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# Cultural and Creative Industries in the Community of Madrid: context and economic development 2008 – 2014 <sup>[1]</sup>

**Eduardo Rodríguez Gómez** [\[CV\]](#) [\[ID\]](#) [\[G\]](#) Professor and researcher in training of the Department of Journalism and Audiovisual Communication. Universidad Carlos III de Madrid - [edrodrig@hum.uc3m.es](mailto:edrodrig@hum.uc3m.es)

**Elena Real Rodríguez** [\[CV\]](#) [\[ID\]](#) [\[G\]](#) Professor in the Department of Journalism III of the Faculty of Information Sciences. Universidad Complutense de Madrid – [ereal@ucm.es](mailto:ereal@ucm.es)

**Gloria Rosique Cedillo** [\[CV\]](#) [\[ID\]](#) [\[G\]](#) Professor and Researcher in the Department of Journalism and Audiovisual Communication. Universidad Carlos III de Madrid – [grosique@hum.uc3m.es](mailto:grosique@hum.uc3m.es)

## Abstract

The Community of Madrid is one of the main focuses of Cultural and Creative Industries in Spain (CCI), therefore it is necessary to measure their socioeconomic impact in the region in aspects such as competitiveness, investment, employment and social cohesion. **Objectives:** The objective of this article is to introduce a model, using a harmonized and comparable methodology, that identifies the evolution of CCIs in the Community of Madrid (CAM) in the current context of digital change, so to understand public policies and gain awareness, from an Autonomic perspective, about to what extent they contribute to the generation of employment and social wellbeing. The purpose of our research is, therefore, the construction of tools that improve current statistical parameters and that promote their implementation by Autonomic governments -which doesn't have a Strategic Plan so far, as other Autonomies do–, establishing a better connection with the goals of Horizon 2020 Programme. **Methods:** Therefore, a statistical model has been created with comparable data to those used by the European Union and UNESCO based on INE surveys and reports from the Ministry of Education, Culture and Sports, among other sources. **Results and Conclusions:** Results show the repercussion of the financial crisis in all magnitudes, the relevance of advertisement and audiovisual sectors

regarding regional GDP, stabilization of performative fine arts and libraries and museums, and the dropping of architecture, both economic and labour. We also find there are huge differences in the investment in culture among AACC.

### **Keywords**

Cultural industry; creative industry; business volume; employment; regional GDP; gross value added.

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Translation by **Yuhanny Henares**  
(Academic translator, Universitat de Barcelona)

## **1. Introduction**

According to UNESCO, cultural and creative industries (CCI) are bound to interpret a significant role in the economic and competitive development of States, both developed and developing, defining the evolution towards new production models. They are one of the key sectors considered by the European Union in the framework of the strategy Horizon 2020 (European Commission, 2011a; European Union, 2012) and offer a high potential as triggers for the innovation process, activating resources, knowledge and creative talent.

To verify the status and progress of CCIs helps to confirm their strengths and weaknesses and to be aware about the management of their resources, determining whether it is necessary that corresponding public administrations change strategies. But, so to apply corrective policies that are transversally coherent, a homogeneous measuring system between the different AACC is required, which is harmonized with the European Union standards.

Among researchers who have performed statistical studies about CCIs in Spain, Aguilar Losada (2014: 2), defender of the hypothesis that “cultural and creative industries are more innovative than the rest of sectors in Spain”, admitted to have found “some problems of statistical insufficiency when it comes to evaluating their magnitudes”. Studies about regional richness and employment in cultural industries made by Hervás Oliver (2011) and Rausell (2011) have tried to gather statistical criteria for different regions –in the study led by Hervás 250 European regions were analysed, including several Spanish regions– but its impulse has not been consolidated as methodological model.

The reality is that in Spain we find several studies that witness the huge interest CCIs have brought to developed countries in their evolution towards information society. Roca and Fajula (2005), with a regional approach, Boix and Lazzarotti (2012), Zallo (2011) and Rey (2009), from a national approach, and Bustamante (2011, 2002) from an international one, show more specific studies, but in

no case analysis standardized models are used, that configure a whole image about the economic and social weight of CCIs, either for the national or European area. These studies keep the rich line of descriptive research that intertwines with the traditional studies about structure of media (Díaz Nosty, 1989), communication policies (García-Leiva, 2011; Zallo, 2007 and 1988) or cultural industries (Bustamente and Zallo, 1988).

More recently and with an approach that is closer to descriptive statistics, Fundación Telefónica (2015), la SGAE (2015), la AEDE (2015), la Fundación Orange (2014) and la Fundación Ideas (2012), with a mercantile perspective, and the Ministry of Education, Culture and Sports (2016) and the Ministry of Economy and Competitiveness (2013), from the public sector, have done several studies analysing the economic and social weight of specific cultural activities such as cinematography, television, press, telecommunications or leisure. Since these are sector researches but not longitudinal, carried out in an independent manner and linked to particular interests of the field industry, they are illustrative in their niches of study, but not significant to elaborate a holistic analysis that is comparable between units.

In the European framework, the interest and development of the study about CCIs was established at the beginning of the nineties and it is currently much more advanced. MEDIA programmes, dated back to 1991 and which continued consecutively until 2013, had the philosophy of stimulating development, distribution and promotion of European audiovisual works that could compete with North-American importations. This policy was emphasized with MEDIA Mundus programmes, of reinforcement to the European film industry, and the Green Paper of the European Agenda for Culture (European Commission, 2010), which expected to explore the potential of employment in the creative field. However, the scarce availability of data hindered said harmonization, which stimulated the creation of *Leadership Group on Cultural Statistics (LEG-Culture)* in the year 2000, a group subscribed to the Eurostat, which explored the possibilities of harmonization of cultural statistics between countries of the European Union for the years 1996-1999 (Fuertes, 2011). The research was interrupted on 2004 to be replaced by *ESSnet Culture* (EUROSTAT, 2012), which updated the statistical methodology so to make data comparable in the European framework. Spain decided not to participate in the programme actively, together with other twelve countries, becoming only an observer member.

Regarding subsidies, Creative Europe (European Commission, 2011b) is the new program with the framework on foundations and objectives of Horizon 2020 destined to promote cultural and creative sectors with a global budget of 1.460 million of Euros. These are the main challenges European CCIs face: insufficient financing, scarce intra and inter-sector cooperation, change towards a model of digital business, violation of intellectual property, new behaviours of consumers and absence of standardized models for their economic evaluation. As a response to part of these challenges, the European Grouping of Societies of Authors and Composers (GESAC) confirmed the good practices of CCIs during economic crisis and highlighted their relevance as a dynamic and fast growing sector which directly contributed to youth employment (GESAC, 2014). Researches performed since the end of the nineties in England (*Department for Culture, Media and Sports*, 2016; Garnham, 2005 and 2011), France (Bouquillion et al., 2013; Bouquillion, 2008) and Germany (Engstler, 2013; Ruhr-Universität Bochu, 2008) have demonstrated to be in consonance with these European strategies of harmonization of cultural indicators.

Regarding this issue, and related to a first approach nationwide with Eurostat data for the year 2010, Spain was placed fifth place in the European Union based on employment level in creative economy, with 725.900 employees, which represented 3.8% of country employment and 7.5% of EU-27 employment. Likewise, in 2010 and in the middle of the economic recession, the Community of Madrid positioned as the fourth urban region by employment volume (164.269 employees), obtaining the second position in sectors such as radio and television, and the third in advertisement (Horizon 2020, 2013).

## **2. Objectives, methods and sources**

### **2.1. Objectives**

The first objective of this research is to introduce a model identifying the evolution of cultural and creative industries of the Community of Madrid in the current context of crisis and digital change (2008-2014), so to know to what extent it has contributed to the generation of employment and what has been its contribution to the enrichment of the region and the national gross domestic product. The second objective, directly linked to the R+D project CSO2013-42822-R, is the elaboration of economic and social indicators, through a harmonized methodology, comparable among CCAA – and comparable with European Union standards-, which improve current statistical parameters and that facilitate implementing policies by the Autonomic Government of Madrid – which does not have a Strategic Plan of assistance for CCIs so far, as other autonomies do-, establishing a better connection with the objectives of the programme Horizon 2020.

