
Barriers to the internationalisation of creative KIBS: insights from the Basque Country

Despite the growing relevance of KIBS in the global context, we still know little about how they internationalise, and creative KIBS, in particular, have received little attention. This study explores the barriers creative KIBS may face in their internationalisation. Using a case study approach, we compare empirical data from a project carried out in the Basque Country to support the internationalisation of C-KIBS with an existing theoretical framework that classifies export barriers. Our findings include new insights into the difficulties C-KIBS face in their internationalisation, and how the theoretical framework needs to be adapted. As such, we contribute to extending knowledge of the internationalisation of C-KIBS, refining the theory by adapting an existing framework, and providing useful insights for managers and policy makers.

A pesar de la creciente importancia de las KIBS en el contexto global, sabemos poco sobre su internacionalización, y en particular la de las KIBS creativas. Este estudio explora las barreras a las que se enfrentan las C-KIBS en su internacionalización. Usando un caso de estudio, comparamos datos empíricos de un proyecto llevado a cabo en el País Vasco para apoyar la internacionalización de las C-KIBS con un marco teórico existente. Los resultados proporcionan un mejor entendimiento de las dificultades a las que se enfrentan las C-KIBS, y de cómo es necesario adaptar el marco teórico. Así contribuimos a mejorar el conocimiento sobre la internacionalización de las C-KIBS, a refinar un marco teórico y a apoyar a gestores de empresas y de políticas públicas.

KIBSek testuinguru globalean gero eta garrantzi handiagoa duten arren, gutxi dakigu haien nazioartekotzeari buruz, eta bereziki sormenezko KIBSei buruz. Azterlan honek C-KIBSek beren nazioartekotzean dituzten oztopoak aztertzen ditu. Azterketa-kasu bat erabiliz, C-KIBSak nazioartekotzen laguntzeko Euskal Autonomia Erkidegoan gauzatutako proiektu baten datu enpirikoak, existitzen den esparru teoriko batekin alderatzen ditugu. Emaitzek C-KIBSek dituzten zailtasunen ulermen hobea ematen dute eta esparru teorikoa nola egokitu behar den erakusten dute. Horrela, C-KIBSen nazioartekotzeari buruzko ezagutza hobetzen, esparru teoriko bat fintzen eta enpresen eta politika publikoien kudeatzaileei informazioa erabilgarria ematen laguntzen dugu.

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Table of contents

1. Introduction
2. Theoretical background
3. Methodology
4. Findings
5. Adapted framework and discussion
6. Conclusions

References

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1. INTRODUCTION

The role of service firms in the global economy is becoming more widely acknowledged, and scholarly attention is turning to service multinationals (Blagoeva, Jensen, & Merchant, 2020; Kundu & Lahiri, 2015; Merchant & Gaur, 2008). Similarly, as knowledge-intensive business services (KIBS) become important players in the global context, the focus of academic research should shift towards the internationalisation of KIBS (Braga, Marques, & Serrasqueiro, 2017; Miles & Miozzo, 2015; Rodríguez & Nieto, 2012), as opposed to just how KIBS support the internationalisation of other firms (Kamp & Ruiz de Apodaca, 2017; Shearmur, Doloreux, & La-perrière, 2015). In this sense, although attention to the internationalisation of pro-

fessional and technological KIBS has intensified in recent years, we continue to know very little about the internationalisation of creative KIBS (C-KIBS), and in particular, what difficulties they face in this process.

In this study, we address this gap in the literature by exploring what barriers creative KIBS face in their internationalisation. We adopt a case study approach, to study the complex phenomenon in its natural environment (Yin, 2018). In particular, we studied a project carried out in 2019 and 2020 with 51 small and medium-sized C-KIBS in the Basque Country – a region whose policy includes a particular focus on C-KIBS and their internationalisation, making it particularly relevant for a study of this kind. For the analysis, we started from an existing framework that categorises barriers to internationalisation (Leonidou, 1995, 2004), and using a systematic combining approach (Dubois & Gadde, 2002, 2014), confronted the framework with empirical data from the project.

The findings reveal that C-KIBS do indeed face many of the internal barriers predicted by this framework. More specifically, access to information has greatly changed since the framework was proposed (as predicted by its author) but remains a challenge to C-KIBS seeking new market opportunities due to the global nature of these markets and the channels through which they can be reached. Moreover, C-KIBS often lack organisational capabilities because their human capital tends to be more creative than business-oriented. Finally, C-KIBS face a number of marketing barriers, such as promotion and sales of their services through on-line channels. Overall, the results of the comparison between the empirical data and the existing framework highlighted the adjustments required to make the framework more applicable to C-KIBS.

As a result, this study contributes to the literature in several ways. First, it contributes to increasing our understanding of the internationalisation of creative KIBS and in doing so contributes to filling an important gap in the literature. Second, it refines a theoretical framework from the field of international marketing by adapting it to the specific context of C-KIBS. Third, this study outlines important practical implications for practitioners and policy makers concerned with the barriers C-KIBS may face in their internationalisation.

In the following sections, this article is structured as follows. First, we clarify the context of C-KIBS that this study focusses on, before reviewing the extant literature on the internationalisation of C-KIBS to highlight what is known and what remains unknown, namely the barriers that these firms will face in their internationalisation. In the final section of the theoretical background, we present the framework against which the data will be matched and compared. Next, we present our methodological strategy, including the justification of the case study context and the data collection and analysis methods. We then explain and discuss our findings before presenting the refined framework resulting from our analysis. We conclude the article with some final thoughts on the practical (managerial and policy) implications of our work and reflect on the limitations of our study and future research avenues.

