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Exploitation and development of the job potential in the cultural sector in the age of digitalisation

FINAL REPORT - SUMMARY

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MKW Wirtschaftsforschung GmbH, Munich

in co-operation with

**österreichische kulturdokumentation.
internationales archiv für kulturanalysen, Vienna**

empirica Delasasse, Cologne

INTERARTS, Barcelona

Economix Research & Consulting, Munich

WIMMEX AG, Munich

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EXECUTIVE SUMMARY

The cultural sector in the EU – an overview

- Up until recently, the economic and labour market aspects of the arts and cultural sector were of secondary significance in the welfare state. Culture was seen as part of social policy and was not considered an area which could or should be subject to "normal" economic criteria, since these criteria were interpreted as incompatible with culture. In many European countries, art and culture were understood as a public service meant to promote the aesthetic sensibilities of the nation's citizens.
- In the last 10 years, the number of commissioned scientific studies and political programmes on the broad topical spectrum of „Cultural Economy and Employment" has increased dramatically. Both the current discussion on the theory of culture and current policy are characterised by two processes which are independent and affect each other's further development: one speaks of the "economisation" of culture, on the one hand, and the "culturalisation" of economy, on the other hand.
- In the research literature, three very different levels of discussion can be discerned, each of which is inspired by different interests in specific areas of understanding: culture-critical cultural studies; studies based upon the labour market, sociological approach; studies commissioned by employment policy makers and interest groups concerning "employment in the cultural sector" or the cultural sector as a job-creator.
- Studies addressing themes which combine the aspects of economy, culture and the labour market are in the forefront of the current applied research. At the present time, labour market policy viewpoints still play a subordinate role. This, however, is changing in the face of the increasing need for legitimisation of public budget expenditures.
- There is neither an EU-wide uniform definition of „cultural economy" nor are there corresponding standardised statistics on the EU level which can serve as the basis for empirically depicting the employment developments in the area of culture. Not least of all due to historically evolved patterns of interpretation, European countries have quite different understandings of the cultural sector. Due to inadequate quantitative foundations, the majority of statements to be found in the scientific literature are made based upon non-empirical studies.
- Because the development of cultural economic concepts is a relatively new one, the spectrum of opinions found in research literature is very heterogeneous, so that it is not yet possible to speak of a „mainstream" of thought.

The cultural sector in the EU – characteristics, volume and trends of employment

- The cultural sector is characterised by a high share of freelancers and very small companies. A new type of employer is emerging in the form of the „entrepreneurial individual" or „entrepreneurial cultural worker", who no longer fits into previously typical patterns of full-time professions.
- Despite the unsatisfactory data situation, it was possible to carry out a practicable statistical demarcation of the cultural sector within the framework of this study. The most important quantitative characteristics of the cultural sector were ascertainable and were able to provide for an approximate solution.
- According to the broadest definition, there are currently 7.2 million workers in the EU cultural sector. This figure is significantly higher that assumed in previous studies.
- From 1995 to 1999, the cultural sector in the EU experienced an average annual rate of employment growth of 2.1%. This employment growth was concentrated in those areas within the arts and culture where the demand for content is greatest, while employment stagnated in the characteristically industrial areas (such as the printing industry).

Within the cultural sector, employment figures for cultural occupations grew strongly at a annual rate of 4.8% during the period of 1995-1999, whereas non-cultural occupations in the cultural sector (such as administration) tended to decrease in employment.

- Continued employment growth in the creative occupations of the cultural sector is to be expected in the future since the demand for cultural products and services is strongly increasing, both from private households and from companies. Employment growth in the area of distribution will also increase, but not at the same rate as in the development of cultural ”products”. “Content producers” seem to be in greater demand than marketing and sales persons.
- Generally speaking, the rapidly increasing digitalisation of cultural products will result in "traditional“ cultural media, such as books and printed matter, losing significance, while new media, such as Internet web sites, will come to the fore, also in terms of employment.

Employment in digital culture – characteristics, volume, trends and requirements

- The “digital culture” is the result of an interaction between “traditional” culture (content), the TIMES sector (technology) and services/distribution. The increasingly used term TIMES sector (**T**elecommunication, **I**nternet, **M**ultimedia, **E**-commerce, **S**oftware and **S**ecurity) is used in this study to cover the whole audio-visual sector, i.e. the entire multimedia sector, including culture industry areas such as TV, publishing, and the music industry.
- The TIMES sector in the EU is characterised by very small companies. Only 13.2 % of the companies have more than 50 employees. There is a very high share of freelancers, with 1.3 freelancers for every regular employee. In contrast, at 30 %, the share of women is very low. The percentage of women employed in creative occupations is even lower, and when it comes to company start-ups, only 20 % of new TIMES companies are set up by women.
- Digital culture demonstrates enormous employment dynamics, particularly in the areas of multimedia and software. These two sub-sectors are those with the greatest demand for content and creativity and therefore represent the best employment opportunities for creative workers.
- There are currently approximately 1.5 million companies in the EU active in the areas of multimedia and software, representing a total of 12.4 million workers. Assuming a declining annual growth rate over the next 10 years from 10 percent in 2001 to just 3 percent in 2011, we can estimate 22 million jobs in the year 2011. Thus, approximately 9.6 million new jobs will be created in multimedia and software in the next decade.
- However, the TIMES sector is currently already experiencing great bottlenecks of personnel on an EU-wide level. This shortage of qualified personnel represents the number one hindrance to growth in the TIMES sector.
- In digital culture, completely new job profiles and qualification content are presently emerging which are extremely interesting for cultural workers. The rule of the thumb which can be applied to this sector is that the entire technical segment, including technology, infrastructure, hardware and printing, will undergo a period of relative stagnation or even decline (with regard to both jobs and contribution to the value adding process), whereas all content-oriented i.e. creative areas of employment will continue to show high growth rates (Web design, advertising, publishing, media, education, entertainment, etc.)

Good practices for training and qualification

- A large number of good practices in the EU are related to the new job profiles within digital culture and offer corresponding qualification measures. However, In the light of the enormous need for qualification, they are still no where near sufficient in number.

- Particularly in the sector of „traditional“ culture, there are numerous outstanding good practices in the area of qualification (for example, LIPA, DSA) which are having a radiating, „oil-on-water-effect“ on other existent training institutes. Within the context of these innovative environments, new qualification tools are continually being developed.
- As a rule, the outstanding good practices are organised as public-private-partnerships. Company involvement has proven its worth, but can turn out to be problematic, namely if companies place too high a priority on their demand for short-term returns.
- Although a considerable amount of EU funding is available in particular for cross-border initiatives, there are very few qualification measures within a cross-border context to be found in the EU region.
- The duration of most of the projects is limited. In addition, the networking of projects through relationships to universities, colleges, etc is very limited.

Obstacles to mobility

- Worker mobility between EU states is very limited, both on transnational and cross-border levels. While there are indications that the mobility of workers within the cultural sector is somewhat higher than in other professional groups, cultural worker mobility is still not significantly high, since the total number of mobile workers in general is extremely low.
- At the same time, cultural and multimedia workers face above average obstacles to mobility, primarily because there is no transparent labour market on the EU level. There is a lack of European information networks and „market places“ for vacant positions and those seeking employment which would correspond to the specific conditions of the cultural sector and the digital economy. This is particularly true for the media economy, since newly emerging professions are not registered in public statistics and with employment administrations at all.
- In overcoming obstacles to mobility, the primary issue is to create a transparent European labour market, in order to make it possible for EU citizens to make use of their basic right to professional freedom of movement within the EU. In order to see this legal right of each individual EU citizen become a reality, corresponding structures must be created.
- Within this context, it is a matter of priority to create an Internet-supported „European Information Platform“, which would help to make it possible for workers in the digital culture to gain comprehensive information about vacant job positions in other EU countries. A prerequisite for this is an up-to-date and EU-standardised classification of professions within digital culture.

Overall assessment

Digital culture has acted as an employment motor in the past, and will continue to do so in the future, primarily based upon the strong demand within the TIMES sector for creativity and content. At the same time, dramatic personnel bottlenecks can already be observed in this sector today.

Thus, policy makers must better orient their instruments of employment policy toward this area, both on the European and national levels. Within the framework of European Employment Policy, there is a still a widespread deficit of specific information, communication and funding tools, especially in the area of training and further education. Thus, within the context of subsidisation policy, the economic sector with the best prospects for growth and employment is being extensively neglected, is not being sufficiently recorded in employment statistics and its needs are not being adequately looked after.

1. Introduction

The aim of this study was to identify new strategies to exploit the employment potential of the cultural sector in the European Union. In doing so, it was necessary to pay specific attention to the audio-visual industry and new technological developments in the cultural sectors in general.

Consequently, the Modules of the study have been tailored according to the precise requirements formulated in the **Terms of Reference:**

Module 1: gives an **overview of current research and knowledge on employment potential in the cultural sector**. The changing relationship between the arts, culture and economy is discussed in order to get a better understanding of the increasing importance of new entrepreneurial and technological skills and competency necessary for artists and cultural workers.

Module 2: **identifies the current employment trends in the cultural sector**. The result provides an empirical foundation for analysing the heterogeneous spectrum of the cultural sectors, with its public sector, intermediate and private sector components.

Module 3: **identifies the current employment trends in the TIMES sector** (Telecommunication, Internet, Multimedia, E-commerce, Software and Security), provides an **in-depth analysis of new professions and new skill requirements** for cultural workers in the TIMES sector and identifies **examples of existing adequate flexible training provisions**. The resulting data base can be used as an initial practical step for a **comparative data base** that is able to regularly monitor the most current developments in the analysed fields.

Module 4: compiled a **comprehensive collection of good practices in training provision**, based on the new skill requirements determined in Module 3, with the aim of initiating adequate training policies. In selecting examples of good practices, particular emphasis was placed on the areas of **occupational integration of young people and reintegration of long-term unemployed**. This is due to the urgent need for exploring new training structures and developing new training programmes aimed at providing the technical skills of the digital age, as well as a broad range of other skills, such as management, marketing, public relations, etc.

Additionally, models of **public-private-partnerships** in local/regional development related to training and job creation were identified. Since the cultural sector is often perceived as significant in contributing to regeneration, to creating **employment in depressed areas**, and to enhancing the skills of people on the margins of the labour force, it was necessary to take such projects into consideration.

Module 5: identifies **obstacles to transnational and cross-border mobility** of cultural workers in a country-by-country comparison in order to promote transparency and geographic mobility with regard to the cultural labour market.

2. Employment in the cultural sector in the EU – literature and research

2.1 "Employment" as topic of cultural research and politics

In studying the research literature on this subject, **three very different levels of discussion** can be discerned, each of which are inspired by different levels of specialised understanding. It is interesting to note that this structure reflects the ordering of knowledge inherent in research, namely first that of the arts and humanities (culture-critical cultural studies), second the labour market, sociological, socio-political approach and, thirdly, employment policy or interest group studies of "employment in the cultural sector" or the cultural sector as a job creator.

a) **Humanities or cultural studies** texts represent the outcome of researchers' interest in addressing the changing regimes of working culture. These provide different forms of interpretation of paid labour in general (e.g. Beck, Gorz, Hoffmann/von Osten, Sennett). The changing working and living conditions for the individual or specific societal groups (e.g. workers/employees/women) are at the centre of these studies. They do not focus on the economic exploitation of the employment potential.

b) **Social science labour market research** deals with changes in general or specific labour structures resulting from the application of new technology. These studies and texts are often focused on terms like flexibility, mobility and atypical employment conditions and those it affects (Fink, Flecker, Salamon, Talos).

c) **Cultural employment studies** have often been commissioned by public authorities or interest groups in the cultural sector in order to obtain a better overview of employment data and potential with the goal being to more effectively argue in favour arts and culture subsidisation or in order to raise public awareness of problems in a cultural domain such as music (cf. European Music Office). The aim of many of these studies is to develop or support and promote new political framework programmes on the part of state or international authorities for a growing sector which cannot simply be measured in terms of arts versus commerce (Greffe 1995, 1999, Hacklett/Ramsden, O´Connor).

The subject areas addressed in the following reflect the main argumentation in the literature:

- **End of the employee society? / fragmentation of the world of work**

  The general literature on the transformation of employment, the increase in leisure time or unemployment, the change in the structures of employment and unpaid work, the extension of typical women's conditions of employment to all those who are employed or seeking work is incredibly numerous and extensive. As a result, the discussion of this literature, which include such issues as the redistribution of work and the development of new forms of work, along with their resultant changes in lifestyle, can be seen as a significant contribution in better understanding the repositioning of paid labour in western industrial countries. A rapid rise in "atypical", precarious forms of employment can be observed in all the EU states. Jürgen Kocka and Claus Offe speak of a "fragmentation of the world of work" and basically see a coming together of the working conditions of the genders. Patchwork biographies, which represent a historically familiar employment experience for women, are now being discussed as a novelty, although they are only new in the context of male careers.

- **The "third sector" – a new level of expectations**

  The incorporation of the "third sector" – that is, non-governmental and non-profit-making organisations – in the distribution of welfare-state services is a trend that has been under way for some years. The non-profit sector and the field of organisations and associations

with charitable status currently represents a prospective market for creators of culture, alongside the insufficiently developed first sector (market) and the retreating second sector (state). There are several reasons for the growth of the "third sector". One of these is the extension of the service sector, while another has to do with the role that demographic developments (baby boomers) have played in bringing about an increase in demand. Thirdly, the general political circumstances should be mentioned - that is, the way in which demand is shifted to the third sector. However, in a European-wide comparison, the third sector as a mediator between the state and private enterprise remains as unclear and vague as the cultural sector itself (Bauer, Greffe, Salamon/Anheier).

The relevance of the third sector for European development is currently being researched. The Directorate-General for Employment, Industrial Relations and Social Affairs launched a programme in 1997 entitled "Third system and employment pilot action", which included the "Banking on Culture" project as an innovative action research project to investigate and stimulate new sources of financial investment for the cultural sector in Europe.

- **Getting used to new employment relations : Labour conditions in the cultural sector**

  Most analyses of the employment potential in the cultural or cultural industry field do not consider the awkward and, from the standpoint of survey techniques, practically unanswerable question of the working conditions of people active in the cultural sector. However, for this purpose, we can draw on the general cultural and social science literature regarding increases in atypical, precarious employment and the growing number of small and micro-companies and enterprises. All of these reports come to a surprisingly similar conclusion: artists are highly qualified but on average their income is very low and the situation of women artists is even worse than that of their male counterparts.

- **Artists / cultural workers / creative workers / media workers / content workers**

  As with all other professions, the image of the *artist* is subject to constant change, with new technology playing a major role. The arts theoretician Boris Groys sees contemporary artists primarily as "avant-garde consumers" and he assumes that the function of arts can no longer be described by artistic *production* alone, but that it is now, above all, a matter of the trend-setting "consumer function" of the artist:

  A particularly interesting term then crops up in the literature and in employment and cultural-policy debates, namely one no longer speaks of the artist who is creatively active, but of the *cultural worker* (Angerer, Feist, Giroux/ Trend, Grundmann). This term is as problematic as it is interesting. The *cultural worker* is an emancipatory term from the 1970s which has acquired a new interpretation in the employment policy context of the 1990s. A cultural worker – according to media theoretician Marie-Luise Angerer's diagnosis – is "on average a 25-30-year-old, multiskilled, flexible person, psychologically resilient, independent, single, unattached to a particular location, who jumps at whatever opportunity there is to be had in the field of the art, music or the media," (Angerer 1999, 26). The type of person being addressed represents, at the same time, just the kind of worker that the New Economy needs: young, unattached, creative (Hewitt).

  In as much as employment policy has discovered the cultural and media sector as the great white hope in recent years, the positioning of artists and creative workers in the public discourse has changed significantly. In the German-speaking world *"creative workers"* are generally classified under the commercial advertising sector and are clearly differentiated from those in artistic activities or creators of culture. In the British *Creative Industries mapping document*, in contrast, it is much broader: *"Activities have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property..."* (DCMS 1998, 3).

In some definitions, the cultural worker is located precisely in this area of association between *arts/culture and new media* and named *media worker or content worker*. Digitalisation has meant the emergence of new content-oriented jobs such as information broker or online-editor, in which cultural skills and content are applied, and which, therefore, may also represent an area of employment for arts scholars and graduates of the humanities.

In general, the labour market qualification requirements have changed drastically as a result of the introduction of new technology, just as it has restructured the production, distribution and consumption of cultural goods and services. Labour market researchers point out that interpersonal skills and intellectual capital are acquiring an increased profile and significance precisely as a result of the technologising of particular processes. The need for generalists versus specialists appears to be dependent upon company size, rather than sectoral or regional differences. Smaller enterprises are more likely to require workers capable of performing a number of tasks, while large firms tend to hire specialists who work in multi-disciplinary teams. (Ekos, Michel)

- **Cultural entrepreneurs / freelancer cultures**

  The strengthening of entrepreneurial initiatives and individual responsibility for education and training has become an increasingly pronounced trend in recent years. In *Was kommt nach der Arbeitnehmergesellschaft?* Heinz Bude analyses the process as follows: "The tendencies towards separating gainful employment from companies and professions are making entrepreneurial activism a key qualification in dynamic labour and product markets . . . what is developing here is the guiding concept of the "*entrepreneurial individual*" who does not follow prescribed standards but tries out their own combinations and asserts themselves on the market and in society," (Bude, 132).

  It is precisely this in-between position of the "new worker" / "new entrepreneur", between capital and labour, that is particularly interesting for labour market researchers, cultural studies analysts and politicians, because it reflects new socio-political relationships beyond the welfare state. The categories of the full-time job society – here the worker, there the employer – no longer apply; the (cultural) worker is suddenly also a (cultural) entrepreneur (without capital).

Until recently, in the age of the welfare state, economic or labour market policy arguments were of little interest for the arts and cultural sector, because it was not assumed that the creation of art and culture should be calculated economically. In most countries, the state has been responsible for the promotion of art, culture and literature and has had to fulfil this duty. Today, in the context of public austerity budgets, this consensus is no longer taken for granted. The cultural budgets are coming under increasing pressure to justify themselves and new funding models are being sought.

