

European Skills Council for employment and training
in the Audiovisual and Live Performance sectors

The logo consists of a white, rounded, speech-bubble-like shape with a pointed top and bottom, centered on a dark blue background. Inside this shape, the words "creative", "skills", and "europe" are stacked vertically in a dark blue, lowercase, sans-serif font.

creative
skills
europe

Trends and **skills** in the European **audiovisual**
and **live performance** sectors

June 2016

Creative Skills Europe, the European Skills Council for employment and training in the Audiovisual and Live Performance sectors, is a joint project piloted by social partners of the EU Social Dialogue Committees in the Audiovisual and Live Performance Sectors:

- EURO-MEI (media, entertainment and arts sector of UNI Europa)
- International Federation of Actors (FIA)
- International Federation of Musicians (FIM)
- European Federation of Journalists (EFJ)
- European Broadcasting Union (EBU)
- Performing Arts Employers Associations League Europe (PEARLE*)
- European Coordination of Independent Producers (CEPI)

Creative Skills Europe also benefits from the support and expertise of the following national skills bodies:

- mediarte.be, Fonds Social du Secteur Audiovisuel & Fonds Social de la Production de films / Sociaal Fonds voor de Audiovisuele sector & Fonds voor de filmproductie (Belgium)
- Sociaal Fonds voor de Podiumkunsten (Belgium)
- Commission Paritaire Nationale Emploi Formation Audiovisuel (France)
- Commission Paritaire Nationale Emploi Formation Spectacle Vivant (France)
- GOC, Expert-centre for the creative industries (the Netherlands)
- Creative Skillset (United Kingdom)
- Creative & Cultural Skills (United Kingdom)

Creative Skills Europe, Trends and skills in the European audiovisual and live performance sectors

A report prepared by Daphne Tepper

Proofreading: King's Translation & Copywriting sprl

Layout: Laurence Dierickx

Published in June 2016, Brussels

This project receives support from the European Commission. This publication reflects the views of the authors only and the Commission cannot be held responsible for any use which may be made of the information contained therein.

TABLE OF CONTENTS

Foreword	5
Executive Summary	8
Introduction	15
a. Who we are	16
b. Our report	18
c. Our methodology	19
Chapter I: Trends in Europe	20
a. Classification and 'counting units'	22
b. The type of available statistics	30
c. A statistical 'snapshot' of the sector	38
d. Preliminary conclusions	55
Chapter II: Skills for tomorrow	62
a. Qualitative analyses of the sector: our resources	63
b. Key trends affecting the sector	69
c. The impact on occupations	74
d. Adapting skills acquisition to the skills needs	78
Chapter III: Inspiring initiatives	82
■ Sector-driven initiatives for a sustainable action in the skills field in Sweden	83
■ A comparative diagnosis (1997-2014) of the employment and training situation in the live performance sector in France	85
■ 2020 starts tomorrow: anticipating future profiles in the media and communications fields in the Netherlands	89
■ A platform to offer guidance and advice to the employees and employers of the cinema and audiovisual technical industries in France	90

■ A peer learning network on human resources management in the life performance sector in Flanders	91
■ The development of new National Occupational Standards for digital skills in the United Kingdom	93
■ A Service Centre for the insertion of arts students and their professionalisation in Germany	95
■ The development of apprenticeships schemes in the live performance sector in the United Kingdom	97
■ A project to accompany the internships of young graduates in the audiovisual sector in Belgium	98
■ A retraining programme for dancers in the Netherlands	100
Conclusions	101
■ Developing labour market intelligence	102
■ Creating platforms for exchanges and co-operation	103
■ Equipping sector professionals with relevant skills in the digital environment	105
■ Acknowledging the transformations of the sector and the corresponding impact on careers	106
■ Promoting schemes for on-the-job learning	107
Recommendations	108
■ Labour market intelligence	109
■ Spaces for exchange and co-operation	111
■ The digital environment	112
■ Career management	113
■ On-the-job learning	114
Annexes	115
Annex 1: Key organisations and resources	116
Annex 2: Bibliography	119

Two additional annexes (the full list of participants to the Creative Skills Europe's meetings and a glossary) are available in the digital version of this publication published on the website www.creativeskillseurope.eu



FOREWORD

Adjusting initial education and ongoing training schemes to the realities on the ground, and anticipating future changes, have been identified as topics for top priority on the European Union agenda in its fight against unemployment. A dynamic workforce is a workforce that is equipped to face current and future challenges, and that has access to relevant training schemes each time that new skills needs emerge.

The key importance of skills development and professional training has been recognised by the Social partners of the EU Audiovisual and Live Performance Social Dialogue Committees for many years. The opportunity to join forces on this topic was seized when DG Employment offered, through its PROGRESS programme, the possibility to fund joint initiatives in the form of 'European Sector Skills Councils'. Designed to anticipate more effectively the need for skills in specific sectors and to achieve a better match between skills and labour market needs, these Councils were asked to provide more and better information about the skills situation in different sectors of the European economy. They were also invited to help develop skills governance in the different sectors and national skills policies.

Creative Skills Europe, the European Skills Council for Employment and Training in the Audiovisual and Live Performance sectors, was

launched in November 2014 by a partnership of European trade unions and employers' organisations: the International Federation of Actors (FIA), the International Federation of Musicians (FIM), the European Federation of Journalists (EFJ), the European Broadcasting Union (EBU), the Performing Arts Employers Associations League Europe (PEARLE*), the European Coordination of Independent Producers (CEPI) and EURO MEI (UNI Global Union – UNI Europa, media, entertainment and arts).

From November 2014 to June 2016 Creative Skills Europe collected and shared sector labour market intelligence gathered from different EU countries, developed a European perspective on developments in the audiovisual and live performance sectors, promoted contacts and exchanges between sector stakeholders active in the employment and training fields, and promoted peer learning and the exchange of best practice across EU borders.

The results of this work are presented in this report. It summarises hours of discussions in different EU capitals, and capitalises on the expertise of national skills bodies that kindly agreed to play an active part in the project.

In the following pages, you will find data on the audiovisual and live performance markets in

eight EU countries. You will read the conclusions of an extensive literature review on the trends at work in our sectors and on the skills needs emerging from them. You will be invited to reflect on the impact of the digital shift, of the economic downturn and of the emergence of new business models on occupations in our sector. Finally, we present you with a set of conclusions and recommendations, aimed at policymakers and sector stakeholders, with the aim of encouraging further collaboration at national and European levels.

This report should be seen as a first step in our sustained efforts to continue the discussions and cooperation at national and European levels towards better professional training in the European audiovisual and live performance sectors. Our efforts need to be maintained both within and beyond social dialogue frameworks, and must continue to

engage a large variety of stakeholders: from social partners to professional associations, national skills bodies and education and training organisations.

We warmly thank the national skills bodies from Belgium, France, the Netherlands and the UK that took actively part in the project and that have given our discussions depth and relevance: mediarte.be, Sociaal Fonds voor de Podiumkunsten (Belgium), the Commissions Paritaires Nationales Emploi Formation Audiovisuel et Spectacle Vivant (France), GOC the Expert-centre for the creative industries (the Netherlands), Creative Skillset and Creative & Cultural Skills (United Kingdom).

We also extend our thanks to all the participants who during many meetings devoted their time and expertise to this project, making it a true sector partnership activity.

William Maunier
President of EURO MEI

Nicola Frank
Head of European Affairs, EBU
Coordinators of the EU Audiovisual
Social Dialogue Committee

Anita Debaere
Director, PEARLE*

Dearbhal Murphy,
Deputy General Secretary, FIA
Coordinators of the EU Live
Performance Social Dialogue Committee



The European Sector Skills Council for the Audiovisual and Live Performance Sectors, also known as the 'Creative Skills Europe' initiative, is a partnership of European professional organisations and national skills bodies. In 2015 and 2016, Creative Skills Europe shared labour market intelligence and identified some trends in what skills sets are needed to improve the quality of professional training schemes, contribute to developments in the sector, and increase the security of career paths for sector professionals.

After carrying out an extensive literature review, followed by consultation meetings hosted in different European cities, Creative Skills Europe is now in a position to outline the sector's key features and salient characteristics, and to describe how the two main drivers of change (the digital shift and the challenged economic context) have transformed its operating environment.

Both the audiovisual and the live performance sectors have young workforces, both are made up of mostly small-sized companies, both count a large (and increasing) number of professionals operating outside the standard 'employee status' (as freelancers, intermittent workers, self-employed, etc. or any other status as provided by the provisions of national labour law). The two sectors also have relatively dynamic markets that translate into a growing number of companies. Unfortunately, this does not necessarily lead to a similarly linear upward growth in employment opportunities.

In the audiovisual sector, most companies are active in the field of production, with broadcasters still employing the larger workforces. Surveys and qualitative analyses have shown that the general technology shift and the acquisition of digital skills represent key challenges for the development of the sector. The digital shift has also deeply impacted the sector's business models, demanding even stronger capabilities to innovate and experiment with new development schemes. Individual career paths have also been affected, with the emergence of multi-skilling, the appearance of new occupations and the disappearance of others.

In the live performance sector, most companies are active in the creation and production field. Highly dependent on public subsidies, this sector has suffered from the squeezed public funding that followed the 2008 financial crisis. Work opportunities have become more precarious, as seen in shorter employment contracts and an increase in freelancing.

In parallel, since live performance occupations remain highly attractive, job demand is still higher than supply. The 'multi-activity' of workers is therefore becoming increasingly important (both within the sector and when combined with activities in other sectors).

Keeping up with technological developments has always represented a challenge for economic sectors whose activities rely heavily on technology (here the audiovisual and live performance sectors provide a good example). The 'digital shift' has hastened this process.

The key evolution for the audiovisual sector stakeholders has been the transition to a 'multi-platform environment' combining a presence on the web and on new multimedia applications with their traditional distribution channels. This multiplatform environment requires not only new maintenance skills but also new competences in the fields of creation and production.

In the live performance sector the digital environment has opened up new opportunities for diversifying income streams, reaching out to new audiences and exploring new creative horizons. Specific skills are also needed to manage these new digital tools.

Given that the digital environment has engendered a pressing need for new skills, it has also placed the audiovisual and live performance sectors at the forefront of the creative and innovation forces that drive digital technological development. If it is to thrive, the digital environment needs creative new content. Equipping audiovisual and live performance professionals with the necessary skills to engage fully in the digital environment constitutes a solid investment for the future.

The economic downturn has dramatically reinforced some of the employment features of the audiovisual and live performance sectors, namely project-based work and self-employment. To manage their careers, which have become less and less linear, professionals have to diversify their skill sets even more than before. Many also have to acquire the necessary knowledge and skills to be able to cope with the legal, administrative and financial requirements of being self-employed or freelance.

To address the skills challenges facing the audiovisual and live performance sectors, the Creative Skills Europe's initiative has encouraged the sharing of information across EU borders and highlighted good practices being tried out in different EU countries.

Sweden, France, the Netherlands, the United Kingdom, Germany and Belgium have provided examples of solutions being tried out at local, regional and national levels to identify and address trends in sector skills needs. These examples of good practice were the foundation for the drafting of this report's recommendations.

COLLECTING THE RIGHT DATA FOR MARKET INTELLIGENCE

Sectoral stakeholders and policy makers need access to reliable and stable national data in order to monitor developments in the audiovisual and live performance markets.

They have to understand the deeper trends, be better at anticipating future conditions, and then be capable of adapting the skills of the workforce accordingly. Better decision-making at European level requires that part of the collected national data should be comparable. Data-banks should be built in sufficient detail to enable subsectors to be properly analysed.

- **EU level:** EUROSTAT should build up more detailed cultural statistics that acknowledge the specific features of the sector and of its subsectors. More pan-European data should be collected, including on employment mobility.
- **National level:** Efforts should be pursued to collect the right set of data to enable the development of sector skills strategies, and the data collected should be published together with qualitative sector-specific analyses.
- **Sectoral level:** Qualitative analyses should be seen as part of labour market intelligence, and form the basis for new action plans to be drawn up in dialogue with all parties. A strong commitment for the development of pertinent qualitative indicators (career paths of graduates, benefits of on going training schemes, etc.) needs to be maintained.

SETTING UP INFORMED AND SUSTAINABLE SECTOR PLATFORMS

New platforms should be set up, composed of the relevant representation of sectoral stakeholders (unions and employers' organisations, national skills bodies, professional associations, education and training organisations) to develop analytical studies of the data gathered, exchange views, information and best practice and open up possibilities for practical decision-making that will respond to sectoral needs in the short, medium and, above all, long term. Such platforms need to be set up at both national and European level and receive the necessary resources to be able to function in a sustainable and practical way to help shape the future of the sector.

- **EU level:** Due recognition should be given to the cultural sector's professional organisations when debating various European initiatives for developing skills and training in our sectors.
- **National level:** If not already existing, stakeholder platforms, bringing together educational and professional representatives, should be set up and funded by the most relevant means in the national context (collective agreements, public funding, etc.) to reinforce and revitalise the sector.
- **Sectoral level:** Better communications and more permanent cooperation should be established between cultural and educational bodies.

RESPONDING TO THE DIGITAL SHIFT

The new digital environment, with its constantly evolving technological advances, has impacted every aspect of our daily lives. It has operated a thorough transformation of the creative and cultural industry, affecting production and distribution channels, performances and publicity, and has also made content creation far more important. Relying more than ever on its capacities for innovation, digitisation has placed the creative and cultural sectors back at the heart of our economies and societies, and this should receive the recognition it deserves.

- **EU level:** All relevant EU funding programmes (Creative Europe, Erasmus+, Horizon 2020 etc.) should be made compatible with the needs of skills development for the digital environment in the audiovisual and live performance sectors, going well beyond basic ICT skills.
- **National level:** Funding schemes at regional and national level should be made available to support the education and professional cultural stakeholders as they adapt to – and even help reshape- the digital environment. Educational and training bodies should rethink their curricula to incorporate the digital reality horizontally, promoting T-shaped profiles and interdisciplinary teams.
- **Sectoral level:** All stakeholders should take stock of their transformed operating environments, and adapt their formal and informal training schemes accordingly, experimenting with new models and tools (inter-generational learning, online and blended learning, training partnerships with other sectors, etc.).

IMPROVING CAREER MANAGEMENT

Project-based work, intermittent employment, and retraining needs have been features of the sector for decades. However, the digital shift and precarious economies are putting new pressures on individual workers, confronting them with greater insecurity than before. For many, it has become essential to expand their skills set far beyond their initial training. Chosen or imposed self-employment has also increased the demand for new skills: from teamwork and communication, to legal and entrepreneurial skills.

- **National level:** Support schemes (either existing or newly created) should be designed to ensure they offer the right tools for career development (specific and horizontal skills) to all workers, whether salaried or self-employed freelancers.
- **Sectoral level:** Proper social and management policies should be developed that combine a vision for the future of the sector and for individual careers in the workforce. Better publicity is needed to advertise training opportunities for a greater take-up by businesses and individual workers.

DEVELOPING ON-THE-JOB LEARNING

On-the-job learning has proved its effectiveness in helping new professionals entering the market gaining a better understanding of their future work environment, and acquiring the right set of skills to navigate it. More opportunities should be developed for on-the-job learning, ensuring that the schemes set up are fully in line with the specificities of the activities of the sector (often project-based, seasonal, and supported by very small structures).

- **EU and national levels:** Support should be given to partnerships between educational and professional partners who are developing on-the-job training schemes. Wider recognition and validation should be given to vocational qualifications, sector-relevant skills and competences in order to enhance and facilitate professional mobility.
- **Sectoral level:** The development of on-the-job learning through internships, apprenticeships and other modes of cooperation between the world of work and the world of education should receive commitment and support. Given the specificities of the sector, new training models should be tried out (online and blended schemes, mentoring, tutoring, collective training workshops in the workplace, etc.).



creative
skills
europe

INTRODUCTION

a. Who we are

The European Sector Skills Council for the Audiovisual and Live Performance Sectors, also known as the 'Creative Skills Europe' initiative, started its activities in November 2014. Piloted by sector stakeholders¹ and co-funded by the European Commission², its main objective is to contribute to the development of EU-level intelligence and co-operation projects on employment and skills in the Audiovisual and Live Performance Sectors.

Implemented in partnership by European social partners and national bodies for skills development and professional training, this initiative is grounded in the realities of the sector. Its complementarity with the national and European social dialogue frameworks allows for a solid connection with labour market developments and policy orientations across Europe.

Monitoring the labour market and analysing its evolution is recognised as being key to: a better adjustment of the initial and lifelong training offer to the realities of the workplace and of the market; assisting the employers in the management of their human resources and the development of their business strategies; increasing awareness among current and future professionals about the opportunities and challenges in a given sector.

To address those issues, the European Skills Council ran different activities in 2015 and 2016.

¹ The project is supported by the social partners that are members of the European Social Dialogue Committees for the Audiovisual and Live Performance Sectors. It is more specifically piloted by EURO-MEI (media, entertainment and arts sector of UNI Europa), the International Federation of Actors (FIA), the International Federation of Musicians (FIM), the European Federation of Journalists (EFJ), the European Broadcasting Union (EBU), the Performing Arts Employers Associations League Europe (PEARLE*) and the European Coordination of Independent Producers (CEPI).

² PROGRESS programme (European Commission, DG Employment), Call for Proposals VP/2013/010 – Delivering on skills for growth and jobs.

It prepared thematic reports, organised meetings and capacity-building sessions in different European cities³, and set up a web platform (www.creativeskillseurope.eu).

These activities looked at encouraging the collection of statistics, contributing to the identification of mid- and long-term skills needs, identifying good practices, and offering enhanced cross-border and cross-sectoral opportunities for exchanges and peer learning.

Those activities were implemented in close partnership with a variety of local, regional and national stakeholders, ranging from professional associations, national agencies and regulating bodies to education and training institutions.

Before starting their joint project in the field of skills trends monitoring and skills development, the European social partners had run a feasibility study in 2012, already with the support of the European Commission. This investigation revealed the fact that quite a few bodies, national sector skills councils or equivalent organisations, already existed in a number of EU countries (17 sectoral organisations were identified in 10 countries), but they were all at different phases of development and did not necessarily pursue the same goals or implement the same activities.

Most of these organisations, however, are similarly composed or piloted by sectoral social partners, and aim to improve sectoral knowledge in the employment and skills needs field. All bodies were also interested in cooperating at European level for a better use of the existing national intelligence and the development of joint projects.

³ Creative Skills Europe organised three meetings in Tallinn, Estonia (April 2015), Prague, Czech Republic (January 2016) and Madrid (March 2016), as well as two capacity-building sessions organised simultaneously to the Prague and Madrid meetings. In each of those meetings, one of the thematic reports – that now form part of this final publication – was presented, discussed, and enriched with regional expertise.

Because of their advanced experience in skills anticipation and data collection, seven national skills organisations in four countries (France, United Kingdom, Belgium, and the Netherlands)⁴ were invited to join the steering committee of the newly created Council alongside the European social partners who were leading the initiative. A presentation of the different partners of the project is included in Annex 1 of the present report.

The 'Creative Skills Europe' initiative warmly thanks all the institutions and individuals that offered their help in collecting, organising and analysing the information presented in the following pages.

b. Our report

The objectives of the Creative Skills Europe's report is to collect existing data and qualitative analyses on the trends at work in the European audiovisual and live performance sectors, analyse their impact on sector skills needs, put them in a European perspective, identify gaps in information, initiate discussions on key trends, and identify priorities for action.

In chapter I, the report presents quantitative data on the sector employment market available in 8 EU countries. In chapter II, a literature review of national qualitative studies and surveys outlines the main trends that impact the skills needs of the European audiovisual and live performance workforce. Chapter III highlights concrete examples of initiatives tested across Europe to identify and address sector skills needs. Given that available national information is still not complete nor fully comparable at EU level, this report does not offer an exhaustive view of the state of the sector across Europe, neither does it aim to set out harmonised European data.

⁴ mediarte.be, Fonds Social du Secteur Audiovisuel & Fonds Social de la Production de films / Sociaal Fonds voor de Audiovisuele sector & Fonds voor de Filmproductie (Belgium), Sociaal Fonds voor de Podiumkunsten (Belgium), Commission Paritaire Nationale Emploi, Formation Audiovisuel (France), Commission Paritaire Nationale Emploi Formation Spectacle Vivant (France), GOC – Expert-centre for the creative industries (the Netherlands), Creative Skillset (United Kingdom), Creative & Cultural Skills (United Kingdom).

What it does offer, however, is a first attempt to bring together existing data and analyses on the trends at work in our sectors in terms of skills needs, and to build up some European expertise on the subject. It represents a first step towards building European labour market intelligence for the audiovisual and live performance sectors for the purpose of improving professional training and skills development.

c. Our methodology

As indicated above, the present report does not aim to present any new data or statistics but rather to compile available national intelligence and analyse it in a European perspective. To do so, the project has built on the body of work produced by our seven national partners that had all, at one level or another, developed labour market intelligence to feed into their regional or national skills strategies and actions. Thanks to the information they shared with us, it was possible to develop a first understanding of the issues at stake, and to draw up a framework for data collection. We were then able to identify and collect relevant statistical contributions from additional EU countries.

Data from the four focus countries (Belgium, France the Netherlands and the United Kindgom) was also used to structure the available information, and to identify the biggest challenges and caveats in employment data collection, before opening up the exercise to a larger pool of countries. In total, the report presents employment data for the audiovisual and live performance sectors in eight EU countries: Belgium, France, the Netherlands, the United Kindgom, Estonia, Finland, Germany and Spain.

In order to identify the key trends impacting the skills needs in the European audiovisual and live performance sectors, Creative Skills Europe also ran a literature review of the work produced within its network of partners and contacts. It focused first, once again, on the publications of the national skills organisations member of its steering committee. The intelligence gathered was then discussed and tested in the light of the realities of different local contexts during 'live' consultations at the three Creative Skills Europe's meetings (Tallinn, April 2015; Prague, January 2016 and Madrid, March 2016).



CHAPTER 1

TRENDS IN EUROPE

CHAPTER 1: TRENDS IN EUROPE

Creative Skills Europe has been collecting available statistics in the audiovisual and live performance sectors in different European Union countries. This is the first step towards developing European labour market intelligence for better skills strategies. During this process, our partners became very aware of the many challenges that had to be addressed to avoid shortcuts or misunderstandings in the interpretation of this data.

Statistical exercises are always challenging. Using raw data without analysis can easily lead to biased conclusions, especially if such quantitative data are not placed in the social and economic context at the moment of examination and the drawing of conclusions.

In the audiovisual and live performance sectors, for example, the number of workers who are unemployed, or in between contracts, or are active in other sectors while looking for sector assignments, is very high. Employment statistics can therefore be misleading, given that, generally speaking, there are a great many more potential workers than the ones who show up in the statistics. Similarly, when the number of sector businesses increases, this does not automatically mean expansion in the sector workforce, given that many newly created businesses are one-person companies or employ a limited staff on irregular contracts.

The statistics collected in this report (existing national statistics, some already published at national level, others not) have therefore to be viewed with precaution and must be understood in their national context (eg. coming from what source, produced for what reason, and used in what manner). The qualitative analysis of this data – and their positioning in a longer-term perspective when possible - is also key to ensuring that national and sector specificities are not overlooked when the statistics are used for planning further actions.

a. Classification and ‘counting units’

For several years now, European institutions have been working towards the establishment of European statistics for the cultural sector. The European Council published different statements on the topic, the most recent in November 2014 when the new Work Plan for Culture¹ was adopted. In this document the importance of collecting EU-level sectoral data in the cultural and creative sectors is once again reaffirmed as encouragement for the development of qualitative ‘evidence-based policymaking’ at national and European levels.