2. THEORETICAL BACKGROUND

2.1. Creative KIBS

Knowledge intensive business services (KIBS) are service organisations that apply their expertise to the business problems of their clients and in doing so provide clients with tailored solutions (Miles, Belousova, & Chichkanov, 2018; Seclen-Luna, Moya-Fernández, & Vendrell-Herrero, 2022). KIBS often provide knowledge-intensive inputs to the business processes of clients (Miles, 2005). For this reason, KIBS are often considered a source of innovation for their clients, and their role in the competitiveness and internationalisation of other firms has gained more attention (Kamp & Ruiz de Apodaca, 2017; Seclen-Luna & Moya-Fernández, 2020). Moreover, their role as problem-solvers for their clients has become even more palpable in the COVID-19 pandemic (Miles, Belousova, Chichkanov, & Krayushkina, 2021).

KIBS can be grouped into P-KIBS (professional KIBS including accounting, management consulting, legal services etc.), T-KIBS (technological KIBS, including information technology, research and development, engineering and other technical business services) and C-KIBS (creative KIBS, including creative and cultural activities) (Miles, 2011; Miles *et al.*, 2018). Despite the on-going work by scholars to improve these categorisations of KIBS, some overlap remains between the categories. For example, architectural firms are considered by some scholars as C-KIBS or P-KIBS (Miles *et al.*, 2021), whereas scholars in the field of professional service firms (PSFs), claim architectural firms for the P-KIBS category (Von Nordenflycht, 2010).

In this study, we focus on creative KIBS or C-KIBS. C-KIBS are those whose knowledge base rests on creative and cultural knowledge (Miles *et al.*, 2018; Seclen-Luna *et al.*, 2022). The term creative KIBS (or C-KIBS) has not yet been widely accepted academically, although some effort has been made to identify the industrial sectors to be included in C-KIBS (Miles *et al.*, 2018, 2021).

In parallel, many public institutions have been commissioning reports on creative and cultural industries (CCIs) (Bakhshi, Freeman, & Higgs, 2013; European Commission, 2010; Retegi, Carrillo, Eguia, Oleaga, & Vázquez, 2022), which include defining and framing these firms. Creative industries are those where «*creativity is not employed for its own sake but rather for the achievement of some other purpose*» (Abecassis-Moedas, Ben Mahmoud-Jouini, Dell’Era, Manceau, & Verganti, 2012; European Commission, 2010). These include advertising, architecture, (graphic, fashion...) design, etc. Cultural industries are those that produce services and goods that embody cultural expressions, for example performing or visual arts, cultural heritage, video, video games, new media, etc. (European Commission, 2010).

The overlap in statistical classifications proposed for C-KIBS and CCIs, as well as the proposed definition of C-KIBS as firms whose knowledge is of creative and cultural nature (Miles *et al.*, 2021; Seclen-Luna *et al.*, 2022), lead us to consider the terms C-KIBS are creative and cultural industries as synonymous. Although this

equivalence may be debated, at the very least C-KIBS as defined by Miles and colleagues (2018, 2021) can be considered to include creative and cultural industries.

Creative KIBS are gaining importance in the knowledge economy (Ketels & Protsiv, 2016) and are therefore garnering more attention from policy makers both on a European or local level who intend to incentivise the development of the sector (European Commission, 2010; Observatorio Vasco de la Cultura, 2018). These policy makers recognise that cultural and creative firms – like other KIBS – operate in a global context, and therefore encourage and support their internationalisation through cluster initiatives and public support mechanisms (European Commission, 2010; Observatorio Vasco de la Cultura, 2018). However, in order to support firms in their internationalisation, policy makers need to understand how they internationalise and what barriers they may face. Creative KIBS, like other KIBS, are knowledge-intensive, i.e. their production of outputs relies on complex knowledge that often resides in the organisation's people (Starbuck, 1992; Von Nordenflycht, 2010), and this high dependency on knowledge embedded in people can generate particular challenges for these firms (Abdelzaher, 2012; Hitt, Bierman, Uhlenbruck, & Shimizu, 2006; O'Higgins, Andreeva, & Aramburu, 2021).

2.2. Internationalisation of services, KIBS and creative KIBS

The extent to which service firms are internationalising is increasing due to the liberalisation of trade (with the signing of the General Agreement on Trade in Services (GATS) in 1995) and the opportunities provided by technological progress and new technologies (Miles & Miozzo, 2015; Rodríguez & Nieto, 2012). However, these changes in the context have also affected the way in which service firms can internationalise. In particular, it was often said that services could not be exported, and that service firms needed a subsidiary in foreign markets to provide their services, due to the difficulty of separating production and consumption of the service (Erramilli & Rao, 1990, 1993; Miles & Miozzo, 2015). Yet, research on information or knowledge-intensive service firms has shown that these firms may choose from a much broader set of choices for how they provide their services internationally (Ball, Lindsay, & Rose, 2008). Indeed, contemporary communication tools enable knowledge-intensive service firms to combine both in-person and remote interactions with clients, allowing them to disaggregate or decouple activities in a manner that was more difficult in the past (Rammal & Rose, 2014; Rugman & Verbeke, 2008). In sum, the phenomenon of globalisation of service firms is growing and changing, and academic research has not kept pace with these developments (Kundu & Lahiri, 2015; Merchant & Gaur, 2008; Rodríguez & Nieto, 2012). Not only is more research required in general on the internationalisation of services, but the diversity among service firms is immense. Recent reviews of the literature have proposed that research should focus on the diversity within the service sector and

examine more closely how different types of service firms operate (Blagoeva *et al.*, 2020; Kundu & Lahiri, 2015; Merchant & Gaur, 2008).