2.2 Culturalisation of the economy – economisation of culture

Historically, the link between the economy and culture has long been met with scepticism or outright rejection in the European tradition of cultural criticism. There was a general common sense consensus that commercial business interests and the creation of culture and art were simply contradictory. The economic marketing of art and culture was left to the commercial cultural industries. The deciding factor was quality not quantity. In this sense, specifically in the German-speaking countries, for example, the concept of culture that long dominated was one which maintained a strict separation of culture and industry, culture/arts and business. This again refers back to the culture-theory discourse that established this separation on the theoretical level (the Frankfurt School).

The principle was simple and clear: Business is responsible for earning money, culture for the "other side" of life – analysis, contemplation, personal forms of expression or the

provision of opportunities to escape from commercial marketing pressure. The arts and cultural sphere was seen as a socio-political field that could not be subject, so-to-speak, to ”normal” economic cost-benefit analysis, because the economic evaluation criteria were not regarded as being compatible with culture.

Cultural studies, which emerged in the context of adult education in Britain in the 1950s and slowly established itself in the 1970s, turned against the cultural pessimism of the Frankfurt School in that it attempted to link economic and cultural analyses and argued in the tradition of Antonio Gramsci for the integration of the cultural dimension, of the use of cultural products and practices in a critical analysis of capitalism (Hall 1992). Today, with the term ”cultural economy”, an attempt is made to describe the transformation of the production-oriented economy to a consumption-oriented one, as well as to underline the greater importance of cultural and symbolic goods as ”invisibles”, material and immaterial cultural products.

The **”economisation of culture”** means that economic categories are being drawn upon to an increasingly noticeable extent in the discussion and evaluation of the cultural sphere, which, in turn, leads to the general question of subsidy and of the canon of values and selection criteria that lie behind support for the arts and culture in the European states.

However, according to the cultural policy expert Robert Hutchinson, in recent years, ”culture” has emerged in the everyday usage of politics and public life in Britain, too, and, indeed, above all through the concept of cultural industries or creative industries. The historically deep-rooted British penchant to talk of ”the arts”, ”sport” and ”the press and television” rather than ”culture” is still prevalent (Hutchinson 1999). In contrast, in the paternalistically formed understanding of cultural policy characteristic of continental Europe, such as in France and Austria, the promotion of the arts and culture in the interests of the general public good is considered precisely to be the task of the state.

”Culture as commodity” and commercial cultural products were long absent from public cultural support plans and departments – these were the responsibility of commerce and industry. This has changed. Pop and consumer culture has established new relationships and semantic systems. Individualisation and pluralisation of lifestyles, and ”culture” as a reservoir of differences and distinctions have further contributed to the fact that the differentiation between high and low culture has lost much of its significance.

In the process, the criteria of the arts and culture subsidy system have also shifted. The traditional strict separation between a publicly subsidised non-commercial cultural sector and the cultural industry has been increasingly ”softening” in favour of mixed forms. Public establishments are called on to adopt market-oriented behaviour. An example of this is the partial/total legal independence of museums in all EU member states – although the discussions here vary significantly in the individual member states, ranging from the successful Tate Modern in London to the difficult separation of the Austrian museums from the federal administration. Furthermore, the function of public cultural establishments and their programmes can be defined according to cultural economic as well as artistic criteria. Every branch of the arts has thus ”fallen under the cultural industry’s wheel of fortune” (Steinert) - for example, exhibitions without museum shops and cafes are practically inconceivable.

Among a broader public, however, *one* interpretation of the arts and culture – namely, that they only cost money – obstinately persists. For a long time, in the context of public discussion, the broad range of supported, subsidised ”arts and culture” has rarely been associated with innovative productive effects, despite the fact that the specific benefit of this public support for private enterprise is obvious in the interrelationship between public support for the arts and cultural productions and their marketing in the private-enterprise culture and media economy, the cultural industries. Thus, in *The Politics of Culture: Policy Perspectives for Individuals, Institutions and Communities*, a book dealing with the interest in cultural policy that has recently emerged among US policy makers, the authors points out the

commercial sector's use of cultural productions developed in the non-profit-making field. (President's Committee, 74).

Talking of the arts, culture and employment in the same breath reflects the new social and economic significance of the production of symbolic goods. It also signals the development toward less state and more private structures and the penetration of private enterprise structures into areas where they previously did not exist. The context for this is the forced monetarisation processes taking place in areas of the (publicly funded) welfare state which were previously not widely monetarised and which are potentially accessible "to all", such as education, science, health and culture. "The profitability of universities, music academies and museums is increasingly often measured by the same criteria as for brickworks or screw factories" (Mandel, quoted from Volkart). The reduction of state budgets or the austerity budgets have necessitated new legitimisation strategies for culture and arts subsidies that are not exactly well-known for their effectiveness in commanding widespread public support.

The "marketisation" of culture and the "culturalisation" of the market means, on the one hand, that high culture is becoming increasingly commercial and, on the other hand, that cultural content is increasingly shaping commodity production.

These processes run concurrently and are part of a general trend of post-modern society (cf. Koivunen/Kotro). The authors point out, however, that the significance of the cultural industry should not be seen solely in terms of its economic importance, since culture exists primarily as something immaterial and abstract and, as a result, its effects on society often only emerge indirectly, making cause-and-effect relationships difficult to discern. In this sense, it is also difficult to measure the influence of cultural industries precisely. The cultural industry also creates relationships where previously there was little connection, for example in fashion. "The elevation of fashion to art and the apparent devaluation of art to fashion, however, beyond the traditional discourse of ennobling effects of art, are also examples of the inherent functional relationship of the cultural industry." The Australian cultural theoretician McKenzie Wark writes: "Fashion can be regarded as a social rhythm that is both culturally and industrially determined ... The enormous concentration of media, design and cultural knowledge and capital in the First World can function as an anchor for creative and cultural added value in the clothing industry." (Volkart, 81).

As we can read in the preface to a recently published collection with the promising title *Das Phantom sucht seinen Mörder: Ein Reader zur Kulturalisierung der Ökonomie* [the phantom seeks his murderer, a reader on the culturalisation of economy], "[on] the one hand, from the perspective of art, nothing seems so remote as economics. This separation builds on a cultural historical tradition within capitalist societies, in which the economy represents the rationalised and functional, and art the non-alienated, emotional exchange relationships" (Hoffmann/ von Osten 1999, 7). "Under the cover of so-called neo-liberalism, the economic has become a paradigm for cultural, national, municipal and educational policy decisions. Above and beyond this, the increasing importance of cultural processes and images in late capitalism is also quite eloquent testimony to the mutual conditioning of culture and political economy ... could we still at all assume that culture and economics are opposing pairs?" (Hoffmann/ von Osten, 8.)

Despite all the findings of the rapprochement and mutual conditioning of economics and culture, in this mainstream of all-embracing commercialisation interests and pressures, one of the greatest and most gripping nation-state and supranational (cultural) political challenges is to demand and maintain space for artistic, cultural and knowledge products that are not immediately marketable or to position socio-political arguments more deeply and forcefully in a field of public discussion that has largely been abandoned to economics.

2.3 "Old" and "new" culture - digital culture and TIMES sector

The ever more frequently addressed field of ”creative industries”, ”*Kreative Wirtschaft*” and ”cultural industries” – as it appears in the policy programmes of the EU states of Britain (DCSM 1998), Germany (Gnad et al, *Arbeitsgruppe Kulturwirtschaft* 1995, 1998) and Finland (Ministry of Education, Cultural Industry Committee) – is extremely heterogeneous and, for the most part, still not clearly positioned. There is no fixed definition of cultural industry and cultural economy in the literature.

The term **”creative industries”** is increasingly present in international cultural and labour market policy discussion as a result of the activities and programme of the British Labour government, and often appears to be closely related to the search for new jobs intended to integrate the cultural sector into the media and technology context of the labour market. The term ”creative industries” signals a continuation of the earlier term ”cultural industries”, extended by the inclusion of structural changes that have arisen with new technology (the inclusion of new products produced with and by new technology that belong to the broad sector of the leisure industry).

In the British mapping document (DCMS 1998), advertising, architecture, the art and antiques market, artistic handicrafts, design, designer fashion, film, interactive leisure software, music, performing arts, publishing, software, TV and radio are counted among the ”creative industries”. Here, we are dealing with a mixture of traditional branches of the cultural industry with parts of the telecommunications sector, that is, the integration of new forms of production and distribution that have arisen as a result of the digital revolution. Interdependencies in sectors such as tourism, museums, galleries and heritage are referred to, but interestingly, these are only accorded the ”creative” attribute in a secondary sense.

However, not even the term “creative industries” has proved to be a sufficient definition for the broad spectrum found at the intersection between audio-visual, multimedia and cultural industries. Therefore, it was not our intention in this study to take up one of the various existing demarcations and categorisations of the cultural sector as described above. In order to talk about the development of job potential, it was necessary to leave the classic, more narrowly defined art and culture sector, and look instead for new synergetic effects between old and new culture.

As a first step, it was necessary to define a precise categorisation of industries that would be the subject of the study. When taking into consideration the central questions of this study, we were able to arrive at no better working definition than that of **digital culture** (DIGICULT). DIGICULT, by the way, is also the title of a programme run by the Directorate General “Information Society”[1].

We have chosen to define the sphere of digital culture as those sectors of business and culture which

1.) are already very closely related to the multimedia sector qua definitionem (e.g. the whole film industry) or

2.) those sectors of industry and culture which have received new expanded possibilities from implementing these technologies. These are sectors which have had to make use of the new technologies in order to achieve their social, cultural or economic tasks, whether these refer to museums and libraries or to the preservation of historical monuments.

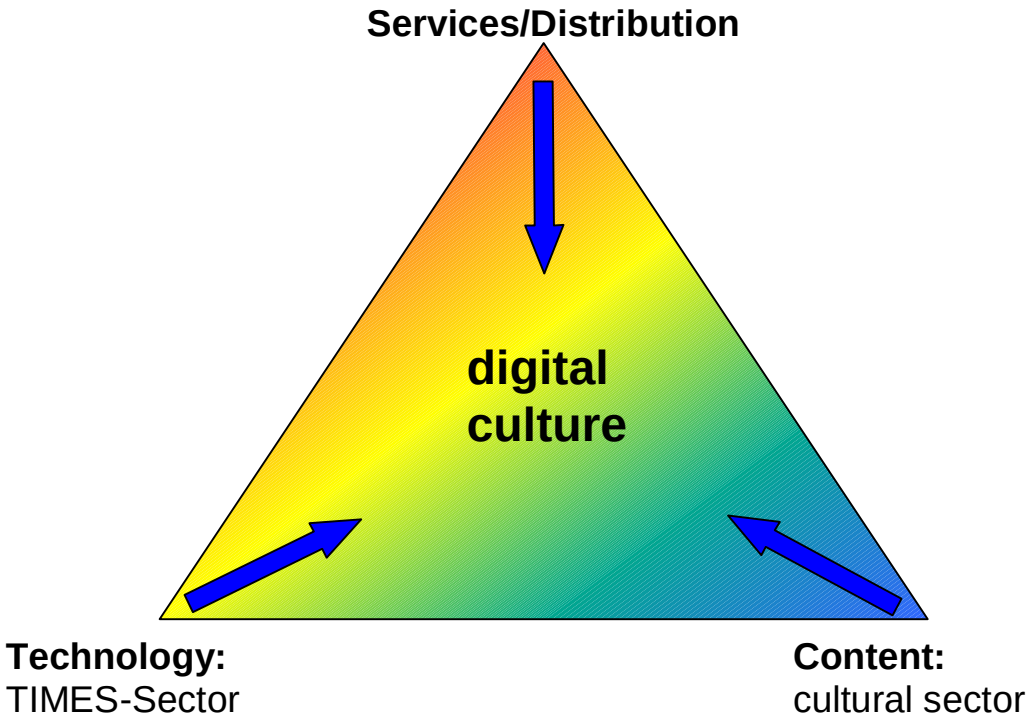
The increasingly used generic term **TIMES sector** (**T**elecommunication, **I**nternet, **M**ultimedia, **E**-commerce, **S**oftware and **S**ecurity) is used to cover the whole audio-visual sector, i.e. the entire multimedia sector, including culture industry areas such as TV, publishing, and the music industry.

[1] cf. European Commission. DG Information Society (ed.), *e-Culture. A Newsletter on Cultural Content and Digital Heritage*

The great advantage of this sectoral definition is that it covers all value adding chains – horizontal and vertical - i.e. not only the sector we are interested in, with its content-oriented, creative activities, but also the whole sector of infrastructure suppliers and devices. We find this is important insofar as the borders between these area of activities are fading even in smaller companies. In addition, the content-oriented, creative share of employees in companies which traditionally have had a more technical focus is also constantly increasing.

In this context, digital culture is the result of an interaction between traditional culture (content), the TIMES sector (technology) and services/distribution (see Figure 1).

Figure 1: Digital culture - joint forces of content, technology and services



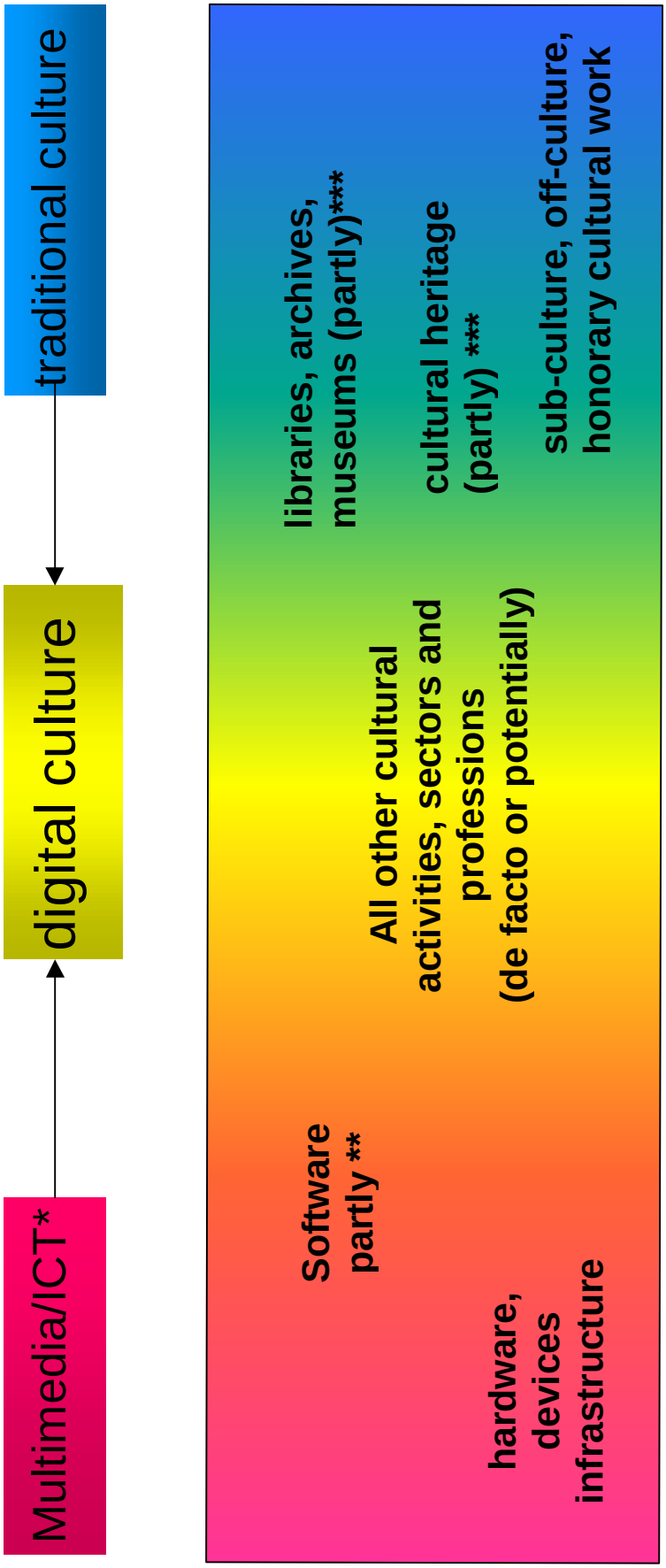
It goes without saying that not all sectors defined according to this demarcation can be studied equally. From the aspects of employment policy, which is central to our discussions here, only those sectors and areas can be taken into consideration which **work market-oriented in the long run and, accordingly, also see themselves as part of the regular labour market (regardless of whether this is public-based, public-private or private)** – although this is certainly not always the approach taken by many creative artists and those who represent their interests.

The corresponding creative artists and their sectors are rarely accessible, making it difficult to include them in a labour market and job policy discussion: to a certain extent they are intangible, certainly for the framework of this study.

The difference between traditional and digital culture is important in this context because in the new or digital culture, new jobs are emerging at the interfaces between the different sectors, and not within the classic segments.
Traditional culture sectors can profit from the developments at the interfaces, with additional jobs also being generated in traditional culture from developments in digital culture.
The borders here between old and digital culture are just as fuzzy as those between industry and services. The decisive element is to focus on the activity and its integration in the value adding chain.

Figure 2 illustrates this complex interaction. Traditional culture and multimedia are like two ends of a spectrum which "flow together" in the broad sector of digital culture.

Figure 2: Digital Culture - interface and synergy between traditional culture and Multimedia/ICT*



* ICT = Information and Communication Technology

** e.g software for e-business applications doesn't belong to digital culture, neither does software for the development of embedded systems. On the other hand, software for training and qualification activities belongs to digital culture.

*** Regarding museums, archives and libraries digitalisation is in full swing. Nevertheless, in many cases this is merely an operational, technological process (needing new qualifications but not more staff). On the other hand, if a museum is presented via internet, this could mean that new forms of presentation have to be developed with the possibility of reaching formerly marginalised social groups. Such examples would be part of digital culture. The same also applies to cultural heritage in parts.