To shape those ambitions, a couple of key initiatives were implemented during the past few years:

- Eurostat published the ‘Cultural statistics in Europe’ Pocketbook² (first edition published in 2007, updated in 2011);
- The European Commission (EC) funded the work of a European working group on cultural statistics (ESSnet-CULTURE) which published a final report³ in 2012 formulating recommendations for the production of improved European statistics on culture in the future.
- The EC Directorate-General for Education and Culture commissioned a ‘Feasibility study on data collection and analysis in the cultural and creative sectors in the EU’⁴ (KEA European Affairs, September 2015)‘.

In the last decade a number of additional studies and initiatives emerged on collecting European-level data in the cultural sector.

¹ Draft Conclusions of the Council and of the Representatives of the Governments of the Member States, meeting within the Council, on a Work Plan for Culture (2015 – 2018), Brussels, 26 November 2014, p. 5

² Cultural statistics, Eurostat Pocketbook, Eurostat – European Commission, 2011 edition

³ ESSnet CULTURE – European Statistical System Network on Culture, Final report, Luxembourg, May 2012

⁴ Feasibility study on data collection and analysis in the cultural and creative sectors in the EU, KEA European Affairs, September 2015

CHAPTER 1: TRENDS IN EUROPE

Funded by the European Commission, the Council of Europe, or resulting from private initiatives, the following studies are worth a mention:

- 2006: The Economy of Culture in Europe⁵, KEA European Affairs;
- 2013: Representativeness of the European social partner organisations: Live performance industry⁶, European Foundation for the Improvement of Working and Living Conditions;
- 2014: Creating growth, measuring cultural and creative markets in the EU⁷, EY;
- 2015: The resilience of employment in the Culture and Creative Sectors during the crisis, EENC;
- the European Audiovisual Observatory, part of the Council of Europe (CoE);
- the Compendium of Cultural Policies and Trends in Europe, also supported by the CoE.

The statistics collected by those projects focus mostly on economic markers (turnover, value added to domestic product, contribution to growth, employment, etc).

In most cases, however, the same challenges have given rise to the same consequences: **the data collected is incomplete because of the lack of harmonised statistics at EU level. Even the definition of the sector itself varies greatly from report to report.**

As far as employment statistics are concerned, most of the data presented in the above reports are based on different definitions of the sector and its subsectors. Those diverging definitions are based on different combinations of NACE codes⁸.

⁵ The Economy of Culture in Europe, Study prepared for the European Commission (Directorate-General for Education and Culture), KEA European Affairs, October 2006

⁶ Representativeness of the European social partner organisations: Audiovisual sector, European Foundation for the Improvement of Working and Living Conditions, 2003

⁷ Creating growth, measuring cultural and creative markets in the EU, EY, December 2014

⁸ Statistical Classification of Economic Activities in the European Community, commonly referred to as NACE (for the French "Nomenclature statistique des activités économiques dans la Communauté européenne")

In order to present a truer picture of the sector, one closer to reality, thereby facilitating the production of statistics that are more useful, the 2012 ESSnet CULTURE report proposed the reorganisation of the classification of the cultural and creative sectors into 10 cultural domains:

- Heritage
- Archives
- Libraries
- Book and Press
- Visual arts
- **Performing Arts⁹**
- **Audiovisual and Multimedia¹⁰**
- Architecture
- Advertising
- Arts crafts

The ESSnet-CULTURE report also recommended a more detailed level of classifications in harmonised surveys to enable cultural activities and cultural occupations to be better identified and used at subsector levels.

At the moment, almost all available statistics at European level cover a sector footprint (definition/scope of the sector) that is larger than the audiovisual and live performance sectors, and do not offer the right tools for isolating data in subsectors.

As regards the sectoral skills needs (evolution of occupations) and the supply side (people trained in sectoral occupations), no European-level data is available to date.

⁹ Performing Arts - covering music, dance, drama, combined arts and other live shows

¹⁰ Audiovisual and Multimedia - covering film, radio, television, video, sound recordings, multimedia works, videogames

At national level, the sector footprint also varies from country to country.

Some organisations cover a sector footprint that goes beyond the audiovisual and live performance sectors per se. This is the case for GOC, Creative Skillset, and Cultural & Creative Skills (see tables 1 and 2 below). In most cases, however, it is possible to isolate the data and obtain statistics that fit more restrictive definitions of the two sectors.

As regards the exact perimeter of the sector footprints, it varies somewhat from country to country. While the differences are not major, they do have an impact on the comparability of the data. The two tables below present the sector footprints used in the different countries for collecting the data.

All categorisations - except the one used for the Creative Skillset's census, the Creative and Cultural Skills' workers' statistics and the Finnish theatre data - are based (with several national variations) on the Statistical Classification of Economic Activities in the European Community, the European industry standard classification system, commonly referred to as NACE.

In Table 1 (pages 26-27), dedicated to the audiovisual subsector, the codes - or otherwise defined categories - that are not part of the audiovisual footprint in all countries (such as sound recording and music publishing, motion picture projection, photography, film libraries and archives) are highlighted in violet.

Similarly the codes highlighted in violet in Table 2 (pages 28-29) outline the differences in the sector footprints used to collect statistics in the live performance subsector. In the UK, industrial classifications and occupational classifications are combined, and this allows for data to be obtained per occupation; statistics on workers include performing arts education but exclude musicians (counted in separate 'music statistics' that also include recorded music and distribution, which cannot be disaggregated).

The sources used to establish the sectoral quantitative data are either official sources, external to the organisation (national office of statistics, social security offices, ministry of culture or other governmental agencies) or internal sources (own databases, surveys, census, etc.).

TABLE 1: SECTOR FOOTPRINTS USED TO COLLECT DATA FOR THE AUDIOVISUAL SECTOR

mediarte.be (BE)	Belgian Statistical classification of economic activities (NACE*-BEL)/ aligned to NACE Rev.2 59.111 Motion picture production 59.112 Motion picture for television production 59.113 Other motion pictures production 59.114 Television programme production 59.120 Motion picture, video and television programme post-production 59.130 Motion picture, video and television programme distribution 60.100 Radio broadcasting 60.200 Television programming and broadcasting
Kutsekoda (EE)	Estonian Classification of Economic Activities 591 Motion picture, video and television programming 601 Radio broadcasting 602 Television programming and broadcasting
Prefix (FI)	Finnish Standard Industrial Classification TOL 2008 59.11 Motion picture, video, TV programme production 59.12 Motion picture, video, TV programme post-production 59.13 Motion picture, video, TV programme distribution 60.10 Radio broadcasting 60.20 Television programming and broadcasting
CPNEF AV (FR)	Nomenclature d'activités française (NAF) / aligned to NACE Rev.2 59.11A Motion picture and television programme production 59.11B Institutional and advertisement films production 59.11C Cinema Motion picture production 59.12Z Motion picture, video and television programme post-production [59.13A Motion picture distribution] [59.13B Video edition and distribution] ** 60.10Z Radio broadcasting 60.20A Television programming/broadcasting (generalist channels) 60.20B Television programming/broadcasting (thematic channels)

CHAPTER 1: TRENDS IN EUROPE

Ministry (DE)	Classification of Economic Activities, 2008 edition (WZ 2008) 59.11 Motion picture, video, TV programme production 59.12 Motion picture, video, TV programme post-production 59.13 Motion picture, video, TV programme distribution 60.10 Radio broadcasting 60.20 Television programming and broadcasting
GOC (NL)	Standaard Bedrijfsindeling (SBI) / aligned to NACE Rev.2 591 Motion picture and television programme production and distribution 592 Sound recording and music publishing 601 Radio broadcasting 602 Television broadcasting
Ministry (ES)	Clasificación Nacional de Actividades Económicas - CNAE-2009 591 Motion picture, video and television 592 Sound recording and music publishing 601 Radio broadcasting 602 Television programming and broadcasting
Creative Skillset (UK)	SIC 2007 / aligned to NACE Rev. 2 - employers' statistics 59.11 Motion picture, video and television programme production 59.12 Motion picture, video and television programme postproduction 59.13 Motion picture, video and television programme distribution 60.10 Radio broadcasting 60.20 Television programming and broadcasting activities Workforce survey 2014 – workers' statistics Animation, Digital, Facilities, Postproduction, Film, Games , Radio, Television, VFX, Other creative media

* NACE - Nomenclature statistique des activités économiques (Statistical classification of economic activities).

** It is important to note that there is a difference in France between the scope of the mandate of the CPNEF AV and the statistics collected for the preparation of this report. While the statistics cover motion picture and video distribution, those subsectors are not part of the mandate of the CPNEF AV.

TABLE 2: SECTOR FOOTPRINTS USED TO COLLECT DATA FOR THE LIVE PERFORMANCE SECTOR

SFP (BE)	Belgian Classification of Economic Activities (NACE-BEL / aligned to NACE Rev.2) 90.01 Performing Arts 90.02 Support activities to performing arts 90.04 Operation of arts facilities + some employers (20% of total number) registered under other codes
Kutsekoda (EE)	Estonian Classification of Economic Activities 90 Creative, arts and entertainment activities
TINFO – Theatre Info Finland (FI)	Theatres and companies subsidised by law (Finnish Financing Act) 44 drama theatres and 11 dance companies Theatres and groups receiving state subsidy on the basis of independent project grants 65 free theatres and groups
CPNEF SV (FR)	Nomenclature d'activités française (NAF) / aligned to NACE Rev.2 90.01Z Performing arts 90.02Z Support activities to performing arts 90.04Z Operation of arts facilities
Ministry (DE)	Classification of Economic Activities, 2008 edition (WZ 2008) 90.01.1 Theatre ensembles 90.04.1 Organization of theatre performances and concerts 90.04.2 Operation of opera houses, theatre and concert halls, etc. 90.04.3 Operation of variety theatres and cabarets 90.02 Support activities to performing arts
GOC (NL)	Standaard Bedrijfsindeling (SBI) / aligned to NACE Rev.2 90011 Practising performing arts 90012 Producers of stage productions 90013 Circuses 9002 Activities supporting performing arts 90041 Theatre 90042 Event halls

CHAPTER 1: TRENDS IN EUROPE

Ministry (ES)	Clasificación Nacional de Actividades Económicas - CNAE-2009 741 Specialised design (incl. in companies/employers statistics) 742 Photography (incl. in companies/employers and workers statistics) 743 Translation and interpretation (incl. in companies/employers and workers statistics) 900 Artistic creation and performing arts
Creative & Cultural Skills (UK)	SIC 2007 / aligned to NACE Rev.2 - for employers' statistics 90.01 Performing Arts 90.02 Support activities to performing arts 90.03 Artistic creation* (individual artists, writers, etc.) 90.04 Operation of arts facilities Combination of SIC 2007 and SOC classification – for workers' statistics Actors/Entertainers Arts Facilities (operation, reservation services) Arts Officers, Producers, Directors Backstage Dancers/choreographers Other entertainment activities (support activities to performing arts) Performing arts education Not included: musicians (in music statistics that include recorded music/distribution)

The variation between the sector footprints used to collect the data in the different countries is a first indicator explaining why harmonised EU statistics could not be produced at the present time, and that conclusions on EU trends will have to be drawn up with great care and on an ad hoc basis.

* This class includes: activities of individual artists such as sculptors, painters, cartoonists, engravers, etchers etc; activities of individual writers in all areas including writing fiction, technical writing etc; activities of independent journalists; restoring of works of art such as paintings etc.

b. The type of available statistics

In addition to the different sector footprints used to produce sectoral statistics, the type of quantitative data collected also varies from country to country. The tables below present, for each subsector, the type/sources/years of the statistics collected per country.

It is important to note that the statistics collected for this report in the different countries:

- 1) relate to **different calendar years**;
- 2) **do not always use the same statistical units** – this is especially the case for workers (counted as full time equivalents; as professionals who have worked at least one hour in a contractual framework; or without discrimination between full time or part time).

Finally, the **use of the term 'freelancer'** is very common in the audiovisual and live performance sectors to describe workers performing their activities in a different legal status from that of a work contract. Different legislations exist in the different EU countries to regulate it, under different names (self-employment, independent workers, casual workers, one-man businesses, etc.). If the activities are performed under a legal status recognised as a business, this type of workers are counted in the companies/employers' side of the statistics.

TABLE 3: TYPE OF DATA AVAILABLE FOR THE AUDIOVISUAL SECTOR

	Year	Source	Type of data available
mediarte.be (BE)	2013	Social security national office <u>and</u> company social balance sheets as provided by the Belgian National Bank*	<p>Employers: total number, and per category (public or private), per type of activities, size, location</p> <p>Workers: total number (in full time equivalents), per type of employers (public/private), with artistic occupations, gender, full time/part time, age</p> <p>Not included: independent/interim workers</p>
Kutsekoda (EE)	2013	Statistics Estonia	<p>Employers: total number, per type of activity, per size</p>
Prefix (FI)	2013 2012	Statistics Finland Survey	<p>Employers: total number, per type of activity</p> <p>Workers: total number (in full time equivalents), per type of activity</p>
CPNEF AV (FR)	2013	AUDIENS (social protection group)	<p>Employers: total number, and per type of activity, size, location</p> <p>Workers: total number (professionals that have worked at least one hour in a contractual framework be it permanent/short term/<i>intermittent</i>), in artistic occupations or other types of occupations, permanent or <i>intermittent</i></p> <p>Not included: independent workers/freelancers</p>

* Of the companies that compose the two joint committees on which mediarte.be depends: the joint committee 227 (audiovisual sector) and joint committee 303.01 (feature film production)

TRENDS AND SKILLS IN THE EUROPEAN AUDIOVISUAL AND LIVE PERFORMANCE SECTORS

	Year	Source	Type of data available
Ministry (DE)	2012	Federal Statistical Office and Federal Employment Agency	Employers: total number, per type of activity Workers: total number, per type of activity
GOC (NL)	2013	Statistics Netherlands and GOC's own data	Employers: total number (incl. self employed), and per type of activity, size Workers: total number (full and part time jobs are treated equally), gender
Ministry (ES)	2013	Central Company Directory and National Statistical Plan	Employers: total number, per type of activity, size, legal status, location Workers: total number, per gender, age group, study level, employed or not, type of contract (long or short term), full or part time
Creative Skillset (UK)	2012	Creative Skillset's Employment census	Employers: total number, and per category (public/private), per type of activity, per size, location Workers: total number (full and part time jobs are treated equally), and per subsector, per occupation, employees and freelancers, location of the workforce, gender, BAME (black, Asian and minority groups), disability, EU nationals Not included; freelancers not on contract on census day
	2014	Creative Skillset's Workforce survey	Graduates and highest qualification held, proportion with other qualifications (vocational) and apprenticeships, work experience and unpaid work, recruitment methods, work status (permanent/freelance), occupation profiles (per gender, per work status), job grades by sectors, average income, training undertaken, skills needs, diversity

TABLE 4: TYPE OF DATA AVAILABLE FOR THE LIVE PERFORMANCE SECTOR

	Year	Source	Type of data available
SFP (BE)	2013 2014	Social security national office	<p>Employers: total number, per size, location, legal status</p> <p>Workers: total number, per gender, age, marital status, type of occupation, type of contract (short term/indefinite, full time/part time), total working days, total working hours, total wages.</p> <p><i>Not included: independent/interim workers</i></p>
Kutsekoda (EE)	2013	Statistics Estonia	<p>Employers: total number, per type of activities, per size</p>
TINFO – Theatre Info Finland (FI)	2013	Theatre, Dance and Circus Info Finland	<p>Employers: total number, public/private, per size</p> <p>Workers: total number (full time equivalent), per professional groups (artistic, technical, administrative), per occupation, percentage of temporary contracts, average monthly salary per professional group (and per gender per professional group) and per occupation</p>
CPNEF SV (FR)	2012	<ul style="list-style-type: none"> - AUDIENS (social protection group) - National Institute of Statistics - Pôle Emploi (unemployment agency) - Afdas (professional training agency) 	<p><i>For the private sector (excluding public institutions under public authorities – State/Regions)</i></p> <p>Employers: total number, live performance as main activity or not, per size, status, location</p> <p>Workers: total number (professionals that have worked at least one hour in a contractual framework be it permanent/short term/intermittent), type of employer (live performance as main activity or not), type of contract (permanent or intermittent), type of activity (artistic, technical, administrative), multi-activity, age, gender, domiciliation of the payment, length of the work, access to social rights, use of the training, evolution since 2000</p> <p><i>Not included: self-employed/freelancers</i></p>

TRENDS AND SKILLS IN THE EUROPEAN AUDIOVISUAL AND LIVE PERFORMANCE SECTORS

	Year	Source	Type of data available
GOC (NL)	2013	Statistics Netherlands and GOC's own data	<p>Employers: total number, size, legal status, location</p> <p>Workers: total number (full and part time jobs are treated equally), men/women, self employed</p>
Ministry (ES)	2013	Central Company Directory and National Statistical Plan	<p>Employers: total number, size, legal status, location</p> <p>Workers: total number, per gender, age group, study level, employed or not, type of contract (long or short term), full or part time</p>
Creative & Cultural Skills (UK)	2010 2011	Statistics Netherlands and GOC's own data	<p>Employers: total number, and per category (public/private), per type of activities, per size, location</p> <p>Workers: total number (full and part time jobs are treated equally), and per nation, region, skill level, occupation/seniority, private/public split and wage band, age, disability, ethnicity, self-employment, type of self-employment (freelance, subcontractor etc.), full-time/part-time work, gender, Seasonality, Workers with a second job, Skill level, continent of birth, Length of time in Creative & Cultural Industries</p>

CHAPTER 1: TRENDS IN EUROPE

COUNTRY	SECTOR	Companies / Employers							
		TOTAL	Per type of activity	Per size	LP or AV as main activity or not	Self-employment	Legal status	Public/ Private	Location
BE	AV	x	x	x				x	x
EE	AV	x	x	x					
FI	AV	x	x						
FR	AV	x	x	x					x
DE	AV	x	x						
NL	AV	x	x	x		x			
ES	AV	x	x	x			x		x
UK	AV	x	x	x				x	x
BE	LP	x	x	x	x		x		x
EE	LP	x		x					
FI	LP	x		x				x	
FR	LP	x	x	x	x		x		x
DE	LP	x	x						
NL	LP	x	x			x			
ES	LP	x		x					
UK	LP	x	x	x				x	x

TRENDS AND SKILLS IN THE EUROPEAN AUDIOVISUAL AND LIVE PERFORMANCE SECTORS

COUNTRY	SECTOR	Workers									
		TOTAL	Per type of employer's activity	Men/Women	Age	Artistic occupation	Artist, techn., admin.	Full -Part time	Long /short contracts	Employee/ other status	Study level
BE	AV	x	x	x	x	x		x			
EE	AV										
FI	AV	x	x								
FR	AV	x	x	x			x		x		
DE	AV	x	x								
NL	AV	x		x							
ES	AV	x		x	x			x	x	x	x
UK	AV	x	x	x	x		x			x	
BE	LP	x		x	x	x		x	x		
EE	LP										
FI	LP	x					x		x		
FR	LP	x		x	x		x	x			
DE	LP	x	x								
NL	LP	x		x					x		
ES	LP	x		x	x			x	x	x	x
UK	LP	x		x	x		x	x		x	x

CHAPTER 1: TRENDS IN EUROPE

Three key variables are found in the quantitative data from Belgium, Estonia, Finland, France, Germany, the Netherlands, Spain and the United Kingdom presented in this report:

- (1) scope of the sector footprint used to collect and organise the statistics;
- (2) year of the statistics collected, and sometimes the units used to count the data;
- (3) type of data, collected or not, in the different countries.

Despite these differences, there are also important similarities due to the use in all countries of an industrial classification in line with the European industry standard classification system.

Inside the different countries, data is also collected and analysed with the same aims: enhancing sector intelligence on employment trends, and translating this knowledge into relevant skills' development initiatives.

When presenting national statistics in the chapters below, it was decided to highlight only part of the data available in the different countries. References to all existing statistics are presented in the bibliography in annex II of the report.

C. A statistical 'snapshot' of the sector

The following pages present data on the audiovisual and live performance sectors in 8 EU countries: Belgium, Estonia, Finland, France, Germany, the Netherlands, Spain and the United Kingdom. First come the statistics for the audiovisual sector, followed by the statistics for the live performance sector.

The introductory tables present the total population and the total active population for each country, as well as the sector footprint and year of the statistics.

Different icons are used to ease the reading of the data:



Companies/Employers in the audiovisual sector



Companies/Employers in the live performance sector



Workers in the audiovisual and live performance sectors

CHAPTER 1: TRENDS IN EUROPE

AUDIOVISUAL SECTOR

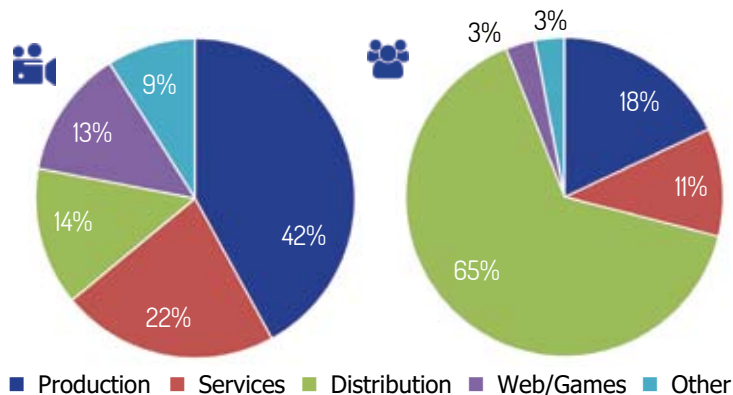
BELGIUM*

TOTAL POPULATION: 11,161,600
TOTAL WORKING ACTIVE POPULATION: 4,530,300**

Footprint	Film, TV, Video, Radio and Computer programming
Sources	Social security national office and company balance sheets
Unit (workers)	Full time equivalent
Not included	Independent/freelancers/interim
Year	2013

Companies/Employers: 773

Workers: 10,443

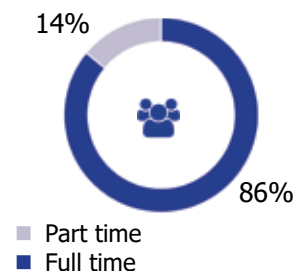
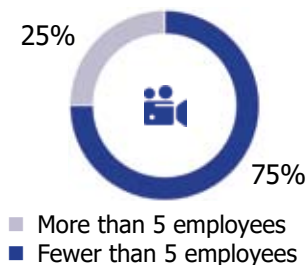


* Source: Le secteur audiovisuel – chiffres 2008-2013 – Marché de l'emploi, mediarte.be, Draft version as of May 2015

** The total population figures were taken from the Eurostat publication 'Key figures on Europe – 2014 edition'. The total working active population figures were taken from the Eurostat website (total employment – resident population concept – LFS).