In this context, although research on the internationalisation of KIBS has increased it remains limited (Braga *et al.*, 2017; Miles & Miozzo, 2015; Rodríguez & Nieto, 2012). The links between collaboration, innovation and internationalisation have been explored (Braga *et al.*, 2017; Rodríguez & Nieto, 2012), yet we still know little about the internationalisation of KIBS themselves. Research in related fields is contributing to filling this gap. For example, the growing field of professional service firms (PSFs) has stimulated more research on the internationalisation of PSFs or P-KIBS (Boussebaa & Morgan, 2015; O'Higgins, Aramburu, & Andreeva, 2022; Smets, Morris, von Nordenflycht, & Brock, 2017). Furthermore, the increase in outsourcing of IT services has driven an increase in research on T-KIBS (Guo, Jasovska, Rammal, & Rose, 2018; Miles & Miozzo, 2015; Pisani & Ricart, 2016). However, C-KIBS have not received the same attention and their internationalisation remains largely understudied.

The few studies on the internationalisation of C-KIBS provide us with some answers regarding *how* creative KIBS internationalise. For example, research on architectural firms suggests there are two types of strategies: those that tender for projects wherever they arise by proposing new, innovative ideas; and those that build on their solid experience in a particular domain and follow clients into specific markets (Winch, 2008, 2014). In both cases, architectural firms need to carefully consider the local context when designing buildings, ensuring localisation by incorporating local teams (Faulconbridge, 2009). A study on design consulting firms (Abecassis-Moedas *et al.*, 2012) concluded that three approaches appeared appropriate: the *star*-based approach – building on the personal brand of an individual star; the *process*-based approach – building on the robustness of the creative process of the team; and *glocality*-based approach – creating local teams that interact often with local clients and the team at the headquarters.

Table 1. **TYPOLOGIES IDENTIFIED IN THE LITERATURE**

Authors	(Winch, 2008, 2014)	(Abecassis-Moedas <i>et al.</i> , 2012)
Types of C-KIBS analysed in the study	Architecture	Design consulting
Strategy typologies	Creators of architecture Constructors of buildings	Star-based approach Process-based approach Glocality-based approach

Source: Own elaboration

Furthermore, the extant literature has revealed two key interrelated elements in the internationalisation of creative KIBS. The first is the knowledge asymmetry that can arise between creative KIBS and their clients, often making it difficult for clients to assess the quality of a given service or project, even after it has been delivered (Løwendahl, 2005). Research on advertising agencies shows that such knowledge asymmetry can require closer client interaction between agencies and their clients (Dou, Li, Zhou, & Su, 2010). As a result, creative KIBS also need to think about how to signal quality and build their reputation in international markets (McQuillan, Sharkey Scott, & Mangematin, 2018).

Overall, despite their limited number, these studies provide us with some insight into how creative KIBS internationalise and what some of the key factors might be. What we know very little about, however, is what export barriers creative KIBS might face. Without this knowledge, firms are limited in their ability to overcome barriers and policy makers are limited in their ability to support firms in their internationalisation.

2.3. Barriers to internationalisation

Given that in this study we draw on literature from the fields of international business (IB) and international marketing, a clarification relating to the terms *exports* and *internationalisation* is warranted. In the field of IB, exports are considered the first phase within the internationalisation process, after which firms will increase its commitment by opening a commercial subsidiary and then transforming it into a productive subsidiary (Johanson & Vahlne, 1977, 2009). However, in the field of international marketing, all firms with international activities are considered exporting firms, regardless of the mode with which they do so (e.g. distributors, subsidiaries etc.) (Leonidou, 1995, 2004). In this study, the terms exporting firms and international firms are used interchangeably, and refer to firms with international activities regardless of their operation modes in international markets, and therefore consider barriers to exporting or to internationalisation as interchangeable also.

Barriers to internationalisation refer to the constraints that hinder the firm's ability to initiative, to develop or to sustain business operations in overseas markets (Leonidou, 1995, 2004). Research on such barriers has been carried out mainly in the field of international marketing, where a number of different classifications have been proposed (Cavusgil & Zou, 1994; Leonidou, 2004; Tesfom & Lutz, 2006) considering a number of internal and external barriers. These classifications have then been applied to investigate the specific barriers of firms of different origins (e.g. Portugal, Jordan, New Zealand...).

Scholars that centre on SMEs have highlighted that smaller firms are particularly vulnerable to export barriers and require a unique and appropriate set of strategies to overcome them (Griffith, Cavusgil, & Xu, 2008; Paul, Parthasarathy, & Gupta, 2017). The argument made is that SMEs lack the resources and capabilities that

large firms have developed over time that make them more likely to overcome the barriers. In particular, SMEs have been found to face export marketing and branding challenges, human resource management challenges, and lack social capital (Kahiya, 2013; Paul *et al.*, 2017).