There are no distinct separations and limits, the transitions are fluid. The proximity of the different sub-sectors of multimedia and traditional culture to digital culture varies and cannot be located precisely. Only a few sub-sectors can be excluded from digital culture (e.g. parts of cultural heritage), at least in terms of their relevance to employment potential.

As already mentioned, the job potential in the cultural sector cannot simply be reduced to the digital culture, as new developments are not generated by an "artistic big bang" but by interaction between actors in the old and digital culture. This also has clear dimensions when it comes to the actual physical location:In the boom towns of the New Economy, the traditional culture scene is also in high gear. Festivals and event offering consumers a mixture of original and elite culture are enjoying new broad-based demand from Sicily to Finland. In these centres, the New Economy is giving clear growth signals to the traditional culture sector, i.e. the scene in the New Economy also induces traditional demand.

However, one problem for both the traditional and digital culture is that the digital culture has already reached a degree of regional concentration which can be seen as unhealthy, at least in the growth phase.

2.4 The cultural sector and European Employment Policy

In December 1997 at the Luxembourg summit of the European Council, the **European Employment Strategy** was agreed upon for the combating of unemployment. As a result, ”the whole policy of the Community” was to be ”mobilised for employment more systematically and consciously than previously” and the following four pillars were established :

- developing entrepreneurship
- improving employability
- encouraging adaptability of businesses and their employees (modernisation of work organisation)
- strengthening equal opportunities policies

The great relevance of ”culture and employment” for the European Employment Strategy is evident in the Commission document *Culture, the Cultural Industries and Employment,* presented jointly by DGV and DGX in early 1998, in which the employment potential of the cultural sector (arts, culture and the audio-visual sector) was explored. Since then, it would be unimaginable to discuss culture and employment without quoting the rough estimate of three million employees in the cultural sector. The assumption is that Internet and online services are causing the emergence of completely new cultural practices which are structurally transforming the whole cultural field. The market for multimedia products is described as being extremely dynamic and relevant to employment, with new forms of co-operation being observed between the major multimedia concerns and small enterprises developing niche products.

The extremely poor availability of data on the cultural sector and the very diverse structuring of national cultural statistics necessitate activity on the European level. A study group for cultural statistics (LEG) has been set up at Eurostat, with cultural employment as one of its main areas of focus.

In recent years, the European Union has possibly received more notice for its efforts to integrate culture (in the broadest sense) into European employment strategy than for its typically extremely modest financial arts and culture support programmes in the narrow sense (EU programme: *Culture 2000*, based on the subsidiarity principle). A total of €167 million have been made available for 2000-2004, or €33.4 million per year; by comparison, the cultural budget of the city of Vienna for the year 2000 was a little over €167 million. A

programme equipped with these very limited financial resources cannot point the way forward for the cultural industries. As early as 1993, it was pointed out in a Bates & Wacker study that much more funding may flow into the cultural sector in the broadest sense through EU programmes that are not specifically cultural, i.e. via the community initiatives and structural funds. The precondition for participation, however, is the economic relevance of the project (Bates&Wacker, Morina) In recent years, particular attention has been paid to opportunities within the framework of programmes promoting the information society, such as Info 2001, e-content etc.

The increasing importance of the issue of employment in the cultural sector in the European Employment Strategy should be also placed within the context of falling state cultural budgets in every European country. Today there is a greater need to legitimate the expenditure of public money on the cultural sector, and employment creation is a widely used and accepted argument. We can therefore say that the increasing frequency and increased in-depth examination of the employment potential in the cultural sector is a result of changes in economy, as well as of the restructuring process of public administration management in general and cultural and social affairs management in particular.

3. The cultural sector in the EU – characteristics, volume and trends of employment

3.1 Characteristics of employment in the cultural industries

According to the results of literature research, a rapid rise in "atypical", precarious forms of employment can be observed in all the EU states. In almost all studies on the subject, it is pointed out that the arts, culture and media sector is heavily characterised by **atypical forms of employment**[2]. These atypical forms of employment are characterised by:

- Flexibility
- Mobility
- project work
- short-term contracts
- part-time work
- voluntary or very low-paid activities
- employee-like, pseudo-self-employment/freelancing.

The available reports stress the fact that the cultural sector is overwhelmingly made up of small businesses (less then 10 staff) and micro-businesses and self-employed/freelancers. These new "self-employed" or "freelancers" are on the one hand described heroically as "micro-entrepreneurs" and as "entrepreneurs of their own human capital", but also as "job slaves", "day labourers", "migrant workers" or as "pseudo-self-employed" (Haak/Schmid).

Another important conclusion of the analysed reports is that the situation of female artists is even worse than that of their male counterparts (Angerer et al., Almhofer et al., Cliche et al. 2000, Swanson/ Wise, Schulz/ Krings). Generally speaking, there is a noticeable income difference between men and women in all sectors, the cultural sector being no exception. In almost every European country in recent years, this income difference has not reduced decreased but has grown. This cannot be ascribed to less economic activity by women in general, but to the fact that more women are employed on a part-time basis.

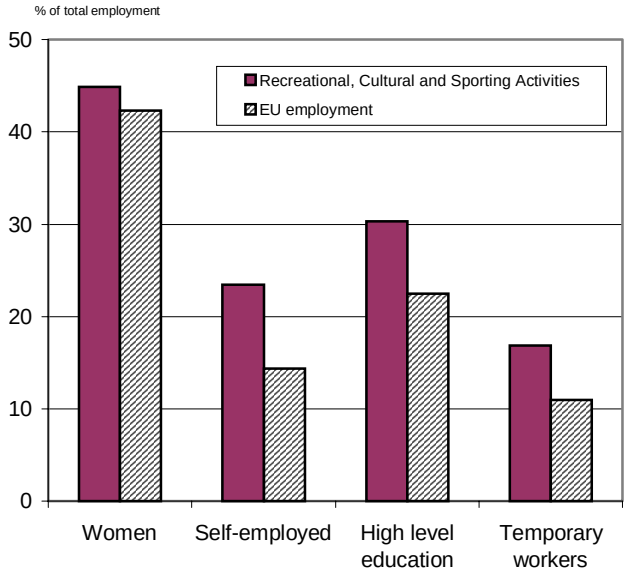
However, women are more used to atypical working conditions than men. One could even go so far as to say that the increase of atypical working conditions is, in fact, an extension of typical women's employment conditions to all those who are employed or are seeking work (Fink, Kocka/Offe, Neyer).

The **statistical analysis** of the cultural sector in the EU only partially confirms the above described atypical working conditions. The sector "recreational, cultural and sporting activities"[3], as defined by the labour force survey of Eurostat, is, in fact, characterised by a high share of self-employed workers (23.4%) and workers with high-level education (30.3%), when compared to EU average. Simultaneously, the share of temporary workers is also well above the EU average (16.9 %). Women are slightly more represented in the sector than in EU employment (44.9 %). Figure 3 shows the comparison with EU employment.

[2] cf. for instance Hackett/Ramsden, O'Connor 1999, Pratt 1997, 1999, Schiffbänker/Kernbeiß 2000

[3] Recreational, cultural and sporting activites = motion picture and video activities; radio and television activities; other entertainment activities; new agency activities; libraries, archives, museums and other cultural activities.

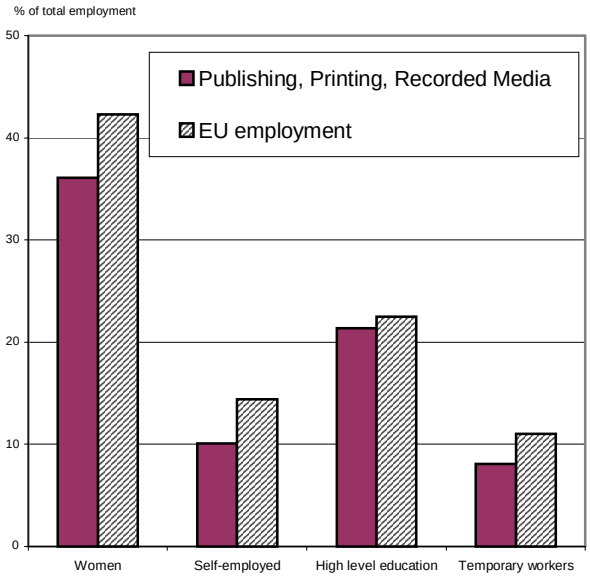
Figure 3: Working conditions in recreational, cultural and sporting activities in the EU in 1999



Source: Eurostat - Labour Force Survey

However, according to the available employment figures portrayed in Figure 3, .self-employed and temporary work is by no means the rule. In the second statistically relevant cultural sub-sector, "publishing, printing, recorded media", working conditions are even "less atypicial" than on EU average (see Figure 4).

Figure 4: Working conditions in publishing, printing, recorded media in the EU in 1999



Source: Eurostat - Labour Force Survey

When comparing results of cultural literature and official statistics, several aspects have to be taken into consideration:

- the collection of cultural data is usually based upon the use of qualitative methods, while statistics work with the available quantitative data (cf. expert interviews). This might lead to totally different results.
- Because cultural work is not necessarily carried out as a full-time job providing subsistence and may sometimes generate no revenue at all, it might not always be registered statistically.
- Statistics on atypical jobs can only provide a limited description of the working conditions. In particular, no data regarding income is available and categories like self-employment or temporary jobs are only described in quantitative terms which can hardly provide ongoing information on poor job conditions, fictitious self-employment etc.

3.2 Volume of employment in the cultural industries

Since the beginning of the 1990s, counting the number of workers employed in the cultural sector in the EU is something that has been frequently addressed and has proved to be a very difficult and vague business, indeed.

Every study produced during this time has tried to put its finger on this definitional problem but none have provided findings of general validity. The situation varies from country to country, depending on the specific cultural tradition. Here are some examples for the variety of study results concerning employment in the cultural sector:

- In the British *Creative Industries Mapping Document* (DCMS 1998), it is assumed that the creative industries in Britain employ a total of 1.4 million people, or 5 per cent of the employed population. Andy Feist arrives at a figure of 420,000 employed in the cultural sector, based upon the 1991 microcensus (Feist 1997, 180).
- In Finland, the importance of cultural entrepreneurs is particularly highlighted. Calculations show 13,600 Finnish companies belonging to the cultural industry sector, which corresponds to 7.2 percent of all Finnish companies (1995). In 1995, all cultural industry enterprises together employed more than 66,000 people (Ministry of Education, Cultural Industry Committee).
- In the case of Austria, the cultural researchers Otto Hofecker and Michael Söndermann speak of 98,000 people employed in the cultural and media sector, or 3 per cent of the economically active population (Hofecker/Söndermann). The economist Norbert Geldner arrives at a figure of approximately 140,000 (Geldner).

Only one paper, written in 1998 by the European Commission, provided a **European-wide** impetus to deal with the employment potential of the cultural sphere in a more concentrated way. According to *Culture, cultural industries and employment*, the employment potential in culture and the cultural industries throughout the EU is estimated at approximately **three million jobs**.

The **statistical analysis** carried out in the course of this study, however, has produced different and more diversified results concerning the number of jobs in EU cultural industries.

In order to calculate the number of jobs in EU cultural industries, it was necessary to use a statistical combination of **cultural sectors** and **cultural occupations**, which represents the narrowest definition of cultural employment. In doing so, it had to be taken into consideration that **there are cultural workers working in non-cultural sectors and that cultural sectors also employ non-cultural workers!**

- The following sectors were selected from the European **sectoral** classification NACE:

Cultural sectors

- NACE 22: Publishing, printing and reproduction
- NACE 92: Recreational, cultural and sporting activities

Non-cultural sectors

- Other business activities (architecture, photography, cultural events)
- Public administration (cultural services, events)
- Other social services (cultural services, events)
- Other non-cultural sectors

- The definition of cultural **occupations** as used in this study includes the following occupations taken from the ISCO 88 classification:

Cultural occupations

- ISCO 88 group 243: Archivists, librarians
- ISCO 88 group 245: Writers, creative and performing artists
- ISCO 88 group 347: Artistic, entertainment professionals, sportsmen

Non-cultural occupations

- ISCO 88 group 213: Computing professionals
- ISCO 88 group 313: Optical and electronic equipment operators
- ISCO 88 group 214: Architects, engineers
- Other non-cultural occupations

Measuring employment in the EU cultural economy using the two dimensions “cultural sectors” and “cultural occupations” provides different quantifications of the volume of employment in cultural activities. Table 1 shows the results for EUR-15 in 1999:

Table 1: Employment in Cultural Activities

EUR-15 1999		Occupation		
NACE	Industry	Cultural occupations	Non-cultural occupations in cultural production	Total
22	Publishing, music recording	1,167	3,595	4,762
92	Cultural and sporting activities			
	Non-cultural sectors	837	1,566	2,403
	Total (in thousands)	**2,004**	**5,161**	**7,166**

Source: EUROSTAT, Economix. figures estimated

- **7.2 million workers** or 4.6 % of total EU employment are engaged in the **production of cultural products and services in the most comprehensive sense**. This includes the number of workers in cultural occupations and the related workers in non-cultural occupations being engaged in the production of cultural products and services.[4]
- 4.8 million of these workers are engaged in the two cultural industries NACE 22 and NACE 92 (3.1 % of EU employment).
- 2 million workers are professionals or technicians with cultural occupations which are employed in all sectors of the economy (1.3 % of EU employment).
- 1.2 million workers have cultural occupations and are engaged by the cultural industries. This figure represents 58 % of all workers with cultural occupations and 25 % of the workers in cultural industries.

Therefore, there are significantly more people employed in the EUR-15 cultural industries than all previous studies have allowed us to assume.

3.3 Employment trends in the cultural industries

Available literature and statistics report a strong increase in EU employment in the traditional cultural sector in recent years.

The paper *Culture, cultural industries and employment* of the European Commission in 1998 estimates that employment in Spain's cultural sector grew by 24 per cent between 1987 and 1994, in France by 37 per cent between 1982 and 1990, and in Britain by 34 per cent in the time period of1981 to1991. These figures do not indicate whether gainful employment in general has grown as strongly or whether it is a case of more workers sharing less work. The audio-visual sector has clearly shown the highest growth rates (key word, deregulation of the TV markets).

These estimations are partially confirmed by the statistic research carried out in the course of this study. While overall EU employment grew by a moderate rate of 1.2 % per year during the second half of the nineties, the rate of employment growth in Recreational, Cultural and Sporting Activities (NACE 92) was threefold, or 3.8 % annually. Since 1995, 98,000 jobs were created by this sector in the EU every year, and 2.8 million people were working for this industry in 1999 (see Table 2). This represents 1.8 % of total EU employment.

Table 2: Employment in Recreational, Cultural and Sporting Activities (NACE 92)

	1995	1996	1997	1998	1999	Annual % change
	(in thousands)					1995-99
EU-15	2,412	2,549	2,612	2,716	2,804	3.8

Source: EUROSTAT Labour Force Survey.

Growth rates since 1995 show wide variations among the EU member states with Italy, Finland, Portugal and Germany being at the top, and the United Kingdom, France, and Austria at the lower end. However, as the figures are derived from sample data, these differences should be interpreted cautiously.

The second cultural sector to be statistically assessed was Publishing, Printing and Reproduction of Recorded Media (NACE 22). In contrast to the previous sector, here

[4] The number of workers in the „Other sectors" are estimated by calculating the average share of non-cultural workers in the NACE 92 sector (Cultural and sporting activities) in the period 1997 to 1999. This is applied to the 1999 matrix. The calculation of the growth rates between 1995 and 1999 required the estimation of the 1995 matrix due to missing data for some countries.

employment was stagnating at the level of 2 million workers over the period of 1995 to 1999 (Table 3).

Table 3: Employment in Publishing, Printing and Reproduction of Recorded Media (NACE 22)

	1995	1996	1997	1998	1999	Annual % change
	(in thousands)					1995-99
EU-15	1,969	1,979	1,907	1,935	1,958	-0.1

Source: EUROSTAT Labour Force Survey.

When we study the situation among cultural occupations, we find an even higher rate of employment growth than in the cultural sectors. Between 1995 and 1999, employment in cultural occupations grew by 4.8% per year (see Table 4).

Table 4: Employment in Cultural Occupations

	Employment (in thousands)		Annual % growth
	1995	1999	1995-99
EU	1659.7	2004.3	4.8

When we combine the developments in the cultural sectors and cultural occupations, cultural employment in the EU grew at an above average rate of 2.1 % annually since 1995 (Table 5). Growth was equally distributed between the cultural and non-cultural sector but heavily concentrated on cultural occupations (+4.8 % annually). Employment growth among non-cultural occupations, which cover jobs ranging from manager to porter, was no greater than the average EU employment growth (+1.2 % per year).

Applying this type of measurement to the EU member states, we find Finland and Sweden at the top of the rankings. In these two countries, the indicators show levels well above the EU average of 1999. More than 4 % of the work force of these two countries were engaged by cultural industries and more than 2 % were working in cultural occupations. The values for the Netherlands are approaching these levels. In the United Kingdom, however, cultural industries absorb an even higher share of the work force (4.3 %) while the share of workers with cultural occupations is only slightly above the EU average (1.8 %). Italy and Portugal are at the lower end of the rankings, with low values for all three indicators. In Austria, the share of employment in cultural industries is below average, while the proportion of employment in cultural occupations is close to the EU average value.

Table 5: Growth of Cultural Employment

EUR-15 1995-99 (annual % change)				
		Occupation		
NACE	Industry	Cultural occupations	Non-cultural occupations in cultural production	Total
22	Publishing, music recording	5.1	1.2	**2.1**
92	Cultural and sporting activities			
	Non-cultural sectors	4.4	1.1	**2.2**
	Total	**4.8**	**1.2**	**2.1**

Source: EUROSTAT, Economix. figures estimated

Future employment growth in cultural industries and occupations is dependant upon a whole set of determinants:

- Private consumption of cultural services
- Business demand for the presentation of products, services, companies etc.
- Foreign trade through exports and imports of cultural goods
- Innovation of production technologies (ICT in particular)
- Financial inflows through the sale of advertising space or time
- Public subsidies for cultural activities

As far as future demand for cultural goods is concerned, there is no reason to assume a significant change in the positive growth trends of the past. The private consumption of cultural products and services will continue to grow and to make relative gains against other areas of consumer goods production. However, the various sectors of cultural activities will be affected differently. The production of books and press products will continue to face positive demand as far as the content is concerned. The products themselves will increasingly be substituted by the provision on the Internet and multimedia products. The media via which these products will be consumed will change and therefore create a very positive impact on the audio-visual and multimedia industries, and a negative impact on book printing and retail distribution. This trend will be supported by the increasing consumption of videos, movies, and TV programs.