*** VRT, RTBF, Medialaan (VMMa) and RTL Belgium

- ▶ 4 employers*** employ 52% of the workers
- ▶ 38% employers located in Brussels, 43% in Flanders and 19% in Wallonia
- ▶ 44% of the employees working for public broadcasters
- ▶ 64% of the employees based in Brussels, 28% in Flanders, 8% in Wallonia
- ▶ 17.8 % of the employees with artistic contracts in feature film subsector and 2.11% in audio-visual sector
- ▶ Average age of employees in AV sector: 36.5 years – Marked decrease after 40

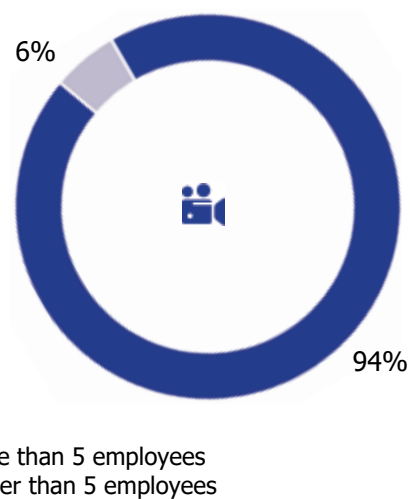
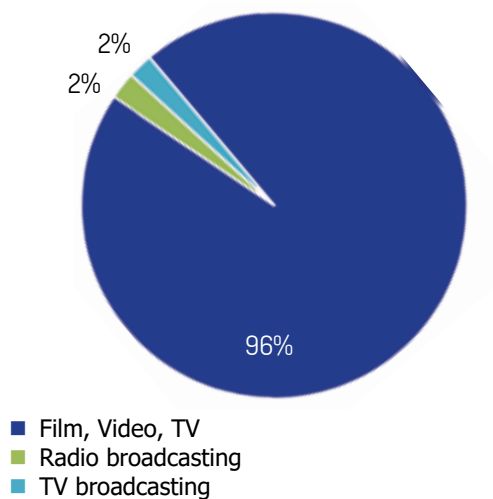


ESTONIA*

TOTAL POPULATION: 1,320,200
TOTAL WORKING ACTIVE POPULATION: 621,300

Footprint	Film, TV, Video, Radio
Sources	Statistics Estonia
Year	2013

Companies/Employers: 431



* Unpublished statistics provided by the Estonian Qualifications Authority (Kusekoda) – Source: Statistics Estonia

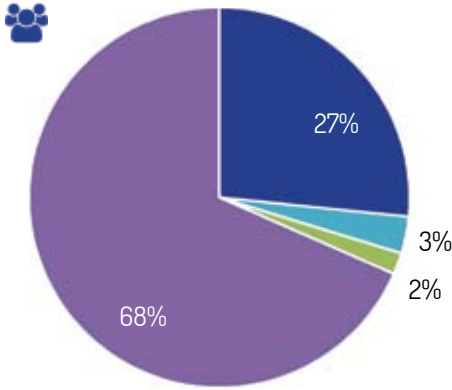
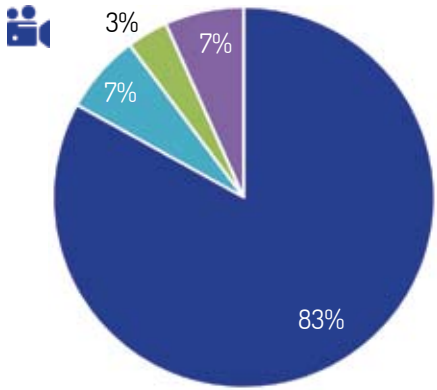
FINLAND*

TOTAL POPULATION: 5,426,700
TOTAL WORKING ACTIVE POPULATION: 2,456,700

Footprint	Film, TV, Video, Radio
Sources	Statistics Finland
Unit (workers)	Full time equivalent
Year	2010

Companies/Employers: 939

Workers: 7,207



■ Production ■ Postproduction ■ Distribution ■ Radio and TV broadcasting

* Source : Audiovisuaalisen alan tuottajakentän toimialakartoitus, Marianne Toiskallio & Minna Laukkanen, PREFIX, November 2013 (Survey on the production branch of the AV sector, in Finnish only)

FRANCE*

TOTAL POPULATION: 65,578,800

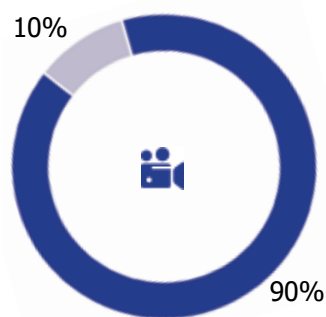
TOTAL WORKING ACTIVE POPULATION: 25,749,400

Footprint	Film, TV, Video, Postproduction, Radio
Sources	Social protection group (Audiens)
Unit (workers)	At least one hour in a contractual framework (any type)
Not included	Independent/freelancers
Year	2013

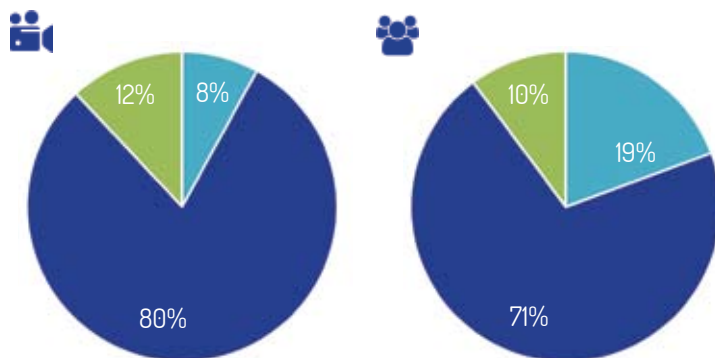
► 75% of the employers located in Île-de-France (Paris and its region)

Companies/Empl: 7,365

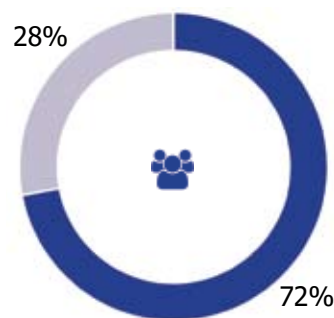
Workers: 246,163



■ Fewer than 250 employees
■ More than 250 employees



■ Production ■ Radio and TV broadcasting
■ Postproduction and other services



■ Permanent contracts
■ Intermittents

* Unpublished statistics from Audiens (2013)

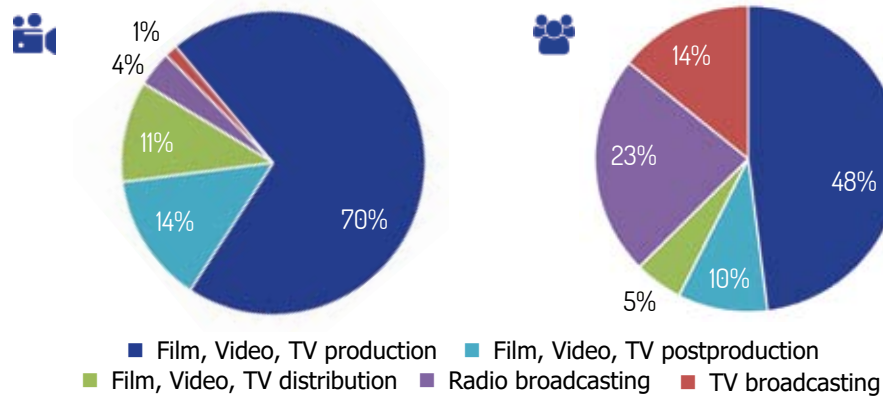
GERMANY*

TOTAL POPULATION: 80,523,700
 TOTAL WORKING ACTIVE POPULATION: 39,531,400

Footprint	Film, Video, TV, Radio
Sources	Federal Statistical Office and Federal Employment Agency
Year	2012

Companies/Employers: 6,712**

Workers: 57,926***



* Source: Monitoring of Selected Economic Key Data on the Culture and Creative Industries 2012, Federal Ministry for Economic Affairs and Energy, January 2014

** + 9,507 in category 'Own-account stage, motion picture, radio and TV artists, etc.' and 17,843 in category 'Own-account journalists and press photographers'

*** + 10,097 in category 'Own-account stage, motion picture, radio and TV artists, etc.' and 18,742 in category 'Own-account journalists and press photographers'

TRENDS AND SKILLS IN THE EUROPEAN AUDIOVISUAL AND LIVE PERFORMANCE SECTORS

NETHERLANDS*

TOTAL POPULATION: 16,779,600

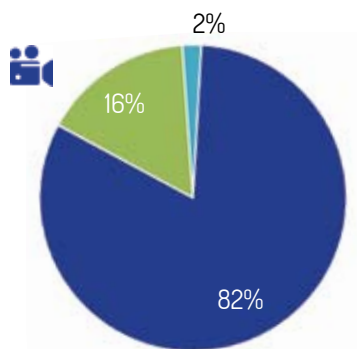
TOTAL WORKING ACTIVE POPULATION: 8,364,800

Footprint	Film, TV, Video, Radio, Sound recording and music publishing
Sources	Statistics Netherlands and GOC's own data
Unit (workers)	Full and part time jobs are treated equally, all types of contract
Year	2013

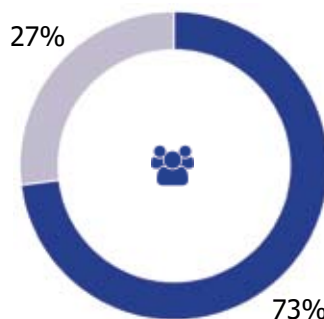
- ▶ 36% of the employers confirmed small growth, 22% a decline
- ▶ 49% of employers declared managing 'business as usual'

Companies/Employers: 13,210**

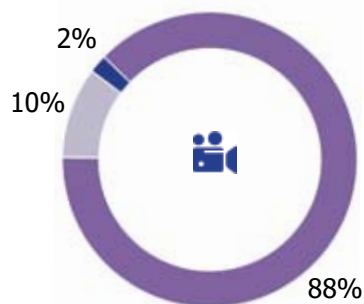
Workers: 26,000



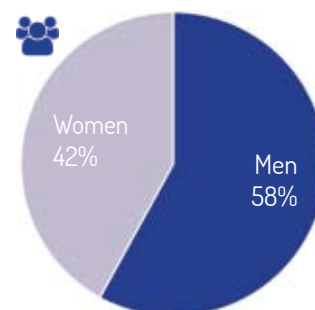
- Radio and TV broadcasting
- Film, TV, video prod. and distribution
- Prod. and distribution sound recording



- Other status
- Employees



- Fewer than 10 employees
- More than 10 employees
- One-man-business



* Unpublished statistics, provided by GOC

** In the Netherlands, 88.4% of the companies have been set up by self-employed entrepreneurs. Of the 13,210 companies registered under the codes Radio/TV broadcast and production, 11,675 therefore correspond to self-employment.

CHAPTER 1: TRENDS IN EUROPE

AUDIOVISUAL SECTOR

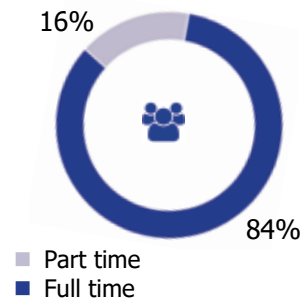
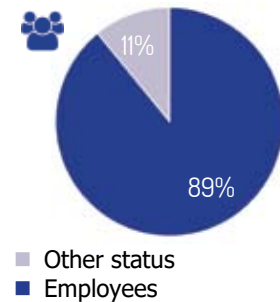
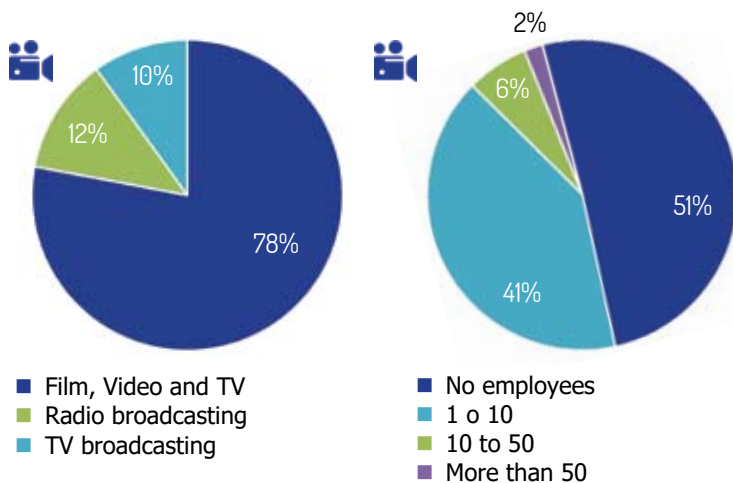
SPAIN*

TOTAL POPULATION: 46,727,900
TOTAL WORKING ACTIVE POPULATION: 17,139,000

Footprint	Film, Video, Radio, Television, Sound recording and Musical edition
Sources	Central Company Directory and National Statistical Plan
Year	2013

- ▶ 70.2% of employees have permanent contracts
- ▶ 59.7% are men, 40.3% are women
- ▶ 85.5% are aged between 25 and 54, 9.4% are over 55
- ▶ 73.2% have higher education or equivalent level of education

Companies/Employers: 8,894** Workers: 68,700



* Source: Anuario de Estadísticas Culturales 2014, prepared by the Sub-Directorate General of Statistics and Studies of the Technical General Secretariat, Ministry of Education, Culture and Sport, October 2014

** Total number only includes Film, Video, Radio and TV

UNITED KINGDOM*

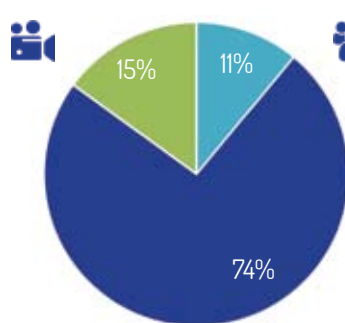
TOTAL POPULATION: 63,896,100

TOTAL WORKING ACTIVE POPULATION: 29,952,500

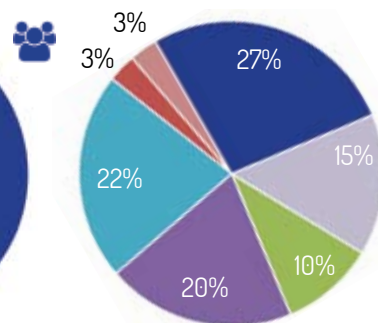
Footprint	Film, TV, Radio, Computer games
Sources	Office of National Statistics, Employment census**
Unit (workers)	Full and part time jobs are treated equally, all types of contract
Year	2012 and 2013

Companies/Empl.: 18,195

Workers: 202,400

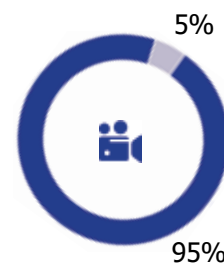


■ Production
■ Postproduction and production
■ Radio and TV broadcasting

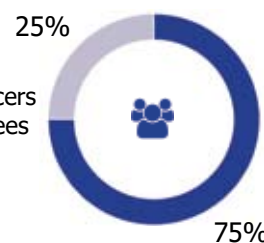


■ Television ■ Interactive media
■ Film ■ Animation
■ Radio ■ Computer games
■ Facilities

■ More than 10 employees
■ Fewer than 10 employees



■ Freelancers
■ Employees



* Source: 2012 Employment census of the Creative Media Industries, Creative Skillset, - 10,200 workers were added to the total numbers of the census (estimates of freelancers working in film)

** Diversity defined as 'Black, And Minority Ethnic groups' (BAME)

- ▶ 42% of the workforce based in London - 36% of workers are women (38% in 2006, declining to 27% in 2009)
- ▶ 29% of workers are aged under 30 years, 35% aged 30-40, 33% aged 40-60, 4% over 60
- ▶ Diversity**: 5.4% of the overall workforce is defined as 'diverse' (decrease of 2% since 2006)
- ▶ Disability: 5% of the overall workforce has declared a disability

CHAPTER 1: TRENDS IN EUROPE

LIVE PERFORMANCE SECTOR

BELGIUM* Flemish-speaking community

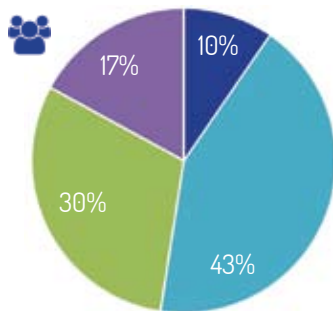
TOTAL POPULATION: 6,351,000
TOTAL WORKING ACTIVE POPULATION: 3,931,269

Footprint	Performing Arts (PA), Support to PA and Operation of arts facilities
Sources	Social security national office
Unit (workers)	Number of employees having worked at least one day
Not included	Independent/freelancers/interim
Year	2013/2014

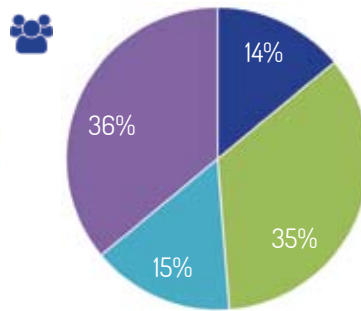
- ▶ 46.1% of workers younger than 34, 7.2% older than 55
- ▶ Average age for men = 38.78, women = 36.74
- ▶ 52.4% of men, 47.6% of women – Decrease of women representation after the age of 35
- ▶ 90.6% of non-artists and 75.1% of artists work for a single employer

Companies/Employers: 466

Workers: 5,691

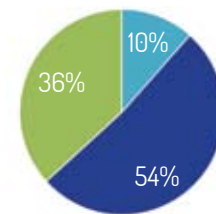


- Artists permanent contracts
- Artists temporary contracts
- Other professions perm. contracts
- Other professions temp. contracts

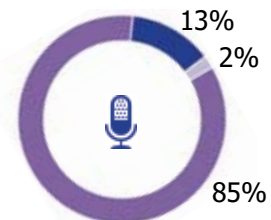


- Artists part time
- Artists full time
- Other professions part time
- Other professions full time

* Unpublished statistics, provided by SFP



- Performing arts
- Services to PA
- Operation arts facilities



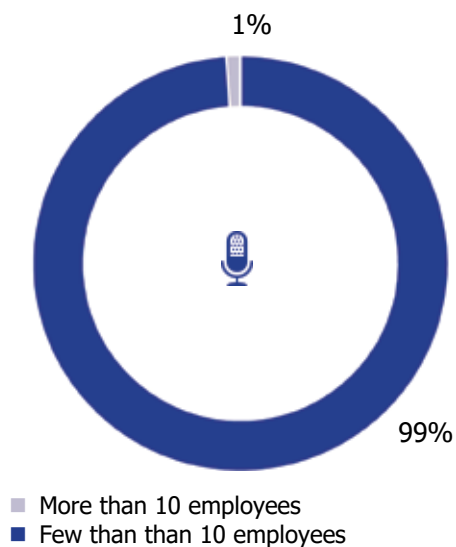
- Fewer than 5 employees
- Fewer than 50
- More than 250

ESTONIA*

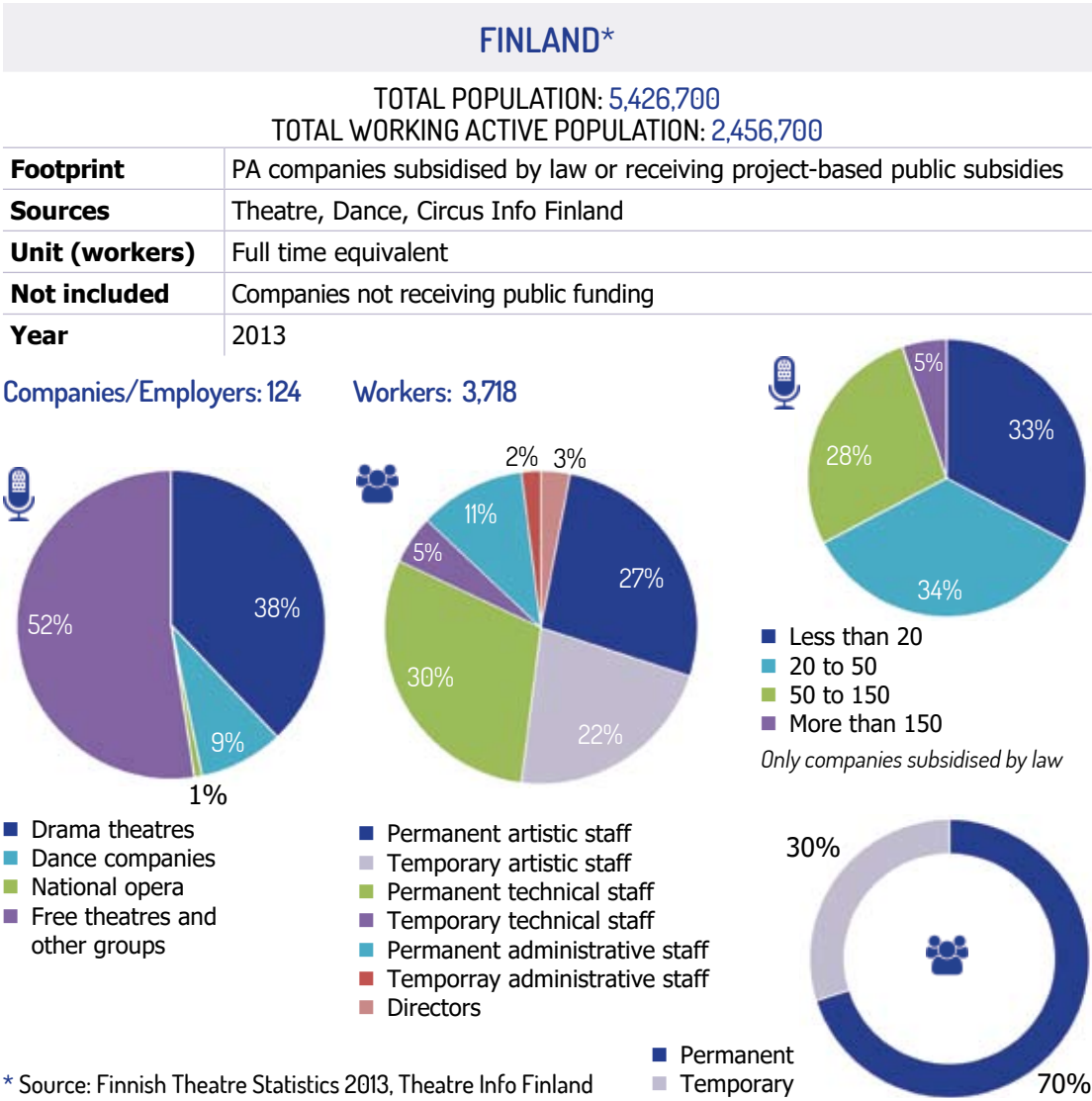
TOTAL POPULATION: 1,320,200
TOTAL WORKING ACTIVE POPULATION: 621,300

Footprint	Creative, arts and entertainment activities
Sources	Statistics Estonia
Year	2013

Companies/Employers: 641



* Unpublished statistics provided by the Estonian Qualifications Authority (Kusekoda) – Source: Statistics Estonia



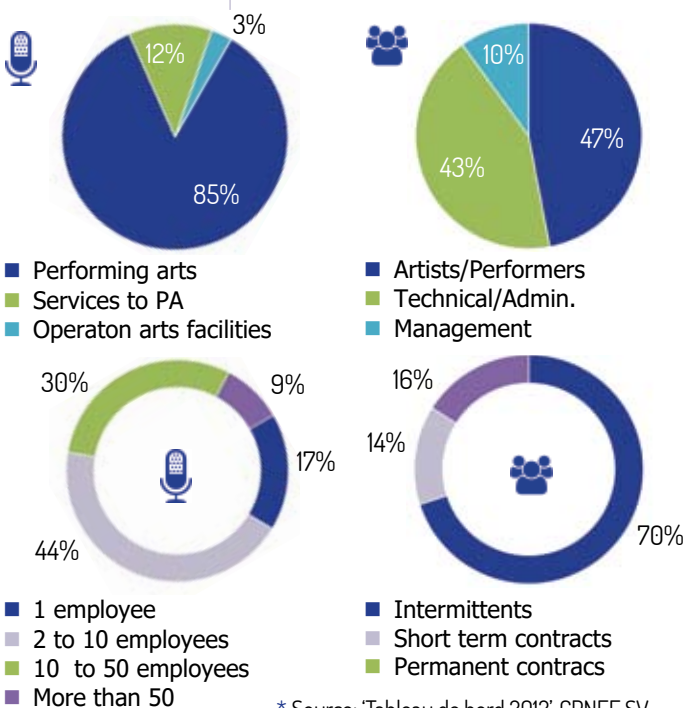
TRENDS AND SKILLS IN THE EUROPEAN AUDIOVISUAL AND LIVE PERFORMANCE SECTORS

FRANCE*

TOTAL POPULATION: 65,578,800

TOTAL WORKING ACTIVE POPULATION: 25,749,400

Footprint	Performing Arts (PA), Support to PA and Operation of arts facilities
Sources	Social protection group (Audiens) / National Institute of Statistics
Unit (workers)	At least 1 hour in a contractual framework, not incl.: independent/freelancers/ interim
Year	2012