### **2.2. Methods**

To meet our objectives with data comparable to those used by the European Union and UNESCO and that enable comparative data with other AACC, we have turned to the National Statistics Institute [2] and the Ministry of Education, Culture and Sports, and we have elaborated, with the assistance of the Catalan Statistics Institute (IDESCAT), a general matrix of data specific for CCIs with four digits, for the National Classification of Economic Activities (CNAE), called Statistic Model Localcom-ICC (MELICC) [3], which has complemented with the statistical data of the region in CAM (aka Community of Madrid).

The main difficulty when working with INE surveys is that, even though the sample allows autonomic disaggregation, there are only data incorporated about two digits of CNAE, which generates distortions on some subcategories we intended to analyse. To solve this lack, the missing values were reassigned through a statistical correlation process, keeping as reference, the sample of data from the Catalan Statistics Institute about Cultural Companies (IDESCAT-EMPCULT), which did have four-digit data of CNAE for the years 2008-2014. Based on these data base, the economic variables to be analysed were recalculated – employment, business volume, etc.- for each autonomous community, verifying the suitability of these calculations compared to data offered by INE, MECD, The General Society of Authors and Publishers (SAGE) and regional institutions, in this case, the Statistics Institute of Madrid (IESTADIS) and the Ministry of Economics, Finance and Employment.

### 2.3. Sources and variables

The samples consulted in INE: Annual Survey of Services, Central Directory of Companies, Active Population Survey (EPA), Industrial Survey of Companies, Regional Accounting of Spain and Survey of Family Budget. MECD sources used: CULTURABase, the Yearbook of Cultural Statistics and Survey of Cultural Habits and Practices. We also consulted the SGAE Yearbook.

To contextualize our results in the Community of Madrid we used the general budgets of the Regional Administration and studies of their Statistics Institute. These data were orienting to correct or at least to alert about deviations the MELICC model may have, even though in many occasions these data had CNAE missing and were presented with different methodologies, hindering the standardized comparison with INE and MECD.

For example, in Culture and Leisure, the series “Direct promotion of the Community of Madrid in Cultural Activities” unfolds expenses in musical, theatre, cinema, and dance activities, except for the celebrations of May 2 (Day of the Community) and Autumn Festival, there is no specification to the type of activities and in no CNAE classification in any section. In the series “Population by economic activity”, the source is EPA, which gathers data for agriculture, construction and services, but not for CCIs. And regarding cultural services, the number of libraries comes from INE, disaggregated by AACC, and with only a two-digit CNAE, the visitors of the main museums are not classified by any CNAE and the number of viewers in performative and musical arts comes from the Yearbook of Cultural Statistics of MECD, disaggregated by AACC, but without CNAE.

Considering the Municipality of Madrid comprises most part of cultural offer developed in CAM, we also considered the Strategic Plan for Culture 2012-2015 (Government of Madrid, 2012), which oriented our conclusions. PECAM responds to the MECD initiative and the Spanish Federation of Municipalities and Provinces to create a System of Cultural Indicators based on Agenda 21 for Culture. In the case of the Capital, an X-ray of the cultural ecosystem was elaborated, where the most relevant activities and cultural centres of the city were reviewed descriptively, without statistical explorations.

CCI sectors selected by CNAE-2009:

- Books and press: incorporates retail trade of books (4761) and newspapers and stationery products in specialized establishments (4762); besides Editing of books, newspapers and journals (5811, 5813, 5814); news agencies activities (6391); and translation and interpretation activities (7430).
- Audiovisual: includes retail trade of music and video records in specialized establishments (4763); Videogame editing (5821); cinematography, video and television programme activities (5912-5920); radio broadcasting activities (6010) and programming and television broadcasting activities (6020); and renting of videos and records (7722).
- Architecture: technical services of architecture (7111).
- Advertisement: comprises Advertisement (731), advertisement agencies (7311) and services of representation of mass media (7312).



- Visual arts: comprises activities of specialized design (7410) and photography activities (7420); and incorporates Artistic and Literary creation (9003), which for CNAE it is a subcategory of Performative arts.
- Performative arts: includes performative arts themselves (9001) and activities complementary to performative arts (9002).
- Libraries, archives, museums: gathers Museum activities (9102), libraries (9105) and archives (9106).

Variables used: number of companies (Companies), individuals with labour activity (Employment), Business volume (VN) and gross value added (GVA).

### 3. Results

#### 3.1. Parliament debates and strategic plans regarding CCIs

The cultural activities that depend on the CAM Government are gathered in the Regional Ministry of Presidency, Justice and Spokesman, which organigram includes Office of Culture and Tourism, the General Direction of Cultural Promotion, General Direction of Cultural Patrimony, General Direction of Tourism and the Territorial Registry of Intellectual Property.

The Office is the coordinating body and it is responsible for the activities of “ordering, promoting, planning and informing about tourism, performative arts, fine arts, books, archives, music and audiovisual and historic patrimony”. Cultural Promotion is responsible for the promotion and development of “theatre, choreography, musical, circus, audiovisual, cinematographic and fashion activities”, among others. On the other hand, Cultural Patrimony has competences “in issues such as historic, artistic, monumental, archaeological, architecture and scientific patrimony, without prejudice of the competence of the State for their defence”.

This administrative structure was object of several debates in the Assembly of Madrid. On July 23, 2015, the Parliamentary Group Podemos presented an oral question about whether the regional Government was thinking about rectifying the decision of not creating a Regional Ministry of Culture. The Regional Minister of Presidency, Justice and Spokesmen, Ángel Garrido, explained that the fact of making culture depend directly of the Presidency entailed to respect and highlight “the singularity and exclusivity of the culture of Madrid”. Therefore, through the Office of Culture, this sector would have the Presidency of the Community “its main responsible and interlocutor”. For the regional minister, the fact of promoting culture and enjoying it is “an end itself”, but also “an instrument to create richness and generate employment, besides an added value to all our policies of touristic development”. Its functional dependency from Presidency grants culture “a transversality that will not be granted if it were a separate Regional Ministry; the purpose is to integrate them all in our policies” [4]. Some weeks later, the President Cristina Cifuentes delved deeper into this policy explaining that cultural politics was promoted under her “direct supervision” due to the relevance it entails “in all actions of the Government and, besides, in a transversal manner among all Regional Ministries”. As a proof of her engagement, she mentioned that she attends every week to the Direction Committees of the Offices of Culture and Tourism [5].

Anyways, neither in the Assembly of Madrid, nor in the IX Legislature (June 2011-March 2015), nor in the first 12 months of the X (June 2015-june 2016) there were general debates about CCIs. They

were held with sector or specific character about Politics and Cultural Promotion [6], Historic-artistic Patrimony [7], Law of Historic Patrimony [8], VAT in the cultural sector [9], Cultural Industry [10] and Cultural-Historic Patrimony [11].

Contrary to other autonomic administrations, the Community of Madrid doesn't have a Strategic Plan for regional CCIs and it is encompassed in the General Direction of Policies of Cultural Industries and the Paper of the Ministry of Education, Culture and Sports (MECD, 2015). On the other hand, the local government of Madrid is elaborating a Cultural Strategic Plan (PECAM 2012-2015), which includes not only an initial specific study made by the Area of Government of Fine Arts, but "new global visions of the future city". It is worth emphasizing the huge relevance of the city of Madrid in the field of regional CCIs. Therefore, the Agency of Economic Development "Madrid Empeñe", created in 2012, has granted different subsidies for the promotion of CCIs in specific urban zones of the municipality, considering its capacity to generate quality employment. The purpose of said initiatives is reinforcing the spontaneous concentration of these activities in particular central neighbourhoods of the city, through the reduction of municipal tributes (up to 5.000 Euros annually for a maximum of two consecutive periods) to micro-companies (under 10 employees) and PYMES (10-50 employees) which present an interesting project.

Likewise, "Madrid Empeñe" is working jointly with Medialab Prado and Talleres AVAM with specific initiatives focused to reinforce the creative tissue of the capital. Medialab Prado is defined as a laboratory for production, research and dissemination of digital culture, sheltering creative and collective projects besides doing training tasks themselves. On the other hand, Talleres AVAM have their origin in an agreement between the Area of Fine Arts, Empresa Municipal de Vivienda y Suelo and Association of Visual Artists of Madrid (AVAM) and are constituted by four facilities in Pradolongo (Usera) that work as temporary incubator for plastic and visual artists.

The private initiative is also one of the development axes of CCIs in Madrid, with bodies such as Factoría Cultural, Instituto Superior de Industrias Culturales y Creativas (InsICC), Clúster ICT Audiovisual, Zinc Shower or Fundación Contemporánea.