Regardless of size, barriers can arise at all stages of the export-development or internationalisation process. Most approaches to export barriers consider exporters on the one hand, and non-exporters on the other (Pinho & Martins, 2010). The former are firms with experience exporting and the barriers they face are experiential in nature, and related to the difficulties encountered while exporting. The latter, however, have not yet initiated exports and therefore the barriers they face could hinder their initial efforts or even discourage them altogether (Leonidou, 2004; Pinho & Martins, 2010).

Among the different classifications, Leonidou's (2004) provides the most comprehensive framework of export barriers, including external (procedural, governmental, task or environmental) barriers and internal ones. Many external barriers such as bureaucracy, target market risks, cultural differences etc. are likely to be similar for all firms as they relate more to the target market. The peculiarities of creative KIBS relate more to the internal aspects of the organisation rather than to other elements of the environment that will be common to different sectors of activity. Therefore, in the study we focus on the internal barriers, which Leonidou (2004) classifies into three major subcategories:

- *Informational barriers*, relating to the availability and reliability of information about international markets and the firm's capacity to identify business opportunities and engage with clients in these markets. More specifically, Leonidou (2004) considers four aspects: limited information to locate/analyse markets, problematic international market data, identifying foreign business opportunities and inability to contact overseas customers.
- *Functional barriers*, regarding a company's preparedness for internationalisation in functional areas such as human resources, production or finance, and managerial implication in the internationalisation process. In particular, Leonidou (2004) considers four items: lack of managerial time to deal with exports, inadequate/untrained personnel for exporting, lack of excess production capacity for exports and shortage of working capital to finance exports.
- *Marketing barriers*, including product, price, distribution, logistics and promotion factors to be managed for international markets. In this case, Leonidou (2004) indicates the following aspects:
 - Product: developing new products for foreign markets, adapting export product design/style, meeting export product quality standards/specifications, meeting export packaging, labelling requirements and offering technical/after sale services.

- Price: Offering satisfactory prices to customers, difficulty in matching competitors prices and granting credit facilities to foreign customers.
- Distribution: Complexity of foreign distribution channels, accessing export distribution channels, obtaining reliable foreign representation, maintaining control over foreign middlemen and difficulty in supplying inventory abroad.
- Logistics: Unavailability of warehousing facilities abroad, excessive transportation/ insurance costs.
- Promotion: Adjusting export promotional activities.

Considering this framework from the perspective of creative KIBS, it seems likely that some of the items within in each of the subcategories will not apply. For example, given the intangible nature of creative and cultural services, the likelihood of facing distribution and logistics barriers – involving inventory and warehouses abroad – seems unlikely. Similarly, creative KIBS are not likely to face packaging nor labelling barriers, and their production capacity is capped by their human capital (i.e. do they have the resources to carry out a given project or not).

In sum, it remains unclear whether Leonidou's (2004) classification applies to creative KIBS, and therefore if it may serve as a tool for companies to plan their internationalisation or for policy makers to define support measures for these firms. In order to address this, in this study, we explore whether Leonidou's (2004) classification of internationalisation barriers requires adaptation in order to apply to Creative KIBS. In particular, by building on data gathered in the context of a project with creative KIBS in the Basque Country, we were able to adapt the classification to better apply to creative KIBS, thus providing companies and policy makers with a tool upon which to base their support mechanisms.

3. METHODOLOGY

3.1. Case study strategy

A study's objective is what defines the most appropriate methodological approach for its development (Ghauri, 2004; Welch, Piekkari, Plakoyiannaki, & Paavilainen-Mäntymäki, 2011). In particular, Yin (2018) suggests that the research strategy should be defined by (1) the type of research questions, (2) the degree of control of the researchers over the current behaviour of the events and, (3) whether the analysis involves contemporary or historical events. In this case, the purpose of this study is to explore what barriers creative KIBS face in order to understand the limitations and problems they face in their internationalisation strategies. These questions require a level of depth that it is out of the scope of a survey-based methodology. In addition, given the characteristics of a contemporary and global environment, it is difficult to control the behaviour of events, which would rule out ex-

perimental methods and historical analysis. Moreover, our aim is to study a complex phenomenon involving the interaction of factors in its natural context, and for this reason, the most appropriate research strategy is the case study (Hillebrand, Kok, & Biemans, 2001; Piekkari, Welch, & Paavilainen, 2009; Yin, 2018).

In this study, we follow the three phased structure proposed by Yin (2018): (i) Definition and planning (section 3.2 below); (ii) data collection and analysis (section 3.3 below) and (iii) conclusions (sections 4 and 5). Data collection and analysis are explained in the following paragraphs, while findings and conclusions of the research are presented in sections 4 and 5 respectively.