The same kinds of changes can be expected for the visual and performing arts, which will also switch to the electronic media. This will result in a favourable labour demand situation for cultural workers, such as authors, journalists, painters, musicians, actors etc. In contrast, the workers employed in distributive activities for the physical products of the cultural industries will face deteriorating labour demand. This will affect printers and sales persons in particular.

The impact of private consumption will be strengthened by business demand, which can also be expected to shift to the new media very rapidly. The demand for printed products will be substituted by the creation of Internet web sites, including presentation through videos, e-commerce facilities, and interactive communication. This will greatly foster labour demand for multimedia designers, Internet programmers, software engineers, and for film directors, actors and many other occupations required by the movie industry. In addition, the distributive sector of the audio-visual and multimedia industries will grow, but not at the same rate as in the production sector. Content providers seem to be more favoured than marketing and sales persons.

The negative impacts of foreign trade on cultural markets will probably become even more severe due to the transition to audio-visual and multimedia products. The US suppliers are not only very competitive in the film and music industry, but also in the software, Internet and multimedia business. Therefore, a strong negative impact on labour demand from rising imports of these products must be assumed. This will affect the content and software providers in the EU much more than the traders, broadcasters, and Internet providers.

In addition to the enhancement of information and entertainment services, information and communication technology will lead to a significant price reduction of these services, which will foster the shift of demand towards the audio-visual and multimedia sector. The negative impact will be most strongly felt by those industries involved in the publishing of books and press products, but will also affect the visual and performing arts. Even the services of museums and libraries will be partially transferred to the new media. Therefore, we can expect ICT to be the driving force of the labour demand trends.

Shifting demand will divert the flows of advertising expenditures from conventional media to the multimedia. This might also affect radio and TV stations. As financing of media production seriously depends on revenues from advertising, the shift will create further problems in the books and press sector in particular.

Public subsidies which are spent for visual and performing arts, as well as for museums and libraries, will remain scarce, although there is no reason to expect any serious reductions. Beyond cultural policy – the financing of which must compete with other policy areas – the financial support of cultural institutions, exhibitions, events etc. will always play an important role, as these cultural activities have very positive external effects on the regional economy. Public support of cultural activities will, however, grow at a slow rate and thus restrict employment growth. The scope of subsidised culture will nevertheless remain important.

The lack of data for cultural production and employment does not allow for the translation of the qualitative arguments of this section into a quantitative forecast – at least not on the level of the European Union. The very few forecasting exercises which are available for some EU countries, however, confirm the positive employment trends of this paper. In particular, a study undertaken by the Fondaçion Tomillo (2000: 210) reveals a strong expected rise of employment of 50% in the Spanish cultural industries by 2005. This will mainly be driven by audio-visual services, but all other cultural sectors are also expected to extend the volume of employment. The forecasts for the multimedia sector itself are exceptionally positive.

4. Employment in digital culture – characteristics, volume, trends and requirements

4.1 Empirical basis

Neither the scientific research literature on culture nor the official statistics available were able to provide comprehensive answers to all the questions relevant to this study. The following questions, in particular, remained open:

- What does the employment situation and the job potential in the digital culture look like?
- How is the digital culture sector structured in terms of personnel?
- What are the most important qualification requirements in digital culture?
- What changes and developments are taking place within digital culture in terms of job potential and the demand for specific qualifications?

In order to answer these questions, it was necessary to directly consult companies from the sector of digital culture.

To begin with, a world-wide panel (the **WIMMEX** Panel, or **W**orld-wide **I**nternet **M**ulti-**M**edia **Ex**perts) was put together portraying as accurately as possible all relevant multimedia industries. Here, the study's emphasis was on companies in the EUR-15 region. By collecting information from individual businesses concerning their main area(s) of activity, it was possible to derive an extremely in-depth aggregate classification of industries and sector structure (cf. Figure 5). This was imperative, since no official public statistics are able to provide us with usable relevant data for our specific sphere of study.

Within the framework of the company survey, the following information, among other things, was collected:

- The share of creative workers, women and freelancers among total TIMES employees
- Business situation and employment expectations in the TIMES sector
- The relative importance of selected qualification features for the TIMES companies surveyed, as a tool for identifying the most current qualification requirements.
- The present and estimated future demand for the most currently qualifications.

In a second step, within the framework of a total survey, WIMMEX determined the total number of companies in the EUR-15 region which are active in the sectors under study. In addition, approximately 400 million (!) web sites were identified, analysed and evaluated. Due to the limitations of the study's prescribed budget, it was not possible to realise an in-depth classification similar to the one derived for the WIMMEX Panel. This, however, is not significant for addressing the central questions defined in the commissioning of this study.

With the help of the WIMMEX total survey, projections could be made for all of the qualitative and quantitative variables determined from the WIMMEX Panel. Therefore, all of the statements made in this study are representative, particularly with regard to the expected job potentials within the areas studied. Nevertheless, within this context, we urgently recommend continual, ongoing observation, since these market segments have proven to be extremely dynamic in nature.

Figure 5: Detailed Structure of the WIMMEX Panel

1. Hardware
Production of ...
1.1 Computers
1.2 Hardware components
1.3 Multimedia upgrades
1.4 Peripherals
1.5 Storage media
1.6 Communications components
1.7 WWW Infrastructure components
1.8 Online payment systems

2. IT Consulting
Consulting in the area of ...
2.1 WEB / Multimedia Development
2.2 Internet Marketing Consulting
2.3 Information brokerage
2.4 Personnel recruitment (TIMES sector only)
2.5 Project development/Management
2.6 Training/Further education
2.7 Quality Management, Quality of Service
2.8 Networking (WAN, LAN, VPN, Internet)

3. Multimedia / Online & Audiovisual Services
Services in the area of...
3.1 WEB Design
3.2 WEB Publishing
3.3 WEB Server
3.4 Desktop Publishing
3.5 Grafic and image design
3.6 Visualisation techniques (3D)
3.7 Digital Film- & Video revision
3.8 Computer animation
3.9 Audio/Video layout
3.10 Screen-Design
3.11 CBT-Techniques
3.12 Digital Printing
3.13 Online Services, e-commerce*
3.14 Design for companies (CI,CC,CD)
3.15 Interactive Media (DVD, CD)
3.16 Film, Television, Video & Radio production

***3.13 Online-Services, e-commerce**
Services in the area of...
3.13.1 B2B Services
Product portals
Portals for products within the TIMES sector
Portals for company services
3.13.2 B2C Services
Job Portals
Finance portals
Product portals (non-TIMES sector)
Portals for products within the TIMES sector
Portals for services within healthcare systems, legal consulting

4. Software
Development in the area of...
4.1 Compressions/Decompression techniques (Audio, Video)
4.2 Data banks /SQL Techniques
4.3 Protocols (TCP/IP, SMTP, FPT)
4.4 WEB Programming (JAVA, CGI, HTML)
4.5 Online payment systems
4.6 Security (Firewalls, encrypting techniques)
4.7 e-commerce Platforms
4.8 Interactive Media (Entertainment, Training/Further education, Electronic catalogs)

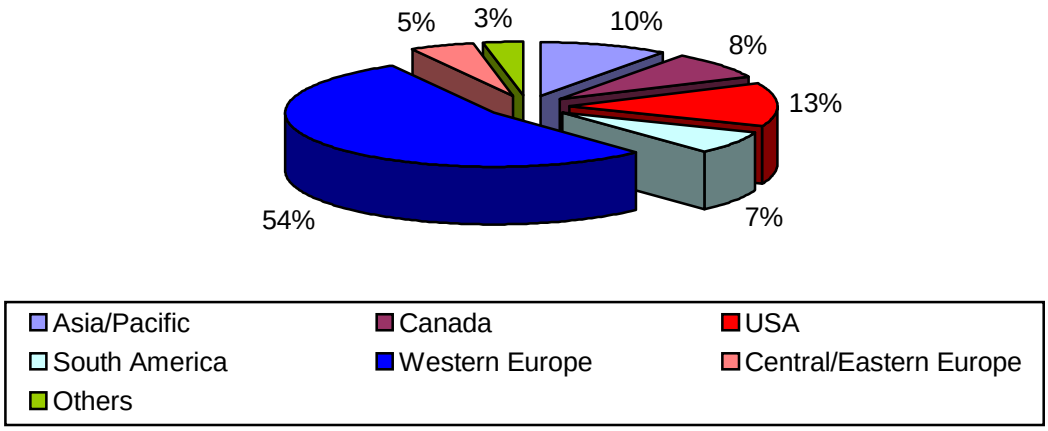
5. Telecommunications
Provider in the area of...
5.1 Web Hosting
5.1.1 ASP (Application Service Provider)
5.1.2 ISP (Internet Service Provider)
5.2 Call Center
5.3 WAP Provider
5.4 Telecommunications-Provider (GSM, UMTS)

4.1.1 WIMMEX Panel

The survey with the WIMMEX Panel was conducted between August and December 2000. At the time of the survey analysis, the panel already included 2,970 companies.

The majority of the 2,970 WIMMEX Panel member companies, namely 54%, are located in Western Europe (see Figure 6). In light of its regional composition, the Panel is naturally not representative from a global standpoint. However, due to the nature of the tasks presented by this study, the over-representation of the EU region was necessary in order to achieve the most satisfactory composition possible within the individual European countries. Particular

Figure 6: Panel composition according to World Regions
Population: 2,970 TIMES companies world-wide

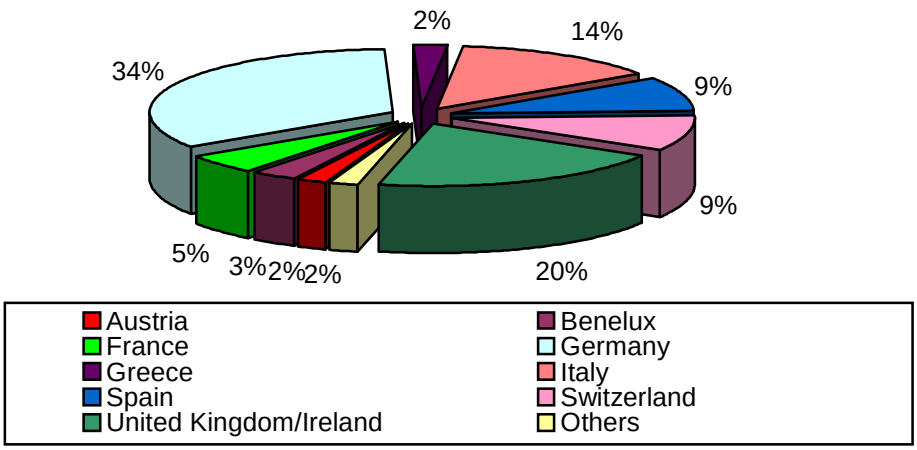


Source: WIMMEX Munich, December 2000

emphasis was laid on gaining a sizeable share of companies from the USA, in order to be able to compare the most recent developments in the EU with those from the main competitor in the TIMES sector and digital culture, the USA.

The biggest share of the Western European companies is to be found in the EU (see Figure 7). To a large degree, the regional composition of the Western European WIMMEX Partners corresponds to the respective economic strengths of the European countries in question. At present, it is merely the French companies which are comparatively under-represented.

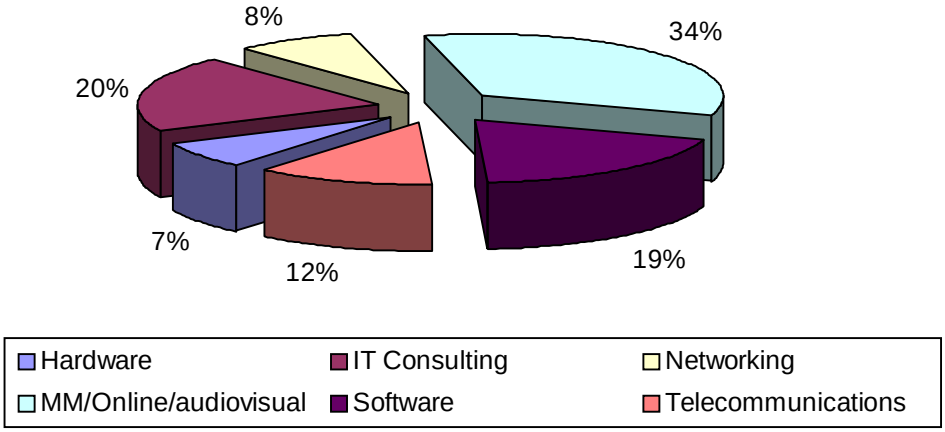
Figure 7: Regional structure of panel companies in Western Europe
Population: 1,604 TIMES companies



Source: WIMMEX Munich, December 2000

The **sectoral structure** of the WIMMEX Panel according to the main areas of activity of its member companies is shown in Figure 8. With 34%, the companies from the "Multimedia/Online/Audio-visual Industry" are most strongly represented. It was our intention to make sure that this area of activity was well-represented in the panel for several reasons. On the one hand, a large job potential for cultural workers is concentrated within this sector and on the other hand, the total share of Multimedia/Online/Audio-visual companies within the TIMES sector is only 9.2%, making this steering intervention absolutely necessary in order to achieve a sufficient representation of this significant sub-sector.

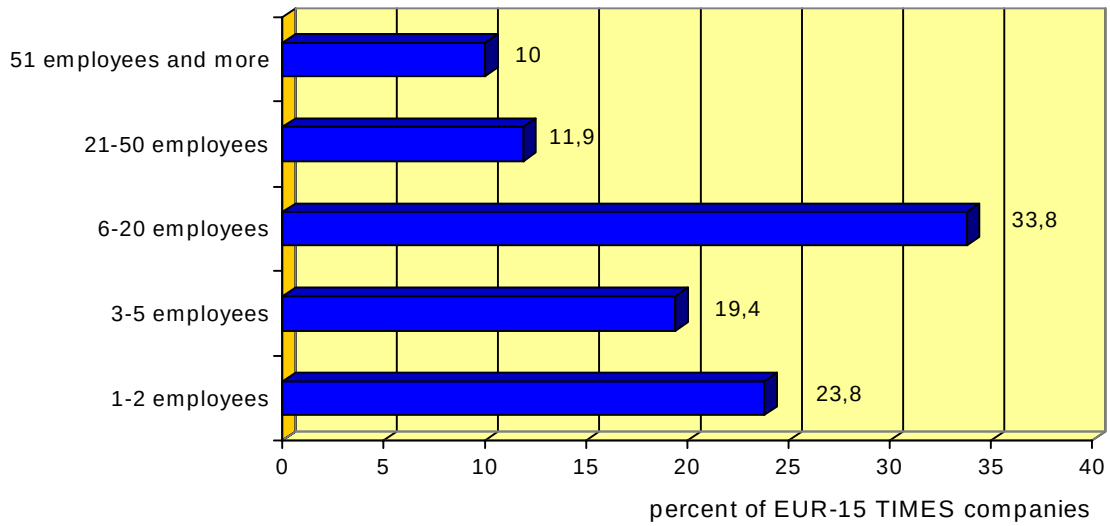
Figure 8: Main areas of activity of companies in the WIMMEX panel
Population: 2,970 companies world-wide



Source: WIMMEX Munich, December 2000

The EUR-15 TIMES companies in the WIMMEX Panel are characterised by the existence of a great number of small and medium-sized enterprises (SMEs). Only 10 percent of the EUR-15 companies in the WIMMEX Panel have more than 50 employees (see Figure 9).

Figure 9: Size of EUR-15 TIMES-companies, according to number of employees
Population: EUR-15 TIMES companies (unweighted)
Unit: number of employees



Source: WIMMEX Munich, December 2000

4.1.2 WIMMEX total survey

At present, there are no statistics available to even come close to reliably describing the size and structural composition of the TIMES sector in the EUR-15 countries. Therefore, WIMMEX carried out an empirical total survey of all EUR-15 TIMES companies in March 2001. This total survey, based on an analysis of 400 million (!) web sites, represents, at the same time, an important methodological addition to the WIMMEX Panel. With the help of the complete compositional overview of the EUR-15 TIMES sector derived from this total survey, it is possible to weight all of the qualitative and quantitative results from the WIMMEX Panel survey, thus making them representative for the entire TIMES sector.

This total survey resulted in a total number of 1,551,908 companies which are active in the TIMES sector in the EUR-15 countries (status: March 2001). Just under 90% of these companies employ at the most 50 workers (see Table 6).

Table 6: Structure of EUR-15 TIMES companies by number of employees in March 2001

Population: 1,551,908 companies

Classes by number of employees	Number of companies	Share in percent
1-2 employees	295,568	19.0%
3-5 employees	233,678	15.1%
6-20 employees	566,081	36.5%
21-50 employees	252,262	16,3%
>50 employees	204,318	13,2%
Total	**1,551,908**	**100%**

Source: WIMMEX Munich, March 2001

4.2 Characteristics of employment in digital culture

In light of the quite differing statements found in the literature and in official statistics concerning the characteristics of the cultural sector, the **results of the Wimmex Panel Survey** have proven all the more helpful in providing key information necessary for answering the questions of this study regarding job potential and personnel structure in the digital culture/TIMES sector.