* Source: 'Tableau de bord 2012', CPNEF SV

- An increase of 60% of the number of employers since 2000
- 13% of turnover / 30% located in the region Île de France (that represent 28% of the total workforce)
- €1,382 billion in total payroll
- 85,066 employers in other industrial classifications, which produce performing arts activities as a secondary occupation (main activity not in live performance sector)

Companies/Employers: 19,160
Workers: 190,263

- Increase of 31% of the workforce since 2000
- 62.4% men, 37.6% women
- 50% of the employees aged under 37 years
- 45% of the employees benefited from social rights (incl. unemployment benefits)
- 32% of the employees are working more than 500 hours per year (42% less than 100 hours per year)
- 55% of the employees have a multi-activity (more than one occupation), among them 47% outside live performance, 73% working for branch employers; 27% for employers outside the live performance branch

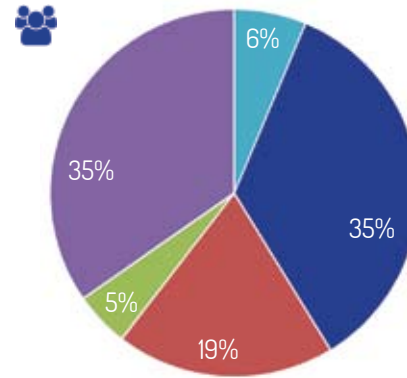
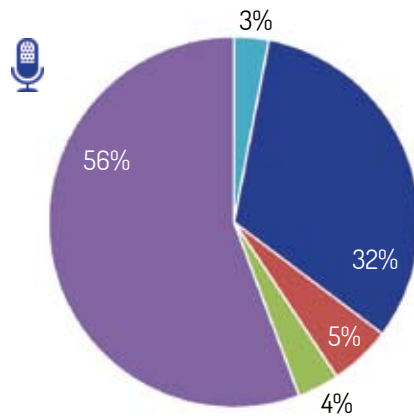
GERMANY*

TOTAL POPULATION: 80,523,700
 TOTAL WORKING ACTIVE POPULATION: 39,531,400

Footprint	Performing Arts (PA), Support to PA and Operation of arts facilities
Sources	Federal Statistical Office and Federal Employment Agency
Year	2012

Companies/Employers: 4,222**

Workers: 57,926***



- Theatre ensembles
- Organisation of theatre performances and concerts
- Operation of opera houses, theatre and concerts halls, etc.
- Operation of variety theatres and cabarets
- Support activities to performing arts

* Source: Monitoring of Selected Economic Key Data on the Culture and Creative Industries 2012', Federal Ministry for Economic Affairs and Energy, January 2014

** + 543 in category 'own-account performers and circus groups'

*** + 1,091 in category 'own-account performers and circus groups'

TRENDS AND SKILLS IN THE EUROPEAN AUDIOVISUAL AND LIVE PERFORMANCE SECTORS

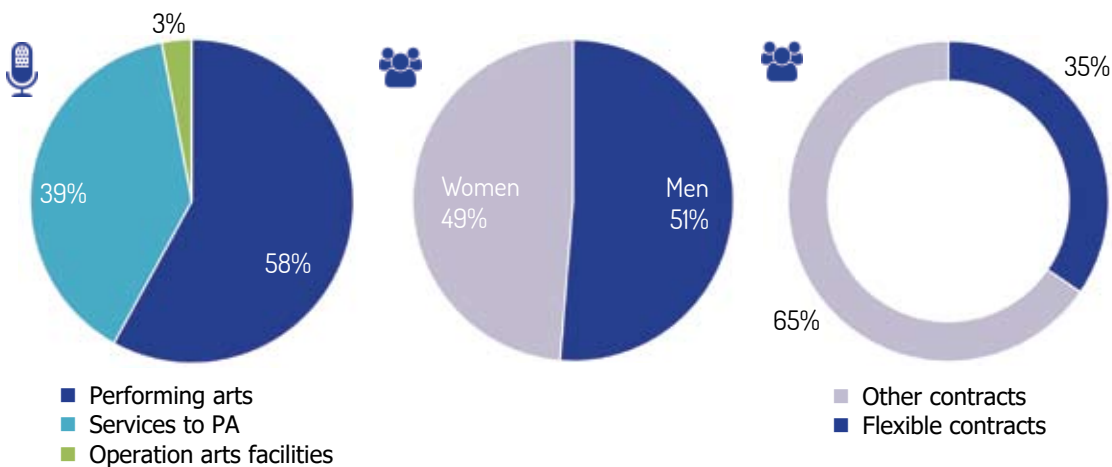
NETHERLANDS*

TOTAL POPULATION: 16,779,600
TOTAL WORKING ACTIVE POPULATION: 8,364,800

Footprint	Performing Arts (PA), Support to PA and Operation of arts facilities
Sources	Statistics Netherlands and GOC's own data
Unit (workers)	Full and part time jobs are treated equally
Year	2013

- ▶ Turnover: 50.65% stable, 24.6% light growth, 16.5% decline
- ▶ 45.45% slightly positive economic result

Companies/Employers: 4,745 Workers: 25,100



* Unpublished statistics, provided by GOC

CHAPTER 1: TRENDS IN EUROPE

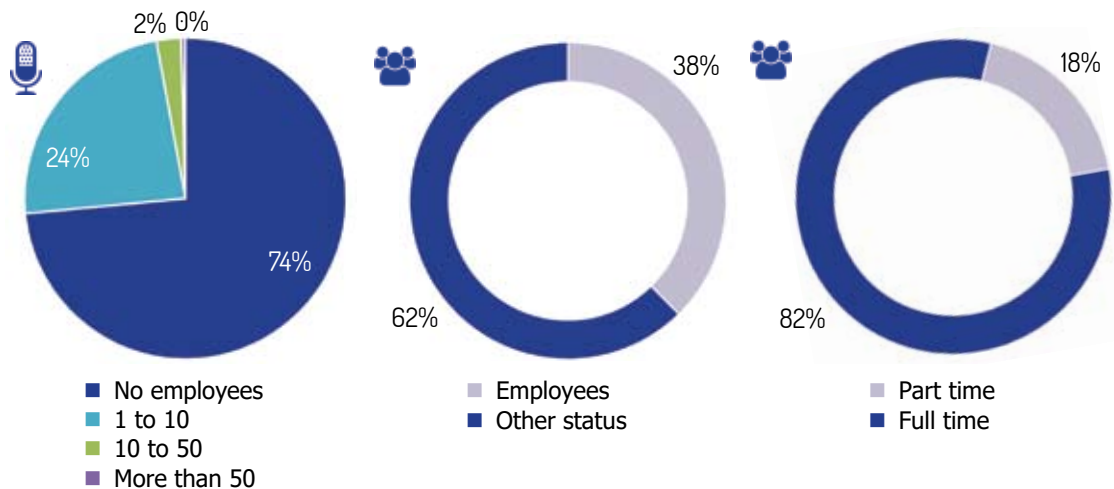
LIVE PERFORMANCE SECTOR

SPAIN*	
TOTAL POPULATION: 46,727,900	
TOTAL WORKING ACTIVE POPULATION: 17,139,000	
Footprint	Artistic creation and Performing Arts, Specialised design (included in employers/companies statistics), Photographic, translation and interpretation activities (included in companies/employers and workers statistics)
Sources	Central Company Directory and National Statistical Plan
Year	2013

- ▶ 66.6% of employees have permanent contracts
- ▶ 60.7% men, 39.3% women
- ▶ 83.3% aged between 25 and 54, 13.4% over 55
- ▶ 63.8% higher level education or equivalent

Companies/Empl.: 25,610**

Workers: 110 800



* Source: 'Anuario de Estadísticas Culturales 2014', prepared by the Sub-Directorate General of Statistics and Studies of the Technical General Secretariat, Ministry of Education, Culture and Sport, October 2014

** Total number only includes Performing Arts activities

UNITED KINGDOM*

TOTAL POPULATION: 63,896,100

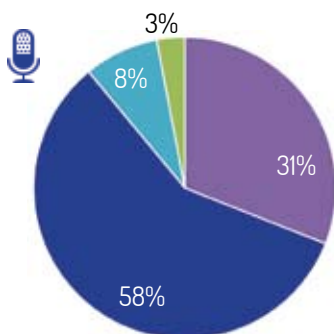
TOTAL WORKING ACTIVE POPULATION: 29,952,500

Footprint	Performing Arts (PA), Artistic creation, Support to PA, Operation of arts facilities <i>For workers' statistics: includes: PA education and excludes musicians</i>
Sources	Office for National Statistics
Unit (workers)	Full and part time jobs are treated equally
Year	2010/2011/2013

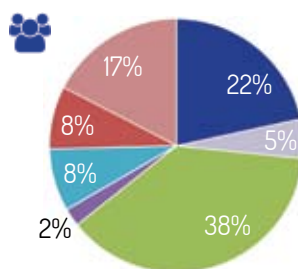
- ▶ 54.8% of the workforce is composed of freelancers
 - 43.9% women, 56.1% men
- ▶ 9% having a second job
 - 59% qualified to level 4 or above
- ▶ 85.1% in private sector
- ▶ Disability: 2.9% of total workforce - Diversity: 9.3% of total workforce
- ▶ 4.85% coming from another European country than the UK

Companies/Employers: 11,905**

Workers: 179,290



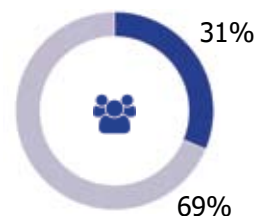
- Artistic creation
- Support activities to PA
- Operation of arts facilities
- Performing arts



- Actors/Entertainers
- Art facilities
- Arts officers/producers/directors
- Backstage
- Dancers/choreographers
- Performing arts education
- Other



- More than 10 workers
- Fewer than 10 workers



- Full time workers
- Part time workers

* Source: Creative & Cultural Skills Economic & Demographic Footprint 2012/13 – Subsector Performing Arts, unpublished

** 28,435 if also including the 16,530 individual artists, writers under the 'artistic creation category'

d. Preliminary conclusions

National bodies have used the expertise of their national sector stakeholders to carry out a qualitative analysis of the statistics at their disposal.

In France, for example, the live performance statistics are accompanied by commentaries that introduce and accompany the data. In the UK, Creative Skillset publishes a variety of reports and documents that complement and enrich the statistical data. Creative & Cultural Skills published its own document that takes stock of the existing statistics and literature, and summarises the main trends in employment and skills needs in the creative and cultural industries. In Belgium, the annual audiovisual statistics are presented in an extensive report that places the quantitative data into its national and sectoral context.

Based on the quantitative data collected, and also using the qualitative analyses of the statistics provided by the different partners, this report is a first attempt to aggregate labour market intelligence on the trends in employment and skills needs for the European audiovisual and live performance sectors. That is the basis for its operational conclusions.

Some of the conclusions presented below derive directly from the statistics collected (number of employers and employees and their characteristics, types of contracts, etc.) while other trends are observed from the qualitative analyses developed in the different countries. A complete bibliography of the sources used is available in Annex II of this report.

COMMON OBSERVATIONS: AUDIOVISUAL AND LIVE PERFORMANCE SECTORS

Although the audiovisual and live performance sectors have their own distinctive features, for example, in their economic operating models or the structure of occupations that compose them, many professionals move between the two sectors and a number of employment trends affect both of them in a similar way.

The audiovisual and live performance sectors each have a young workforce, are composed of a majority of small sized companies, count a large (and often increasing) number of professionals operating outside the 'employee status' (as freelancers, independent workers, self-employed, etc. or any other status as provided by the provisions of national labour law), and represent a relatively balanced workforce in terms of gender (even if significant imbalances still exist when looking at specific occupations or groups of occupations). Both sectors also have relatively dynamic markets that translate into a growing number of companies, but the growth in numbers is not necessarily followed by a similar linear growth in job creation.

AUDIOVISUAL SECTOR (AV)

In **Belgium**¹ the Audiovisual sector represents more than 10,000 workers employed by over 770 companies, 60% of them working in the private sector. Since 2008, the number of companies saw a strong increase (+18.56%) but the volume of employment remained fairly stable with a variation of only a couple of hundred posts per year. Of the 773 companies registered under Audiovisual codes in 2013 in Belgium, the majority are of very small size (75% have fewer than five employees). On the other side of the spectrum, the four biggest companies employ more than half of the workforce (as they are the largest public and private broadcasters). More than half of the employers are active in the production field.

¹ Information collected from Le secteur audiovisuel – chiffres 2013 – Marché de l'emploi, 2015, mediarte.be

CHAPTER 1: TRENDS IN EUROPE

In 2013 in **France** the Audiovisual sector counted 7,365 companies and more than 246,163 workers. The vast majority of these workers (72%) were employed under the 'intermittent' status (*contrat à durée déterminé d'usage*), short-term contracts for artistic occupations.

Both in Belgium and in France, a majority of companies are small- or micro-sized: in Belgium 75% have fewer than five workers and in France 90% have fewer than 250 employees.

As regards the gender balance in the audiovisual sector, most countries show a slight imbalance with a higher representation of men (60/40 in Belgium, 60/40 in France, 58/42 in the Netherlands). In the UK, the imbalance is stronger with 64% of men (but female representation has increased significantly in recent years, from 27% in 2009 to 36% in 2012 – the same positive trend has been identified in France). Representation of women in the UK is highest in certain occupations such as make-up and hairdressing (81%), costume and wardrobe (73%), legal affairs (56%) or business management (52%) but form fewer than half in every other occupational group.

The audiovisual sector is also a young sector, with a significant fall-off of workers after the age 40/45.

In the **Netherlands**, 88% of the companies registered under Audiovisual codes are one-person enterprises (self-employment). Only 1,535 of the remaining companies count more than two workers. Independent workers are therefore a very significant trend in the Dutch audiovisual sector.

Another trend identified by GOC, the Dutch equivalent to a sectoral skills council, is a demand for new skills, especially as regards the increasing overlap between the fields of information and communications technologies and the more traditional audiovisual sector. This demand is naturally fuelled by new technological developments, and also by the competition introduced by new players such as cable companies or streaming services that now take an active interest in content production. The decline of national companies focusing on a single media (print or television, for example) also means that workers need to master new skills (in web video for example).

In the **United Kingdom**², overall employment numbers in the audiovisual sector increased by 2% between 2009 and 2012 (while the increase was 1% in the rest of the UK economy). In 2012 the sector counted 192,200 workers, 24% of them freelancers. Freelancing is most prevalent in those areas most closely involved in the production process.

Within the audiovisual workforce, the single largest subsector is television followed by film. Business management, encompassing a wide range of generic business support areas such as corporate PR and marketing, finance, HR, IT etc. forms the largest occupational group. The next largest groups are involved in content creation – production and art and design. Strategic management, retail and exhibition are the next large-sized groups, both employing a combination of generic and industry specific skills.

As regards the supply side of the market, Creative Skillset, the UK sector skills council, regularly conducts research studies based on data supplied by the Higher Education Statistics Agency. Unpublished research counted up full time equivalent students registered for the 2011/12 academic year in courses relevant to the creative media sector. Results showed that there were 243,759 students studying Creative Skillset relevant courses (that is to say, almost 10% of the entire UK higher education students contingent that year). Numbers were also analysed by subject area, showing the larger numbers registered in computer studies, media studies and photography and cinematography³.

To develop a long-term view on the skills needs of the sector, Creative Skillset combines this student supply information with a number of other intelligence tools such as a future skills survey run by sector employers, or a forecasting instrument for the period 2012-2022. The projections of this forecasting tool show an increase of the employment volume of the media sector of 32.34% in the next ten years. Projections per occupation also give an idea of jobs

² Information collected from the two Creative Skillset publications: 2012 Employment census of the Creative Media Industries, and Creative Media Workforce Survey Report 2014

³ Mapping the Supply of Creative Skillset Relevant Students within Higher Education, Creative Skillset, March 2014

CHAPTER 1: TRENDS IN EUROPE

that will continue to be in demand in the coming years (such as Editorial, Journalism and Sport or Camera and Photography) and others that may decline (such as Broadcast management or Costume and Wardrobe).

In the Audiovisual sector, broadcasters still employ the larger workforce contingents but, in absolute numbers, most companies are active in the production field. The vast majority of companies are of very small size and self-employment is increasingly important in almost all countries. Surveys, reports and further sector consultations have demonstrated that the technological shift and the acquisition of digital skills remain key challenges for the development of the sector. The re-composition of the sector and the emergence of new players and occupations also have an immediate impact on the skillset required from audiovisual professionals. Those developments affect the initial training schemes, which need not only to adjust rapidly to such fast-paced change but also improve the lifelong training offer that should allow professionals to renew and/or broaden their skillsets when required in the course of their careers.

LIVE PERFORMANCE SECTOR (LP)

In the Dutch-speaking community of **Belgium**, there are 466 employers and almost 5,700 workers active in the Live Performance field. 85% of those companies count fewer than 10 employees and more than half of them are active in performing arts creation and production as such.

In **France**, 19,160 companies have the performing arts as their main activities. 63% of them have fewer than 10 employees and a large majority (85%) are also active in performing arts creation and production as such.

Since 2000, the number of French live performance companies increased by 60.6% accompanied by an increase in the workforce of 30.8%. 19,160 people worked in the live performance field in 2012, 73% of them with an intermittent status. 52% of them are artists or performers, 39% occupy technical or administrative positions and 9% management functions.

Like in Belgium, the French live performance workforce is young and experiences a significant fall-off after the age of 30-35.

As analysed by CPNEF SV, the French sector skills council, the live performance sector is still a very open labour market with supply greater than demand. The turnover of employees is also very high (around 40%, with an even higher level for women). Individuals face great challenges to enter the job market and to remain in it. Because of this competition, the annual average length of work is decreasing as also is the level of remuneration.

In France, another trend shows that work opportunities are increasingly fractured and workers become dependent on multi-activity. Workers have to develop a variety of competences next to their principal activity to reduce the risks around job scarcity and discontinuity. Complementary activities, chosen or imposed, within or outside the sector, are increasingly necessary.

As a response to this challenging employment context, professional training needs are increasingly important. Therefore there is an increasing take-up of qualifying training schemes. The impact of specialised training can vary however as it may sometimes accelerates career advancement but may also limit opportunities, especially outside the LP sector.

In 2012, 23 792 employees participated in ongoing training schemes in France (+5.8% compared to 2011), mostly in the LP technical and artistic field but also in cross-sectoral topics or other sector specialisations (29%).

In the **Netherlands**, the live performance sector counts 4,745 companies for 25,100 workers (35% of them with flexible contracts). 58% of the companies are active in PA creation and production activities. As witnessed by GOC, the skills resource centre for the creative sector, the budget cuts of the 2010-2012 period have not resulted in the disappearance of large parts of the sector as was feared but they have nonetheless brought about important changes in employment and skills needs patterns. Live performance companies and individual workers have had to develop their 'entrepreneurial skills' in order to identify new funding streams and diversify their activities (within and outside the sector). This environment has also created increased competition within the sector, making it more precarious both for workers and employers. As a result,

CHAPTER 1: TRENDS IN EUROPE

international opportunities have also become more important for the development of new activities.

In the United Kingdom, the live performance workforce consists of almost 180,000 people (54,8% self-employed). Most of them (60%) work as arts officers/directors or actors/entertainers. They work for very small companies as 94% of companies in this area are formed of fewer than 10 people. Since 2004, employment numbers have increased by 38%.

As highlighted by Creative & Cultural Skills' surveys, 34% of UK live performance employers who have tried to recruit within the performing arts sector have faced difficulties. For over half of those employers (53%), this was due to the fact that applicants lacked the experience to do the work, yet very few (only 7%) lacked the qualifications for the role. 38% of the performing arts businesses also perceive that there are skills gaps within their current workforces.

Qualifications in the live performance field seem therefore not to be always correctly tailored to the work, which is leading to a lack of job readiness for the live events sector. There is also a lack of quality careers information, advice and guidance related to live events backstage roles, as opposed to the large quantity of information that people receive about becoming performers, musicians and entertainers.

The Live Performance sector is composed of a large majority of small companies mostly active in the creation and production field. Highly dependent on public subsidies, the sector has suffered from the squeezed public funding and/or higher VAT rate that followed the 2008 crisis. More precarious work opportunities, such as shorter contracts or the increase of freelancing have also been observed over the last few years. In parallel, as live performance occupations remain highly attractive, the competition within the sector remains very high with job demand exceeding supply. The 'multi-activity' of workers is therefore more and more important (within the sector or combined with activities in other sectors). As revealed in an employers' survey in the UK, a lack of skilled professionals is also an issue in the Live Performance sector (as qualifications do not always match the workplace needs). To increase the security of professional career paths, and provide a skilled workforce in all types of Live Performance occupations (artistic, technical, administrative), it is important to have the right initial and lifelong training schemes.



CHAPTER 2

SKILLS FOR TOMORROW

To identify the key trends at work in the audiovisual and live performance sectors, and understand their impact in terms of current and future skills needs, it is important to collect data on how the sector is evolving, but this will not cover every aspect. Some developments are impossible to capture in dry numbers and statistics, and so demand deeper analysis and discussion.

In order to understand the present and anticipate the future, the Creative Skills Europe's initiative gathered and reviewed a number of qualitative surveys and studies of new developments in the sector published in different EU countries. It then opened discussions on key trends with more than 100 sector representatives at different meetings organised around Europe. The results are presented below.

a. Qualitative analyses of the sectors: source literature survey

Qualitative analyses have been produced at both national and European level on the new developments affecting the audiovisual and live performance sector's operating environments, and their impact on skills needs.

At national level, the focus of our report is on publications from France and the United Kingdom. This is not only because the languages are more accessible but also because in those two countries the sector has created sophisticated skills organisations, steered by social partners and supported by national strategic policy, that have already been developing qualitative analyses of skills trends for a number of years. While similar analyses are being developed in other national contexts, they are not always formalised and/or published.

In France, both sector skills councils (the CPNEF AV for the audiovisual sector and the CPNEF SV for the live performance sector) publish thematic analyses on their sector via their respective 'Prospective Observatories of Occupations and Qualifications'.

In the audiovisual field, the focus has been directed on a number of sector occupations (sound¹, direction², journalism³) and on specific technological developments that have affected the sector in recent years (such as the shift to high definition, HD⁴).

Through those qualitative surveys and studies, the drivers of change have been identified and analysed, and recommendations put forward to help the sector better manage transitions and equip its workforce for the future.

Although not produced by the sector skills council but nevertheless touching upon horizontal issues for the audiovisual sector, a report commissioned by the Ministry of Culture and Communication was published in 2015 in France⁵. Looking at the consequences of the digital era on the printed press sector, this report develops an interesting analysis of the new media multiplatform environment and draws conclusions that are also relevant for the audiovisual sector.