### **3.2. Evolution of the main economic indicators in the Community of Madrid**

Between 2008 and 2014, general GDP and GDP per capita of the region have reduced -3% and -4.3% respectively, that is, the inhabitants of the Community have lost more acquisition capacity compared to the regional macro-economic development. In fact, in terms of GDP at national scale, CAM constituted 18.1% in 2008 –the second more elevated index in Spain– and 18.8% in 2014, that is 0.7 percental tenths more, which indicates that, while the regional economy sensitively increased or, at least, kept its contribution to the national GDP, the natural persons of the region suffered the prejudices of the crisis with more incidence –more unemployment– and benefited less from the richness generated in the region –less income per capita–. According to the Survey of Life Conditions of INE, the average annual income by individual of CAM moved from 13.564 net Euros in 2008 to 2.597 in 2014, one thousand Euros less, while during that same period, the poverty risk rate maintained in 14.8%.

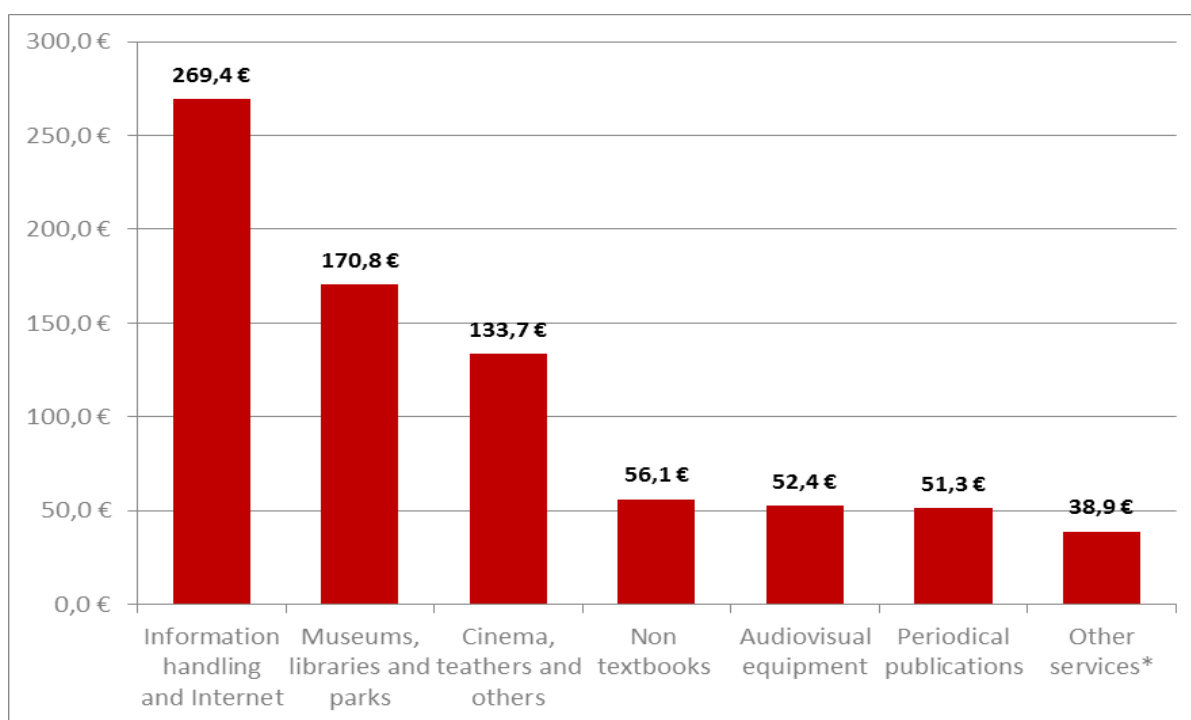
These data are related to the production of employment. Even though crisis has affected all economic magnitudes, employment has suffered its effects more severely. Since 2008, 332.000 individuals

have lost their Jobs and the number of unemployed almost doubled (43%). The poor evolution of employment indicates that individuals with the intention of incorporating to the labour market in the last six years, generally young, have found a particularly difficult context compared to previous times.

Crisis has also prejudiced the general consumption of families, but while expenses of water, gas and electricity reduced drastically from 2008 to 2014 (-4.4%), the consumption of leisure and culture reduced to half (-50%). For that year, the average consumption per home in CAM regarding cultural goods and services was 770 Euros. Graph 1 indicates the distribution of the domestic expense in leisure and culture, which most part was dedicated to services related to Internet, a 35% of the total.

Due to its effect over consumption of goods and services, including cultural, it is mandatory to observe demographic data of the region, which indexes were considered among the most elevated of the country. In 2016, CAM had 6.500.000 inhabitants, the third largest population after Andalusia (8.388.107) and Catalonia (7.522.596). Regarding the demographic density, it is a common pattern that repeats in all Autonomic capitals, but in the case of CAM the difference between the capital and the rest of municipalities is quite high. Only the municipality of Madrid comprises half of all inhabitants of the region (3.165.541), making Móstoles the second most populated Municipality with 205.000 inhabitants, fifteen times less. The capital has a demographic density of 5.225 hab./km<sup>2</sup>, while the average for the whole Community is 795 hab./km<sup>2</sup>.

Graph 1. Average expenses in leisure and culture per home in CAM - 2014 (Euros)



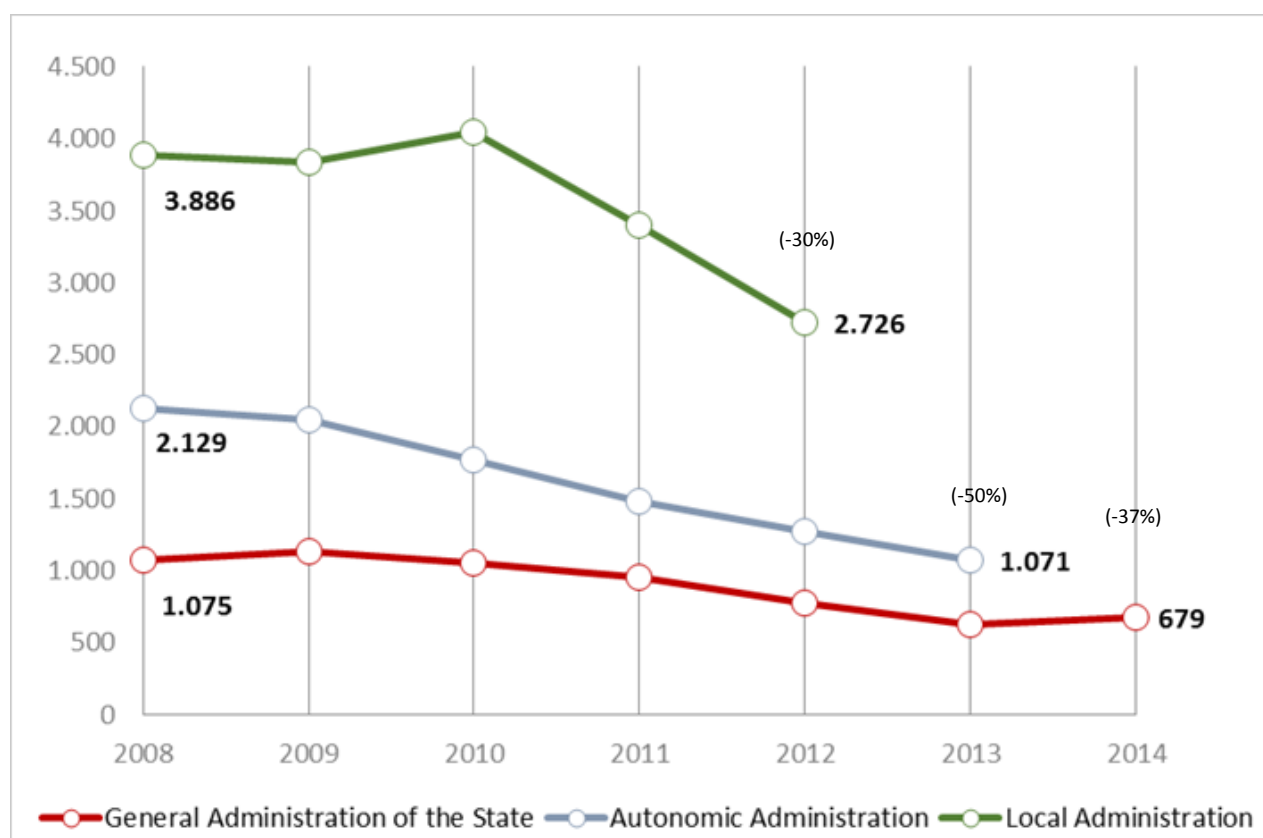
Source: Survey of Family Budget (INE) - 2014. \*Support for the registry of image and sound and musical instruments.