Freelancers in the TIMES sector

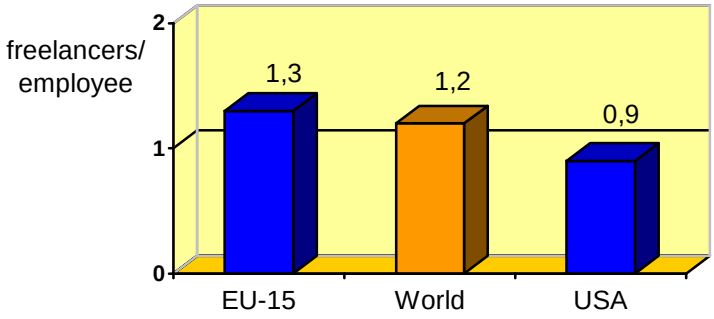
For the first time, the survey carried out among the WIMMEX Panel ascertained to what extent freelancers are working in the TIMES sector, in relation to regular employees in the companies. To summarise briefly, the **share of freelancers in EUR-15 TIMES companies is extremely high, numbering 1.3 freelancers per regular employee!**

A world-wide comparison to other major regions showed that the share of freelancers is highest in the European Union, only just exceeded by Eastern Europe (see Figure 10).

Therefore, when compared world-wide, the share of free-lancers per regular employee in the EUR-15 region is above average and almost 50% higher than in the USA.

Figure 10: Freelancers per employee in TIMES companies in a world-wide comparison

Population: TIMES companies world-wide (weighted by company)
Unit: freelancers per employee



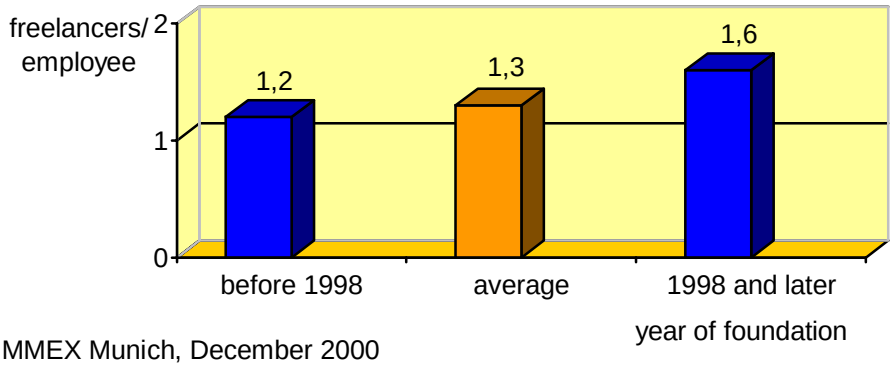
Source: WIMMEX Munich, December 2000

In our opinion, this is due, among other reasons, to the fact that the US market in the TIMES sector is already gradually consolidating – on a very high level – whereas the dynamic growth in the EUR-15 region caused by the immense need to catch up with global developments will continue to grow in coming years.

One additional factor indicative of this is that the younger a company is, the greater its share of freelancers (see Figure 11). In the EU, there are 1.6 freelancers per employee in companies founded 1998 or later, while in companies founded before 1998 the ratio is 1.2:1.

Figure 11: Freelancers per employee in EUR-15 TIMES companies, according to year of company foundation

Population: EUR-15 TIMES companies (weighted by company)
Unit: freelancers per employee



Source: WIMMEX Munich, December 2000

The extremely high share of freelancers in the TIMES sector thus partially confirms the information found in research literature, where atypical working conditions are portrayed as the rule in the cultural sector. As the TIMES sector continues to develop, however, one can assume that the share of regular employees will increase to the same degree to which atypical working conditions will decrease.

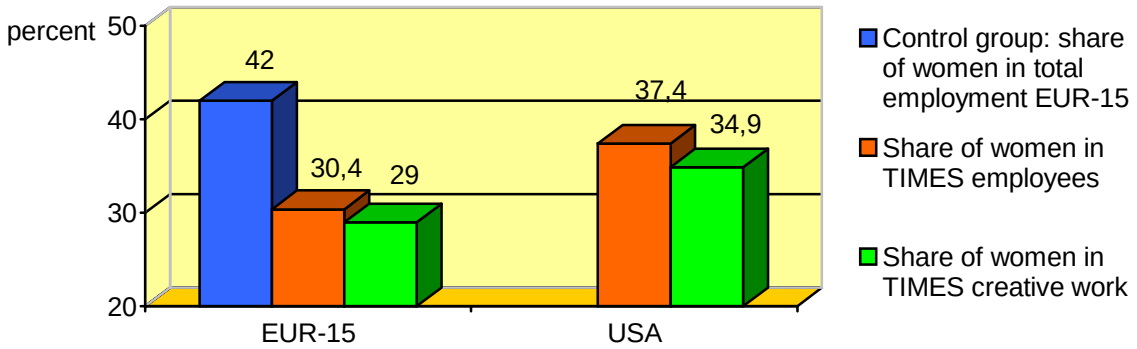
Women in the TIMES sector

The results of the WIMMEX Panel survey provided significant information regarding the **share of women in the TIMES sector**. The percentage of women working in the TIMES sector in the European Union is only 30.4% (see Figure 12). This is about 11 percentage points less than the women's share of all European jobs, which is indicated by the control group in Figure 12. The situation is even worse when it comes to **creative occupations** within the companies. Here women account for only just over 29% of these jobs.

Compared to the USA, which globally has the highest share of women employees (women account for 37.4% of all jobs in the TIMES sector, and for 34.9% of the creative jobs within the TIMES sectors), the EU is far behind, lagging by about 6 percent points in each case.

Figure 12: Percentage of women employed in the TIMES sector (red) and in TIMES creative occupations (green), in economic world regions

Population: TIMES companies world-wide (weighted by company)
Unit: percent



Source: WIMMEX Munich, December 2000

This disturbing development also continues when it comes **to setting up new businesses.** Taking into account the results of GEM[2)], we estimate that the percentage of new companies set up by women in Europe is approximately one third of that in the USA.

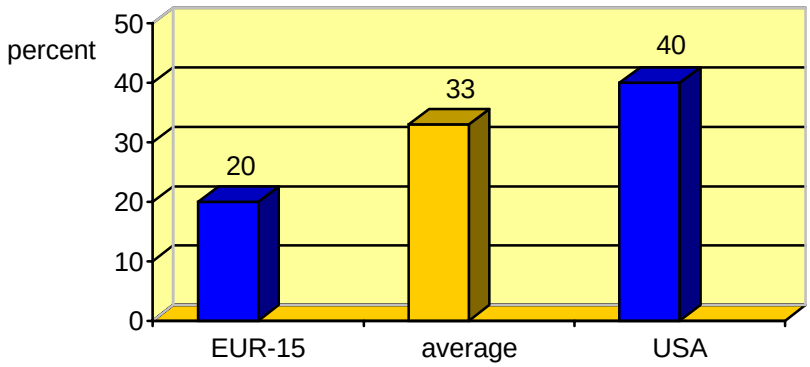
In the USA, 40% of all new companies in the TIMES sector are set up by women, compared to a global average of 33% and a European average of only 20% (see Figure 13). Germany shows the poorest figures in this category, with women making up only 13% of total company start-ups.

The discussions held throughout this study with education establishments, Public Employment Services and companies also showed that **women are completely under-represented throughout the whole education and further training sector.** Even in courses and training events with comparatively little technical content (as it is often presumed that women have poorer access to technical matters) but with more creative, content-oriented subject matter, women only account for 20-25% of the work force.

[2)] cfr. Wirtschaftswoche, no. 33 dated 10.8.2000

Figure 13: Female company setting ups in the TIMES sector in percent (EUR-15 and USA)

Population: TIMES companies world-wide (weighted by company)
Unit: percent



Source: WIMMEX Munich, December 2000

4.3 Employment in digital culture: volume and trends

If we only take into consideration the EUR-15 TIMES companies' main areas of activity „Multimedia" and „Software", we find that these two areas account for approximately 12 million employees (see Table 7). During the course of this study, we have concentrated on these two areas because the numerous expert interviews we conducted revealed that these two sub-sectors require the greatest amount of creativity and content, and are therefore the most relevant for cultural workers.

Table 7: Number of employees in selected EUR-15 TIMES companies in March 2001

Population: 1,551,908 companies

Areas of activity	Number of employees	Share of total EUR-15 TIMES employees
Multimedia	1,952,437	9%
Software	10,426,629	48%
Total	**12,379,066**	**57%**

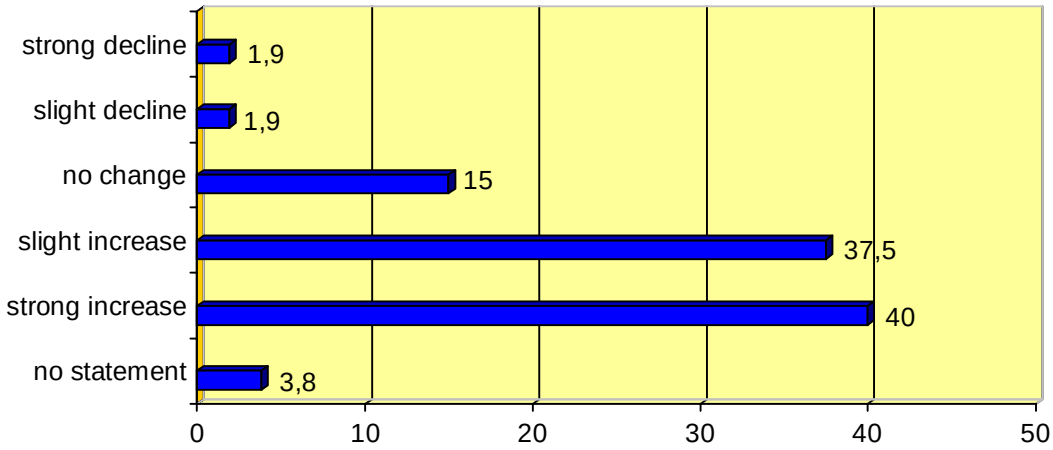
Source: WIMMEX Munich, March 2001

Due to the different main focuses of the research literature on cultural studies and the inadequate generation of data possible from the available statistics, neither the fields of cultural studies nor cultural statistics are able to offer prognoses concerning the development of employment in the digital culture in the near future. In order to answer this question, it was necessary to generate a separate study set-up – the WIMMEX Panel is capable of performing this function.

According to the results of the WIMMEX survey, in the years to come the EUR-15 TIMES companies have quite positive expectations with regard to further employment. Almost 80 % of all EUR-15 TIMES companies expect some increase in mid-term employment, with most of them even expecting a strong employment increase (see Figure 14).

Figure 14: Medium-term employment expectations in EUR-15 TIMES companies in percent

Population: EUR-15 TIMES companies (weighted by company)

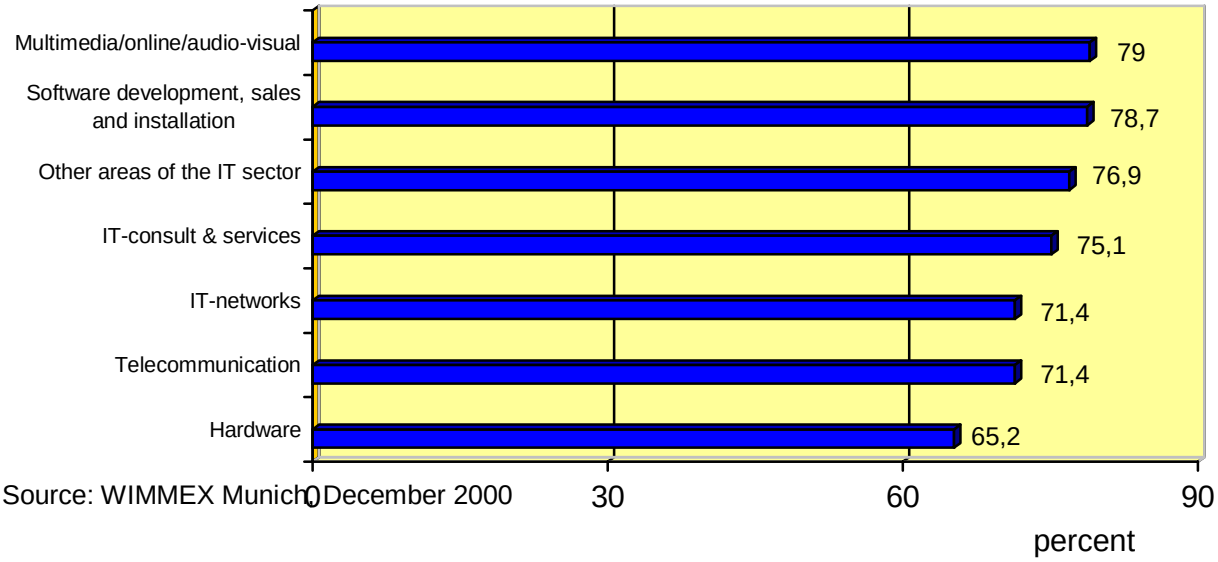


Source: WIMMEX Munich, December 2000

Expectations are particularly high in those companies whose main areas of activity are in “Multimedia/online/audio-visual” and “Software development, sales and installations” (see Figure 15), which is no surprise since these are the same two areas of activity in which business expectations are most positive.

Figure 15: Medium-term expectations of employment growth are to be found in ...% of EUR-15 TIMES companies

Population: EUR-15 TIMES companies (weighted by company)
unit: percent



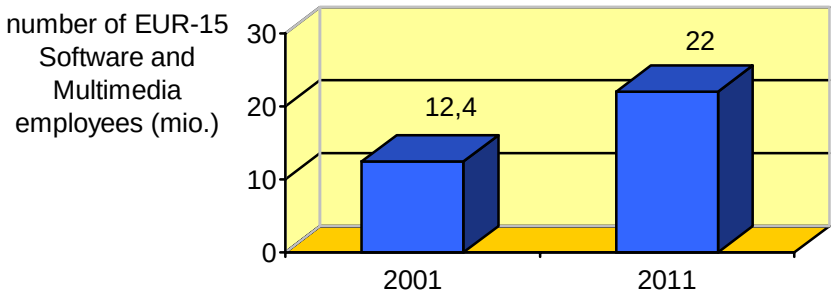
Source: WIMMEX Munich, December 2000

It is not sufficient simply to say „The future outlook for employment in digital culture is good.“ It is much more essential to ask the question „How good?“ In other words, how many new jobs will be created in EUR-15 TIMES companies in the foreseeable future, let's say, within the next 10 years? Within this context, we are especially focusing on the areas „Multimedia“ and „Software“, which are the most interesting sectors for cultural workers. As we know from Table 7, the current number of employees in these two areas is 12.4 million (WIMMEX, March 2001).

Most studies performed in the last few years assume that the annual employment growth rate in the TIMES sector within the next years will range between 10 and 15 percent. However, since we must count on saturation effects and economic fluctuations, we have chosen to develop an extremely conservative prognosis. For the next 3 years, we chose a relatively small figure of 10 percent employment growth, while, at the same time, assuming a steady decline in employment growth from 10 to 3 percent over the next ten years.

Based on the March 2001 figure of 12.4 million employees in EUR-15 Multimedia and Software companies, and assuming a declining annual growth rate over the next 10 years from 10 percent in 2001 to just 3 percent in 2011, we can estimate 22 million jobs in the year 2011. Thus, approximately 9.6 million new jobs will be created in the TIMES sectors of multimedia and software in the next decade (see Figure16).

Figure 16: Number of EUR-15 Multimedia and Software employees in 2001 and 2011 (in millions, weighted)



Source: WIMMEX Munich, March 2001

It goes without saying that not all of these 9.6 million new jobs are suited for cultural workers. Only those jobs that truly require creativity and content are of interest in this context, not those jobs representing the organisational and technical overhead that is necessary for the creation and distribution of any product (e.g. secretary, cleaning personnel, pure technicians etc.).

Therefore, it is necessary to

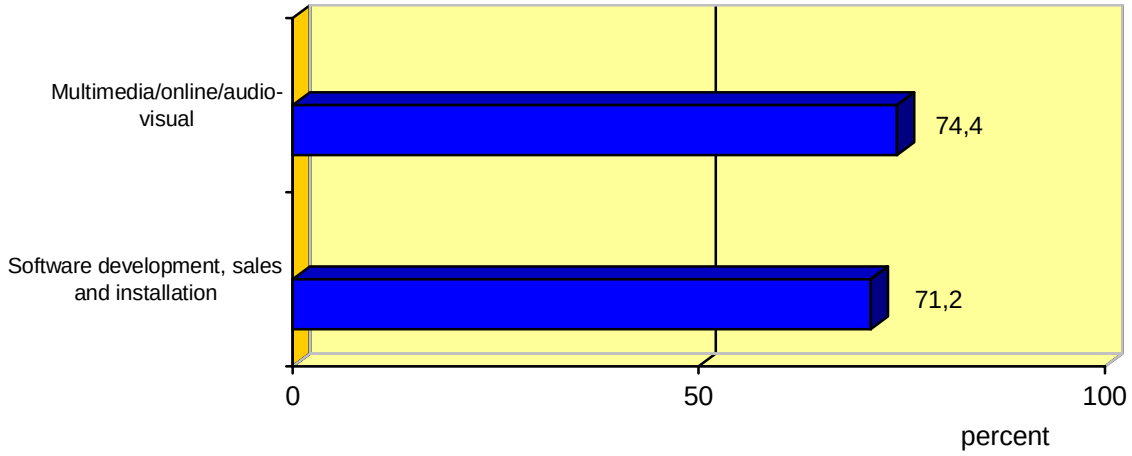
- define which workers are to be counted as “creative workers”
- and to determine the actual number of creative workers in Multimedia and Software.

We define “creative workers” as those workers who spend at least 50 percent of their working time for creative occupations. “Creative occupations” are all those occupations that focus on the creation of new products and services, not on the administration of existing ones. According to our definition, the design of a web site is considered such a creative occupation, whereas the update of a database is not creative work. It has to be pointed out, however, that it is extremely difficult to distinguish between “creative” and “non-creative” work. For example, it is not clear if a programmer is a creative worker or not, since this usually depends on the actual work that a programmer is doing.