3.2. Definition of the case study: the KSIAttea Project in the Basque Country

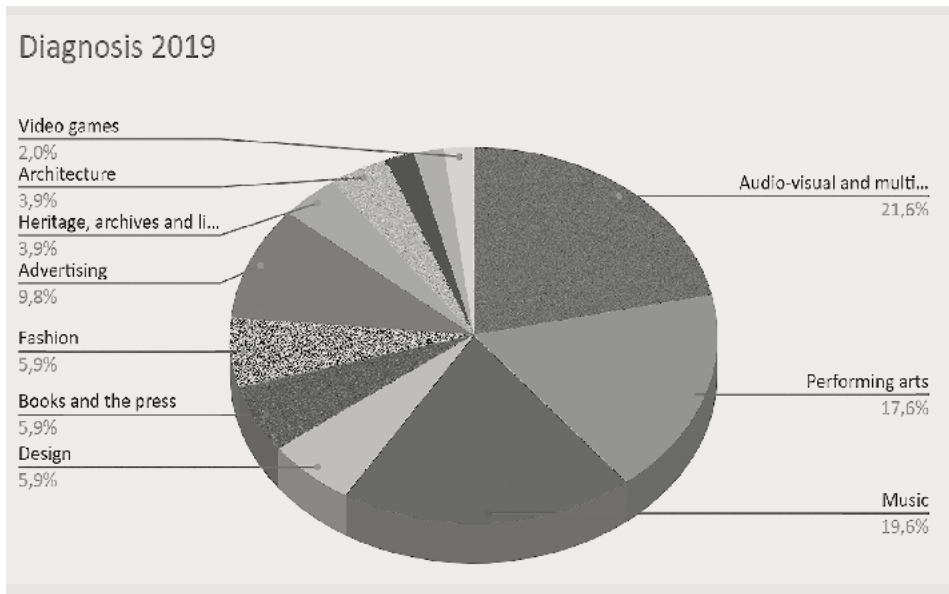
Regarding the first phase, definition and planning, the case that this research focusses on is a project carried out in creative KIBS companies (as defined in section 2.1) from the Basque Country. The project, called KSIAttea – Internationalisation Programme for the Creative and Cultural Industries of the Basque Country (Programa de Internacionalización de las Industrias Culturales y Creativas de Euskadi), was launched by the Department of Culture, Language Policy of the Basque Government and managed by Tabakalera. Tabakalera is an international centre for contemporary culture, located in Donostia/San Sebastián, which promotes talent, socialises contemporary creation and promotes the contribution of the cultural and creative sector to other sectors and to society. The technical assistance for this project was conducted by the consulting firm IDOM Consulting, Engineering and Architecture, and the technical director of the project also participated as a member of the research team of this study.

Prior to the KSIAttea project, the Basque Observatory of Culture (Observatorio Vasco de la Cultura, 2018) had carried out an analysis of the cultural and creative industry, in order to identify and define the specific functions of their value chains (Observatorio Vasco de la Cultura, 2018). In this way, 14 subsectors were identified as forming part of the cultural and creative industry in the Basque Country and firms from these sectors were contacted and invited to participate in the programme. These initiatives are part of a larger commitment made by the Basque Country to support KIBS over the years (Kamp & Ruiz de Apodaca, 2017; Orkestra, 2013). The relative importance of KIBS in the Basque economy (Minondo, 2016), their role in the economic development of the region and the recent strategy to promote the internationalisation of C-KIBS make the Basque Country an ideal context in which to study these firms.

The KSIAttea project, which this study focusses on, consisted of three stages, all managed by the consulting firm providing technical assistance. The first involved a diagnosis of the organisation's preparation for internationalisation; the second a series of in-person and pre-recorded training sessions and the third, the preparation of an internationalisation plan. In total, 103 organisations participated in stage 1; 66

in stage 2; and 50 in stage 3. However, in this study we focus on the data from the firms that participated in stage 1 of the project in the year 2019, as the COVID-19 pandemic affected the barriers that firms faced in the 2020 edition. In 2019, a total of 51 organisations participated in stage 1 (diagnosis), from the subsectors detailed in Figure 1.

Figure 1. **COMPANIES PARTICIPATING IN THE KSIATEA PROGRAMME (2019)**



Source: Own elaboration.

3.3. Data collection & analysis

Once the case study is defined and planned, the second phase of the case study method (Yin, 2018) consists of data collection and analysis. The data used for this study is data generated in the KSIAttea project. In particular, the case study project generated a series of reports that are publicly available on the website of the Basque Government (Tabakalera – Centro Internacional de Cultura Contemporánea, 2019, 2021). These reports, prepared by the consulting team, present aggregated results of the different phases of the project and thus rigorously respect the confidentiality of the participating firms. In particular, the reports from the diagnosis phase include aggregated data on (1) the level of preparation of products and services, (2) knowledge of target market (3) its organisational structure and, (4) the experience of the team of people that make up the company.

Several steps were followed in the data analysis phase. First, the project reports were carefully read and analysed by the academic researchers. Questions and doubts about the project stages, participating firms and report results were clarified with the technical director of the project, who also participated in the research team. Second, the data from the reports was systematically analysed by the academic researchers of the team, and compared with the theoretical framework proposed by Leonidou (2004). Table 2 shows how the categories from the project report were matched with the theoretical framework. This matching of empirical data with theory is known as systematic combining (Dubois & Gadde, 2002), an approach which allows researchers to start from a theoretical framework and approach the data from this perspective, while allowing for empirical observations to inspire changes in the framework. In this way, deductive and inductive approaches can be combined, leading to the development or refinement of existing theories (Dubois & Gadde, 2002, 2014).

Table 2. **MATCHING OF DATA TO LEONIDOU'S (2004) FRAMEWORK**

Leonidou's (2004)	Project report data classification
Marketing barriers: Product, Price, distribution, promotion	Level of preparation of products and services, including pricing, distribution and online and offline promotion.
Informational barriers	Knowledge of target market.
Functional barriers	Organisational structure.
	Experience of the team of people that make up the company.

Source: Own elaboration.