Regarding expenses of the Administration of Madrid for Culture for 2014, it was 0.5% of the total of its general budgets: while Health reached 37% and Education 21.5%. Since 2008, expenses allocation for Culture reduced from 313 to 91 million Euros, 70% less.

Considering that culture is a social asset and that the public support for production of cultural goods is justified, we can see on Graph 2 the negative evolution of expenses of the different administration and the huge difference between local, autonomic and State entities, even though the regional governments bear most of competences in issues such as culture. The Law of Bases of the Local Regime of 1985 which was modified in 2014 to perform more control over expenses of local governments, because often expenses were clearly unjustified. That control will undoubtedly impact CCI's expenses.

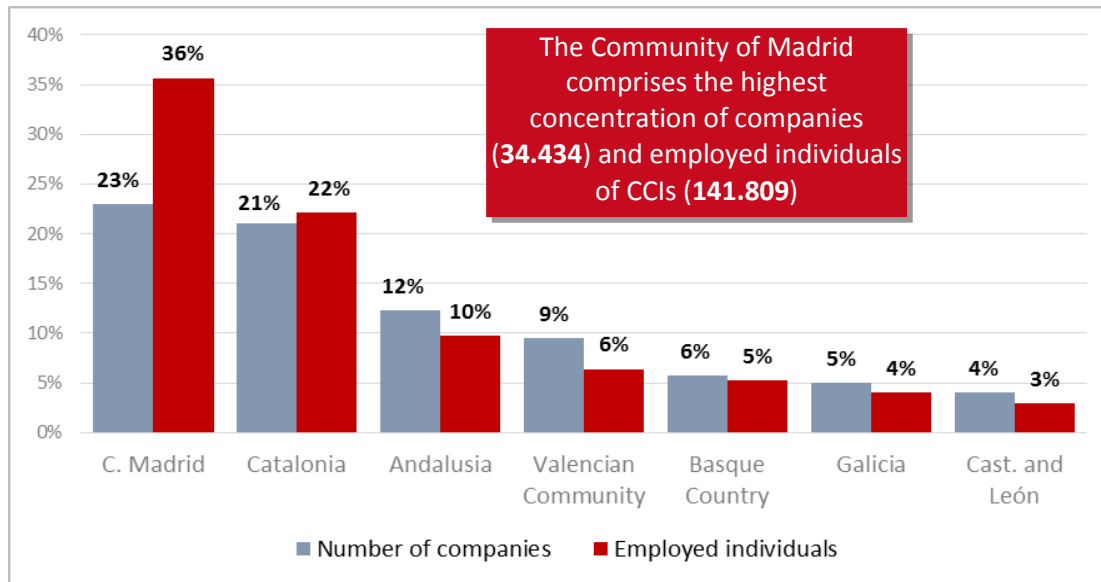
Graph 2. Expenses in culture by type of administration in millions of Euros (2008 - 2014)



Source: Yearbook of Cultural Statistics (MECD, 2013).

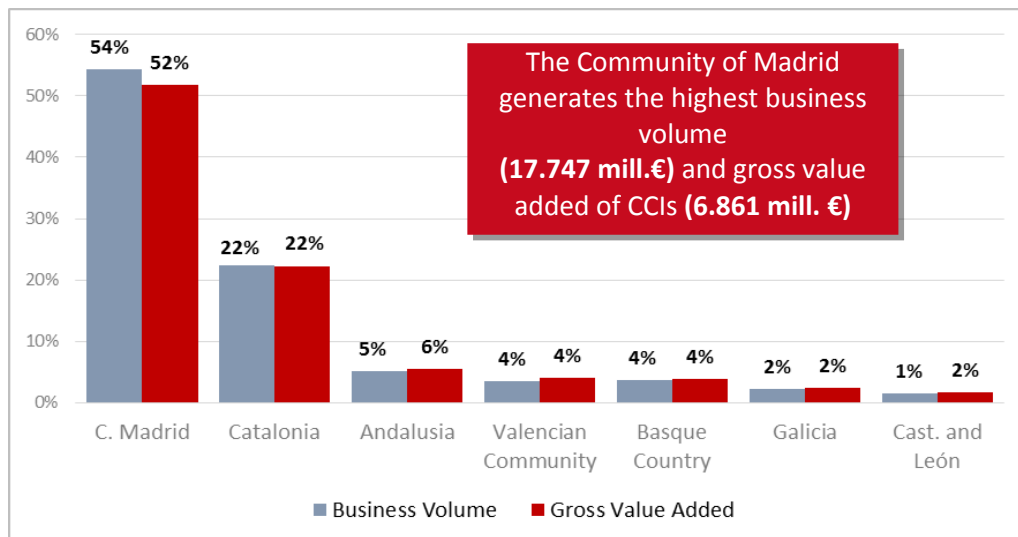
Compared with other autonomous communities, CAM concentrates the largest number of companies, employees and business volume for the CCI's sector (graphs 3 and 4).

Graph 3. Number of companies and CCI employees by AACC – 2014



Source: MELICC - 2014.

Graph 4. Business volume and CCI Gross value added by CCAA - 2014

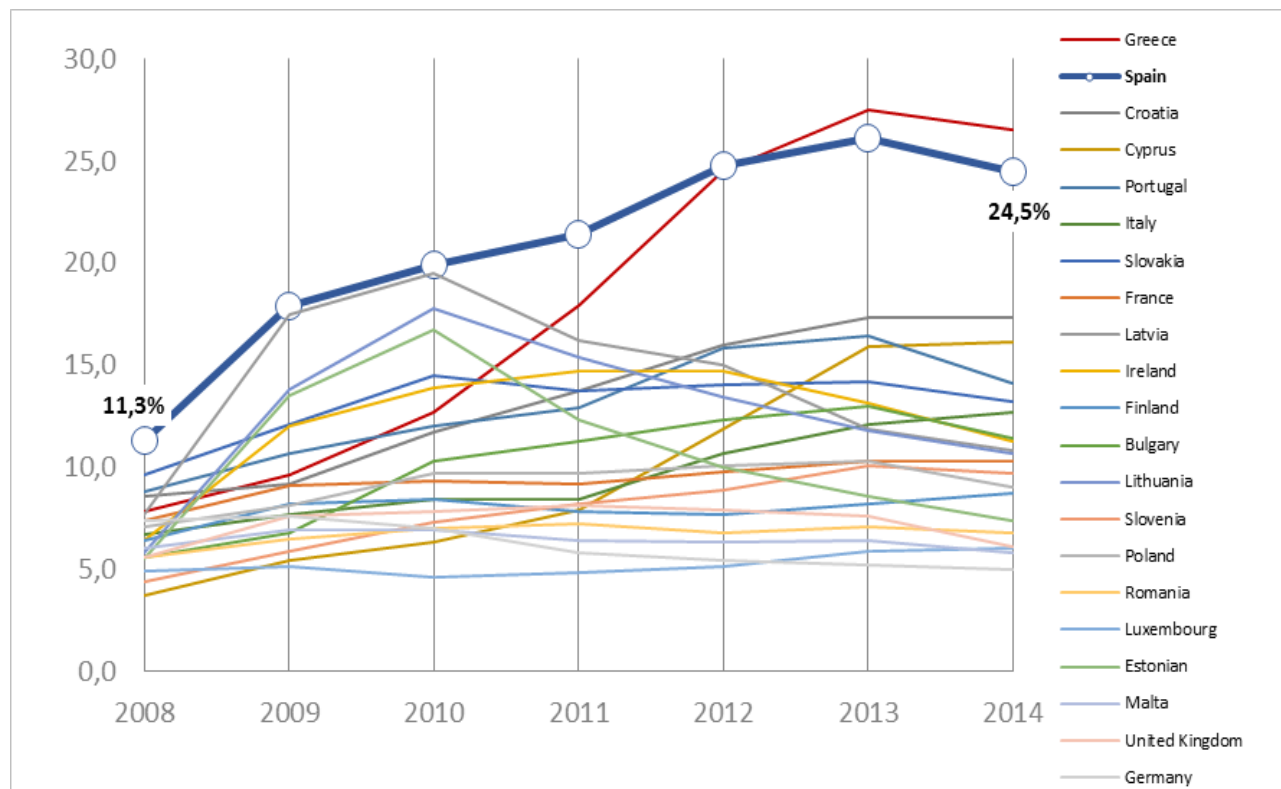


Source: MELICC - 2014.