This differentiation can not be done by a researcher at his or her desk. Only the employers and employees themselves can assess the actual share of creative workers in their workforce. Therefore, in the WIMMEX survey we asked employers to do exactly this, namely to assess the share of creative workers in their total number of employees. The results of the survey are depicted in Figure 17, which shows the share of creative workers in EUR-15 multimedia and software companies.

Figure 17: Share of creative workers in EUR-15 Multimedia and Software companies in percent

Population: EUR-15 Multimedia and Software companies (weighted by company)
Unit: percent



Source: WIMMEX Munich, December 2000

Based upon these results, we can assume that approximately 30 percent of EUR-15 Multimedia and Software employees are not involved in **any** type of creative work. Among the remaining 70 percent, it is clear that not all creative occupations are related to the creation of cultural products and services.

However, it is practically impossible to distinguish on a European scale between creative occupations that are culturally related and those which are not culturally related. This is particularly true for the huge number of small and medium-sized companies (SMEs) in this sector. When there are just three or four employees in a company, every employee must be able to cover several different occupations within the team, creative as well as non-creative, those which are culturally related as well as those which are not. Therefore, we can assume that, in all likelihood, the figure of 70% is an accurate estimation of the share of workers who are expected to perform creative work.

We can now use this percentage to determine the total number of expected new jobs in Software and Multimedia, the main areas of activity which can be considered suitable for cultural workers.

As shown in Figure 16, we can assume approximately 9.6 million new jobs in these two main areas of activities. Taking 70 percent of these 9.6 million jobs, we arrive at approximately 6.8 million potential new jobs for creative workers.

4.4 New qualification requirements of digital culture

According to the results of our study as described in Chapter 4.3, we can count on at least 6.8 million new content and creativity-oriented job positions within EUR-15 TIMES companies being made available in the next 10 years, positions which could be filled by cultural workers. Our survey, however, also confirmed the fact that there is a great shortage of qualified TIMES workers on the European job market. According to EITO, this personnel deficiency could possibly increase to 1.6 million by 2002, if the necessary training and adjustment initiatives are not implemented (Source: EU Commission, EITO 1999).

Thus, those shaping future European employment policy are faced with the opportunity to solve two problems at the same time:

- to reduce the shortage of qualified workers in the TIMES sector,
- by opening up new TIMES-oriented areas of activity to cultural workers.

In order to achieve both employment policy goals (reduction of the need for qualified workers in the TIMES sector, development of new employment potentials for cultural workers), it is essential to recognise which key qualifications are expected from employees in the TIMES sector. Therefore, within the framework of the WIMMEX Panel survey, we gathered information on the most sought-after qualifications in TIMES companies. The seven most sought-after qualifications are listed in descending order of importance in Figure 18.

Figure 18: The 7 most sought-after qualifications in the TIMES Sector (in descending order of importance)

Population: 2,970 companies world-wide

Source: WIMMEX Munich, December 2000

When analysing these most sought-after qualifications, two important facts should be should be taken into consideration:

- **Short-term validity of results**

  The validity of these results are only short-term since the TIMES sector is subject to very rapid technical and personnel changes. Consequently, the requirements for the qualifications of staff are also changing continuously. For this reason, it is important to analyse the qualification requirements on a regular basis and take them into account for the development of respective training measures.

  The key qualifications of the TIMES sector shown in Figure 18, which were analysed by the WIMMEX survey, are valid for the second half of the year 2000. The key

qualifications for the year 2001, however, could already be different, which means that only a regular monitoring can register these changes. The WIMMEX Panel is capable of doing this, due to its flexible nature regarding the classifications and the qualifications features of the TIMES sector.

- **Growing importance of creativity and content**

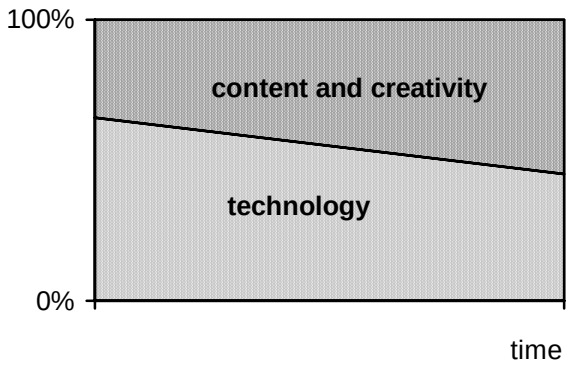
  At first glance, it may seem that the qualifications listed in Figure 3.23 are purely technical in nature; however, they often require a large measure of creativity and content. This is particularly true for the two qualifications which are currently most sought after, namely WEB Publishing and WEB Design, although it also applies to WEB Multimedia and even to Java Programming.

  This is not surprising when one takes into consideration that all types of software products require a strong communicative element. In other words, it is already necessary in the development stage of these products to consider how a PC user will receive and implement a particular product. This ranges from such simple things as making sure that help texts within the program are easy to understand or that the icons used are visually appealing, all the way to more complicated issues such as the designing of complex customer-oriented products. Creativity which is ideally oriented to customer needs is, in the end, a crucial prerequisite for the successful marketing of a multimedia or software product.

  This also explains why, within the context of numerous expert interviews and the analysis of hundreds of good practices in the area of training and further education (see Module 4), we discovered that the relationship between basic technical knowledge and creativity is currently being turned upside down in the cultural sector. While content-oriented activities and qualifications are becoming increasingly important, the demand for the "pure" technician is decreasing.

The rule of the thumb which can be applied to this sector is that the entire technical segment including technology, infrastructure, hardware and printing will undergo a period of relative stagnation or even decline (with regard to both jobs and contribution to the value adding process), whereas all content-oriented i.e. creative occupations and areas will continue to show high growth rates (Web design, advertising, publishing, media, education, entertainment, etc.) (see Figure 19).

Figure 19: Growing importance of content and creativity in the TIMES sector



This development offers excellent employment possibilities, above all to cultural workers. They have content-oriented and creative skills which are imperative for the further development of digital culture and the TIMES sector.

The new qualification requirements of the TIMES sector do not in any way mean that culture is being put at the service of technology. Much more, this points to a “culturalisation” of the New Economy.

As a result of the interaction with multimedia technologies, job profiles for cultural workers are changing. Cultural workers can only participate in the exploitation of the job potential existent within digital culture when they adapt their qualifications and their working methods to the continuously developing qualification requirements of the digital culture.

This development has three important aspects for the training of cultural workers:

- **New job profiles of cultural workers**

  The “old” job profiles of cultural workers are rapidly developing into new profiles which are often not yet regulated. This means that no official and certified training courses exist. These new job profiles are also much more diverse in character than the “old” ones. In addition, there are completely new job profiles emerging, such as “creativity consultant”, for which no equivalent among the “old” profiles can be found. These completely new profiles do not require a specific education - they are principally open to all artists who are flexible enough to take on new opportunities. Table 8 gives an overview of these developments.

Table 8: Examples for the development of “Old” into “New” cultural job profiles

“Old” cultural job profiles	“New” cultural job profiles
Actor	Media actor • Camera actor • Acoustic actor • Virtual studio actor • Motion capture actor • Moderator in virtual media sets
Designer	• Installation designer (galleries, museums, night clubs etc.) • Multi-media designer • Lighting designer • Performance designer
Printer	Online-Publisher
Typesetter	Media editor
Cutter	Media designer

Completely new cultural job profiles
Creativity consultant Arts consultant Media communicator Multimedia conceiver (Multi-)Media project manager ....

- **Specialised cultural workers are becoming multi-skilled**

  There is a clear trend toward cultural workers becoming multi-skilled. It is no longer sufficient to be proficient in only one single art form. Instead, it is of growing importance to be able to combine and integrate different forms of art. Also, there are two other types

of skills, in addition to creative and/or artistic skills, that must not be underestimated: technical skills and support skills (see Table 9).

Table 9: Multi-skill requirements for cultural workers

Creative skills	Technical skills*	Support skills
Acting Dance Music Design Performance Community arts	WEB Publishing WEB Design Java Programming WEB Multimedia ..... * see Figure 18	Company management Production Marketing Self-Presentation Interpersonal skills, social competence, communicative skills ...

Source: MKW Munich, April 2001

Obviously, training in state-of-the-art technical skills is essential for cultural workers. However, support skills like management, marketing and self-presentation cannot be forgotten if cultural workers are to be truly prepared for the employment market, especially if they would like to be self-employed. This is the reason why highly advanced training institutions like the Deutsche Schauspieler Akademie (DSA) so strongly emphasise training in support skills. We will present more examples such as this in Module 4, where we analyse good practices in training and qualification.

- **Multidisciplinary team-work**

  There is a growing number of artistic services that require a multidisciplinary and integrated approach. This means that a single artist is not able to provide a specific service on his own, but instead must co-operate with other artists and non-artists such as technicians, economists or social scientists. An example of one such service could be the complete design of complex web sites, including acquisition, design, programming, composing of melodies, motion capture acting, networking, marketing, administration etc. Integrated services such as this can only be created and offered by a team of artists and non-artists.

  Therefore, Interdisciplinary teamwork is essential for cultural workers in order to make use of the employment potential in digital culture. For this reason, courses in teamwork and project-oriented work are already part of the curriculum in advanced training institutions like the Liverpool Institute of Performing Arts (LIPA).

In adapting to these trends, cultural workers do not give up their original occupational identity by including technological and support skills in their qualifications. Instead, they gain new levels of competence, allowing them to present their skills and potentials for interaction with multimedia technology on the labour market, thus opening up a larger field of employment activity for them. This can best be described as an **“oil-on-water-effect”: in the same way a small drop of oil spreads out on the water surface, a relatively small degree of multimedia and management expertise is already sufficient to open up employment possibilities for cultural workers in a wide range of related occupations.**

Therefore, the exploitation of the job potentials in digital culture will depend decisively on addressing the issues of whether a successful integration of technology and management, on the one hand, and content and creativity, on the other, is possible, and if so, how this can

best be achieved. To overstate the case, the question is whether the necessary basics have been established to combine cultural and artistic content with new technological possibilities and forms of communication. Based on the expert interviews which were carried out within the framework of this study, we can only conclude that we are just at the beginning of this development.

Employment policy makers are confronted with the challenge of improving the necessary preconditions by introducing and supporting methods of training and updating these regularly. These will aid cultural workers and allow them to gain the basic technical knowledge that is prerequisite for employment in the TIMES sector.

5. Good practices for training and qualification

By the end of January 2001, the project team members responsible for carrying out the good practices research (MKW, interarts, Österreichische Kulturdokumentation and empirica) had collected more than 300 best practices (long list) and evaluated 154 of them (short list), which were outstanding in

- preparing the traditional cultural sector for the challenges of the digital economy, primarily through the training and/or further education of cultural workers, not only in technical skills but also in skills such as management, marketing, public relations etc. and/or
- offering marginalised groups of the digital society (women, long-term unemployed, unemployed young people etc.) the possibility to be a part of digital development and/or
- methods of public-private-partnership of local/regional development related to training and job creation and/or
- creating employment in depressed areas.

The overall aim was to initiate adequate training policies.

During the course of this investigation, it became clear to the team members that it is impossible to extract the truly ”best” examples of education and qualification projects from the huge number of European projects in this field. Furthermore, the concepts of the various interesting projects differ so much that they cannot be assessed as ”best” and ”non-best”. Therefore, the term ”best” practices was replaced by ”good” practices.

It was not the team’s intent to create a representative list of good practices from a regional or sectoral standpoint. We consider it more important to provide an overview of the varieties of interconnections and relationships between the cultural sector and the multimedia sector in the field of qualification and education, in particular for disadvantaged population groups.

Specific attention had to be paid to disadvantaged or marginalised groups in the digital society, which constitute a new form of poverty in industrialised countries. This poverty is not to be defined so much by income, but in terms of the degree of availability of basic multimedia technology, particularly access to the Internet.

5.1 Systematisation of good practices in digital culture

In order to simplify and standardise the good practice research, all good practice projects were to be classified according to the systemisation shown in Figure 20.

- **Field of action**

A system of categorisation was necessary which would allow for an unambiguous classification of the projects as well as guarantee a direct connection to the EES. Both of these criteria were best fulfilled by the four main pillars of the EES, namely Employability, Entrepreneurship, Adaptability and Equal Opportunities.

These four main pillars are highly significant, particularly for digital culture. Table 10 illustrates this significance.

Figure 20: New systematisation of Best Practices in digital culture

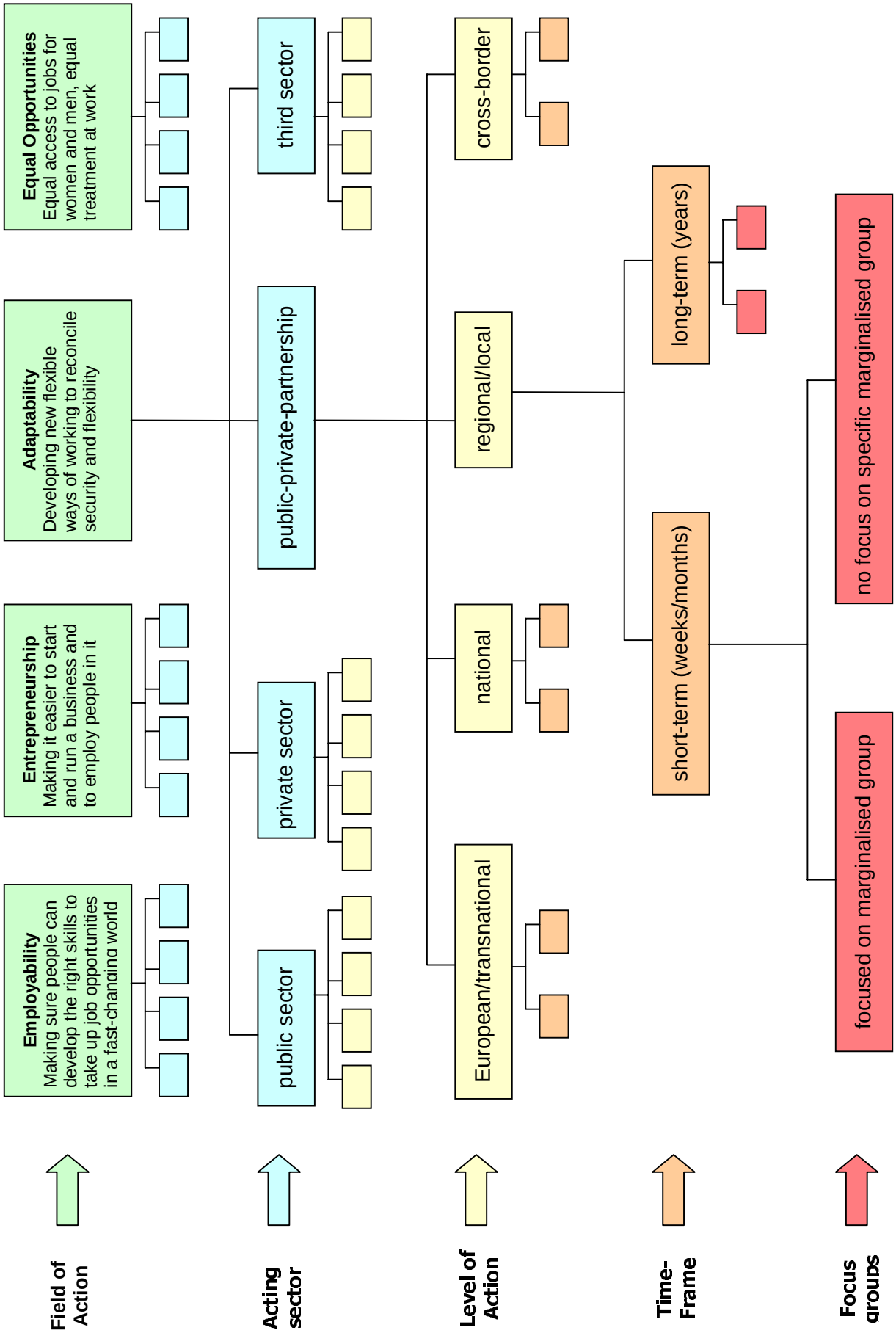


Table 10: Significance of the main EES pillars for digital culture

I. Employability *Making sure people can develop the right skills to take up job opportunities in a fast-changing world* Significance for digital culture: • Prevention of long-term unemployment • Activation of the stock of unemployed • Employability agreements of social partners (employers, trade unions) • Enabling life-long learning • Raising skill levels of young people • Integration of marginalised groups of the digital society (women, older people, unemployed etc.)	**II. Entrepreneurship** *Making it easier to start and run a business and to employ people in it* Significance for digital culture: • Encouraging self-employment and entrepreneurship • Local development • Development of the service sector
III. Adaptability *Developing new flexible ways of working to reconcile security and flexibility* Significance for digital culture: • Digitalisation of cultural services • Modernisation of working life within and between companies • In-house training and recruitment	**IV. Equal Opportunities** *Equal access to jobs for women and men, equal treatment at work* Significance for digital culture: • Gender mainstreaming • Facilitation of re-entry to the labour market • Reduction of gender gaps in the use of multimedia technology

Nevertheless, left unchanged, these four pillars did not represent a suitable categorisation of good practices, for this system resulted in a certain overlapping of content.

For example, under the category ”Employability” also fall those projects with the goal of integrating marginalised groups of the digital society. These measures could also be classified under the pillar ”Equal Opportunities”. In addition, many measures which promote adaptability automatically result in better employability.

In order to avoid such overlapping and to achieve an unambiguous classification of good practices, the following additional criteria were introduced:

- Projects which aim to integrate marginalised groups of the digital society are classified exclusively under the category ”Equal Opportunities”.
- Projects with the goal of **adapting workers** to the new requirements of digital developments, are classified under the category ”Employability” (e.g. training of cultural workers in multimedia proficiency).
- Projects with the goal of **adapting organisations** to the new requirements of digital developments are classified under the category ”Adaptability” (e.g. creation of new networks between organisations, digitalisation of cultural content etc.)

After adding these evaluation criteria to the four pillars of the EES, the result is a first class system for categorising good practices.