In the live performance field, a 2012 thematic study considered the relationship between employment and training⁶, and put forward some conclusions on privileged pathways to employment.

1 Etude sur les métiers du son dans l'audiovisuel (*study on the sound occupations in the audiovisual sector*) – Survey of 32 companies in the radio, television, AV production, film, technical industries, events and multimedia fields, Observatoire des métiers de l'audiovisuel, June– September 2007

2 Etude sur les métiers de la réalisation – réalisateur, assistant réalisateur, scripte (*study on production occupations – director, assistant director, script supervisor*), Observatoire des métiers de l'audiovisuel, 2010–2011

3 Etude sur l'évolution des activités des journalistes dans le cadre des nouveaux médias et les réponses en matière de formation (*study of the evolution of journalists' activities in the context of new media and the answers in terms of training*), Observatoire des métiers de l'audiovisuel, January 2014

4 Etude sur l'impact du cinéma numérique et de la HD sur les qualifications, les compétences et les emplois (*study on the impact of digital cinema and HD on qualifications, competences and jobs*), Observatoire des métiers de l'audiovisuel

5 Presse et numérique – L'invention d'un nouvel écosystème (*print and digital media – the invention of a new ecosystem*), Jean-Marie Charon, June 2015

6 Etude sur la relation formation / emploi dans le spectacle vivant (*study on the training/employment relationship in the live performance sector*), Centre d'études et de recherches sur les qualifications, publiée par l'Observatoire Prospectif des Métiers et des Qualifications du Spectacle Vivant, March 2012

CHAPTER 2: SKILLS FOR TOMORROW

In 2015, another ambitious publication offers a comparative analysis of the employment and training situation of the live performance sector in France (1997-2014), and proposes a new roadmap for developing the sector's professional training in the mid/long term⁷.

Since 2006, the CPNEF-SV has also produced a guide to artistic, technical and administrative occupations, which describes the sector's most emblematic occupations in terms of missions, context, activities and competences.

In the United Kingdom, the two sector skills councils covering the audiovisual and live performance sectors, 'Creative Skillset' and 'Creative & Cultural Skills', published, either separately or together, a wealth of interesting documents on the evolution of skills needs and occupations. A large majority of those publications are based on employment and workforce surveys linked to consultations of stakeholders, which provide a solid foundation for the analyses developed.

The two key joint publications of the skills councils in terms of anticipating skills needs are the 'Sector skills assessment for the creative industries of the UK'⁸ published in January 2011, and the 'Briefing paper'⁹ prepared for the UK Commission for Employment and Skills in October 2012. In these documents the sector skills councils presented a comprehensive picture of the sector and of its developments in the past few years, before analysing the main drivers of change and their key implications in terms of current and future skills needs.

⁷ Actualisation du contrat d'études prospectives du spectacle vivant - Diagnostic comparé de la situation de l'emploi et de la formation professionnelle 1997 -2014 et nouvelles recommandations (*Update of the contract of prospective studies of the live performance sector - Compared diagnosis of the employment and professional training of the sector 1997-2014 and new recommendations*), Observatoire Prospectif des Métiers et des Qualifications du Spectacle Vivant, CPNEF SV, September 2015

⁸ 'Sector Skills Assessment for the Creative Industries of the UK', Creative Skillset and Creative & Cultural Skills. January 2011

⁹ Creative Media and Entertainment: Sector Skills Assessment 2012, Briefing paper, Creative Skillset and Creative & Cultural Skills, UK Commission for Employment and Skills

In 2013¹⁰ and 2015¹¹, Creative & Cultural Skills published complementary papers looking at available literature and case studies at national level in order to enhance their anticipation of future skills needs in the creative and cultural sectors. These publications give very interesting insights into some of the trends that particularly affect the live performance sector.

Further reflections on skills developments and skills needs in the audiovisual and other creative sectors were developed in the following Creative Skillset's publications: 'Creativity and constraint: leadership and management in the UK creative industries' (2015)¹², 'The Creative Media Workforce Survey'¹³ (2014), the 'Film Employer Panel'¹⁴ (2014) and 'Fusion skills: Perspectives and Good Practice'¹⁵ (2013).

Two studies¹⁶ published in 2014 and 2015 by a group of cultural organisations and the UK Commission for Employment and Skills¹⁷ shed light on the digital environment and on the digital skills that are increasingly needed in that sector.

In parallel to the body of work developed within different Member States, **sector-specific projects also emerged at European level** on the initiatives of different funding streams that promote the development of European-level cooperation in the field of higher education and vocational training. This report also takes stock of the important work done in this context.

¹⁰ Building a Creative Nation: Evidence Review, Creative & Cultural Skills, 2013

¹¹ Building a Creative Nation: The Next decade - What the current literature tells us about the future skills needs of the creative and cultural industries, Creative & Cultural Skills, February 2015

¹² 'Creativity and constraint: leadership and management in the UK creative industries' (2015), by Dr. Amy Armstrong & Natasha Page, Creative Skillset & Ashridge Business School

¹³ The Creative Media Workforce Survey 2014 Summary Report, Creative Skillset

¹⁴ Film Employment Panel, Creative Skillset, March 2014

¹⁵ Fusion skills: Perspectives and Good Practice, Creative Skillset, July 2013

¹⁶ Digital Culture 2014: How arts and culture organisations in England use technology, Arts Council England, Arts & Humanities Research Council and Nesta

¹⁷ Sector insights: skills and performance challenges in the digital and creative sector, UK Commission for Employment and Skills, June 2015

CHAPTER 2: SKILLS FOR TOMORROW

An interesting and comprehensive initiative was implemented in the field of live performance technical occupations. In the last ten years a number of projects were initiated, knitting a strong network of educational and professional partners right across Europe. Three key projects can be highlighted in this context together with their main publications: 'Réflexions sur la formation aux métiers techniques du spectacle'¹⁸ (FIRCTE 3, April 2006), 'D'une photographie de l'emploi à la recherche de formation'¹⁹ (Leonardo - the Best, 2007) and 'Methodological guide'²⁰ of the project CAPES-SV (Capitalisation of Learning Outcomes in Europe's Live Performance Arts, November 2011).

In 2009, in the context of the Pearle*/EURO MEI Training Forum, a report was also commissioned from two sector experts on 'theatre technical training in the EU'²¹. This report reviews the European and national contexts of theatrical technical training, and puts forward some recommendations on the way forward for further European co-operation and mobility.

In the field of education in journalism, a project was developed by a partnership of European educational institutions. Entitled 'Integrated Journalism in Europe', this lifelong learning project reflects upon the changes in the global media sphere and on the necessary adjustments in relevant education curricula. One of the project outputs was of particular interest in the context of our literature review: the 'Recommendations on Journalism education - A comparative report based on the French, Spanish, Danish, Romanian and Swedish cases'²² published in 2014.

¹⁸ Réflexions sur la formation aux métiers techniques du spectacle (*Reflections on training in the technical occupations of the live performance sector*), Project FIRCTE3 (Formation initiale et reconnaissance de compétences des techniciens du spectacle vivant), April 2006

¹⁹ 'D'une photographie de l'emploi à la recherche de formation...' (*From a snapshot of the employment situation to the search for training...*), Leonardo - the Best Project, research and interviews led by the social partners F3C-CFDT (France) and FISTEL-CISL (Italy), 2007

²⁰ CAPE-SV: Methodological guide / Guide to CAPE-SV methodology and applications. Project Capitalization of Learning Outcomes in Europe Live's Performing Arts, November 2011

²¹ A report on theatre technical training in EU 1998 - 2008, by Umberto Bellodi (Accademia Teatro alla Scala) and Chris Van Goethem (Tead vzw), PEARLE* EURO-MEI Training Forum 2009

²² Recommendations on Journalism education - A comparative report based on the French, Spanish, Danish, Romanian and Swedish cases, IJIE Integrated Journalism in Europe project, February 2014

Another ambitious programme aims to develop a 'European Sectoral Qualification Framework (SQF) for the Creative and Performing Disciplines and the Humanities'. Developed under the umbrella of the Tuning project (TUNING Educational Structures in Europe) and implemented in partnership by a variety of educational institutions and networks (including ELIA and AEC for the dance, theatre and music sectors), it produced a number of interesting outputs including, in addition to the SQF itself²³, 'tuning documents' (on dance, film, theatre education among others).

Polifonia, 'The Erasmus Network for Music 2011-2014', studied various issues related to professional music training at European level. It involved 55 institutions across Europe and beyond and was jointly coordinated by the Koninklijk Conservatorium Den Haag and the European Association of Conservatoires (AEC). Many relevant topics for our research have been worked on in the course of this project, including 'education for entrepreneurship' and the promotion of mobility through 'recognition, monitoring and joint degrees'.

The European Federation of Professional Circus Schools (FEDEC) ran a project aimed at analysing the key skills needed by young professional circus artists²⁴. Based on surveys of employers and young graduates, its key conclusions and recommendations are also integrated into our report.

Finally, in the context of its 'Digital Agenda for Europe', the European Commission has since March 2013 been steering a multi-stakeholder partnership (The Grand Coalition for Digital Jobs), which looks at promoting the emergence of skilled digital technology experts. It also aims to strengthen the digital skills of the entire European workforce in a more horizontal manner.

²³ Towards a European SQF for the Creative and Performing Disciplines and the Humanities, Tuning Project 2012, Universidad de Deusto, Bilbao and University of Groningen

²⁴ Analysis of key skills of young professional circus artists, Miroir Project part 2

b. Key trends affecting the sector

Most of the literature reviewed for this report has the aim of improving the understanding of the operating environments of the live performance and audiovisual sectors, and also adapting the skills of sector professionals to enhance their employability and further the sector's development.

To enable a deep understanding of the sector environment, there is of course the need to anticipate not just current needs but also future needs, and to put in place the necessary training schemes for preparing the workforce for these changes.

Trends exercising a high impact include the 2008 economic downturn, globalisation and the new digital environment. Together they impacted the whole spectrum of the European economy, but hit the cultural and creative sectors with particular force. While many people view the consequences of such trends as mostly negative, with unfair schemes that need to be corrected and some destructive changes to be resisted, others recommend that advantage be taken of this new reality and that new technological opportunities and original business models should be tried out and tested. The path of long-term sustainability most probably lies in between those two positions, permitting the invention of new models but also preserving the gains that made the sector strong and successful up to this day.

In the following pages, some key drivers of change have been identified and their consequences analysed for their importance in terms of skills needs in both sectors, audiovisual and live performance. Indeed these drivers of change affect the sectors horizontally in the same way as they influence other segments of the economy. It is, however, important to keep in mind that although the audiovisual and live performance sectors share a number of common features and see many professionals navigate between them, they also present important operational differences. Each sector is made up of subsectors that sometimes require – after the establishment of a shared prognosis – specific measures adapted to their particular technical and/or artistic needs. A balance between shared concerns and specific solutions will be the guiding principle of the following pages.

To establish and select the main drivers of change studied below, the literature review was used to double-check and complete the conclusions of Chapter 1 above, dedicated to the collection of employment statistics. Other drivers of change were then added to the mix, as identified in the surveys, studies and qualitative analyses published in different countries and at EU level.

In Chapter 1 we made several observations based on statistical evidence:

- the sector is composed of a variety of functions – artistic, technical, administrative – and activities – creation, production, distribution, etc. All are interlinked, but often require adjusted support schemes;
- the sector is growing, but without any direct parallel impact on the quantity or quality of jobs;
- the sector is mostly composed of small to very small companies;
- self-employment (or other forms of independent work depending of the national legal context) is already extremely prevalent and is expanding at a very fast pace.

Coupled with those statistical observations, some particular characteristics of the audiovisual and live performance fields also weigh heavily on the employment situation in the sector:

- in many cases, work is organised on a 'project basis'; this affects the employment opportunities and management models available to professionals;
- the employment demand (number of graduates) is, in most occupations, largely higher than the employment offer (because of the high attractiveness of the sector for young people, the low level of professional regulation, and the massive increase in the training offer in recent years);
- recruitment pathways remain largely informal and a professional recommendation is a candidate's most valorised asset;
- many professionals find they have to develop an extended skillset, over the course of their careers, either within their original sector (performer and writer, performer and teacher, technician in the sound and light fields, etc.) or outside the arts field - in order to ensure their income streams in between projects;
- the careers of some professionals (performers, technicians) are interrupted by physical and health issues, thus requiring re-conversion options to be implemented early in the career²⁵.

²⁵ Réflexions sur la formation aux métiers techniques du spectacle, Project FIRCTE3, April 2006, pp. 6-13

CHAPTER 2: SKILLS FOR TOMORROW

Finally external factors can and do play an important role, affecting both the prospects for development in the audiovisual and live performance sector and its current operating environment and work conditions.

Following the economic downturn, cuts in public funding have slashed the economic models of many subsidised operators, leading in turn to a slowdown of activities and the need to find new revenue streams. The economic downturn has also caused work opportunities to become even more vulnerable than those previously on offer, with an increase in self-employment forced by reduced resources and growing budget insecurity on the side of employers.

The new digital environment has also strongly impacted the sector. Some subsectors have had to adapt more rapidly than others, but all must ultimately operate in completely new environments. The digital environment has also offered a renewed importance to the cultural and creative sectors, placing them at the heart of content creation and using their innovative capacities to develop new tools and applications.

Globalisation has led to the opening up of new markets, but has also brought with it increased competition between workers and companies²⁶.

The combination of sector-specific features with the state of its employment market and the impact of external drivers of change (such as the digital shift, the economic crisis and globalisation) have all led to a new operating environment that demands specific sets of skills needed to help the sector adapt and respond to new realities.

THE DIGITAL ENVIRONMENT

Since the end of the 1990s, the digital world has taken over our personal and professional lives, and modified, at a more or less rapid pace, the operation of most economic sectors. Some subsectors of the cultural and creative economy have been more rapidly and dramatically affected than others, namely the media, publishing, and the music and film sectors. Over time,

²⁶ Building a Creative Nation: The Next decade – What the current literature tells us about the future skills needs of the creative and cultural industries, Creative & Cultural Skills, February 2015, p. 6

the consequences have been felt on all subsectors of the creative and cultural industries, driving a need for rapid adjustment to this new environment. The most important aspect of this new reality that has to be addressed by cultural and creative stakeholders has most certainly been the multiplatform environment. This not only requires new maintenance skills but also new creation and production skills for the development of platform-specific content.

This multiplatform presence has the most obvious impact on audiovisual stakeholders, who nowadays have to be present on line in addition to their traditional media. The digital environment has also become a new tool for a large number of live performance operators now using new technologies to reach out to new audiences and open up new creative horizons.

On top of content-related trends, the digital shift has also created a demand for new skills, sometimes purely digital (the management of cyber security, mobile and cloud computing; big data and analytics; new applications of social media, etc.) and sometimes skills of another kind but also directly linked to the new digital environment (strategic visions for the development of new business models, the setting up of collaborative platforms, the management of intellectual property rights, etc.).

Those developments have had a great impact on almost all technical and support occupations in the audiovisual sector and is also starting to affect, at an increasing rate, the operations of the live performance sector, as was illustrated in a recent UK study. The findings of this study show that UK arts and cultural operators increasingly use and recognise the importance of new technologies in their marketing, distribution, and revenue generation schemes²⁷. While smaller operators and performing arts companies show a lower take-up of digital tools²⁸, digitalisation seems to be a one-way trend that will only increase in the years to come.

The digital shift has gone hand in hand with other continuous technological developments with which certain technology-dependent sectors (such as the live performance and audiovisual

²⁷ Digital Culture 2014: How arts and culture organisations in England use technology, Arts Council England, Arts & Humanities Research Council and Nesta, 2014, p. 6

²⁸ Op. cit., Fact sheets Performing groups and Arts centres

CHAPTER 2: SKILLS FOR TOMORROW

sectors) have had to keep pace. With the digital shift, however, and other parallel technology developments (such as the extended use of HD), the pace of change has become faster and faster.

While the digital shift has prompted audiovisual and live performance stakeholders to acquire new skills to design, manage and maintain new technological tools, it has also opened up new perspectives to creators and innovators. Although it functions within a completely new operational framework, the digital environment still relies upon the production of content that is original and of good quality. It is also constantly seeking new innovations to accompany and sometimes precede technological developments and the new horizons it offers. This means for the audiovisual and live performance sectors that it is not enough merely to keep skillsets up to date in order to adapt to the digital environment. There has to be investment in the right new skills to enable audiovisual and live performance professionals to fully engage in and help shape the digital environment, if we are to ensure the dynamism and quality of the digital world for the mid- and the long-term.

THE ECONOMIC CONTEXT AND THE SEARCH FOR NEW BUSINESS MODELS

Another major driver of change in the audiovisual and live performance sectors has been the fallout from the financial crisis and the impact it had on the sector as a whole and their associated labour markets. Over the past decade, organisations and individuals working in these sectors have had to adapt simultaneously to both the digital environment and a new economic context, leading in most cases to completely new modes of management and business models. Project-based work and self-employment have always featured in the audiovisual and live performance landscape, and both have seen rapid growth during recent years, already before the 2008 crisis but even more dramatically since then. This trend is clearly illustrated in the data presented in this report's first chapter.

For a large majority of professionals in the creative and cultural sectors, employment opportunities, already fragmented and irregular, have become even more precarious since the crisis. This has pushed professionals to diversify their activities within the sector or in other sectors.

Reductions in public funding and the need to adopt new business models have also encouraged employers (and a growing number of one-man businesses) to develop their own fundraising and business skills in order to give more chances to their business to keep developing in the years to come.

Both trends – the digital environment and the challenging economic context – have therefore influenced the economic choices and employment frameworks of the sector. They have led to the emergence of new horizontal skills needs related to the funding, management and organisation of the audiovisual and live performance activities.

Some other important trends, although not particularly mentioned in the literature reviewed for preparing this report, will be affecting the European audiovisual and live performance sectors for many years to come. They will have to be considered, not only because of their social and economic impacts, but also because of the new skills that will have to be developed to meet the new demand.

The most obvious example is the 'green revolution'. This requires the development of pertinent skills to ensure that productions are 'greener' in the audiovisual and live performance sectors too. The impact of the flow of new migrants into the European employment markets will also have to be understood and addressed, to make sure that the skills offered by the new entrants are used optimally, and to offer the right training schemes for workers needing to update or renew their skills set.

C. The impact on occupations

The digital environment and the economic context exercise a horizontal impact on all activities in the audiovisual and live performance sectors. Some occupations are of course more impacted than others.

What might be regarded as the DNA of the specific characteristics at the heart of the audiovisual and live performance sectors is, of course, the **'creators and performers'** category, or more

CHAPTER 2: SKILLS FOR TOMORROW

generally, the 'artistic occupations' (which also include all the technical occupations that are part and parcel of the artistic functions contributing to the finally produced work). Although performers, in their basic skillsets, may not experience the direct impact of the key trends we have identified, it is still essential for them to acquire new knowledge and skills so that they will be able to operate in the new environment.

For live performers, the digital shift offers new creation and distribution opportunities and is a powerful channel for reaching out to new audiences and supporters. For audiovisual performers (who are often also active in the live performance field) the digital environment represents a new reality with challenges and opportunities that have to be understood and navigated in order to build their careers.

For other categories of 'creators' (cinematographers, cinema and live performance technicians, etc) the digital shift has also deeply transformed their operating environments and also the way their works are distributed (live streaming, high-definition, Internet channels, etc). Although many people are convinced that the creation process remains unchanged, creators still need to understand and adjust to the new environment and adapt their skills sets to new technologies, in order to take full advantage of the new opportunities.

Another major trend impacting the artistic category of occupations is the increase in numbers of the self-employed.

More and more often during their careers, performers and creators, as well as technicians and certain other project-based workers, will find themselves having to earn money outside their traditional employment relationships, and this pushes them to develop new skills. They not only have to understand the rules for being self-employed, and for finding work in a competitive marketplace, but also have to acquire administrative, management and communications skills, skills that are often quite foreign to their initial training.

The reality of this situation is reflected in a combined survey of employers and young graduates in the circus field. This study has shown that even if '*technical knowledge, artistic competence and the capacity to adapt to new environments*' were considered as being acquired and

mastered by the students at the time of leaving their professional circus schools, the competence that they lack most acutely at that moment is the capacity to face up to diverse employment conditions and the harsh realities of the employment market²⁹.

Journalists have been strongly affected by the digital shift. Working at the heart of the transformed media environment, they have had to adapt to new working methods both in the way information is collected (monitoring of the Internet, fact-checking, crowdsourcing, etc.) and in the way that the communication channels operate to reach out to audiences (multi-media platforms, management of commentaries, infography, etc.)³⁰.

In addition to the arrival in the media world of professionals and ITC experts with new jobs that have rarely been heard of before, and on top of the emergence of new specialist profiles (in data journalism, news games, web-documentaries, etc.), journalists have found they have even had to reconstruct their roles. 'Convergent newsrooms' now produce content for several media platforms and journalists are increasingly asked to contribute to all of them ('traditional' platforms such as television or radio, and also digital ones such as websites and mobile applications).

This demand for new competences combined with the tightening of finance often puts editorial teams under pressure, and questions were posed about the level of multiskilling journalists should be expected to reach without putting at risk their core competences of investigation and story telling³¹.

Technical jobs in the audiovisual and live performance sectors are also deeply impacted by new digital and technological developments, and also by economic pressures affecting their operating environments.

²⁹ Analysis of key skills of young professional circus artists, Miroir Project part 2, FEDEC, December 2009, p. 22, 29 and p. 31

³⁰ Etude sur l'évolution des activités des journalistes dans le cadre des nouveaux médias et les réponses en matière de formation, Observatoire des métiers de l'audiovisuel, January 2014, p. 31

³¹ Presse et numérique - L'invention d'un nouvel écosystème (*print and digital media - the invention of a new ecosystem*), Jean-Marie Charon, June 2015, p. 25

CHAPTER 2: SKILLS FOR TOMORROW

Professionals are increasingly asked to carry out a variety of technical operations that go beyond the scope of their original training. Because of the digital shift and the increasingly easy use of some technologies, a number of specialised professional jobs are disappearing, being replaced by positions with multiskilled profiles.

While some occupations have retained their *raison d'être* (mostly those concerned with the artistic/technical dimension of the production, the activities of which could be transposed into the new digital environment), other professions directly linked to the older generation of technologies have disappeared, ceding place to new emerging occupations (for example, those linked to digital archiving or postproduction³²).

Administrative and management roles have also had to adjust to the new digitised environment. In the audiovisual sector, new business models have had to be invented to counteract lost advertising revenues and to address the 'free access to information' model that has become prominent in the online world³³.

In the live performance sector, the digital environment has created new obligations (maintaining a website, developing online marketing tools) and also new opportunities for gaining a better understanding of and connecting with their audiences³⁴.

To anticipate change, administrators and managers have to integrate their work into the new digital reality and strategically prepare for the next steps linked to further technological developments and increased international competition. For many, leadership now needs to be combined with creativity, innovation and the understanding of technology.

³² Etude sur l'impact du cinéma numérique et de la HD sur les qualifications, les compétences et les emplois (*study on the impact of digital cinema and HD on qualifications, skills and jobs*), Observatoire des métiers de l'audiovisuel, pp. 29-31

³³ Presse et numérique - L'invention d'un nouvel écosystème, Jean-Marie Charon, June 2015, pp. 6-8

³⁴ Digital Culture 2014: How arts and culture organisations in England use technology, Arts Council England, Arts & Humanities Research Council and Nesta, 2014, p. 7

Key 'must have' skills now have names like 'budget planning', 'identification of new and alternative sources of financing', and 'managing sustainability and growth'. Managers are expected to have expertise in "*fundraising, creating alternative and new revenue models and harnessing new sources of income*"³⁵.

d. Adapting skills acquisition to the skills needs

The trends for change at the workplace in the audiovisual and live performance sectors affect almost all occupations in both sectors, and accordingly require a review of initial and ongoing training schemes.