Considering that CAM is, with a huge difference, the region of greater impact and economic contribution in the field of CCIs and that it is also one of the regions with more demographic density and with greater contribution to national GDP, when observing the unemployment rate in Spain

compared to the rest of European countries (graph 5), the relevance of the economic performance of CCI in the Community of Madrid is evident, for a better functioning of economy, not only of the region, but also the country as a whole.

Graph 5. Evolution of the unemployment rate in the European Union 2008 –



Source: Eurostat. Years 2008 – 2014.

### 3.3. Economic impact: business volume and gross value added of CCI

Cultural and creative industries of the Community of Madrid generate a joint business value superior to 17.500 million Euros annually, 9.2% of the GDP of Madrid. From 30.775 Euros that correspond to every inhabitant of the CAM in concept of income per capita for 2014, 770 Euros come from CCI.

In terms of gross value added (GVA) [12], the greater contribution to CCI corresponds to the sector of advertisement (31.6%), followed by audiovisual (22.7%) and books and press (21.4%). It is worth mentioning that advertisement, surpassed by the audiovisual in business volume, equals the later in gross value added, that is, generates the same richness from an inferior sales value (table 1).

Audiovisual production is the leader activity of CCI in CAM: generating one third of the business volume of the sector. This predominance incorporates activities quite rooted in the community, specially film and series production, as well as the broadcasting of sports events and the increasing industry of videogames. It is a strongly subsidized activity. The subsidies to the film sector in this community reached 232 million Euros in 2014, which were shared between the 94 Spanish films

with the participation of a Madrid producer (during this year, in Spain there were produced 216 feature films of Spanish nationality, so in Madrid there were produced almost 50% of the total).

|                              | Architecture | Performative Arts | Visual Arts | Audiovisual | Libraries, archives and museums | Books and press | Advertisement | Total CCI's |
|------------------------------|--------------|-------------------|-------------|-------------|---------------------------------|-----------------|---------------|-------------|
| Business Volume (Millions €) | 1.687        | 673               | 473         | 6.375       | 161                             | 3.730           | 4.644         | 17.747      |
| GVA (Millions €)             | 681          | 393               | 263         | 2.074       | 182                             | 1.205           | 2.061         | 6.861       |
| Employment                   | 16.880       | 18.882            | 9.409       | 25.290      | 5.819                           | 32.905          | 32.624        | 141.809     |
| Companies                    | 8.187        | 2.492             | 5.364       | 3.696       | 562                             | 7.321           | 6.812         | 34.434      |

Source: MELICC - 2014.

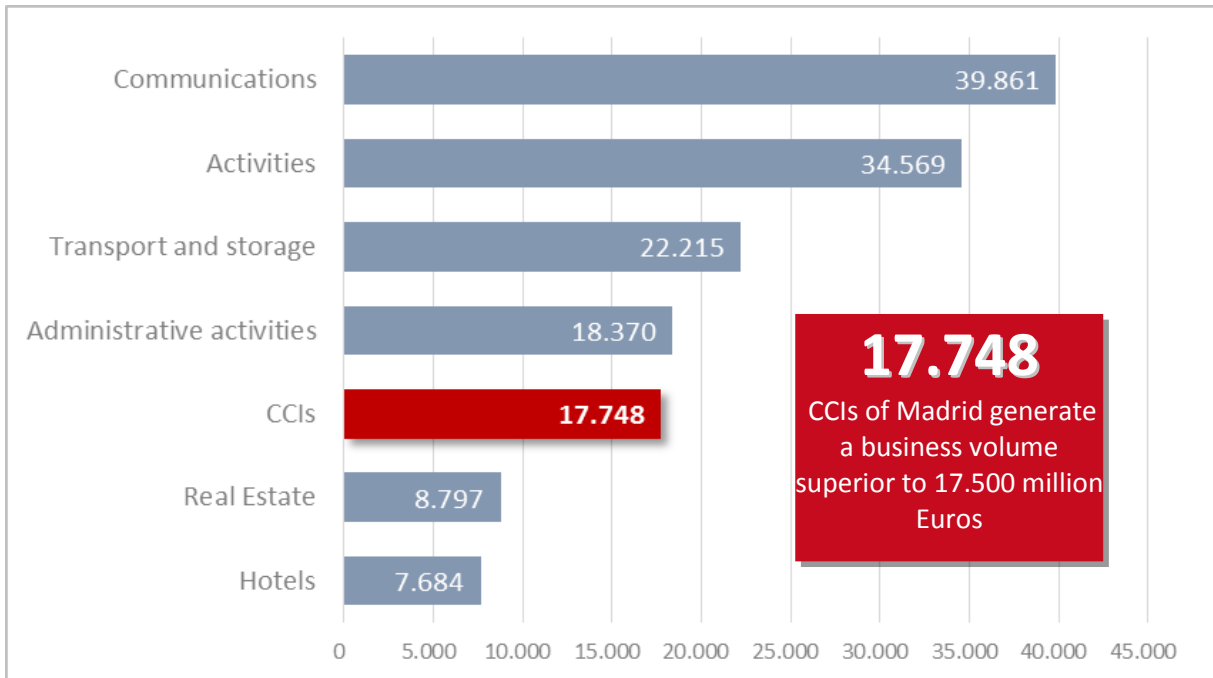
The second cultural and creative activity entailing more incomes in CAM is advertisement, the only subsector that increases its business volume (13%) and its gross value added (14%) in the period 2008-2014.

The case of the subsector of libraries, archives and museums is rather peculiar, because it generates, inside CCI's, a gross value added higher than its business volume. The reason is that GVA is calculated at basic prices and it includes subsidies. Since these are very important in this cultural domain, we find this differentiated behaviour.

In synthesis, the audiovisual, advertisement and book and press editing are the three main economic axes sustaining CCI's in CAM: summing up 83% of the business volume and provide work 65% of employees in the sector.

Graph 6 illustrates the impact of CCI's compared to other sectors of the economy in Madrid. Data come from the annual survey of services of INE and reflect the business volume declared by companies.

Graph 6. Comparison of relevance of CCIs and other economic activities in CAM - 2014 (Thousands of millions €).



Source: MELICC - 2014 and Annual Survey of Services (INE) - 2014.

### 3.4. Social impact: employment capacity of CCIs

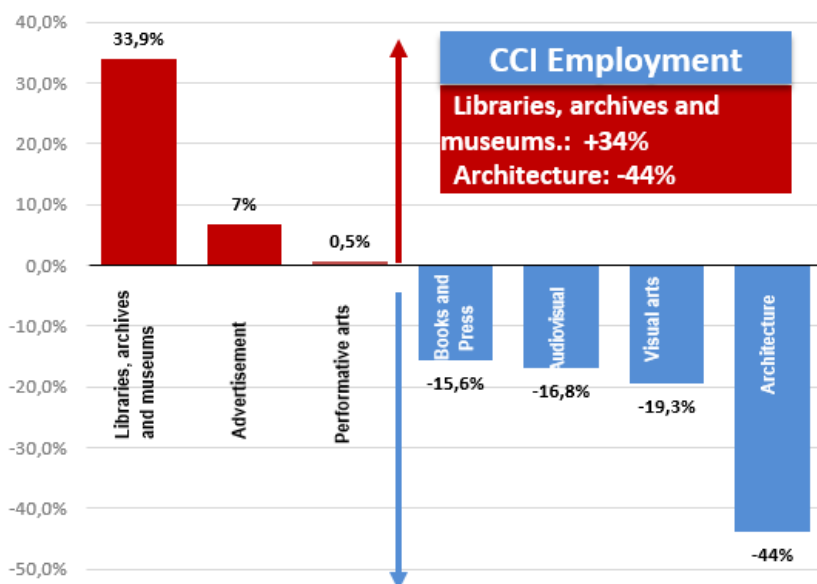
The sector of CCIs employ 141.809 individuals, 10.9% of occupation of service sectors (INE, 2014a) and 5.1% of the total of the Autonomous Community (INE, 2014b). Books and press (23.1%) and advertisement (23%) are the subsectors contributing with more jobs in the field of CCIs, almost half between them, followed by the audiovisual (17.8%). Architecture, which is located in fifth place with a 11.9%, demonstrates a subsector which socio-labour impact is superior to its economic relevance (9.5% of the business volume), that is, there is a high number of employees compared with the richness it generates.