- **Acting sector**

The good practices under study are distinguished according to the various acting sectors:

- Public Sector
- Private Sector
- Public-Private-Partnerships and
- Third Sector

The most promising of these various acting sectors are public-private-partnerships, which organisationally combine public interests with private money and expertise. The results of the research clearly shows that the majority of the most interesting and successful projects are organised as public-private-partnerships.

- **Level of action**

The system of differentiation for the level of action allowed a clear classification under one of the following geographical categories:

- European
- national
- regional/local and
- cross-border

According to this system, a project which is carried out on regional/local level but has been established in a cross-border region and has a sphere of activity which goes beyond national borders will be classified under the category ”cross-border”.

- **Time-Frame**

The subdivision ”Time-Frame” was added to the systematisation of good practices since it turned out that all projects needed to be differentiated according to their length of duration. In this context, two clear trends can be observed:

- short-term projects (weeks/months) and
- long-term projects (years)

While, as a rule, further education projects last only a few weeks to a maximum of one year (short-term), there are other projects which extend over several years (long-term), such as courses of study offered at academies or co-operative efforts between European colleges/universities.

- **Focus groups**

The selected projects are further categorised based on whether they focus on marginalised groups or not. Marginalised groups are to be understood as population groups which, up until now, have had limited access to the use of multimedia technology (for example, women) and/or have been affected by unemployment. The main emphasis among unemployed is on long-term unemployed persons and unemployed youth.

5.2 Assessment of good practices

Each of the 154 projects were analysed and evaluated according to the following four criteria:

- **project organisation**
- **financing plan/cost-benefit analysis**

  One of the most interesting parts of the analysis was the financing plan. Those organisations providing funding and infrastructural support for future projects are

naturally interested in knowing what costs and what cost-benefit ratio they can expect. However, this data was also the most difficult to attain. Not only do many of the project organisations treat their financial data as confidential, but often the projects were organised in such a way that a detailed breakdown of costs was not possible.

- **evaluation of the impact on the labour market**

  Since the present study takes place within the context of labour market policy, it was obviously necessary to analyse as much as possible the impact of the projects on the labour market. In most cases, however, this was even more challenging than the cost-benefit analysis.

- **overall assessment**

  At the conclusion of the analysis, an overall assessment of each project was carried out. This assessment focused for the most part on what conclusions and recommendations can be drawn with regard to policy/strategy options for the EU and whether the project concept can be transferred to other EU regions/EU countries.

As much as possible, the assessment was carried out quantitatively. In other words, comparable statistics were collected, such as costs incurred and the number of project participants. Nevertheless, due to various reasons, it was not always possible to collect all the needed information. In most cases, this was due to the fact that the contact persons did not make all the necessary information available. As a result, among the 154 projects studied, there are those for which not all assessment categories are filled out. Nevertheless, well over 100 projects were able to be analysed completely, covering the entire range of approaches for the training and further education of cultural workers currently being implemented in the EU with regard to the exploitation of job potential within the TIMES sector.

5.3. Conclusions

Based on the different projects analysed, our field work has identified some trends in the evolution of the job market and we have been able to arrive at some valid conclusions which are presented in the following section:

- **Demand for contents.** It has been clearly shown that in the new information era, the demand for contents and knowledge has been stimulated. Therefore, those projects capable of offering and circulating information through the telematics networks are particularly valued. These networks are a highly favourable context for making use of the added value represented by the creativity and artistic sensitivity of products from this sector.
- **New creative possibilities.** The growth of digital culture increases the creative possibilities of the cultural sector. With regard to the creative processes involved in the development of the artistic products, the new technological instruments facilitate new possibilities of creative development which have yet to be fully explored. It is important at this point to emphasise that the innovative and often experimental profile that characterises the cultural and artistic sector facilitates its capacity to adapt to the new opportunities of expression, production and dissemination that have emerged with the introduction of ICTs.
- **New possibilities of dissemination.** The possibilities of dissemination of such projects has been increased by the new communication technologies. Increased dissemination leads to a quantitative increase (attraction of new consumers) and also acts as a driving force for an improvement in quality (new possibilities of selection, participation and interaction).
- **New audiences.** By including the ICTs in their activities, many of the cultural projects become more attractive for new audiences, mostly youth, who recognise that the cultural

project includes an innovative, progressive element which it didn't have previously. If we also add the possibility of interacting with the creator-artist, it is clear that, in specific circumstances, the ICTs grant the cultural project a greater potential for transmitting knowledge, since they imply a much greater level of active participation on the part of the consumer or project audience.

- **New bridges between science and art.** In studying the cases selected, it is clear that the presence of digital culture in cultural projects has particularly served to generate a new relationship between scientific culture and conventional art. Due to these circumstances, which promote interdisciplinary transfer, new bridges have been created between the cultural sector and the new technologies sector, resulting, for example, in the emergence of new fields of employment.
- **New professions.** New professions are emerging which have yet to be clearly defined. Their most relevant characteristics are their interdisciplinary profile and the autonomous nature of their activities. These professionals are accustomed to a certain lack of continuity in their work and the need to work on segmented projects, and are capable of implementing broad relational and informational networks and adapting to changing and evolving contexts. In short, these professions involve the ability to create and to improvise.
- **Market orientation.** It is clear that the introduction of new technologies in the cultural sector does not automatically result in the generation of employment. The introduction of technology must be accompanied by other supplementary measures, such as the formation of interdisciplinary working teams, greater orientation towards the market to generate resources that can cover the high cost of the investments in technological infrastructure, as well as continuing education that is more fully adapted to the new opportunities of multimedia work, including artistic-humanistic training for technologists as well as technological and project management training for artists.
- **Virtual nature of projects.** The introduction of ICTs grants many cultural projects a virtual nature. Since it makes operations more flexible, this phenomenon blurs and makes it more difficult to define a project's contours. Virtuality is a two-way street, which stimulates the possibility of development and expansion of cultural projects, while at the same time making it harder to define their level of implementation and their working structure. Therefore, certain difficulties emerge in assessing the impact of these projects on the job market as well as on their area of activity.

Summarising the aspects described above, the most successful projects in the field of training cultural workers in multimedia proficiency can be characterised as follows:

- Their focus of activity is in playing a mediating role between artists, the cultural and multimedia industry, and the public sector (such as the Public Employment Services).
- They create entirely new job descriptions (like "media actor").
- They offer training not only in creative skills, but also in technological (state-of-the-art multimedia technology) and supportive skills (management, marketing, interpersonal skills, social competence etc.).
- They train students in the important aspect of interdisciplinary co-operation and team work between various artists, technicians and economists.
- They provide training in close connection with the industry in order to integrate state-of-the-art multimedia proficiency in training and to establish personal contacts between training organisations, students and companies.
- They offer classes with qualifying certifications, according to the new job descriptions.
- They comprise the entire value added chain of cultural production.

6. Obstacles to mobility

An important objective in the course of this study was to identify the obstacles to transnational and cross-border mobility of cultural workers within the EU in a country-by-country comparison in order to promote transparency and geographic mobility with regard to the cultural labour market.

It is vital to see this objective within the context of the European Employment Policy, the aim of which is to create a single European labour market by eliminating or reducing obstacles to professional and geographical mobility of European workers. Measures addressing the issues of obstacles to geographical mobility and training and qualification are interconnected since both types of measures aim to improve employment opportunities for European workers.

In this context, it is important to stress that the aim of reducing obstacles to mobility is not to force European workers to become more geographically mobile. The current number of workers who are actually mobile and the desired level of mobility based upon economic considerations is also of secondary importance. The most important aim of reducing obstacles to mobility is to simply offer additional opportunities to those EU workers and employers who intend to make use of their basic right of freedom of movement.

6.1 Labour mobility in the EU

The actual total number of migrant workers in the EU is not high when compared to the number that should be expected in a Single European Market. Although all EU citizens have the right to work and live in other Member States, only 5.5 million citizens - 1.5% of the total population - have opted to settle in another country[5].

Of these 1.5%, not all persons are permanent migrant workers and/or members of their respective families. A significant number of EU citizens settle in another Member State on a temporary basis or for reasons other than employment. The following recent migration trends have to be taken into consideration:

- **Retirement migration.** High numbers of retired EU citizens move to another Member State in order to spend their old age there.
- **Education related migration.** There is a large and growing number of EU students who stay in another Member State for part or for the entire duration of their studies. The EU itself has been strongly promoting the geographical mobility of students within the EU[6].

Taking into consideration these trends, the **actual number of true permanent migrant workers is,** in all probability, **only around 1% of the total EU labour force**, or **2.5 million workers**.

Table 11 shows the current estimated numbers of migrant workers and cross-border commuting workers[7] in the EU compared to the numbers that would represent an economically "healthy" level[8]. The term “healthy level of labour mobility” is to be understood as compared to labour mobility on a national level.

[5] OECD (1999): EMU (European Monetary Union) Facts, Challenges and Policies. Geneva.

[6] European Commission (2000): A new generation of programs. Brussels.

[7] In EU terminology, the term "frontier worker" describes any worker who pursues his occupation in the territory of a Member State and resides in the territory of another (neighbouring) Member State (= political criterion), and to which he returns, as a rule, daily or at least once a week (= timely criterion).

[8] MKW (2000): Migration trends in Europe. Intra-EU labour mobility and migration flows between the

Table 11: Mobility of workers in the EU

	Current number	"Healthy" number for a single market
Migrant workers	2.5 million	4.0 – 6.0 million
Cross-border commuters	300,000	1.8 - 2.4 million

Source: MKW Munich, 2000

As indicated in Table 11, migrant worker mobility should be 2 to 3 times higher, while the mobility of cross-border commuting workers should be even 6 to 8 times higher if economically desirable numbers are to be achieved. This means that in the EU, cross-border mobility is even less developed than transnational mobility.

However, cross-border mobility covers shorter distances than transnational mobility and, therefore, should be compared with the high level of commuter mobility in metropolitan areas. While there are enormous commuter flows within national agglomerations like Paris, Madrid or Munich, flows of cross-border commuters across borders between EU member states are much lower, even in economically prosperous border regions like Salzburg/Austria, Freiburg/Germany, Kopenhagen/Denmark-Malmö/Sweden or the entire Benelux-region. The highest potential for more geographical mobility within the EU is located especially in border regions such as these.

Digital culture is particularly handicapped by the insufficient geographical mobility of its workers.

While the mobility of cultural and multimedia workers is already slightly above average, it is still too low. Cultural workers traditionally have a high level of internationalism. Multimedia workers are also relatively mobile because their ranks are mostly made up of young professionals possessing an internationally oriented and high level of education, good language skills and, in many cases, work experience abroad.

Nevertheless, worker mobility within the digital culture is still far below an economically desirable level. Table 12 shows the estimated numbers of current migrant workers and cross-border commuting workers within the digital culture and compares these numbers to the economically desirable numbers (estimates by MKW).

Table 12: Mobility of workers within the digital culture

	Total number in the EU	Current migrant workers and cross-border commuters	”Healthy” number for a single market
Cultural workers	7.2 million (see Chapter 3.2)	90,000 – 140,000	350,000
Multimedia workers	11.4 million (see Chapter 3.2)	140,000 - 190,000	500,000

Source: MKW Munich, 2000

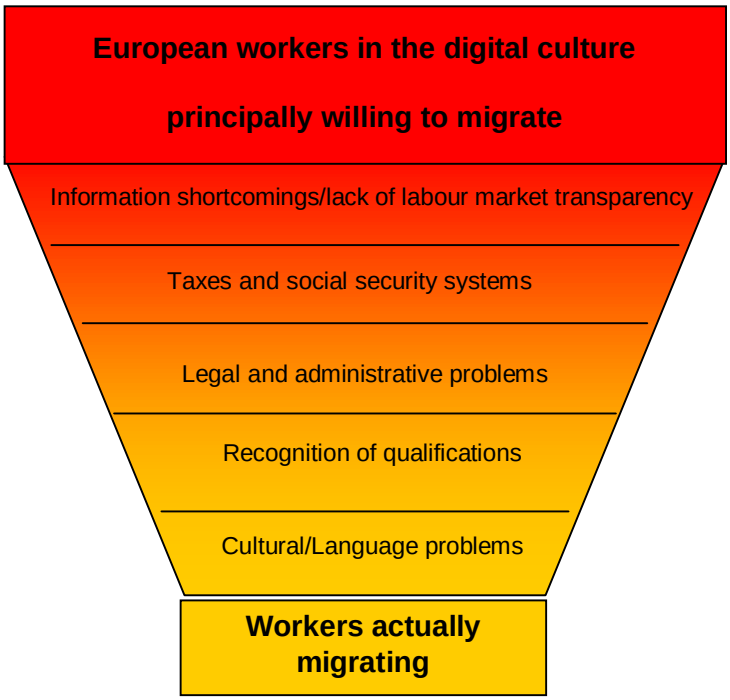
In a single market, the number of migrating and cross-border commuting workers within the digital culture should be at least three times higher than the current level, taking into consideration the high internationalism of the digital culture and the importance of this sector for future economic growth in the EU.

EU and EEA/CEEC. Munich.

6.2 Obstacles to mobility of cultural workers

The mobility of European workers is hindered by a number of obstacles which vary in their degree of significance for cultural and multimedia workers. They can be regarded as a series of "filters" which, step by step, reduce the willingness of European workers to migrate and work in other European countries (see Figure 21).

Figure 21: Obstacles to mobility reduce willingness to migrate



Not all of these obstacles are of equal significance for workers within digital culture (see Table 13).

Table 13: Significance of obstacles to mobility for workers within the digital culture

Obstacle	Significance for	
	Cultural workers	Multimedia workers
Information shortcomings	**Very high**	**Very high**
Taxes and social security systems	High	High
Legal and administrative problems	High	Low
Recognition of qualifications	Low	Low
Cultural/language problems	Low	Low

- **Cultural and language problems** constitute a considerable obstacle to mobility for practically all European workers. One of the biggest cultural obstacles to mobility are the 11 official languages in the EU. Language training tends to channel the movement of highly educated migrant workers towards countries with ”major” European languages like English, French, Spanish, German and Italian. However, most workers within the digital culture possess a level of internationalism and language skills which are well above average. Therefore, this obstacle is of minor importance in this study.

- Both the cultural and the multimedia sector are characterised by relatively few problems with the **recognition of qualification**. The level of qualification regulation is low, particularly in the multimedia sector. This sector is almost free of all regulations concerning qualification: practical knowledge is usually more important to employers than diplomas. In the long run, such an extremely unstructured qualification system may prove to become a problem, but for the near future this is obviously not the case.

  There is a strong correlation between the level of market entry barriers constituted by regulations concerning recognition and qualification, and mobility of workers. Workers of a sector with a high level of regulation consequently have a lower potential mobility, both within their profession and geographically. On the other hand, in a sector with a low level of regulation the potential mobility of its workers is much higher. Examples for several sectors can be seen in Figure 22.

Figure 22: Level of qualification regulation and potential mobility

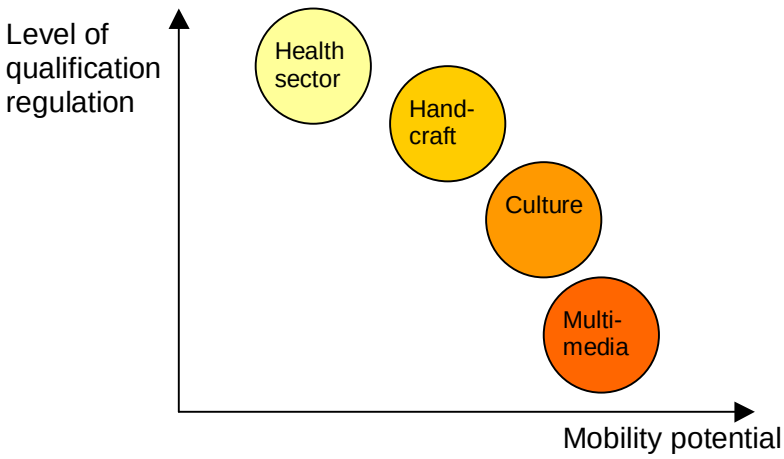


  Figure 22 illustrates the correlation between the level of qualification regulation and potential mobility. Deregulation of qualification recognition and European harmonisation of qualifications can contribute significantly to a higher potential of mobility, but only in those sectors that are still highly regulated today, such as the health sector. In the culture and multimedia sectors, however, deregulation and harmonisation would not lead to a higher potential for mobility, because the amount of regulation within these sectors is already very limited.

- All European workers, not only those within the digital culture, have to face numerous **legal and administrative problems** (mainly concerning residence permit and family reunion), as well as problems with the different **taxes and social security systems**. The differences in social security systems impose a significant barrier to migrant workers, particularly to the growing number of workers who only want to work in a foreign country for a limited time (**temporary migration**). Differing social regulations are of far greater importance for these workers than for workers who migrate permanently, because they have to fear potential disadvantages, for instance, that times of employment in a foreign country might not be accepted in their country of retirement.

  These problems increase with the number of stays in European countries for employment purposes (**multiple migration**), and with the number of European countries that one works in. Some cultural workers, for example musicians, are frequently ”multiple migrants” and/or ”temporary migrants”. It is usual for them to work for a limited time in other European countries. These workers in particular have to face many problems with regard to the different national legal systems; their short-term stays are often hindered

by the typically slow administrative procedures concerning residence permit and other authorisations/permits etc[9]. These artists also have more problems with different tax and social security systems because of their short-term work in foreign countries.

Although problems with the different taxes and social security systems represent one of the most significant obstacles to cultural worker mobility, we will not analyse it in detail in the course of this study. In light of the fact that a study of the Directorate General "Culture and Education" is currently examining the problem area "Taxation, Law, Social Security" as a major obstacle to mobility, MKW proposed and arranged a division of labour with the colleagues who are carrying out that project.

- Thus, in our study we focused on **information shortcomings and labour market transparency**.

  Because of the high level of internationalisation in culture and multimedia, we can assume that workers within the digital culture are more willing than the average worker to overcome the obstacles presented by qualification regulation, legal and administrative problems, as well as by differences in taxes and social security systems, provided they are able to find job vacancies in other European countries for which they are willing to take risks and overcome obstacles.