The third step in the data analysis consisted of discussing the matching results in order to refine the theoretical framework and generate the conclusions of the study. The role of the technical director of the project was key in this phase. His direct experience in the project allowed for a rich discussion within the research team regarding the interpretation of the report data and the refinement of the model. This insider-outsider approach provided a diversity of perspectives, which were helpful in collecting richer insights in the analysis and interpretation of the qualitative data to generate new insights (Bartunek, 2007).

Like all methodologies, case studies suffer from certain limitations or risks. Specifically, Yin (2018) highlights two aspects to take into consideration. The first refers to the risk of working with bias in the interpretation of results and the second to the difficulty of generalising from results. Both issues have been taken into considera-

tion when designing this study. In relation to the first, the mixed team that was formed (including a consultant from the project team) allowed the team to analyse different potential interpretations thus engaging in researcher triangulation (Nielsen *et al.*, 2020). Secondly, given that the study is exploratory, the research does not aim to generalise from the case study but rather achieve greater understanding of the internationalisation of creative KIBS and improve an existing framework by confronting it with empirical data from the cultural and creative industry (Dubois & Gadde, 2002).

4. FINDINGS

Following Yin's (2018) three-phased case study methodology, in this section we present the conclusions resulting from the analysis. In structuring the analysis, we focussed on the three main internal barriers to internationalisation according to Leonidou's (2004) framework as outlined in the theoretical background: informational, functional and marketing barriers. Our analysis allowed us to further elaborate on these categories as well as identify which ones appear relevant to creative KIBS, based on the data from this case study project.

4.1. Informational barriers

As predicted by Leonidou, internet has made information about different markets, and more specifically certain sectors in different markets, widely available. Through their international offices, export promotion agencies prepare extensive and reliable reports of different sectors in a number of countries their firms may be interested to internationalise to. Therefore, one might expect that these barriers no longer exist for firms. However, this study revealed that, in fact, these barriers remain, although in a somewhat modified form. Indeed, the reports prepared by export agencies tend to focus on sectors where it is more common for firms to export, and there are fewer reports on creative and cultural industries. Additionally, participating firms were less knowledgeable about the existence of such reports and where to find them, than firms from sectors where internationalisation is more common. Furthermore, the typical format of such reports (i.e. sector X in country Y) was found to be less useful to C-KIBS, because their target market tends to be defined in terms of types of niche clients rather than geographic markets. In sum, despite the changes effected by the growth of internet, C-KIBS continue to face certain barriers in relation to accessing the necessary information to define their internationalisation strategy.

Another interesting observation this project brought to light is that participating C-KIBS also lacked information about their sector in their home market. This made it difficult for them to form alliances with other internationalising firms and/or identify potential clients that they might follow in the «piggy-back» strategy that is common to other service firms (Glückler, 2006; Rosenbaum & Madsen, 2012).

It was also particularly difficult for participating firms to identify channels by which to access their target markets or target clients. In many cases, access to clients is achieved through digital platforms on which sales are conducted, or through international tenders. Additionally, when targeting specific niche clients, participating C-KIBS lacked knowledge of how to approach those clients and how to identify particular business opportunities. In sum, the companies participating in the project showed weakness in terms of direct knowledge of the market and how to forge relationships with customers and channels.

4.2. Functional barriers

Leonidou's (2004) framework suggested that firms faced barriers related to organisational functions other than marketing, and included among these the lack of managerial time to deal with exports, the lack of preparedness of human resources, as well as the lack of excess production capacity and working capital to finance exports. In addition to these, the case study data suggests that other organisational capabilities are important to C-KIBS, in particular in the areas of strategic management, talent management, production (understood in this context as service delivery and/or project management), finance and others.

First, strategic management capabilities, such as strategic planning, strategic implementation, innovation management and change management, were identified as relevant barriers for a number of C-KIBS. The lack of these capabilities often stemmed from the fact that founders tended to have more of a creative than managerial profile. In particular, firms were found to have difficulties both in terms of setting objectives and establishing and monitoring plans. These companies, traditionally managed by people who are not management professionals, in some cases displayed profound strategic problems relating to the definition of the business model and the value proposition, and even the definition of the product portfolio. A clear exception was observed in the subsector of publishing and print media. This is, perhaps, the subsector most closely related to a business dynamic common to other sectors. Similarly, the fashion subsector is also quite well positioned in this dimension. On the contrary, performing arts, audio-visuals, music and design show important deficiencies in this aspect.

Second, in the case of managing human resources for internationalisation, the case study revealed the need to distinguish between the individual and organisational levels. In addition to Leonidou's preparedness of the personnel for internationalisation, the data suggests that other organisational factors should be included; such as the firm's ability to select and retain talent, the cultural fit of the team and the company with the change required by the internationalisation strategy and the organisational capabilities for role definition and decision-making. Therefore, the capabilities available in the current team to drive the strategy need to be taken into account, as well as those in the organisation to configure the right

team. Relating to individuals, the data from participating firms highlights the cultural suitability of the teams for the internationalisation strategy. The preparedness of the team, both in languages and in management and internationalisation, as well as their previous experience, also stand out positively, although to a lesser extent, which also explains their greater orientation towards internationalisation. However, the same is not true of the company's capabilities, which is the dimension in which the companies are worst placed, although it should be noted that they are in a very similar position to those of the other two dimensions: product and market.

Third, in terms of production capabilities, in addition to the lack of excess production identified by Leonidou, participating C-KIBS displayed varying levels of capabilities relating to service delivery or project management. In particular, service production planning.