Regarding period 2008-2014, occupation in cultural and creative activities has reduced 14.3%, while total occupation in CAM reduced 6.3% in the same period. From more than 78.336 employments lost in the community, 23.622 correspond to CCI.

During the economic recession (graph 7) job positions in advertisement have been created (2.060) as well as in libraries, archives and museums (1.473), while in performative arts barely increased (103). In contrast, books, press and audiovisual have destroyed 6.093 and 6.065 job positions respectively. This was similar in visual arts (1.901) and architecture which, impacted by the drop in Real Estate sector, loses 13.199 jobs.



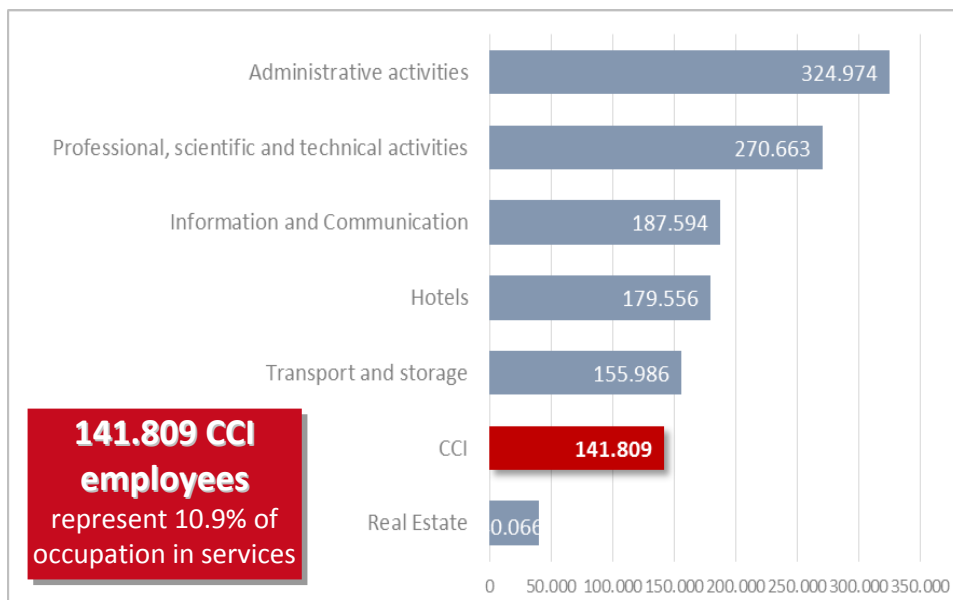
Graph 7. Evolution of CCI employment 2008 - 2014



Source: MELICC 2008-2014.

Likewise, the employment capacity of CCIs in CAM is inferior to the rest of sectors, except for Real Estate activities, which is almost quadruple (Graph 8).

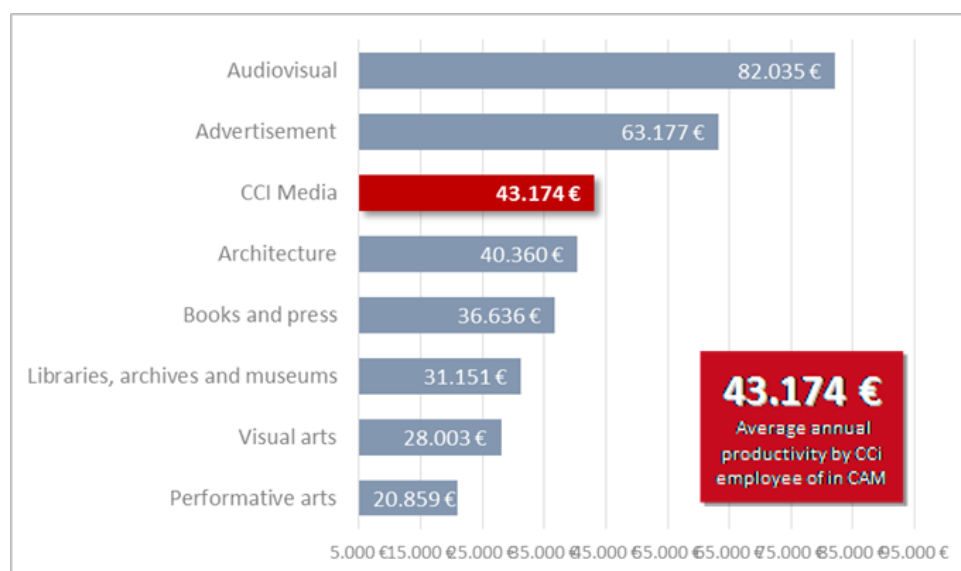
Graph 8. Comparison of CCI employment and other CCI activities in CAM - 2014



Source: MELICC 2014 and Annual Survey of Services (INE) - 2014.

To compare the productivity of employment in cultural industries, we calculated the gross value added by employee in the different subsectors considered. In the case of CAM, the result of this calculation is shown on graph 9, where advertisement and the audiovisual sector leader economic data.

Graph 9. GVA in cultural industries by employee – 2014



Source: MELICC - 2014.

Regarding the activity of libraries, archives and museums we observe again that, even though it is a subsector with little relevance in absolute terms, the incidence of subsidies it receives, allows exhibiting an altered performance, almost the same as the books and press subsector.

### 3.5. CCI companies

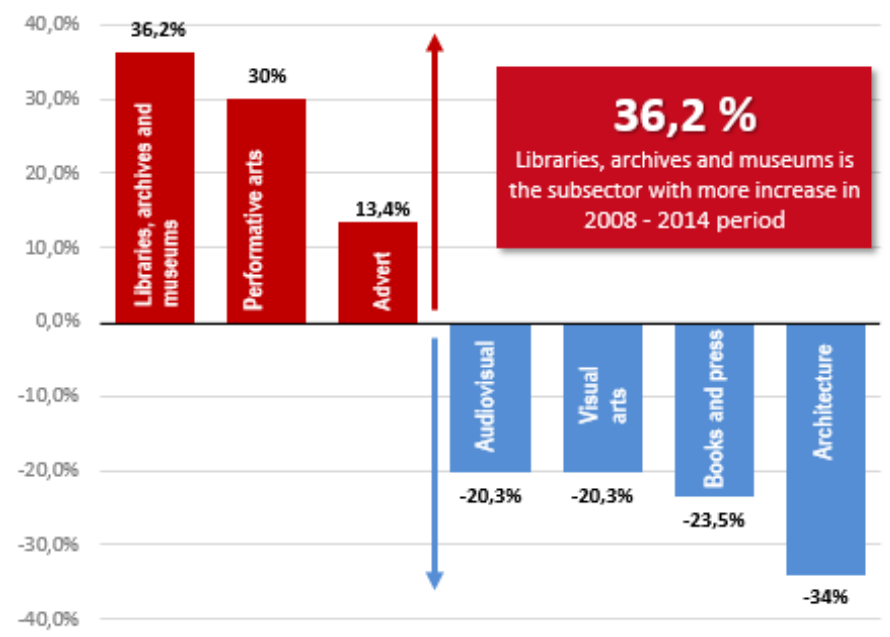
In CAM, there are 34.940 active companies related to CCIs. Architecture has 23.8%, followed by books and press (21.3%) and advertisement (19.8%). These first data confirm the huge economic effort that the architecture labour market must do since there is a high number of companies for the inferior business volume managed.

Visual arts represent 15.6% of companies, audiovisual 10.7%, performative arts 7.2%, and farther behind, libraries, archives and museums, with 1.6%, which is exceptional considering its business volume.

During period 2008-2014, CCI sector witnessed the disappearance of 7.112 companies. The subsectors that were more impacted by the reduction are architecture (-4.216) and books and press (-2.252), followed by visual arts (-1.368) and audiovisual (-940), while three activities have summed new entities: libraries, archives and museums (284), performative arts (576) and advertisement (804).

Because of this reduction in the number of companies, the relative weight in the company tissue in Madrid has also reduced. In 2008 cultural and creative companies represented 17.7% of all companies in CAM, in 2014 this value reduced to 16%.

Graph 10. Evolution of the number of CCI companies between 2008 - 2014



Source: MELICC 2008 - 2014.