ENTREPRENEURSHIP, SELF-EMPLOYMENT AND THE DIVERSIFICATION OF ACTIVITIES

Business skills for strategic development are relevant to both existing and future initiatives. They should be harnessed through different training tools. The majority of people wanting to work in the sector will inevitably need to acquire a deep understanding of the structure of the market, of labour law, and of the different employment and/or working statutes and regulations.

Teamwork, together with the development of professional networks, communication strategies and sustainable business models, are key areas that will have to be incorporated into the initial education curricula of almost all professionals in order to equip future workers with the right tools to face possible phases of self-employment and to enable them to manage their professional careers.

Raising awareness of the need to diversify one's skillset to cater for chosen or imposed multi-activity has also become a central theme for a large number of professionals in a growing number of sector occupations.

³⁵ Building a Creative Nation: The Next decade - What the current literature tells us about the future skills needs of the creative and cultural industries, Creative & Cultural Skills, February 2015, pp. 14-15

MULTISKILLING AND NEW JOB PROFILES

In the field of journalism, while polyvalence or multiskilling is considered as “a major quality to adjust to a multimedia environment”, it is also seen by some as “a pure utopia [as] nobody can reasonably master all the different formats, media, skills, writings and contents journalists are expected to find in a so-called “integrated news room”[even more when one agrees on the fact that] the technical environment is changing all the time”³⁶.

As a consequence multimedia production studios or workshops in schools of journalism have become an important feature of practical training. In most cases, first year students get acquainted with all four media and then specialise in one traditional medium, usually associated with the web³⁷. The focus is also directed on ‘working in teams’ where a combination of specialists’ profiles can be found, without asking everyone to master all skills.

It is also recognised that bridges between training schemes and educational frameworks need to be further developed (such as between journalism institutions and graphic and computer schools) in order to anticipate future methods of collaboration in the workplace and enhance the attractiveness of the media sector for graphic or IT professionals³⁸. The journalism schools that have jointly implemented the ‘Integrated Journalism in Europe’ project³⁹ have also recognised the importance of informing graduates about future job prospects, of paying more attention to new job market opportunities, and of giving future journalists the information they need about the reality of the employment market in the new media environment (self-employment, entrepreneurship, etc.)⁴⁰.

³⁶ Recommendations on Journalism education – A comparative report based on the French, Spanish, Danish, Romanian and Swedish cases, IJIE Integrated Journalism in Europe project, February 2014, p. 12

³⁷ Op. Cit., p. 13

³⁸ Presse et numérique – L’invention d’un nouvel écosystème, Jean-Marie Charon, June 2015, p. 98

³⁹ University Pompeu Frabra (Barcelona, Spain), Danish School of Media Journalism (Copenhagen, Denmark), Linnaeus University (Kalmar/Växjö, Sweden), Université Paris 8 (Paris-Vincennes, France), Babes-Bolyai University (Cluj-Napoca, Romania)

⁴⁰ Recommendations on Journalism education – A comparative report based on the French, Spanish, Danish, Romanian and Swedish cases, IJIE Integrated Journalism in Europe project, February 2014, p. 17

TECHNICAL SKILLS IN LIVE PERFORMANCE

For technical occupations, it is vitally important to acquire skills in real work conditions. All knowledge acquired during theoretical training has to be put into practice and compared with real situations that, in the case of live performances, are influenced by many factors (creative, technological, related to the audience and its safety, etc.).

For live performance employers, who are often faced with tight production schedules and increasingly complicated financial situations, it can be a challenge to host interns or apprentices. There is a growing recognition, however, that for employers to benefit from a pool of skilled and job-ready technical professionals in the future, investment and proximity to education providers are a must. The right balance must be found in a technician's training between the time spent in school classrooms and workshops and the time spent learning in the workplace⁴¹.

European surveys have shown that more has to be done to promote on-the-job learning, especially in countries where employers and trade unions are not necessarily associated with formal vocational training schemes. At European level, there is also a need to establish stronger links between social dialogue partners and education and training providers/networks⁴².

To ensure the mobility of the technical workforce, the European validation and recognition of qualifications is crucial – not only because technicians handle machinery and ensure the safety of the crew and audience, but also to increase the security of professional career paths that are often conditioned by international mobility. Different projects have been implemented with this in mind and further efforts to share and implement their outputs are needed⁴³.

⁴¹ Op. Cit., p. 21

⁴² A report on theatre technical training in EU 1998 – 2008, by Umberto Bellodi (Accademia Teatro alla Scala) and Chris Van Goethem (Teatd vzw), PEARLE* EURO-MEI Training Forum 2009, p. 21 and p. 48

⁴³ CAPE-SV: Methodological guide / Guide to CAPE-SV methodology and applications. Project Capitalization of Learning Outcomes in Europe Live's Performing Arts, November 2011, p. 25

CHAPTER 2: SKILLS FOR TOMORROW

Finally, professionals who are not contractually tied to one employer only find it challenging to keep their skills up to date and to keep abreast of technological developments. The increased convergence across technical roles (recording of live events, streaming services of events, and cross-multimedia platforms) are also creating new complexities for the live events sector as the barrier between digital and physical media come tumbling down. Training solutions have to be found to cater for these new situations as well⁴⁴.

TECHNICAL SKILLS IN AUDIOVISUAL ACTIVITIES

In the audiovisual sector, professionals must possess technical skills, must understand the creative process, and must be able to work in multidisciplinary teams. The incredibly fast pace of new technological developments does not permit a large majority of employers of small size companies to build up necessary resources to put in place sophisticated and/or reactive training schemes for the technicians they work with (on a contractual basis or as freelancers).

The existing lifelong learning training schemes are usually run by the larger employers in the sector, such as public and private broadcasters.

In the UK, with the increased used of highly specialised technologies, some job profiles have been identified as being in short supply. One example area is in the field of visual effects⁴⁵.

As the creative sub-sectors become increasingly digitised, there will be an on going need to update the workforce skills, and employers will have to build dedicated time into their planning to accommodate this. Such updating will justify even more the establishment of stronger relationships with local education institutions and training providers to avoid staff having to travel very long distances in order to update their skills⁴⁶.

⁴⁴ Building a Creative Nation: The Next decade - What the current literature tells us about the future skills needs of the creative and cultural industries, Creative & Cultural Skills, February 2015, p. 34

⁴⁵ Creative Media and Entertainment: Sector Skills Assessment 2012, Briefing paper, Creative Skillset and Creative & Cultural Skills, UK Commission for Employment and Skills, p. 20

⁴⁶ Op. Cit., p. 74



creative
skills
europe

CHAPTER 3

INSPIRING INITIATIVES

Sector-driven initiatives for a sustainable action in the skills field in Sweden

The development of skills for the benefit of organisations and their employees in Sweden's cultural sector has been on the agenda for many years. But, with rising numbers of non-permanent workers and of workers having to re-train and/or shift between jobs during their careers, together with an increasingly challenging operational environment for the cultural organisations to survive, the sector has had to seek out innovative solutions.

To this end, the social partners have taken several initiatives, one of the latest being to launch a feasibility study to find out more about the challenges and opportunities in the labour market for the performing arts, music and film/television sectors. The goal is to draw up recommendations for sustainable action in the field of skills development.

The KROM study - which stands for Kompetens (skills/competences), Rörlighet (mobility) and OMställning (transformation) - is steered by Trygghetsrådet TRS, a foundation owned by the social partners that offers skills development solutions based on the needs of organisations, institutions and companies.

Financed by the European Social Fund, the study is intended to lead to a concrete proposal to establish sustainable skills platforms (possibly at subsector level) that would be owned by the sector, respond to its current needs and react to future trends. The recommendations put forward by the study are expected to receive additional EU funding for trials after the research study period. An operational plan endorsed by the different partners will be the ultimate output of the study.

The KROM study is the continuation of different projects that have already been running for several years.

The KulturKraft-project ran from 2010 to 2014 in three different regions of Sweden (Skåne/Malmö, Gothenburg/Western region, and Stockholm). Managed by the social partners through

Trygghetsrådet TRS, with funding from the European Social Fund, the project focused on skills development, and organised over 1,100 activities targeting more than 16,000 participants – employees and self-employed - working in the fields of performing arts, music, film, television, transmedia and the gaming industry. All activities were designed in close co-operation with the participating institutions, organisations and companies to meet their current needs and requirements.

Other key organisations are the 'Alliances' - Dansalliansen (Dance Alliance), Musikalliansen (Music Alliance), and Teateralliansen (Theatre Alliance) – that employ actors, dancers and musicians in between their freelance contracts and offer a number of services to help independent performers secure their careers, including skills development.

At regional level (west of Sweden), Kulturakademin Trappan (a cultural training programme designed for professionals in film, television and the performing arts) provides courses, workshops and lectures developed on the basis of the input of the cultural institutions that make up its governance and extended partnership¹. Funded by the region, the training offer is free and accessible to employees, freelancers and self-employed. Kulturakademin conducts continuous evaluations of its actions to assess their impact in terms of employment, and also addresses horizontal challenges for the sector such as gender equality.

A new foundation launched in January 2016 will support retirement age dancers, singers, musicians and actors by helping them to manage their end-of-career transition through financial support but also coaching and counseling². The Foundation will be connected to TRS.

¹ Kulturakademin Trappan's management teams includes Academies, cultural institutions, independent group organisations, the social partners in film and stage, Swedish television in the western region, the regional film fund, Film West, and the Culture and Media Division of the National Employment Office

² The foundation, launched in January 2016, is the result of a new collective agreement replacing an earlier system for pension and early retirement of dancers, singers, musicians and actors. It has been signed between Svensk Scenkonst (employers' organisation), Teaterförbundet and SYMF (employees' organisations). It covers approximately 60 institutions in Sweden

A comparative diagnosis (1997-2014) of the employment and training situation in the live performance sector in France

In 1997 a first study was published establishing a diagnosis of the social and economic situation of the live performance sector in France. Designed to be an operational tool, it combined statistics with a qualitative analysis of the sector. Drawing upon its observations and descriptions of emerging challenges, recommended actions were put forward for the benefit of employment and training in the sector.

This study was the first ambitious project of the French national joint committee for employment and training in the live performance sector (CPNEF SV). Employers' and employees' organisations were involved in the implementation of its recommendations, with the support of public authorities (ministries of employment and culture) and social welfare agencies (social security, unemployment, training funds, etc.).

Twenty years later, the joint committee decided to update this study. It intended to establish a comparative diagnosis, assess new developments, examine the emergence of new challenges, suggest paths of action, and prepare a summary review of the actions implemented so far.

The new study³, published in October 2015, identified the following factors affecting evolution of the sector:

■ **Artistic and cultural:** development and restructuring of a number of subsectors (modern music, musicals, street arts, new circuses, urban dances, etc.); development of interdisciplinary shows and hybrid art pieces; development of artistic performances in non-traditional settings; of amateur productions, etc.

³ Actualisation du contrat d'études prospectives du spectacle vivant – diagnostic comparé de la situation de l'emploi et de la formation professionnelle 1997-2014; CPNEF SV / Observatoire des Métiers du Spectacle Vivant / Centre d'études et de recherches sur les qualifications (CEREQ), September 2015

■ **Political and institutional:** expansion of the engagement of regional and local authorities in culture; generalisation of cross-financing (State, regions, departments, cities); development of agreements with the State and the regions on employment and training; creation of the High Authority for the Distribution and Protection of creative works on the Internet (HADOPI), etc.

■ **Technological:** the digital shift; increased use of computers and resulting impact on artistic (music composition, video and 3D, motion capture, etc.), technical (networks, recording, projection, etc.), and administrative activities (web, e-commerce, streaming, IP protection, etc.).

■ **Economic:** rise then fall in public funding, diversification of the funding streams (non-cultural, European, private, participative, etc.); longer production processes due to the complexity of the funding of artistic projects; economic collapse of the music recording industry; emergence of piracy and of illegal downloading, etc.

■ **Social:** development of a European (and even global) employment market and of social dumping; appearance of the "360 deal" in the music field, development of concert-related revenues, development of entrepreneurial intermediaries (production offices, cooperatives, wage portage companies – even if illegal...); greater challenges to the international mobility of artists; etc.

The study also establishes **new diagnostic elements** regarding the situation of the French live performance sector in terms of employment and training.

Although dynamic and expanding, in constant renewal and capable of innovation, this sector has a **structural weakness at the social and economic level**. Professionals and companies need to be supported, of course, but an overall consolidation also needs to be pursued through the reinforcement of the organisations and institutions, and the adjustment of the regulatory frameworks.

Since 1997, great efforts have been made to collect **labour market intelligence** on the sector but some complementary data have to be collected in order to gain better understanding of some sector imbalances. Decision makers also need to make better use of the data thus collected.

CHAPTER 3: INSPIRING INITIATIVES

The number of **live performance companies** has been constantly rising, but with a strong disparity between the large cultural institutions and the myriads of tiny businesses. The sector has been moving in parallel towards a greater structuring. Providing support to companies, in addition to training individuals, is now seen as a priority action.

The **live performance economic model** is vulnerable, even more so since public subsidies have been cut and households are spending less and less on cultural activities. Although the sector has developed strategies to counter its economic difficulties, its further evolution, linked to the deep mutation of its environment and of its production/distribution model, could threaten its economic model even more, with enormous impact on its activities and workforce.

While the workforce has increased, **inequalities between workers** are becoming more and more important in relation to the job performed, the type of contract, the type of employer, and also the profile of the person (age, gender, location, social origin, etc.). Artists remain the most vulnerable population but there are great variations within this category.

Instability and lack of financial security for professional career paths continue to be the rule for a large majority of the workforce (short term contracts, high level of workforce renewal, etc.). Sector support schemes should better address the complexity of the individual situations (mobility, multi-activity, etc.). Over half of those professionally engaged in live performance have paid work outside the sector (most of them in the areas of entertainment, leisure and tourism but some also work in the public sector and in education). Inter-professional discussions and agreements could obtain better security for their career paths, allowing for the recognition of horizontal competences, and ensuring the coordination of welfare regimes.

Even though the offer of initial training does respond in general terms to the needs of the sector, because of the **strong sector attractiveness** to young people, the supply of employment jobs still falls far short of demand.

Training offers should be more in phase with **the needs of companies and of professional individuals to manage their careers**. To this end, companies should further develop their HR and management strategies.

On the basis of this comparative diagnosis, the report makes **recommendations** organised under four main headings:

1. Sustaining and regulating employment (consolidating the representation of the sector employers, developing the coordination and dialogue with the public authorities and other sectors, developing the entrepreneurial capacities of the very small businesses, supporting cooperation logics between companies, articulating the social welfare regimes of workers active in different sectors, etc.)

2. Qualifying individuals through initial and on going training (informing about employment perspectives before start of initial training, developing initial and on going apprenticeship schemes, encouraging the acquisition of transferable skills to make mobility possible, integrating knowledge of the professional environment and of live performance social law into academic curricula, developing on going training schemes enabling artistic professionals to acquire further competences in their own fields and in other domains, developing qualifications and certifications for technical professions, etc.)

3. Improving the quality of the initial and on going training offer (making it easier to understand, especially in terms of learning objectives, systematizing the surveys on the professional insertion of graduates, etc.)

4. Strengthening the production of tools for a better understanding of the situations on the labour market, their coordination and appropriation (developing longitudinal approaches to enable individual career paths to be managed, collecting information on individual incomes and wages policies for better understanding of the sources of the main inequalities within the sector, etc.)

'2020 starts tomorrow': anticipating future profiles in the media and communications fields in the Netherlands

What will the media and communication sector look like in 2020?

'In 2020, media and communication companies work together in network relationships. They earn their money by producing, advertising, realizing and combining content; they do so with services ranging from highly specialist to full services. The greatest qualities of the sector (just like in 2013) are the 4 Cs: creating, curating, communicating and converting.'

This is how the Dutch publication '2020 starts tomorrow – meet the employees of media and communication companies in 2020'⁴, published by GOC – the Expert-centre for the creative industries - depicts the future.

In an entertaining format, it presents the profiles of ten employees of tomorrow's media and of their companies. Through 'competence profiles' (rather than job descriptions) and long interviews within their 'futuristic' environments, we learn about what they do, how they interact with their colleagues, and what are their most important professional qualities.

Micky, the community manager, is a good networker with solid writing skills. Among other tasks, she monitors and participates in online conversations, creates content (blog, photo, video) and transfers information to other departments of her companies for further product development. She is in regular touch with her colleagues, the 'web care worker', and the 'concept manager'.

Marcel, the content logistics manager, is in close contact with external partners such as web designers, software consultants and 3D print designers. His main task is to provide back-end service for the realisation and logistics of print and digital products, and to organise multimedia production processes. He has strong problem-solving skills.

⁴ 2020 starts tomorrow – meet the employees of media and communication companies in 2020', GOC, 2014

Simone, the data journalist, is curious and analytical. She has strong writing skills and masters multidisciplinary and project-based working methods. She collects data (public, her own database, real-time through Apls), analyses it, does the preliminary work for visualisation, and uses it to create content (blog, articles). She discovers stories within large quantities of information, and then tells those stories.

Looking at those profiles and observing how they work, the most important conclusion for the report is how collaboration and networking will be key features in the future, both between colleagues within a company, and between companies within the sector.

A platform to offer guidance and advice to the employees and employers of the cinema and audiovisual technical industries in France

It has taken just a few years for digitisation to deeply modify the production processes of the audiovisual industry: rolls of film are becoming a thing of the past, media platforms are now the rule and there is an increasing and massive use of digital technologies. This has had a great impact on many occupations. The photochemical laboratories, dubbing activities and post-production units have been particularly exposed to this.

To cope with these changes, in 2010 France created a platform for the technical industries. The platform proposes responses to employees and employers on how to adapt to the new needs of their affected professions. The idea was to pool financial and human resources at sector level to assist the worst hit subsector. The platform receives the support of the social partners, of the European Social Fund, of the State, of the Île-de-France Region, of the National Centre for the cinema and animated image (CNC) and of the sector training fund (AFDAS). It is piloted by the French National Joint Commission on Employment and Training of the Audiovisual Sector (CPNEF AV).

During the period 2010-2013, thanks to this platform, more than 750 persons in 250 companies received support. There were 65 career reconversions, 174 people received skills assessment

CHAPTER 3: INSPIRING INITIATIVES

and career guidance, and 461 were given opportunities to access training. In 2015, the platform's period of activity was extended since the technical industries (at the end of the production chain) continue to be weakened by technological and economic developments. A major emphasis is now placed on video laboratories.

The support given to employees consists of career management guidance and is free, confidential, and tailored to individual needs. Strategies are drawn up for the next professional steps, identifying what competences/qualifications to validate or acquire, and building an action plan with the names of potential interlocutors and available funding to apply for. Advice is also given on what professional training schemes are available and how to apply for funding.

Companies are offered a human resource diagnosis that analyses the impact of digitisation on the company workforce, identifying what are the current competences and qualifications of their employees, which are the most vulnerable occupations, and what are the training needs. Funds are then made available to implement the training plan. Information sessions for employees can also be organised.

A peer learning network on human resources management in the life performance sector in Flanders

Since 2010 the Social Fund of the Performing Arts in Flanders (SFP) has set up a peer learning network of live performance human resources managers. Today more than 80 members representing 67 different employers, big and small, of all disciplines, are part of this network. Once or twice a year, meetings are organised. They are usually held in two or three of the cities where most of the organisations are based, so that people do not have to travel far, and can speak to colleagues working in the same region. The network aims at an exchange of experience, and at addressing common challenges in an informal way. Whenever the network lacks expertise or information, external guests can be invited. Membership is free and taking part in the network is voluntary.

Discussions are kept as open as possible so that all experiences can be discussed, from the most positive to the more challenging ones. In the last years, the topics discussed - proposed by the members of the network or by SFP following the adoption of new legislation - included evaluations, extra-legal benefits, elderly workers, diversity and irregular work. Meetings are also a useful tool to identify needs to be addressed at sectoral level.

To facilitate HR management in the sector SFP updated, thanks to a subvention of the Ministry of Culture, a sectoral classification system of occupations. As the descriptions of occupations it contains are mostly based on tasks and responsibilities, and less on the skills needed to perform those occupations, SFP also developed a complementary sectoral dictionary of skills. Together with an external consultant, SFP gathered existing job descriptions of official occupational profiles (either from the live performance sector or from other sectors, such as health and safety or housekeeping). From those job descriptions, 25 behavioural skills were isolated, all clearly defined, as well as about 15 behavioural indicators linked to those skills. Technical skills, specific to the sectoral occupations, were added, also accompanied by behavioural indicators.

This list of skills/descriptions can be seen as a toolbox from which HR managers can choose when having to establish a job profile (to update a job description, publish a job offer, identify the staff training needs, identify - sometimes unused - talents, etc.). Through a digital tool, managers will have access to a number of 'reference profiles' but, because in a lot of organisations individuals are combining different occupations/functions, they will also be able to assemble specific "skills packages". SFP will provide training on how to use the tool, as well as on how to identify the skills you need/want in your organisation, and on how to run job interviews.

The development of new National Occupational Standards for digital skills in the United Kingdom

Creative Skillset, the UK skills body for the audiovisual and other creative sectors, developed a new set of National Occupational Standards (NOS) for Digital Production Skills to be used across all four UK nations. Funded by the UK Commission for Employment and Skills, the need for this initiative became apparent and pressing as the industry recognised that there was a skills gap due to the emergence of new technologies and the convergence of skills in the way content is produced.

The NOS address the full spectrum of the digital workflow process, and will be advantageous to many job positions in the production cycle. In the most recent (2012) Creative Skillset Census, 8,661 jobs in the UK were identified as falling within the scope of production, 2,385 in editing, and 7,900 in post-production.

The development of NOS was originally requested by the employer-owned Digital Production Partnership⁵ (DPP) and the UK Screen Association. They pointed to specific examples of new disruptive technologies that were changing job roles. They also recognised the recent legislative changes in relation to employment rights and working conditions that were affecting the industry.

The challenge of the digital shift was highlighted by the Creative Industries Council: *"Skills needs analysis suggests there is an increased need for multi-skilling to understand different technology platforms and their impact on content development and digital work-flow, and new approaches to working in cross-functional creative/technical teams within and across companies" as well as "crucially the Creative Industries need a range of very different skills including science, technology, production and business skills"*.

⁵ The DPP is a UK-wide initiative formed jointly by the UK's public service broadcasters (BBC, Channels 4 and 5, S4C in Wales, and Sky) who work closely with trade bodies such as AMWA (Advanced Media Workflow Association) in the US, EBU (European Broadcasting Union), and the UK's PMA (Production Managers Association) and UK Screen.

The 2012 Skills Assessment for Creative Media and Entertainment identified how digital production roles are of critical importance to the UK economy and how current skills needs are not being met. This is evidenced through shortages in the skills areas of Multi-platform and STEM⁶/Technology, both of which are relevant to digital production.

Finally, as a further outcome of the rapid change in the sector, new job roles are being introduced that are not yet accounted for in the current Standard Occupational Classification. The changes to workflow and convergence of sectors are requiring new job descriptions to be created.

Over the course of the consultation process, to create this new set of NOS, Creative Skillset obtained input from professionals from all corners of the UK through online consultation and workshops. Key respondents were finally identified as the final group to sign off the NOS. By conducting the functional analysis and developing the NOS, Creative Skillset now has a better understanding of how these new or revised roles fit within the sector. IT and broadcast continue to converge, leading to the overlapping and blurring between production and post-production roles.