Fourth, in addition to lack of working capital to be able to export, the case firms revealed that it is also necessary to know where and how to access funds that can support internationalisation. Indeed, participating firms seem to know little about existing internationalisation support programmes or other means of financing or leveraging their activities, although their financial capability appeared important, both in terms of the availability of resources and the financial expertise required to carry out international activities. However, they showed clear problems both in terms of the availability of resources and the financial expertise to carry out international activities.

Finally, the case study data suggests that additional components are relevant to creative KIBS such as quality accreditations, intellectual property or technological capabilities and tools, and indeed these were found to be among the greatest deficiencies of participating firms.

4.3. Marketing barriers

Unsurprisingly, given that the framework stems from the field of international marketing, Leonidou's (2004) proposal provides considerable detail relating to five marketing subcategories, namely product, price, distribution, logistics and promotion.

Here too, our case study data allowed us to adapt and extend the framework to the context of creative KIBS. First, rather than products, C-KIBS generally offer and deliver services, although in some cases the service may include physical products also. Nevertheless, what the project data revealed was that the lack of a complete, competitive and sufficient service (and product) portfolio adapted to the international market could prove an important barrier. Indeed, firms need to have the capacity to make the necessary adaptations to the current offering.

Additionally, these services need to be competitive in price, to prove of interest to international clients. Participating firms often needed to learn to set prices for international clients and tenders, and in doing so develop price-setting processes for international activities.

Given that, generally, C-KIBS offered services or service-based projects, we found that logistics were not particularly relevant to participating firms. Some exceptions were identified in the case of end-products in fashion or books. However, distribution was found to be relevant to the internationalisation of participating firms. In particular, firms often found it difficult to identify potential sales agents or distributors, as well as identify and understand other routes to market such as the digital platforms for global sales. Firms described their shortcomings in terms of knowledge and use of commercial agents in new markets. Finding the right distribution channels was particularly important for firms who found it difficult to identify or access niche clients or to access international tenders (as described above).

Furthermore, promotion & advertising were identified as important elements of the internationalisation strategy, both in online and offline format. In terms of online promotion, participating firms displayed weaknesses in their online presence (website, social media etc.), which generated barriers for international online promotion activities. In terms of offline promotion, firms did not tend to know or participate in trade missions, fairs or international congresses, which in turn generated a barrier to developing their knowledge of potential distributors, clients and final end-users. Again, the performing arts and design subsectors stood out negatively in these aspects. In the case of the performing arts, the problems were limited to online promotion and the use of agents, while in offline promotion they reported a good position compared to the other sub-sectors. Moreover, participating companies from the publishing and print media subsector showed greater capabilities in these dimensions, especially in the area of both online and offline promotion.

In conclusion, with the exception of logistics, whose importance was fairly minor for creative KIBS, all the categories proposed by Leonidou remained highly applicable to C-KIBS. Our data nevertheless allowed us to adjust the contents of each category to align better with the specific C-KIBS context.

5. ADAPTED FRAMEWORK AND DISCUSSION

The previous section, in which findings are presented, provides a more fine-grained understanding of the barriers that creative KIBS may face in their internationalisation. Additionally, our analysis of the data from the KSIAttea project – aimed at supporting small Basque creative KIBS in their internationalisation – allowed us to explore the extent to which Leonidou's framework of export barriers is useful in the context of creative KIBS.

Table 3. ADAPTED FRAMEWORK OF BARRIERS TO INTERNATIONALISATION FOR C-KIBS

Access to information to define strategy	Access to information	Knowledge of and access to market reports (sector reports, country reports, segment reports)
	Identify specific international clients	Knowledge of specific client needs, ability to identify potential clients in specific niches.
	Identify business opportunities	Ability to assess market opportunities from existing information (size, client behaviour...), understanding of how to access clients (e.g. international tenders, digital platforms) and ability to identify international opportunities.
Organisational capabilities	Strategic management	Strategic planning and control capability, innovation and change management.
	Talent management	People (International profiles, training, languages, international experience), talent management & organisation (capability to attract & retain talent, decision-making and organisational structures)
	Production	Service delivery capacity (ability to respond to increases in demand), service / project management (production planning, process improvement and quality management, certifications, technologies etc...)
	Finance	Financial resources (availability of financial resources, access to funding programmes), financial management (cost structure & financial management)
	Other	Protection of intellectual property, digital capabilities, accreditations and quality certifications.
	Service (product) adaptation	Adapting services / projects to international market specifications, comprehensive portfolio of services (& products), competitiveness (differentiation) of the service.
International Marketing Mix	Price	Price competitiveness & price-setting process.
	Distribution	Access to market through sales agents, distributors... or other routes to market such as digital platforms.
	Promotion	Promotion & advertising both online (including social networks) and offline (including commercial actions or missions)

Source: Own elaboration

We found that the framework was indeed useful, although it required some updates and adaptations to apply to the specific context of C-KIBS. Indeed, these firms present certain particularities that require some adaptation of the theoretical framework: in particular, as KIBS, these firms are knowledge-intensive and more specifically human capital intensive, which makes them particularly sensitive to issues of talent management, production management (understood as service delivery) and more broadly knowledge management (Abecassis-Moedas *et al.*, 2012; Miles & Miozzo, 2015; Starbuck, 1992). In addition, this knowledge-intensive nature rests on a specific type of knowledge, namely creative and cultural knowledge, which in turn is subject to specific knowledge management challenges such as intellectual property (European Commission, 2010; Miles *et al.*, 2018). Moreover, the global nature of the markets in which C-KIBS compete (as opposed to a more traditional product-market approach) means that C-KIBS have somewhat different market information needs, and these include an understanding and an ability to access the specific channels (e.g. global platforms or tenders). Finally, the firms participating in the KSIAttea project were SMEs, which compounded the effects of some challenges, namely access to market information, talent management and lack of social capital resources (Paul *et al.*, 2017).