### 3.6. Behaviour of variables in the period 2008-2014

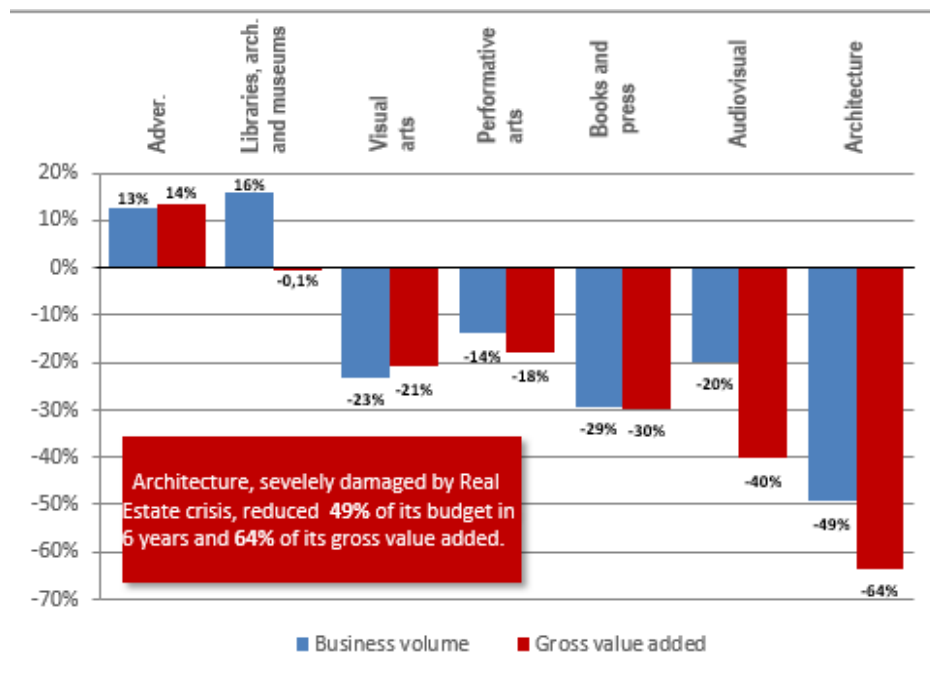
The descending curve of CCI companies during the study period is also manifested in the remaining variables considered: employed individuals, business volume and gross value added.

The balance of the economic behaviour is clearly negative until 2014 (graph 11). In all activities, except advertisement, the gross value added reduced, with significant drops in architecture –which has stopped the contribution of 64% of value to economy–, audiovisual (-40%), and books and press (-30%).

Income loss in the audiovisual subcategory has a special impact in the economy of Madrid, because it is the activity that most resources contributes with CCIs in absolute terms: almost 4 out of every 10 Euros. We must consider that the average expense in cinema by inhabitant for 2014 was 17.6 Euros and the total collection in movie theatres in Madrid was 112.3 million Euros, 22% of collection in Spain.

In contrast, libraries, archives and museums is one of the field of this subgroup that comes out better from the recession, because it wins 16% of invoicing and only losses -0.1% in its contribution to economic enrichment.

Graph 11. Business Volume and Gross Value Added by subcategories 2008 - 2014



Source: MELICC 2008-2014.

The role of performative arts is worth mentioning which, for the period 2008-2014, created job posts (103) and increased the number of companies (576), but lost more than 108 million in business volume and 98 million in gross value added, a new indication of the exceptional effort of the business tissue in this subsector and the huge competitiveness there must be when sharing the scarce resources.

### 3.7. Other activities of relevance

One last activity to consider and that has been analysed separately considering the cultural relevance it entails and the media polemic and appeal around it, is tauromachy, from which it is impossible to know exactly the ratio between public subsidy and economic and social contribution to the community.

In the year 2013, CAM budget for 1.5 million Euros to promote bull-fighting activities, besides offering subsidies to non-profit entities and tauromachy schools (Zaldívar, 2013), an outstanding amount compared to subsidies in other private cultural activities such as theatre or music. Tauromachy defenders ensure, however, that this activity is the cultural industry with fewer subsidies in Spain and contributes to the Administration with much more than it takes (Medina, 2016). What we do know for sure is that both detractors and defenders are obliged to perform

illustrative estimations without offering statistical inferences that could be compared with official budget data.

The only data available comes from MECD and mention to the number of bull-fighting professionals, cattle breeder and party companies, all disaggregated by Autonomous Community, but without classification in CNAE. In Spain, four autonomous communities –Andalusia, Castile and Leon, Castile-La Mancha and Community of Madrid–, focus 77.6% of bull festivals celebrated in 2014 (MECD, 2016b: 345).

In CAM, for this same year, there were only four tauromachy schools (Ibid.: 344) –very few compared with 26 of Andalusia–, however, in Madrid 305 bull festivals were celebrated, the same than in the Andalusian Community. From this data, the relevance of bull festivals in the culture of the Community of Madrid is deduced, and we imagine that they entail a relevant route for incomes, but just as public subsidies, statistical inferences cannot be made because there is no data about it so far.

Taurodelta, the company that has managed Las Ventas square from 2004 to 2014, offers data about the number of bull festivals celebrated, the average capacity, subscribers, incidences, television broadcasting of bull fighting, the number and name of bullfighters and cattle breeders, but not about the number of job posts created, the business volume generated, benefits obtained or subsidies received from the Community of Madrid. However, we know, based on its official website, that San Isidro festival of 2014 brought 920.000 viewers. How is this data translated into contribution to regional GDP? Does it create or improve job posts in this subsector?

Positions of the European and Spanish governments are totally contrary about it. On October 2015, the European Parliament approved the amendment 1.437 of EU budgets for 2016 with absolute majority, which forbid using credits to “support the reproduction of bull breeding destined to tauromachy activities”. On the contrary, on October 2016, the Spanish Congress approved, through its Commissions of Culture and Finance, a motion with favouring votes of PP and PSOE supporting bull fighting subsidies.

## **4. Discussion and conclusions**

### **4.1. Public policies**

The society and the scientific community have already accepted that cultural and creative activities generate innovation and have a great potential for the economic development, where they play a more relevant role every time. Despite this and the huge weight that the city of Madrid represents in the field of CCIs, public decisions targeted to promote this sector have not had a preferential place in the political agenda of the last years. The statements of leaders in the government of Madrid emphasize the relevance of CCIs in all their interventions, but the allocation for Culture expenses has reduced 70% since 2008 and expenses destined to the sector for 2014 only comprised 0.5% of the total of general budgets.

The reduction of the public assistance joins to the contraction of the acquisition capacity of consumers, even below the development of the economy of the region, which has caused Madrid natives to reduce their expenses in all fields, specially activities that are not first need, such as cultural consumption.



One of the most appealing findings is about the distribution of public subsidies. For example, the subsector of libraries, archives and museums, which strongly depends on the funding of local or national government, shows a business volume and economic contribution to regional GDP of a higher proportion compared to other activities. We understand that the promotion and visualization of works of art, as a general good and the same as health or education, must have public funding without the purpose of achieving profit, but it is clear that the economic support and budget allocations must be organized better. For example, in the case of museums, we must recall that this subsector was polemic after the general strike of 2015 (Riaño, 2015) and the subsequent regional strikes that occurred in the next months, which kept several public museums and archives closed due to the demand of improvement of labour conditions for curators and watchmen. They are mainly outsourcing companies not linked to the sector (Durán, 2016), on which the governments of communities seem to have a not so thorough monitoring, living entirely at the hands of these companies, the responsibility of economic and administrative management of patrimony guarded. The losses these institutions claim, are due to the same idiosyncrasy of the economic context and the impossibility of its sustainment or the failing performance of its current administrators?

Another noticeable example is taumachy, from which administrations do not offer official data about expenses and incomes and in no case harmonized calculations can be made for each one of the AACC.

These facts make us think about the criteria applied when it comes to allocate public subsidies and their organization, and how their effects are supervised, especially when considering performative arts or architecture -where more companies and employments have disappeared during the 2008-2014 period-, which are not part of the main axes of action of Administration for the regeneration of the Community business tissue. Performative arts created employment and increased the number of companies, but lost economic capacity, while architecture, with a 23.8% of CCIs employment, strongly reduced all its magnitudes. These levels are indicative of the huge economic effort the labour market must have in these two subsectors since there is such a high number of companies and employees compared to a business volume quite punished by the current situation. We must recall that in 2014 only the CCI sector comprised 30% of total of job posts lost in the whole community. For Spain, in general CCIs represent 12% of the total of service companies, they employ 7.7% of population and generate 8.4% of business volume. Considering that Madrid is the region of greater economic contribution in this sector (graphs 3 and 4) and observing the unemployment data in Spain (graph 5), the need to define an adequate assistance policy is evident – with more specific executable programmes and less statements of good will- as a key factor in the country's economic recovery.

