tr>
<tr>
<td>Elena Rilova</td>
<td>Cultural manager and independent curator. Vice-president of Mujeres en las Artes Visuales (Women in the Visual Arts), MAV.</td>
</tr>
<tr>
<td>Jesús I. Rivas García</td>
<td>Lecturer in the Business and Communication Department at the UNIR.</td>
</tr>
<tr>
<td>Joan Roig Prats</td>
<td>Photographer. Advisor to the Asociación Fotógrafos Profesionales de España (Association of Professional Photographers of Spain), AFPE.</td>
</tr>
<tr>
<td>Joanfra Rozalén</td>
<td>Cultural manager at La Dependent, management and production of performing arts.</td>
</tr>
<tr>
<td>Montse Ruano</td>
<td>Independent actress, singer and puppeteer.</td>
</tr>
<tr>
<td>David San Felipe</td>
<td>Creative director at Domestika.org</td>
</tr>
<tr>
<td>Victor Manuel San José</td>
<td>Musician. Singer songwriter.</td>
</tr>
<tr>
<td>Alfonso Sánchez Izquierdo</td>
<td>Director General of the Corporación de Radio Televisión de Galicia (Galician Radio and Television Corporation), CRTVG.</td>
</tr>
<tr>
<td>Alba Silva Rodríguez</td>
<td>Lecturer at the USC.</td>
</tr>
<tr>
<td>Rodolf Sirera</td>
<td>Writer. Translator, scriptwriter and playwright. Founding member of the Spanish Academy of Performing Arts.</td>
</tr>
<tr>
<td>Vicent Tamarit Rius</td>
<td>Scriptwriter and filmmaker.</td>
</tr>
<tr>
<td>David Torrejón Lechón</td>
<td>Writer. Director of the Spanish Marketing Association. Former Director General of the Federación de Empresas de Publicidad y Comunicación (Federation of Advertising and Communication Companies), FEDE. Former Secretary General of the Advertising Academy</td>
</tr>
<tr>
<td>Pedro Luis Verdejo Olmo</td>
<td>Poet. Freelancer in cultural communication management.</td>
</tr>
<tr>
<td>David Vidal</td>
<td>Editor, writer, poet, rhapsodist, researcher and cultural manager.</td>
</tr>
<tr>
<td>Virginia Yagüe Romo</td>
<td>Film and TV actor. President of Derechos de autor de Medios Audiovisuales (Audio-visual copyright), DAMA. Member of the Board of Directors of the Film Academy.</td>
</tr>
<tr>
<td>Ramón Zallo Elguézabal</td>
<td>Emeritus professor from the UPVEHU.</td>
</tr>
</tbody>
</table>
BIOGRAPHIES

Inmaculada Ballesteros. Director of the Observatory of Communication and Culture at the Fundación Alternativas. She holds a European PhD in History of Art, a European Diploma in Cultural Project Management and a master’s degree in European Union Law. She has extensive experience in the sector and has worked in Spain, Italy, Peru, Guatemala and Nicaragua. She is an expert consultant in cultural cooperation and draws up proposals for public policies in culture and communication. She was director of the Cultural Centre of Spain in Guatemala and in Nicaragua, and is an instructor at postgraduate programmes in Europe and Latin America.

Sol Candela Alcover. She holds a degree in architecture, specialising in building construction, from the Escuela Técnica Superior de Arquitectura de Valencia (Valencia Technical Architecture School, or UPV). Final Project Award from the Department of Public Works Urban Planning and Transport. Director of the Arquia Foundation, she was secretary of the Governing Council of Arquia Banca (formerly Caja de Arquitectos), of the Board of Trustees of the Arquia Foundation, and has sat on the jury in a variety of architecture competitions. Since joining the Valencian Community’s Architects’ Association, she has executed numerous projects in the uninterrupted practice of the profession at her own studio, while also holding different positions in the governing bodies of the Association, which, together with the continuous training and the experience acquired, has allowed her to better understand and study architecture in relation to society and the figure of the architect.

Patricia Corredor. She holds a PhD in Information Sciences and has been a lecturer at the Universidad Rey Juan Carlos (King Juan Carlos University) in Madrid since 2000. Previously, she was associate professor at the Complutense University and Universidad Pontificia de Comillas (Comillas Ponifical University), ICADE. As a journalist specialising in communication, she was content director of the digital edition of Anuncios, a weekly advertising and marketing magazine, editor-in-chief of Interactiva, a digital communications magazine, and a contributor to other specialised publications. She is a director of and regular lecturer in master’s programmes and other postgraduate courses at a variety of institutions.

Salomé Cuesta. Artist, with a PhD in Fine Arts and a professor of Sculpture at the Department of Fine Arts, UPV. She has taught in the Department of Fine Arts in Cuenca at Castile and La Mancha University, UCLM (1989–1998), and in master’s and doctoral programmes at several universities. She has worked on the production of texts, interventions and works in the Laboratorio de Luz research group (UPV). She was a member of the Spanish Foundation for Science and Technology (FECYT)’s ACT Group that drew up the white paper on the relationship between art, science and technology in Spain (2007) di-
rected by José Luis Brea. Since June 2021 she has been Vice-Rector for Art, Science, Technology and Society at the UPV.

**Jordi Sanjuán.** Economist with a master’s in Economic Policy and Public Economics and a PhD in Social Sciences from the Universitat de València (University of Valencia), he holds a data science certificate from Harvard University. He has worked as a consultant in cultural economics at the specialised consulting firm Culturalink and as a quantitative analyst at the Joint Research Centre of the European Commission in Ispra, Italy. He is currently a researcher in the Department of Applied Economics at the University of Valencia and is a member of the research unit on the Economics of Culture and Tourism (Econcult), where he has participated in the European projects MESOC and Measuring CCS.

**Víctor Fernández.** CEO, producer and game designer at Mansion Games, a transmedia-based game development studio that develops products for PC, Playstation, Nintendo and Microsoft, among others. He is a member of the Innovation Unit in Videogames and Artificial Intelligence (UVJIA) at the Universidad de las Islas Baleares (University of the Balearic Islands). Instructor specialising in project management, production and development of video games. He has also taken part in initiatives such as Playstation Talents and SpielFabrique and has won several awards both in the video game sector and the world of business.

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Production and printing: Lúa Ediciones 3.0
www.luaediciones.com

ISBN: 978-84-18677-98-4
Depósito legal: M-31103-2023