The six key functional areas that were identified included: Digital workflow, Capture Media, Process Media, Use Professional IT Skills, Archive Media and Deliver and Distribute Media.

General skills such as managing yourself and working with others, and knowledge of health and safety requirements, were also identified among the skills needed.

New job descriptions identified include: data wranglers, digital image technicians, media wrangler, digital management operator.

Creative Skillset are now looking at ways in which to share the mapping work and job role mapping in a user friendly way.

⁶ Science, Technology, Engineering, and Mathematics

A Service Centre for the insertion of arts students and their professionalisation in Germany

The Berlin University of the Arts offers teaching courses at the colleges of Fine Arts, Architecture, Media and Design, Music, and Performing Arts, as well as at the Central Institute for Continuing Education/ Berlin Career College. It encompasses the full spectrum of the arts and related academic studies with more than 70 courses.

The Career and Transfer Service Center (CTC) was founded in 2001 together with the career centers of the three large universities in Berlin with co-financing from the EU. It is the first career centre at a university of the arts in Germany. Since 2004 all the CTC's activities are open to participants from the other three artistic universities in Berlin, the Berlin Weissensee School of Art, the "Hanns Eisler" School of Music Berlin and the "Ernst Busch" Academy of Dramatic Art.

The CTC advises students and graduates on questions relating to starting and planning their professional careers, also covering strategic decisions to be taken when setting up a business. Information on current offers of the CTC is available on its website, notice boards in the universities' buildings, and from a newsletter available on subscription. Since 2001, ten EU-programmes were carried out at the CTC. In 2015, 859 participants took part in nearly 10,000 hours of activities.

About 500 students aim to complete their training at the University of the Arts each year. Most of them leave the university with a BA, MA or as "graduates of a master class". Although they have had opportunities during their studies to develop contacts with professional institutions (galleries, opera houses etc.), and commercial companies, the students and graduates also need to acquire additional competences relevant to the employment market. This is the goal of the CTC.

The CTC sees itself as a clearing house between college/university and the employment market and world of work. It offers opportunities for acquiring practical experience as well as additional

qualifications such as organisational, social, personal, IT skills and/or learning languages. In addition, soft skills such as the ability to work in a team, communication skills, a capacity for innovation, and social skills are also seen as key for successful entry into working life. The realities of the labour market also oblige students to be prepared for temporary contracts, periods of practical experience and freelance work.

The goals of the CTC therefore are:

1. to raise awareness of the situation on the job market and to promote entrepreneurship education;
2. to increase entrepreneurial skills through qualification;
3. to accompany the translation of project ideas into viable business ideas.

The CTC services offer **consultation and coaching, workshops and services**.

Consultation sessions at the CTC place the individual (the artist) at the centre of all activities. Detailed profiles of those seeking advice are produced, focusing on choices to be made from the offers of qualification available, bearing in mind their usefulness for sharpening an artist's profile. Consultations are aimed at promoting empowerment and directly responding to the specific questions of the individual. The spectrum of responses ranges from answering purely informational questions, developing start-up strategies or improving already planned strategies, consideration of the individual's curriculum vitae or adjusting his/her ideas of a future profession to economic and practical professional realities. Recommendations are also given about other resources, institutions and individuals that could offer advice and assistance in addition to that provided by the CTC.

During these consultations, the students' skills, knowledge, experience, wishes and strengths are established, and on that basis a personal "employability profile" is created. The students' hidden potentials are identified and compared with the demands of the arts or employment markets. An individual plan is then established to show what skills still need to be acquired to be competitive and where they can be acquired.

CHAPTER 3: INSPIRING INITIATIVES

Workshops take place during the terms from Monday to Friday and typically last 3-8 hours. During term break, weeklong intensive workshops are offered on one specific area, such as marketing.

Workshops modules cover '*Positioning*' (how to position oneself optimally as an entrepreneur in a dense art and creative market), '*Financing*' (guidance on the market support instruments, both public and private, and also covering crowdfunding, grants, sponsorship and fundraising), '*Social Security and Taxes*' (how to build a security net on a small budget, taxes relevant for artists, etc.), '*Law*' (copyright issues, both as a creator and also as a user of creative services), '*Marketing and Social Media*' (how to market a product using all suitable social media channels), '*Communication and Cooperation*' (how to enter successful – interdisciplinary - collaborations).

In addition to its consultations and workshops, the CTC provides information on regional, national and international internships and job offers, fellowships and competitions, and networking opportunities. It also offers access to literature on professional orientation and applications, and to an online platform addressing practical topics such as the starting salary, the search for a studio, etc.

The development of apprenticeships schemes in the live performance sector in the United Kingdom

Several years ago, no apprenticeships existed in the creative and cultural sectors in the UK. Wherever this term was used, it was usually for an informal arrangement with no educational supporting structure and often unpaid. With education and industry partners, Creative & Cultural Skills developed and tested the first creative apprenticeships framework. In 2013, the Creative Employment Programme, with the support of the Arts Lottery funding from Arts Council England, allowed for an exponential leap forward.

In its 2016 publication 'Building a Creative Nation: Putting Skills to work – creating jobs, apprenticeships and work opportunities in the creative and cultural industries'⁷, Creative & Cultural Skills take stock of this experience, offers an insight into the UK system, and provides tools for further development of the apprenticeships schemes in the years to come.

Case studies of apprentices give the viewpoints of the learners and relate their experience in the work place. First-hand accounts given by some of the hosting institutions, the 'Six steps for taking on an apprentice', and the 'business case for apprenticeship', give all the necessary information to employers to help them decide whether apprenticeship schemes would suit their organisations and fit their needs.

Finally, an insight into the future UK Apprenticeship Levy framework informs arts organisations on future prospects for the development of apprenticeship schemes in their sector.

A project to accompany the internships of young graduates in the audiovisual sector in Belgium

The project "STAGES MEDIA" has been designed to help young people (less than 26 years old) who want to acquire some professional experience in the media field. It is an initiative of mediarte.be, the Social Fund of the Audiovisual and film production sector in Belgium.

The project offers young people the possibility to take up an internship that respects legal conditions and that really allows for the acquisition of professional competences. mediarte.be creates the link between the young graduate and the employer and ensures the quality of the internship.

Internship offers are published and highlighted in the mediarte.be database of online jobs. Young people interested in a specific job offer apply to mediarte.be using a dedicated contact

⁷ 'Building a Creative Nation: Putting Skills to work – creating jobs, apprenticeships and work opportunities in the creative and cultural industries', Creative & Cultural Skills, 2016

CHAPTER 3: INSPIRING INITIATIVES

form. If the personal objectives and the motivation of the intern match the employer's expectations, mediarTE.be puts the two in contact. mediarTE.be then plays the role of 'internship sponsor', monitoring the internship during its entire duration and, when it ends, offering the intern practical information for a successful first professional paid job. For the company it is understood that no intern may replace a payroll worker and that educational objectives have to be respected during the entire internship.

With this initiative, mediarTE.be's objective is to fight the misuse of interns and to offer young graduates some meaningful work experience.

Another resource developed by mediarTE.be aims to offer workers the necessary knowledge to manage their careers in an informed way. This online tool gives a comprehensive view of the different non-permanent job positions in the sector. It details their different employment status (direct contract, independent, temporary, third party for artistic occupations) and highlights their main characteristics at different levels:

- **financial** (salaries, social security contributions, taxes, employment costs);
- **responsibilities** (administrative obligations, responsibilities in case of an incident, risks in case of non-payment, end of contract, authority and relationship of subordination);
- **personal and professional evolution** (recognition of experience and competences, training, career management);
- **well-being & family** (time flexibility, sickness, holidays, etc.).

A retraining programme for dancers in the Netherlands

Founded in 1986, Omscholing Dansers Nederland (Dutch Transition Program for Dancers) assists dancers who have reached the end of their performing careers, providing them with advice and financial support.

Omscholing Dansers Nederland can help a dancer who is making plans for the future in a number of ways: through careers advice; by refunding the costs of training, studies or a course, in whole or in part; by providing income during the period after a dancer has ended their career and is preparing for a new one; by giving financial assistance and advice to a dancer for setting up his/her own business.

Careers advice is offered to all professional dancers at any time during their career. There are no conditions or costs attached to this service. In order to be eligible for financial support, certain conditions must be met and dancers must have subscribed to the Retraining Scheme during their careers.

The Dutch Transition Program for Dancers is funded from contributions from employers and employees, covered by the Collective Agreement for Theatre and Dance. The Retraining Scheme is also supported by public subsidies. Freelance dancers and dancers who do not work for a company that automatically pays such contributions can join the Omscholingsregeling on a voluntary basis.

Dancers who have paid at least 60 premiums can apply for a refund of their study costs up to a maximum amount of € 10,000. Their performing career does not need to be over and this way dancers can prepare themselves for their career change while still dancing.

Dancers who have ended their dancing careers, and who have paid at least 96 premiums over a time span of at least ten years, can apply for a Study and Income Allowance. This Allowance comprises a refund of their study costs and a contribution to maintenance costs. It is also possible to use the allowance for a refund of costs incurred in setting up a business.



creative
skills
europe

CONCLUSIONS

Developing labour market intelligence

The data collected on the audiovisual and live performance employment markets in the different EU countries is partial and cannot, at the moment, be compared at European level. In many countries no statistics are available at all or is not accessible to sector professionals and/or the broader public.

Efforts need to be made to collect relevant data, guided by Eurostat and following the recommendations of the ESSnet CULTURE project. It will be vital to mobilise national stakeholders to collect comparable statistics, from national statistical agencies to ministries of employment and industry, and authorities issuing qualifications.

As statistical initiatives are complex and burdensome, the data that has to be collected needs to be relevant and appropriate for the specific features and needs of the sector. The sectoral footprint used to collect statistics should be defined at the right level of detail (for example, allowing analysis of subsectors) and be harmonised to make national and European analyses possible. Sector stakeholders should be taking

part in the elaboration of data collection methodologies to make sure that outputs will reflect the real situation in the sector and will be usable as a tool for anticipating future trends. Sector professionals should also have a role in the qualitative analysis of the data collected.

The statistics to be collected should cover specific aspects of businesses and workers (size/turnover/status/field of activities for businesses; types of contract/status/age/gender/study level for employees). 'Europe-relevant data', such as the number of workers coming from other countries, or the number of activities in a calendar year performed across borders, should also be gathered in the different EU countries.

Data per occupation is not yet available in most countries. However, it would prove most useful for developing comprehensive skills strategies for the future.

A grid that brings all the national data together has been created for this report and can be developed further in the years to come. ■

Creating spaces for exchanges and co-operation

Opportunities for meeting, exchanging views, and designing joint initiatives were strongly recommended by the participants in our project (social partners, educational bodies and professional associations) as essential tools for enhancing the quality of professional training in the audiovisual and live performance sectors.

In many countries, it is all too rare to find any discussions on trends and their impact on professional training needs taking place at sectoral level, and almost never in formal settings that would open the way to structural changes.

Generally speaking, educational bodies are indeed following developments in the sector, as they do include active professionals on their teaching staffs and sometimes establish partnerships with businesses (for example for internship schemes). But holding structured dialogues with professional stakeholders is happening far too seldom. Both worlds are evolving in parallel, missing opportunities for enriching each other and for better preparation of students for their future careers.

New spaces for cooperation should therefore be created, not just when study curricula are drawn up, but also during the students' studies and later on at different key moments of their career as professionals. Different national initiatives have been tested across Europe and could serve as inspiration for other local and national contexts. They include: local businesses sitting on the academic board of a vocational school in the Netherlands, encounters between professionals and young graduates in the UK, regular meetings between education and professional stakeholders in the animation domain in France, and other similar activities.

Formal discussions for developing a joint understanding of professional standards should also be pursued in a dynamic and flexible way. Occupational standards are indeed a valuable tool to help professionals and educational stakeholders develop a shared understanding of the various sector occupations. Occupational standards are however limited in their 'projection capacity' as, by definition, standards fix the expected skills and competences associated with an occupation at a certain moment in time. To develop a vision of the evolution of what skills are needed at sectoral level, a good understanding of the sector as it

operates today has to be coupled with the capacity to identify and anticipate change, not just within the framework of existing occupational standards but also looking beyond them. This is the exercise that is currently being implemented in different EU countries where sector bodies are, in addition to drawing up occupational and qualification standards¹, conducting surveys amongst employers and workers, organising consultations and commissioning research that lead to the identification of current trends and future skills needs. Coupling the definition of occupational standards with qualitative analyses of the sector and its evolutions is therefore crucial – at both national and European level.

Creating sustainable spaces for exchange, at sector level, in more national contexts and at EU level, would therefore be a highly relevant exercise.

¹ To consult examples of national occupational standards for our sectors, you may consult the dedicated website pages of Creative Skillset in the UK (<http://standards.creativeskillset.org/standards>), mediarte.be in Belgium (<http://www.mediarte.be/fr/le-secteur/les-fonctions>), Sociaal Fonds voor de Podiumkunsten in Flanders (<http://www.podiumkunsten.be/Home/werk/jeloop-baanindesector/beroepenindesector/tabid/4578/Default.aspx>), CPNEF SV in France (<http://www.cpnfsv.org/metiers-spectacle/presentation>) or GOC in the Netherlands (<http://www.goc.nl/kwalificatiedossiers>)

The development of opportunities for permanent dialogue should go hand-in-hand with the identification of financial resources necessary to get those initiatives going.

A great many themes could be discussed and addressed in those new spaces for exchange:

- the long-term perspectives for the development of the sector (Could the sector be more efficient in how it anticipates change, rather than only catering for the needs that have already emerged?);
- the imbalance between new entrants and available positions (Should the sector think up solutions for the better regulation of the employment market?);
- the increasing trans-sectoral reality of many activities – be it in terms of skills needs or its impact on individual careers (Should sectoral education schemes broaden their scope to equip students with a larger variety of skills? Should sectoral institutions be more aware of multi-activity and develop relevant tools to secure such career paths - employment status, access to training, social benefits, etc?). ■

Equipping sector professionals with relevant skills in the digital environment

The digital shift has transformed our day-to-day lives and also the operating environment of most actors in our economy. Certain skills for navigating this new reality have therefore become essential, and this is particularly true in the cultural and creative sectors, which have seen almost all their activities drastically changed as a result of the digital shift.

In the audiovisual sector, the multiplatform environment demands new creation and production skills, new technical skills, and also the capability to invent new business models that will permit the sustainability of the activity in the long-term.

In the live performance sectors, digital skills are needed to ensure a web presence, to use online tools for marketing, fundraising and audience development purposes, and to experiment with new processes for creation and dissemination (digital arts, web streaming, etc).

The development and acquisition of skills for the digital environment is recognised as a priority by a large majority of sectoral

education and professional stakeholders but this is not a tension-free process.

Multiskilling – in other words, developing profiles to enable the diversification of a professional's tasks – is seen as a necessity in a multiplatform and multi-technologies environment. However, it is also viewed as a potential threat to the specialisation of profiles and the quality of outputs.

Generations of workers now possess different skillsets, often complementary but demanding different types of ongoing training, new hierarchies and team dynamics.

The disappearance of some specialised profiles and the appearance of new ones lead to career reconversions and the creation of new training schemes.

To navigate this new environment, and also to be able to keep up with the pace of change, audiovisual and live performance businesses must integrate the digital reality into their management strategies, offer appropriate training opportunities to their staff, and maintain a constant dialogue with education and training institutions. Interdisciplinary work teams should become the rule for many companies and related skills have to be incorporated into educational curricula. 'T-shaped profiles' (which combine specialist skills in a single area of expertise with horizontal skills) need to be promoted. ■

Acknowledging the transformation of the sector and the corresponding impact on careers

The changes now operating in the audiovisual and live performance sectors affect not only all their activities and prospects for development, but also modify the careers paths of their professional workers.

As these workers have to update their skills continuously (to keep pace with technological developments, be able to innovate in the digital environment, diversify their private activities in order to earn a living, retrain when relevant, develop entrepreneurial and management skills, etc), efficient career management becomes a top priority, and skills management is an integral part of this process. This should be acknowledged by all sector stakeholders, and receive relevant support from public policies.

For this new reality to be tackled effectively,

employers must adapt their HR strategies - not only to ensure the sustainability of their activities but also to offer proper career prospects to their employees and freelance staff. Individuals themselves have to look for opportunities for continuously acquiring new skills, and they should be asking for relevant schemes to be set up to help them better manage their careers.

Finding solutions to finance such schemes should become a priority for the sector, either through collective agreements, or via unions and employer-driven initiatives and/or public funding.

Support schemes should be accessible to all workers (employees and independent) and be flexible enough to enable rapid adjustment to the new realities faced by the sector. While elaborating these schemes, the sector should be thinking 'out of the box' to acknowledge and respond to the latest trends (the rise of self-employment, the emergence of new occupations, the increasing cross-sectoral nature of occupations, multi-activity, etc.). ■

Promoting schemes for on-the-job learning adapted to the sector

The rapid and deep-seated developments that have transformed the audiovisual and live performance sectors require strong links to be forged between the world of work and the world of education. New models of skills acquisition must be developed to put learners into 'real life' situations, enabling them to understand the reality of the tasks that will be demanded of them and their future working conditions.

On-the-job learning schemes, still rare in our sector, have therefore to be trialled on a larger scale, with due regard for the specific features of our industry.

Internships opportunities should be developed as an integral part of education curricula and there should be constant dialogue on this subject between educational institutions and hosting organisations. The high attractiveness of the sector should not be exploited to the detriment of a 'cheap workforce' but should be seen as an area for investing in future skills.

Apprenticeship programmes and vocational training must become central tools for the

sector's development. They influence the quality of the skills possessed by future workers, and will also ensure a greater diversity in the sector in terms of profiles and backgrounds. To help sectoral companies engage in apprenticeship schemes, the specific features of their business (project-based, seasonal) and of their organisation (small size) have to be recognised and accommodated. Public support and collective sectoral solutions have to be explored and formalised within solid and sustainable frameworks.

Other modes of on-the-job learning should also be tested at different times during initial and ongoing training. They should take different forms and should pursue a variety of goals (partnerships between schools and local companies on specific projects, businesses support and mentoring, consultation of students in the development of new digital tools, etc).

The mutual recognition and validation of qualifications, skills and competences acquired through on-the-job learning schemes should finally be developed at both national and EU level, with priority given to subsectors and occupations that are particularly subject to a high level of mobility during a professional's career. ■



creative
skills
europe

RECOMMENDATIONS

With a young workforce, a large number of small-sized companies, an increasing number of individuals operating outside the employee's status and having to diversify their activities, the audiovisual and live performance sectors have specific training needs. These needs are strengthened by two key trends that have been affecting the sectors' activities in recent years: first, the digital shift and its impact on creation, production and distribution channels, and, second, the state of the economy that has transformed the sector's business and employment models.

To design and implement relevant skills schemes the sector has to improve its labour market intelligence - based on solid and detailed quantitative data, coupled with shared qualitative analyses. The sector also has to learn from the experiences reported in the different EU countries while experimenting with new European partnerships that could support the sector development within, across and beyond EU borders.

LABOUR MARKET INTELLIGENCE

Sector stakeholders and policy makers need to have access to **solid and stable data** if they are to be able to follow the latest developments in the audiovisual and live performance labour markets, understand their deep trends, better anticipate the future and adapt the skills of the workforce accordingly.

Some of the data collected should be made comparable at EU level with a view to the development of a **European perspective** on the issues at stake, the setup of collective actions and the promotion of mobility across occupations and borders.

For skills development purposes, useful data has to be developed **at the right level of detail** (to be able to isolate subsectors) and its collection made **sustainable** in time (to identify trends). It also has to be accompanied with qualitative analyses putting trends into perspective with the specificities of our sectors.

The following are priority areas for sectoral data collection, aiming to contribute to efficient sector skills policies: the number, size, type of activities, growth dynamics, etc. of the employers in the sector/the number, occupations, types of contract, employment status (employed, independent, author), revenues, time worked, levels of education, etc. of the workers in the sector. ■

RECOMMENDED ACTIONS

At EU level: EUROSTAT should develop more detailed cultural statistics to recognise the specificities of the sector, and allow for meaningful skills analyses. It should base its actions on the recommendations of the ESSnet project. More pan-European data should be collected with regard to employment mobility (number of workers active in another EU Member States, countries of initial education, etc.).

At national level: A number of EU countries already collect relevant data on the sector employment market. In those countries, efforts should be made to enrich this body of data with further relevant information and to publish it alongside qualitative analyses developed with and for the sector. In other countries, similar information should be collected in constant consultation with sector stakeholders.

At sectoral level: Sector stakeholders should define their objectives and priorities in terms of labour market intelligence, taking into account the context of their social policies. Data cannot contribute to relevant intelligence if it is not put into perspective within its social context. To be productive, statistics should also be collected in parallel to the development of action plans, based on a dialogue within the sector and on joint initiatives that examine all identified trends. Finally, sector co-operation schemes for the development of qualitative indicators are needed. Such schemes should evaluate the impact of actions through the collection of pertinent data (career paths of graduates, benefits of ongoing training schemes, etc.).

SPACES FOR EXCHANGE AND CO-OPERATION

The qualitative analyses of the trends at work in the audiovisual and live performance sectors and the setting up of appropriate responses to these trends can only happen when sector stakeholders (professional and educational) are able to meet and exchange views and best practice in **sustainable and informed platforms**.

Those platforms have to enable the development of practical tools responding to short-term needs, and for **longer term discussions** that ensure that the sector may better anticipate the future and participate in shaping it.

Such platforms should comprise **an appropriate pool of partners** (representing the sector and its developments) and receive the **necessary resources** to be able to function in a sustainable and productive way. Only then can they become useful consultation bodies for policy makers. ■

RECOMMENDED ACTIONS

At EU level: The relevant sector stakeholders – national skills bodies, social partners, professional associations, education and training organisations, etc - need to receive constant recognition and support in the different skills-related EU initiatives.

At national level: If not already existing, stable sector platforms should be set up - bringing together educational and professional representatives -, funded by the most relevant means in the national context (collective agreements, public funding, etc.)

At sectoral level: More permanent channels of communication and co-operation should be established between education and the industry, going beyond specific projects and allowing for a two-way conversation.

THE DIGITAL ENVIRONMENT

The digital environment has not only transformed **production and distribution channels** it has also offered a renewed importance to **content creation**. It has brought the creative and cultural sectors

back into the heart of our economies and societies, dependent more than ever on its innovative capacities.

Adapting the sector skills to the digital shift and its constant technological developments is therefore crucial, as is the proper recognition of its role in animating and shaping the future of the digital environment. ■

RECOMMENDED ACTIONS

At EU level: In addition to developing digital skills across economic sectors, the specific contribution of the creative and cultural sectors to the digital environment has to be recognised. All relevant EU funding programmes (Creative Europe, Erasmus +, Horizon 2020, etc.) should recognise and support the needs of skills development in the audiovisual and live performance sectors including, but also going beyond, basic ICT skills.

At national level: Funding schemes at regional and national level must be made available to support education and professional stakeholders adapt to - and shape - the new digital environment. Education and training bodies should rethink their curricula to integrate the digital reality in a horizontal manner, promoting T-shaped profiles and interdisciplinary teams.

At sectoral level: Sector stakeholders (social partners, professional associations, businesses) should take stock of the transformation of their operating environment and of sector occupations, adapt their actions with regard to formal and informal training, and experiment with new training models and tools (intergenerational learning, online and blended learning, training partnerships with other sectors, etc).