As a result of the comparison of the empirical data from the project with the theoretical framework proposed by Leonidou, we were able to adapt the framework to the specific C-KIBS context. This new, adapted framework is presented in Table 3.

This framework differs from the original framework in several ways: First, the section relating to access to information has been both updated and adapted to the specific C-KIBS context (type of market and access to market). Second, the section relating to functional barriers has been expanded substantially, in order to address the specific organisational capabilities of these firms, but also to include a broader range of organisational capabilities than originally considered by Leonidou (2004). Finally, the marketing section has seen minor adaptations, mainly to recognise that overall the relative importance of logistics is much lower for C-KIBS.

6. CONCLUSIONS

This study aimed to explore what barriers creative KIBS may face, by contrasting the theoretical framework proposed by Leonidou (2004) with empirical data from Basque creative KIBS participating in an internationalisation programme supported by the Basque Government. Indeed, this is where the originality of this research lies: we contribute to expanding knowledge on the export barriers that firms face by applying a specific lens, namely of creative KIBS (or C-KIBS). In doing so, we contribute to developing the literature on the internationalisation of KIBS (Braga *et al.*, 2017; Miles & Miozzo, 2015; Rodríguez & Nieto, 2012).

From a theoretical standpoint, we refined an existing framework to better reflect the idiosyncrasies of a sector of increasing economic and social impact. From

an empirical perspective, the analysis of the project data allowed us to provide a more fine-grained understanding of what barriers C-KIBS need to overcome. From a practical perspective, these findings provide significant managerial contributions and policy implications.

6.1. Managerial & Policy Implications

This study, comparing the empirical data from a project conducted during 2019 and 2020, enabled not only the refinement of the theoretical framework, but also the identification of a number of opportunities for managers and policy makers to enhance their support to the internationalisation of this sector.

First of all, the project findings highlighted how many creative KIBS do not necessarily adopt the traditional approach of targeting one or several geographic markets, but rather focus on niche clients irrespective of where they are situated geographically, as well as sell through global platforms and international tenders. Two policy implications can be derived from this. First, export promotion agencies that prepare sector reports and make market information available to firms may need to reconsider their approach for this sector. In particular, reports should include information on end-user trends as well as information about different types of clients and distribution channels. Second, internationalisation support programmes may need to be adapted to enable firms to present their strategies based on particular client niches rather than geographic markets.

Secondly, the diagnoses carried out during the project revealed a number of managerial weaknesses, explained in part by the fact that many of these firms were founded by people with more creative than managerial profiles. In this sense, in order to support these firms in their internationalisation, policy makers need to provide more comprehensive support to these firms, to help them first, increase their competitiveness and then, grow internationally. For example, capacity-building activities should focus on aspects such as strategic management, financial management, international promotion. Moreover, participating firms were unaware of existing support programmes and face difficulties when applying to such programmes (for example to the European programme Creative Europe), so additional training and support to help firms understand and manage these processes would be extremely beneficial.

Thirdly, as can be seen in Figure 1, the heterogeneity within the creative KIBS remains high, and broad measures aimed at the sector as a whole may prove of little use to the specific case of each firm. Policy makers are therefore shifting towards a more ad-hoc approach, so that individual firms might find the support they need through modular training components (where firms can pick and choose the training they need) and/or subsidised consulting services tailored to their specific case.

Finally, the project revealed opportunities for networking in the home market, as this sector has not (to date) taken advantage of such networking opportunities, for example to create export consortia or project consortia for international tenders or programmes. Similarly, participating firms revealed they were not experienced in identifying potential international contacts nor how to establish collaborations with them. Therefore, policy makers might also consider supporting creative KIBS in building up their relational capital both in their home and other markets.

6.2. Limitations and future research

Like all research, this study too has several limitations. First, for reasons of data availability, our study focussed barriers that are internal to creative KIBS. Further research could assess the relevance of the external barriers that these firms may face and to what extent these barriers may differ across subsectors and with other types of KIBS. Second, the team of academic researchers did not have direct access to the firms or data collected by the consulting team, which could result in a limited ability to understand and interpret the data. However, this was addressed by incorporating the technical director of the project into the research team, allowing us to contrast different interpretations both of the theoretical model and of the empirical data. Finally, it is important to acknowledge that firms participated in the programme by choice due to their interest in exporting, which could generate a potential bias in terms of the strengths and weaknesses these firms may possess. However, given that our intent was not to test the framework nor propose generalisable findings for all creative KIBS, but rather to understand to what extent the existing framework helped understand the internationalisation of C-KIBS, this was considered and addressed this in the interpretation of findings. Further research could seek to test and validate the adapted framework in a larger sample of C-KIBS. Indeed, future programmes to support or incentivise the internationalisation of C-KIBS in the Basque Country or indeed in other regions may serve to do so. In addition, although the particularities of the subsectors have been taken into account when analysing the barriers to internationalisation, it would be interesting to go deeper into said analysis, identifying the causes of such differences.

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