The Promotion Plan of Cultural and Creative Industries from the Ministry of Education, Culture and Sports destined more than 15 million of Euros in subsidies, loans and scholarships nationwide in 2015, but we do not know exactly how were they allocated geographically [13] nor, an even more importantly, what kind of repercussion had in the economy of the region, considering there is no proof that monitoring is done nor that reports are elaborated by each one of the AACC. As we insisted, CAM is a specially appealing region economically and demographically, and it would be very beneficial, especially for the community but also for the nation as a whole as well, to count on a more organized involvement by its public administrations.

On the other hand, changes envisioned in the new plans and programmes, that the European Union will activate with the Creative Europe Programme 2014-2020 are worth mentioning. In them, we can conclude that CCIs gain a new relevance within the EU strategy, which makes us think that a good part of the development of CCIs in the next years will walk hand by hand with European institutions through their public policies, even more than with local or autonomic institutions [14].

#### **4.2. Dominant Industries of CAM and impact of crisis**

The sector of cultural industries has been severely injured by a prolonged crisis which set them aside to the last places in public investments of the Community and in consumption of their inhabitants. CCI companies, especially Pymes – which constitute 90% of the sector -, face severe problems derived from the situation of current crisis and the difficulty to access public funding. All subsectors and their economic magnitudes has been affected: reduction of employment, closure of companies, reduction of business volume, etc. However, CCIs have continued to contribute to the increase of the cities appeal in benefit of their residents and visitors, and constitute one of the strengths with most value in cities: “when contributing to social cohesion, promotion of cultural diversity, spreading of information and knowledge, and generation of values” (MECD, 2016a: 6).

The comparison between sectors (graphs 6 and 8) shows how the administrative subsector generates 60% more employment than CCIs, but it has almost the same business volume. That is, in strictly economic terms, the relative capacity to generate business volume of every employee in the cultural sector is much more superior compared to an employee of administrative activities.

Currently, the audiovisual sector, advertisement and editing of books and press, constitute the three main axes that sustain CCIs in CAM, because they sum up 83% of business volume and employ 65% of employees from the sector.

It is evident that the culture and creativity industry is a highly dynamic activity, especially in the middle of a change to a digital paradigm, and that failures have come and will keep coming (Mateo Pérez, 2015), but it is precisely due to this reason that the economic and social weight they represent is undeniable in the regional development and should be object of greater interest by the administration and local governments, either through reductions of taxes or through direct funding.

#### **4.3 LOCALCOM Statistical Model of Cultural and Creative Industries (MELICC)**

As a response to our second objective, this research evidences results for CAM derived from the R+D project entitled “Transformation of cultural and creative industries in Spain: digital change, competitiveness, employment and contribution to the social well-being in Horizon 2020”, whereas the statistical model MELICC was originated.

This project, which global results can be consulted in the website of the Ibero-American Observatory for Communication [15], shows data for all AACC from the following indicators: total population, rural population; risk of poverty; education level; public expense; cultural consumption; employed individuals; the number of companies; business volume and gross value added of CCIs.

Configuration of databases, in harmony with European standards, admits contrast between Autonomous Communities, enabling implementation by regional -CAM in this case- and State

government to establish execution policies that are better organized and a better connection with the objectives of the Horizon 2020 programme.

\* This research is a result of the research project called “Transformation of cultural and creative industries in Spain: digital change, competitiveness, employment and contribution to the social wellbeing in the Horizon 2020”, with reference [CSO2013-42822-R](#), funded by the Ministry of Economy and Competitiveness within the Ibero-American Observatory for Communication (OIC) of Universidad Autónoma de Barcelona and whose main researcher is Marcial Murciano Martínez.

## 5. Notes

[1] The authors of this article would like to thank the support received for its elaboration by Doctor Josep María Sanmartí, Full Professor of Universidad Carlos III until August 31, 2016. Currently, he is member of the Ibero-American Observatory for Communication (OIC).

[2] The acquisition of INE surveys regarding CCIs was made with previous expressed request, because data bases disaggregated by Autonomous Communities were not of public access.

[3] Localcom model was created by the Ibero-American Observatory for Communication (OIC), of Universidad Autónoma de Barcelona. Its data can be seen in:  
<http://centresderecerca.uab.cat/oic/content/icc-estadisticas-resumen>

[4] Minutes of Sessions of Madrid Assembly nº 18 of July 23, 2015, pp. 321-322.

[5] Minutes of Sessions of Madrid Assembly nº 34 of October 8, 2015, pp. 1258-1260.

[6] Commission of Vice-presidency, Culture and Sports and Youth of the Assembly of Madrid, Minutes of Sessions nº 31 of September 20, 2011, pp. 749-757; Commission of Employment, Tourism and Culture of the Assembly of Madrid, Minutes of Sessions nº 251 of October, 17, 2012, pp. 13045-13046; Commission of Employment, Tourism and Culture of the Assembly of Madrid, Minutes of Sessions nº 637, of June 11, 2014, pp. 34796-34819; Commission of Vice-presidency, Culture and Sports of the Assembly of Madrid, Minutes of Sessions nº 224 of June 20, 2012, pp. 11617-11620 and 11625-11648; and Commission of Employment, Tourism and Culture of the Assembly of Madrid, Minutes of Sessions nº 29 of October 5, 2015, pp. 1052-1070.

[7] Commission of Vice-presidency, Culture and Sports and Youth of the Assembly of Madrid, Minutes of Sessions nº 190 of May 16, 2012, pp. 9653-9695; Plenary Session of the Assembly of Madrid, Minutes of Sessions nº 663 of October 9, 2014, pp. 36368-36370; Commission of Employment, Tourism and Culture of the Assembly of Madrid, Minutes of Sessions nº 329 of February 20, 2013, pp.17696-17724; and Plenary Session of the Assembly of Madrid, Minutes of Sessions nº 678 of October 27, 2014, pp. 37208-37224.

[8] Plenary Session of the Assembly of Madrid, Minutes of Sessions nº 379 of April 18, 2013, pp. 20599-20624.

[9] Commission of Employment, Tourism of the Assembly of Madrid, Minutes of Sessions nº 463 of October 23, 2013, pp. 25461-25477; Plenary Session of the Assembly of Madrid, Minutes of Sessions nº 572 of March 20, 2014, pp. 31628-31642.

[10] Plenary Session of the Assembly of Madrid, Minutes of Sessions nº 563 of March 13, 2014, pp. 31028-31032.

[11] Commission of Culture and Tourism of the Assembly of Madrid, Minutes of Sessions nº 29 of October 5, 2015, pp. 1031-1052; and Plenary Session of the Assembly of Madrid, Minutes of Sessions nº 41 of October 15, 2015, pp.1703-1719.

[12] Gross Value Added: it is an economic magnitude which measures the income generated by the producers of an economic area, CCIs in our case, therefore it represents the values aggregated to goods and services of the different stages in the productive process. It is about a statistic of special comparative usefulness, because it allows measuring the contribution of CCIs to the national enrichment, expressed in GDP (macroeconomic dimension, the sum of the gross value added of all companies in the country)

[13] Subsidies for modernizing and innovating cultural and creative industries (1.864.190 €); Subsidies for cultural promotion and activities (1.900.000 €), Hispanex subsidies, for natural persons in the foreign university area (180.000); Subsidies for Iberex programme, for young Ibero-American professionals in the cultural sector (80.000 €); Subsidies for editing books (1.000.000 €); Subsidies for editing cultural journals (930.000 €: 630.000 in favour of companies and 300.000 for non-profit institutions); Subsidies for strengthening the editorial industry (395.000 €); Subsidies for cultural modernizing and re-value of libraries (150.000 €); Subsidies for foreign language translation (260.000 €); Loans (11.000.000 €); Formarte Scholarships (540.000 €); Culturex Scholarships (202.490 €); Fullbright Scholarships (250.000).

[14] Some subsidies for CCIs in the European field: Societies Taxes (in effect since January 1, 2015) which has created tax incentives for CCIs, subsidies for modernizing and innovating cultural and creative industries, subsidies of cultural promotion and action, subsidies of IBEREX programme, subsidies for editing books, cultural journals and to strengthen the editorial industry, for cultural modernizing and re-value of libraries, etc.

[15] Specific URL of the project:

<http://centresderecerca.uab.cat/oic/content/industrias-culturales-creativas-presentacion>

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