CAREER MANAGEMENT

The new developments that affect the audiovisual and live performance sectors have impacted not only the occupations and related skills sets, but also the career paths. Individual workers are faced with **greater employment insecurities** (short-term contracts, short or long phases of chosen or imposed self-employment, etc.) and they increasingly see the need to **diversify their own activities** in order to earn a living. These trends build on sectoral

specificities that have already for decades been impacting careers, such as project-based work, intermittent employment or early retraining needs.

Setting up initial and ongoing training schemes that help workers acquire sectoral specialised but also horizontal skills (teamwork, entrepreneurship, communication, etc.) is therefore crucial.

It is vital to equip employers with the necessary skills to develop their HR policies appropriately. Only then can career development become a tool that benefits both businesses and their workforces (employed and independent). ■

RECOMMENDED ACTIONS

At national level: Support schemes should be redesigned to ensure they offer the right tools for career development (specific and horizontal skills) to all workers (employed and independent).

At sectoral level: Proper social and management policies should be developed that combine a vision for the future of the sector and for the individual careers of the professionals composing the workforce. Better publicity should be made to advertise training opportunities for a greater take up by businesses and individual workers.

ON-THE-JOB LEARNING

In the audiovisual and live performance sectors, as in other sectors, on-the-job learning has proved its efficiency in helping future professionals better **understand their future work environment** and

acquire the **right set of skills** to navigate it.

More opportunities for on-the-job learning should be developed, making sure the schemes set up **suit the organisation of the activity in the sector** (project-based, seasonal, often carried by very small structures, etc) and offer **mobility perspectives** to future workers. ■

RECOMMENDED ACTIONS

At EU and national levels: Partnerships between education and professional partners that develop on-the-job learning schemes should be supported. Greater recognition and validation of vocational qualifications, skills and competences in the sector should be given in order to enhance and facilitate professional mobility.

At sectoral level: There should be commitment to the development of on-the-job learning through internships, apprenticeships and other modes of co-operations between the world of work and the world of education. Given the specificities of the sector, new training models should be tried out (online and blended schemes, mentoring, tutoring, collective training workshops on the workplace, etc.).



creative
skills
europe

ANNEXES

ANNEX 1: KEY ORGANISATIONS AND RESOURCES

NATIONAL SKILLS BODIES

► **Sociaal Fonds voor de Podiumkunsten** (SFP) is the Social Fund for the live performance sector in Flanders (Belgium). It redistributes levies for risk groups agreed upon in a sector collective agreement. It exists since the 1990s and is governed by sectoral social partners. SFP's main activities consist of identifying sectoral training needs, organising short-term trainings and redistributing training grants. It manages a sectoral supplementary pension established in 2006 and other sectoral financial benefits like eco-vouchers. Since 2009 it also manages a career counseling center for performing artists. It publishes employment and training information on its website (job bank, information on public schemes, internship opportunities, etc.) and established a list of competence profiles for sectoral occupations. Thanks to its management role of sectoral financial benefits it has access to a large pool of employment data.

For more information: www.podiumkunsten.be

► **mediarte.be** is the 'Social fund for the audiovisual and film production sectors in Belgium'. It was created to manage and redistribute levies for risk groups agreed upon in sector collective agreements. It represents the interest of the audiovisual sector since 2008, and of the cinema feature films production subsector since 2012. mediarte.be produces yearly statistics on the employment situation in the sector, and distributes

training grants to the professionals covered by the two collective agreements mentioned above. It manages an online information platform for future and current professionals in the audiovisual sector, as well as a guide to occupations and a description of occupational standards. The portal also centralises job adds, and lists all existing vocational training schemes in Belgium. Finally mediarte.be organises public events and runs specific programmes such as a large-scale initiative to promote diversity in the workplace.

For more information: www.mediarte.be

► **CPNEF SV** (Commission Paritaire Nationale Emploi Formation Spectacle Vivant) was set-up in 1993 at the initiative of French social partners and is governed by them. It pilots the 'Observatory on Live Performance Professions', hosted by Afdas (Fonds d'assurance formation des secteurs de la culture, de la communication et des loisirs). The CPNEF SV and its observatory produce annual quantitative labour market intelligence (employment and training statistics), and qualitative reports. It also publishes online sectoral occupational standards, orientation material for young people, and a directory of the initial and continuous training offer in the sector. It contributes to formal frameworks for the development of professional qualifications and continuous training schemes, initiated the establishment of new qualification certificates for riggers, electricians, and risk prevention professionals and provides advice to training bodies.

In partnership with other social institutions, it has created a support platform for micro-businesses, a website dedicated to apprenticeships, and developed a skills assessment scheme for the employees of the sector.

For more information: www.cpnefsv.org

► **CPNEF AV** (Commission Paritaire Nationale Emploi Formation Audiovisuel) was created in 2004 following the adoption of a new legislative framework on professional training in France. It is governed by social partners and financed by a levy on wages. The activities of the Committee receive the technical support of the 'Observatory on Audiovisual Professions' hosted by Afdas. The CPNEF AV publishes studies and thematic reports, as well as online employment and training information, occupational profiles, web documentaries on occupations, and a panorama of the AV professional training offer in France. It launches ad hoc initiatives to respond to urgent sectoral needs (regional platform supporting the reconversion of the technical industries, new qualification certificates for radio presenters, machinists and digital conservation professionals, etc.) and develops longer terms initiatives (production of standards, surveys of companies and employees, etc.).

For more information: www.cpnef-av.fr

► In the Netherlands, **GOC** – owned by the social partners – is the skills and training body for the media and creative sector. Its core activities are labour and market research, technical and 'soft skills' training, and organisational consultancy (strategy, productivity). GOC is also researching the feasibility to support the development of new

profiles and programs for educational institutions. Labour mobility of employees in a broad sense is another focal area for GOC with the mobility centre 'C3 works' (<https://eportfolio.c3werkt.nl/>). GOC finally publishes an annual survey of the trends affecting the Dutch cultural, media and creative sectors.

For more information: www.goc.nl

► **Creative & Cultural Skills** (CCS) is the UK skills organisation for the craft, cultural heritage, design, literature, music, performing arts and visual arts sectors. It was founded in 2004. CCS is employer-led but trade union and education representatives are also member of the board of the organisation. The main activities of CCS include: the management of the National Skills Academy (a network of employers and education providers working on industry-led careers events), of an apprenticeship programme, of Creative Choices (a career information and guidance programme), the development of professional standards and vocational qualifications. All CCS publications are available online in the form of research, market intelligence, statistics, think pieces and policy analysis. In 2012, CCS opened and moved to the Backstage Centre, a dedicated rehearsing and training centre in Purfleet, Essex.

For more information: <http://ccskills.org.uk>

► **Creative Skillset** is the UK-wide strategic skills body for the Creative Industries, covering film, television, radio, fashion, animation, games, visual effects, textiles, publishing, advertising, marketing communications and performing arts. Through co-investment, Creative Skillset manages a range of training funds raised from both industry

and Government aimed at delivering solutions for skills development. Creative Skillset develops qualifications and accredits education courses via the Creative Skillset Tick, an assessment process conducted by experts working in the Creative Industries. Creative Skillset also offers careers

information and, as research leaders, examines the size and shape of the Creative Industries, in order to understand the needs of employers and the workforce, investigating existing training provisions and scoping out future needs.

For more information: www.creativeskillset.org

OTHER RELEVANT INITIATIVES

All links as consulted on 19 May 2016

FRANCE

- ▶ AFDAS, the Trainingfund of the live performance, cinema, audiovisual, advertisement, leisure, press, and publishing sectors
www.afdas.com
- ▶ The platform of the technical industries in the film and audiovisual sector
www.plateforme-itac.fr

ESTONIA

- ▶ Estonia Qualifications Authority (Kutsekoda)
www.kutsekoda.ee/en/index

GERMANY

- ▶ The Career and Transfer Service Center (CTC) of the Berlin University of the Arts
www.careercenter.udk-berlin.de

THE NETHERLANDS

- ▶ Omscholing Dansers Nederland (Dutch Transition Program for Dancers)
www.omscholingdansers.nl

SWEDEN

- ▶ Dansalliansen (Dance Alliance)
www.dansalliansen.se
- ▶ Trygghetsrådet TRS, foundation 'for a more secured working life'
www.trs.se
- ▶ Musikalliansen (Music Alliance)
www.musikalliansen.org
- ▶ Teateralliansen (Theatre Alliance)
www.teateralliansen.se
- ▶ Kulturakademin Trappan, a cultural training programme in the West of Sweden
www.kulturakademintrappan.se

EU-LEVEL

- ▶ European League of Institutes of the Arts (ELIA)
www.elia-artschools.org
- ▶ Association Européenne des Conservatoires, Académies de Musique et Musikhochschulen (AEC)
www.aec-music.eu
- ▶ 'CAPE SV: Capitalisation of Learning Outcomes in Europe's Live Performing Arts' project
www.cfpts.com/capesv

- ▶ European Qualifications Framework (EQF)
http://ec.europa.eu/ploteus/search/site?f%5B0%5D=im_field_entity_type%3A97
- ▶ ESCO – European Skills, Competences, Qualifications and Occupations
<https://ec.europa.eu/esco/home>
- ▶ The Compendium – Cultural Policies and Trends in Europe
www.culturalpolicies.net
- ▶ Grand Coalition for Digital Jobs
<https://ec.europa.eu/digital-agenda/en/grand-coalition-digital-jobs-0>
- ▶ Groupement Européen des Ecoles de Cinéma

- et de Télévision (GEECT) / European Grouping of Film and Television Schools
www.cilect.org
- ▶ The European Audiovisual Observatory
www.obs.coe.int
- ▶ European federation of Cinematographers (IMAGO): www.imago.org
- ▶ European Feder. of Professional Circus Schools
www.fedec.eu/en/la-fedec
- ▶ Integrated Journalism in Europe' project:
<http://integratedjournalism.upf.edu>
- ▶ EU Skills Panorama
<http://euskillspace.cedefop.europa.eu>

ANNEX 2: BIBLIOGRAPHY

BELGIUM

- ▶ Le secteur audiovisuel – chiffres 2013 – Marché de l'emploi, mediarte.be, Version mai 2015
www.mediarte.be/sites/default/files/fileupload/photo_sectorielle_marche_de_emploi_-_2008-2013.pdf
- ▶ Le secteur audiovisuel –chiffres 2013 – Effort de formation, mediarte.be, 2015
www.mediarte.be/sites/default/files/fileupload/photo_sectorielle_efforts_de_formation_-_2008-2013.pdf
- ▶ Flanders in Figures 2013, Departement Internationaal Vlaanderen, November 2013
www.vlaanderen.be/int/en/publications/detail/flanders-in-figures-2013-1

FINLAND

- ▶ Audiovisuaalisen alan tuottajakentän toimialakartoitus', Marianne Toiskallio & Minna Laukkanen, PREFIX, November 2013 (Survey on the production branch of the AV sector, in Finnish only)
www.prefix.fi/docs/Toimialakartoitus.pdf
- ▶ Finnish Theatre Statistics 2013', Theatre Info Finland www.tinfo.fi/documents/teatteritilastot_2013_web_2908141513.pdf

FRANCE

- ▶ Tableau de bord, données 2012, CPNEF SV
www.cpnsv.org/donnees-statistiques/tableau-bord/donnees-nationales

► Etude sur la relation formation / emploi dans le spectacle vivant (study on the relation training / employment in the live performance sector), Centre d'études et de recherches sur les qualifications, publiée par l'Observatoire Prospectif des Métiers et des Qualifications du Spectacle Vivant, March 2012
<http://cpnefsv.org/sites/default/files/public/pdf/E-Etude-et-rapport/E1-Pdf1-rapport-emploi-formation-2012.pdf>

► Actualisation du contrat d'études prospectives du spectacle vivant – diagnostic comparé de la situation de l'emploi et de la formation professionnelle 1997-2014', CPNEF SV / Observatoire des Métiers du Spectacle Vivant / Centre d'études et de recherches sur les qualifications (CEREQ), September 2015
www.cpnefsv.org/etudes-colloques/etudes-rapports/contrat-detudes-prospectives-cep-spectacle-vivant

► Etude sur les métiers de la réalisation – réalisateur, assistant réalisateur, scripte (study on the direction occupations – director, assistant director, script supervisor), Observatoire des métiers de l'audiovisuel, 2010-2011

www.cpnef-av.fr/metiers-realisation

► Etude sur l'évolution des activités des journalistes dans le cadre des nouveaux médias et les réponses en matière de formation (study on the evolution of journalists' activities in the context of new media and the answers in terms of training), Observatoire des métiers de l'audiovisuel, January 2014
www.cpnef-av.fr/les-etudes/les-journalistes-face-aux-nouveaux-medias

► Etude sur l'intégration des technologies numériques dans les formations aux métiers de l'audiovisuel (study on the integration of digital technologies in the training of audiovisual

professions), Observatoire des métiers de l'audiovisuel

www.cpnef-av.fr/les-etudes/les-techniques-numeriques-et-leu

► Presse et numérique – L'invention d'un nouvel écosystème (print and digital media – the invention of a new ecosystem), Jean-Marie Charon, June 2015

www.culturecommunication.gouv.fr/Ressources/Rapports/Rapport-Charon-Presse-et-numerique-L-invention-d-un-nouvel-ecosysteme

GERMANY

► Monitoring of Selected Economic Key Data on the Culture and Creative Industries 2012', Federal Ministry for Economic Affairs and Energy, January 2014

<https://www.kultur-kreativ-wirtschaft.de/KuK/Redaktion/PDF/monitoring-wirtschaftliche-eckdaten-kuk-2012-kurzfassung-englisch,property=pdf,bereich=kuk,sprache=de,rwb=true.pdf>

NETHERLANDS

► Vind je draai – Trends in de creatieve industrie (2014), GOC

www.goc.nl/trends2014

► 2020 starts tomorrow – meet the employees of media and communication companies in 2020', GOC, 2014

www.goc.nl/Onderzoeken-Publicaties/2020-starts-tomorrow

SPAIN

► Anuario de Estadísticas Culturales 2014, Sub-Directorate General of Statistics and Studies of the Technical General Secretariat, Ministry of Education,

Culture and Sport, October 2014

www.mecd.gob.es/servicios-al-ciudadano-mecd/estadisticas/cultura/mc/naec/portada.html

UNITED KINGDOM

► Sector Skills Assessment for the Creative Industries of the UK, Creative Skillset and Creative & Cultural Skills, January 2011

http://creativeskillset.org/assets/0000/6023/Sector_Skills_Assessment_for_the_Creative_Industries_-_Skillset_and_CCSkills_2011.pdf

► Creative Media and Entertainment: Sector Skills Assessment 2012, Briefing paper, Creative Skillset and Creative & Cultural Skills, UK Commission for Employment and Skills

www.gov.uk/government/uploads/system/uploads/attachment_data/file/306379/briefing-paper-ssal2-creative.pdf

► 2012 Employment census of the Creative Media Industries, Creative Skillset

http://creativeskillset.org/assets/0000/5070/2012_Employment_Census_of_the_Creative_Media_Industries.pdf

► Creative Media Workforce Survey Report 2014, Creative Skillset

http://creativeskillset.org/assets/0001/0465/Creative_Skillset_Creative_Media_Workforce_Survey_2014.pdf

► Film Employment Panel, Creative Skillset, March 2014

http://creativeskillset.org/assets/0000/7823/Employer_Panel_Film_Report_March_2014.pdf

► Fusion skills: Perspectives and Good Practice, Creative Skillset, July 2013

http://creativeskillset.org/assets/0000/0230/Fusion_report.pdf

► The Creative and Cultural Industries, Performing Arts 2012/13, Creative & Cultural Skills, October 2012

<http://creative-blueprint.co.uk/statistics/reports/industry-statistics>

► Building a Creative Nation: Evidence Review, Creative & Cultural Skills, 2013

http://ccskills.org.uk/downloads/Building_a_Creative_Nation_-_Evidence_Review.pdf

► 'Building a Creative Nation: the Next Decade – What the current literature tells us about the future skills needs of the creative and cultural industries', Creative & Cultural Skills, March 2015

<http://ccskills.org.uk/supporters/employer-advice/article/building-a-creative-nation-the-next-decade-a-research-report>

► Building a Creative Nation: Putting Skills to work – creating jobs, apprenticeships and work opportunities in the creative and cultural industries', Creative & Cultural Skills, 2016

<https://ccskills.org.uk/supporters/advice-research/article/building-a-creative-nation-putting-skills-to-work>

► Creative Industries Economic Estimates, Department for Culture, media & Sport, January 2015

www.gov.uk/government/uploads/system/uploads/attachment_data/file/394668/Creative_Industries_Economic_Estimates_-_January_2015.pdf

► 'Publicly-Funded Arts as an R&D Lab for the Creative Industries? A Survey of Theatre Careers in the UK', Creative & Cultural Skills, Arts Council England and Nesta, 2013

<http://creative-blueprint.co.uk/library/item/publicly-funded-arts-as-an-rd-lab-for-the-creative-industries-a-survey-of-u>

► Digital Culture 2014: How Arts and Cultural Organisations in England use Technology, Nesta, Arts Council England and the Arts and Humanities Research Council

<http://artsdigitalrnd.org.uk/wp-content/uploads/2014/12/Digital-Culture-2014-Research-Report1.pdf>

► Creativity and constraint: leadership and management in the UK creative industries (2015), by Dr. Amy Armstrong & Natasha Page, Creative Skillset & Ashridge Business School: http://creativeskillset.org/assets/0001/5933/Creativity_and_constraint_leadership_and_management_in_UK_2015.pdf

► Sector insights: skills and performance challenges in the digital and creative sector, UK Commission for Employment and Skills, June 2015: www.gov.uk/government/uploads/system/uploads/attachment_data/file/433755/Skills_challenges_in_the_digital_and_creative_sector.pdf

EU-LEVEL

Sector initiatives

► Réflexions sur la formation aux métiers techniques du spectacle (reflections on the training to the technical occupations of the live performance sector), Project FIRCTE3 (Formation initiale et reconnaissance de compétences des techniciens du spectacle vivant), April 2006

www.cfpts.com/download.php?id_file=324

► CAPE-SV: Methodological guide / Guide to CAPE-SV methodology and applications. Project Capitalization of Learning Outcomes in Europe Live's Performing Arts, November 2011:

www.cfpts.com/download.php?id_bloc=1219

► 'D'une photographie de l'emploi à la recherche de formation...' (from a picture of the employment situation to training research...), Project Leonardo the Best, research and interviews led by the social partners F3C-CFDT (France) and FISTEL-CISL (Italy), 2007

www.cfpts.com/download.php?id_file=317

► A report on theatre technical training in EU 1998 – 2008, by Umberto Bellodi (Accademia Teatro alla Scala) and Chris Van Goethem (Teatd vzw), PEARLE* EURO-MEI Training Forum 2009:

www.podiumtechnieken.be/sites/podiumtechnieken.be/files/TTF_5-nov_definitive_0.pdf

► Recommendations on Journalism education – A comparative report based on the French, Spanish, Danish, Romanian and Swedish case, IJIE Integrated Journalism in Europe project, February 2014 : http://integratedjournalism.upf.edu/wp-content/uploads/2015/06/NR_RECOMMENDATIONS.pdf

► Analysis of key skills of young professional circus artists, Miroir Project part 2, European Federation of Professional Circus Schools:

https://issuu.com/fedecpro/docs/fedec_miroir2_en_web?e=12051196/8235650

► Towards a European SQF for the Creative and Performing Disciplines and the Humanities, Tuning Project 2012, Universidad de Deusto, Bilbao and University of Groningen :

www.elia-artschools.org/images/activiteiten/32/files/sectorial-qualifications-framework.pdf

► Tuning Document Theatre Education www.elia-artschools.org/images/activiteiten/32/files/Tuning_Theatre.pdf

► Polifonia www.aec-music.eu/polifonia

► Tuning Educational Structures in Europe – SQH Humanities and Arts:
www.unideusto.org/tuningeu/sqf-humanities-and-arts.html

► Tuning document for Dance Education:
www.elia-artschools.org/images/activiteiten/32/files/Tuning_Dance.pdf

► Tuning Document for Film/Screen Arts Education
www.elia-artschools.org/images/activiteiten/32/files/Tuning_document_film_EN.pdf

► Polifonia Final report
www.aec-music.eu/userfiles/File/2011_3637_FR_Polifonia_pub.pdf

European Cultural statistics

► Cultural statistics, Eurostat Pocketbook, Eurostat – European Commission, 2011 edition
<http://ec.europa.eu/eurostat/en/web/products-pocketbooks/-/KS-32-10-374>

► The Economy of Culture in Europe, KEA European Affairs, 2006
www.keanet.eu/ecoculture/studynew.pdf?4f4eb7

► ESSnet-CULTURE – European Statistical System Network on Culture, Final report, Luxembourg, May 2012
http://ec.europa.eu/culture/library/reports/ess-net-report_en.pdf

► Draft Conclusions of the Council and of the

Representatives of the Governments of the Member States, meeting within the Council, on a Work Plan for Culture (2015 – 2018), Brussels, November 2014

<http://data.consilium.europa.eu/doc/document/ST-16094-2014-INIT/en/pdf>

► Creating growth, measuring cultural and creative markets in the EU, EY, 2014
[www.ey.com/Publication/vwLUAssets/Measuring_cultural_and_creative_markets_in_the_EU/\\$FILE/Creating-Growth.pdf](http://www.ey.com/Publication/vwLUAssets/Measuring_cultural_and_creative_markets_in_the_EU/$FILE/Creating-Growth.pdf)

► The resilience of employment in the Culture and Creative Sectors during the crisis, EENC, 2015
www.europacreativamedia.cat/rcs_auth/convocatories/EENC-resilienceemploymentCCSs-final20022015.pdf

EU General statistics

► 'Key figures on Europe – 2014 edition', Eurostat
<http://ec.europa.eu/eurostat/documents/3930297/6309576/KS-EI-14-001-EN-N.pdf/4797faef-6250-4c65-b897-01c210c3242a>

► Total working active population (total employment – resident population concept – Labour Force survey), Eurostat website,
http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=lfsi_emp_a&lang=en

Two additional annexes (the full list of participants to the Creative Skills Europe's meetings and a glossary) are available in the digital version of this publication published on the website

www.creativeskillseurope.eu

Photo credits

- Foreword, p. 5 and Skills for tomorrow, p. 62: CC licence
- Executive Summary, p.8: La Belle et la Bete © National Theatre Brno
- Introduction (p. 15), Conclusions (p. 101) and recommendations (p. 108): European Broadcasting Union
- Chapter 1 Trends in Europe, p. 20: Belonoga, BNR, Bulgaria, at Euroradio Folk Festival 2015, © Michal Ramus, KBF, Krakow
- Chapter 3 Inspiring initiatives, p. 82 : Kesäteatteri ©Leena Klemelä
- Annexes (p.115) : Gobé Band, MTVA, Hungary, at Euroradio Folk Festival 2015, © Michal Ramus, KBF, Krakow

Creative Skills Europe, the European Skills Council for Employment and Training in the Audiovisual and Live Performance sectors, was launched in November 2014 by a partnership of European trade unions and employers' organisations.

From November 2014 to June 2016 Creative Skills Europe collected sector labour market intelligence gathered from different EU countries, developed a European perspective on developments in the audiovisual and live performance sectors, promoted contacts and exchanges between sector stakeholders active in the employment and training fields, and promoted peer learning and the exchange of best practice across EU borders.

The results of this work are presented in this report. It summarises hours of discussions in different EU capitals, and capitalises on the expertise of national skills bodies that kindly agreed to play an active part in the project.



A publication prepared in the context of a European project supported by the EU Programme for Employment and Social Solidarity – Progress (2007–2013)