  However, it is at this stage in the process that they encounter one of the biggest obstacles of all - **it is simply extremely difficult to find sufficient information about high quality job vacancies on the European level.**

NO INFORMATION ABOUT HIGH QUALITY JOB VACANCIES IN EUROPE

NO MOTIVATION FOR OVERCOMING OBSTACLES

NO MOBILITY.

6.3 Information shortcomings – lack of transparency

A wide "information gap" exists for workers and employers alike which has prevented a higher mobility of workers in the digital culture between European countries. Several questions are of specific interest in this context:

- What media are available for transmission of information on labour market and working and living conditions for employed workers and freelancers?
- What media have the potential to distribute inexpensively large amounts of labour market information on the European level, thus serving to close the information gap?
- Where do "bottlenecks" for relevant information about the European labour market exist?
- What measures would be necessary to eliminate these bottlenecks and to close the information gap?

The "old" transmission media like print media, personal contacts and brokerage offices have not been able to provide a solution, because they focus mostly on their domestic employment markets and are too exclusive, expensive and/or inflexible. **What is urgently needed is a high quality European-wide Information Platform.**

With the development of the Internet, for the first time there is now an excellent technology available that can be used to create such an Information Platform. The characteristic features of the Internet (the possibility to make huge amounts of information

[9] European Music Office (1996): Hindrances and Obstacles to the Circulation of Repertoires, Productions and Artists in Europe. Brussels.

available quickly, cheaply, flexibly and interactively, without being limited by national borders) make it ideally suited to serve as an information medium for European workers who are willing to work in another European country and who have the motivation to overcome the various obstacles to mobility.

There is already a high number of web sites available on the Internet with job and applicant data bases. One can find web sites of all Public Employment Services (PES) of the EU countries, as well as several hundred private/commercial web sites. However, these services do not yet constitute the type of Information Platform that would be necessary. They still suffer from severe handicaps which, up until now, have prevented a higher mobility of workers within the digital culture.

Internet services of European Public Employment Services

In most EU countries, the Public Employment Services (PES) mediate the highest numbers of job vacancies and job applicants. All PES present their services in the Internet, many of them include in their web site a data base for job vacancies and/or job applicants. A portion of these national job vacancies are combined to form the Internet data base of EURES, which represents the only real European job data base of any considerable size. Consequently, the research of MKW not only included the PES of the 15 EU-countries, but also Iceland and Norway, which are EURES members.

The analysis that MKW carried out in 2000 was particularly interested in the suitability of the available Internet services for promoting the geographical mobility of workers within the digital culture sector. The results showed that basic features of PES and EURES Internet services (e.g. free of charge, large numbers of job applicants and job vacancies, high levels of internationalism and credibility) make them excellently suited for establishing a European Information Platform with the aim to distribute information on the European labour market and working and living conditions in other European countries, thus closing the "information gap". However, the PES and EURES Internet services are still not perfect. Table 14 shows the results of the quantitative assessment of these services performed by MKW.

The aggregated quantitative analysis shows significant differences in the performance of web sites in the three assessed categories “use of foreign languages”, “quality of job data bases” and “quality of information on working and living conditions”. The most interesting statistic in this context is the comparison of the average points of the three categories with the maximum points of each category. On the average, all web sites reach 62.7% of the maximum points in the category "links and information about working and living conditions", revealing that the information available about working and living in other EURES countries on the web sites is already relatively good. Performance in the other two categories however, is significantly poorer. The quality of the job data bases received, on the average, just 43.7% of the maximum points. However, this category is still rates relatively high when compared to the use of foreign languages, where the average data base earned just 19.3% of the maximum points available.

The **assessment of the ”quality of the job data bases”** was based primarily on the user friendliness of the web sites and the quality of the job categorisations used by the data bases. While, in general, the user friendliness is satisfactory, job categorisations for culture and multimedia are still underdeveloped. Some of the PES data bases do not even have a categorisation of cultural and/or multimedia jobs at all.

Table 14: Quantitative assessment of EURES PES web sites

Country/Region	Job vacancies 10 August 00	Language max. 30 points	Data Base max. 40 points	Information max. 30 points	Overall Points
Germany	400,000	9	38	27	74
Sweden	32,039	9	33	22	64
Finland	5,397	19	22	18	59
Austria	26,328	0	30	27	57
Greece	0	12	28	14	54
Norway	8,049	9	26	18	53
Netherlands	42,655	12	16	21	49
France	147,039	0	26	20	46
Iceland	194	6	14	22	42
EURES	5,725	9	10	23	42
Denmark	4,880	0	22	19	41
Belgium/Flanders	27,848	0	16	22	38
Belgium/Brussels	1,451	19	13	4	36
United Kingdom	3,720	6	16	14	36
Belgium/Wallonia	3,000	0	9	24	33
Ireland	1,568	0	18	14	32
Italy	0	6	0	24	30
Spain	0	0	0	23	23
Luxembourg	15,561	0	13	10	23
Portugal	0	0	0	10	10
Average	36,272	5.8	17.5	18.8	42.1
Average/Maximum		19.3%	43.7%	62.7%	42.1%

Source: MKW Munich, 2000

Several qualitative drawbacks also have to be taken into consideration:

- Most job data bases offered by PES on the internet don't contain a large enough number of job vacancies and CVs to satisfy the needs of the employment market.
- With the exception of Austria, Germany and Sweden, no PES offers data bases whereby freelancers within the digital culture can present themselves.
- User friendliness of the job data bases could be further improved.
- Only one PES (Austria) provides the possibility for employers and job applicants to register their job vacancies and CVs in the data base directly and interactively.
- The EURES web site (the only really ”European” job data base) is extremely hard to find within the web site of the European Commission.
- Use of foreign languages on the PES web sites is rare. None of the PES job data bases are available in any languages other than the official national languages.

- Links to other public and private European job data bases are usually insufficient.
- The differentiation of cultural jobs is usually more detailed than the differentiation of multimedia jobs. Only the PES of Austria, Sweden and, above all, Denmark have good categorisations for multimedia jobs. Yet even these are not state-of-the-art, compared to the job categorisations available on commercial web sites.

The **EURES web site** contains a job data base and a data base with information on working and living in the various EURES countries. The EURES job vacancy system has been in operation for over five years, and the EURES Internet services for three years. Nevertheless, a number of characteristics could be improved:

- The number of job vacancies offered by the data base on the Internet is much too low, with 5,725 (as of August 10, 2000) for the entire EURES region, compared to a stock of around 220,000 vacancies administered by EURES[10].
- The job data base only exists in three languages (English, French, German).
- The job categories are neither in alphabetical nor another user friendly order. While there are such useless categories as ”astrologers”, ”fortune-tellers” or ”faith healers” there is absolutely no category for cultural jobs.
- There is no job seekers data base where those searching for employment can present themselves and employers can search for workers. In 2000, the goal was to start a pilot programme whereby potentially mobile job seekers could register their CV's via Internet. In its initial phase, the pilot will be restricted to the sectors ICT, Hotel/Catering/Tourism, Healthcare and the Air Travel Industry.
- Employers can not register vacancies themselves, which goes against the growing trend among employment services which allow employers to register their vacancies on-line.
- The EURES site offers no services to freelancers.

Private/commercial internet services

In addition to the job and applicant data bases offered by the PES and EURES, hundreds or even thousands of private as well as commercial web sites can be found throughout the EU which contain job vacancies or information about applicants. A major portion of the job vacancies presented by these web sites are for multimedia workers, but there are also numerous data bases for cultural workers, mainly offered by cultural associations.

In the summer of 2000, MKW collected and assessed 100 of the best currently available commercial web sites that mediate CVs of job applicants.

There was a specific reason for restricting the analysis to web sites with CVs of job applicants. Most commercial web sites concentrate on offering job vacancies to job applicants. However, services for employers are limited because there are still only a few good web sites where job applicants can present their CVs to employers. Therefore, a high quality data base of applicant CVs on a web site is an indicator for a state-of-the-art web site. Since it was MKW’s intention to assess state-of-the-art web sites, the analysis of the commercial web sites concentrated on those that were the most suitable for enabling employers to find highly qualified staff.

The private/commercial web sites have some advantages over their PES counterparts, but also have severe disadvantages (see Table 15).

[10] European Commission (June 2000): The Commission to the budgetary authority Draft report; Future resource requirements of the EURES job vacancy system and the Internet services. Brussels.

Table 15: Private and PES web sites

Web sites	Advantages	Disadvantages
PES	• small number of web sites • free of charge • large numbers of job vacancies and applicants • high level of internationalism • information usually in various languages • additional information about working and living conditions	• certain amount of "low quality" of job vacancies and applicants • usually no in-depth specialisation on specific branches • few services for freelancers
Commer-cial	• often very high quality of job vacancies and applicants • often specialised in specific branches (like cultural sector or multimedia) • more services for freelancers	• too many individual web sites • often not free of charge • small numbers of job vacancies and applicants per web site • usually restricted to one country • usually in just one language • no additional information about working and living conditions

The systems of job categorisations found on commercial web sites are usually much more state-of-the-art than the categorisations that can be found on PES web sites, and can therefore be implemented in building a European Information Platform. The job descriptions used by commercial services are more flexible and up-to-date than those of public services since they are not restricted to legally and statistically defined job descriptions.

However, a severe disadvantage is simply the large number of private web sites with job and applicant data bases. It is practically impossible for the average worker or employer to find and browse all relevant private web sites and to find out the best ones. Often data bases contain just a small number of job vacancies, as well as poor information and/or services, which often only prove to be a waste of time for those users searching for information. Often, the services for employers are not free of charge. Job applicants and employers have to spend a great deal of time and money in order to find out the best practices among the vast pool of data bases. Such a system is not user friendly at all.

Furthermore, there are some additional factors which make private web services totally unsuitable for mediating services on a European level:

- Practically all private web sites concentrate on a single country, and they are only available in the national language. A few contain job vacancies from other countries, but these job vacancies represent just a tiny fraction of the total vacancies offered.
- Information about working and living conditions can rarely be found on private web sites.

7. Recommendations

In the recent past, the cultural economy and the digital economy have both shown clear employment growth – indeed, this growth has been strong and above average when compared to other economic sectors.

This is no surprise in the case of the digital economy, which represents the boom industry of the 1990's. However, the cultural economy has also been able to demonstrate impressive numbers. While overall EU employment grew by a moderate rate of 1.2 % per year during the second half of the nineties, employment in cultural activities expanded with the threefold speed of 3.8 % annually.

According to the results of this study, in the near future, one can count on several million new jobs being created in the digital economy of the TIMES sector (Telecommunication, Internet, Multimedia, e-commerce, Software and Security).

These two findings – strong employment growth in the past and significant employment growth potentials for the future – both needed to be taken into consideration in the development of policy recommendations.

In doing so, we were faced with an extremely challenging task, since it was necessary to start from the very beginning. What made the development of recommendations particularly difficult was the fact that we based the formulation of specific measures on the assumption that the cultural economy and the digital economy are sectors of employment policy; in other words, we placed priority on the employment effects in the first sector of the labour market. In doing so, however, we define measures and project recommendations in the following section for a policy area which doesn't even exist yet, since the political decision must still be made as to whether culture and the cultural economy are to be treated as a separate sector from the standpoint of employment policy.

Consequently, there is no employment policy for the cultural sector at the present time. In addition, as a result of this, there still aren't any institutionalised structures and definitions of responsibilities for many of our recommendations mentioned below.

In order to tap the employment potential of digital culture, which can be regarded as the "overlapping" sector between the cultural sector and the TIMES sector, a series of measures is necessary on European, national and regional levels

Recommendations are made at three levels:

1. Policy Orientation and Integration
2. Information and Communication
3. Affirmative Action Programmes

Regarding the European Commission, the following departments are primarily concerned:

Commission Directorate General	Main Concern with respect to Cultural Sector
1. Employment and Social Affairs	Labour market development, employment policy, equal opportunities
2. Education and Culture	Development of job profiles, project subsidisation such as in the case of Culture 2000
3. Research	Promotion of cultural research
4. Regional Policy	Renewal in depressed regions, cross-border co-operation
5. Information Society	Promotion of digitalisation in the cultural sector

Policy Orientation and Integration

An essential prerequisite for all measures which are designed to exploit the job potential in the digital culture and to improve the qualification of cultural workers is a stronger networking of cultural, economic and labour market policy measures. Within this context, such concentrated actions are more economically effective on the national and supranational levels than at the regional level and, in addition, require a stronger awareness of the interrelations between culture and economy.

- **Networking of Measures**

Here, an optimal co-ordination of measures among the various actors responsible will be crucial.

- It is clearly necessary to achieve a significantly better networking of the political-administrative levels where the development and implementation of subsidised programmes takes place. Information should be gathered regularly from those working in the respective offices concerning their experiences in the implementation of subsidised programmes. This significant information should then be analysed and taken into consideration in the revision of existing programmes and the development of new subsidised programmes.
- In the first place, this requires a clear improvement in the flow of information between national offices, the European Commission and the European Parliament, as well as the development of effective, tailor-made feedback techniques and incentives for workers to contribute their insights and experiences to the regular information process.
- Existent systems of subsidisation in the areas of economic and cultural promotion should be networked on the EU level, as well as on national and regional levels. Here, the important initial step would be for all actors to exchange, compare and, as much as possible, to co-ordinate their ideas and viewpoints. Since such a network does not yet exist, the estimated achievable synergetic effects are very high.

- **New Forms of Action Programmes**

Building upon a better networking of the political-administrative levels, it would be possible to develop completely new action programme tracks, such as:

- Cultural labour market funding programmes on the national and European levels.
- Specific programmes for SMEs (small and medium-sized enterprises) in the area of culture and media, with the goal of promoting both “high” and “low” culture. By means of an improved networking of administration and policy-making departments on the European and national levels, such programmes could be organised with much greater efficiency than is possible today.
- It should become a principle of educational policy in the EU that musical and artistic subjects (in connection with the use of digital technologies and forms of communication) should already be given highest priority in the curricula of primary schools, in order to promote creativity at the age where it manifests itself the most. However, since the educational sector is organised exclusively on the national and regional levels, this goal requires an especially intensive and co-operative information exchange between the responsible EU institutions and the national/regional decision-makers. A possible measure on the EU level would be the provision of funding for the equipping of schools with multimedia hardware.

- **Trans-national and cross-border co-operation**

The exploitation of the job potential within the digital culture requires a significantly higher level of trans-national and cross-border co-operation:

- In the further development of Interreg, much greater attention should be paid to aspects of the cultural economy and the digital culture labour market. Above all, this means a better integration of cultural workers and companies of digital culture in the Interreg process.
- In the IST (Information Society Technologies) programme, cultural aspects on the trans-national level should clearly be taken into stronger consideration. Although cultural content and digital heritage already play an important role in IST, there are definitely more sub-sectors of the digital culture above and beyond heritage which could be included, such as music, video and design. Beyond this, the IST programme could be used considerably more often for European collaborations.
- In the funding of trans-national and cross-border initiatives, a significantly greater emphasis should be placed on SMEs and small grass-roots initiatives, since the majority of innovative ideas and new jobs emerge from companies of this size. In contrast, the subsidisation of large projects, which has been typical up until now and which primarily benefits global players, produces distinctly lower employment effects. In addition, therefore, project subsidisation should not be dependent upon a prerequisite minimum project size, but should instead be principally open to every applicant, regardless of the financial volume of the project.

Information and Communication

With regard to activities in the fields of information and communication, it would be a wise step to place a high priority on the creation of a European Newsletter for the cultural community that would serve to collect and regularly update the most recent employment trends, qualification requirements, best practices etc. This is a very simple instrument capable of collating and communicating the recommendations and individual proposals made. Areas of special concern include the improvement of official statistics, the monitoring of trends in employment and skills requirements, and the establishment of a European Job-Information Platform for digital culture.

- **Harmonised statistical basis**

The analysis of Eurostat data illustrated that there are already statistical tools available to monitor the cultural sector. However, the study also indicated that the existing statistical basis is no where near sufficient to cope with the manifold issues of concern.

  - To improve official statistics, a major task to be accomplished is the distinct categorisation of creative and other types of activities inside and outside the cultural sector. For example, in the field of architecture, there must be categorisations which enable one to discern between engineering activities and creative design work.
  - The European Commission, in close co-operation with the statistical agencies on the national, regional and local level, should ensure clear definitions for the collection and dissemination of data concerning the labour market in the cultural sectors, including media and creative industries (e.g. cultural barometer).
  - Building upon a clear and harmonised statistical basis, it would be possible to analyse the cultural sector in more detail than was possible in the course of this study, thus providing a better foundation for future decisions in the context of the European Employment Strategy.

- **More knowledge and research on European cultural and creative industries**

  - Development of solid know-how on cultural and creative industries at the theoretical and applied research level.
  - More intensive co-operation between university departments and external research should therefore be supported by European research strategies as well as national and regional research research programmes. Generally, the cultural sector is too much neglected in the EU research support planning. These research initiatives should address the whole complexity of the cultural sector – so to speak, the changing profile of culture and economy in European societies (addressing arts and humanities at the universities as well as empirical applied research work coming from commercial research institutes).

- **Monitoring trends in employment and skill requirements**

  - In addition to improving official statistical data, it is important to regularly analyse the constantly changing employment trends and qualification requirements in the traditional cultural sector and, in particular, within the digital cultural sector (monitoring and evaluation) on a European level. The results must then be taken into account as early as possible in the development of respective training measures.
  - Since digital culture is subject to very rapid technical and personnel changes, regular monitoring of these trends is only possible by directly contacting the companies in digital culture. This has been shown by our study. A regular European-wide company

survey – possibly structured on a regional basis - would provide the digital culture sector and decision-makers with a dynamic, web-based research resource to make skills and labour market information available on demand.

- **European Job-Information Platform for digital culture**

In order to improve conditions for the professional and geographical mobility of digital culture workers, it is of primary importance to implement measures which would increase labour market transparency:

- Increased transparency of the labour market in the cultural sector and in the digital culture on a European level can be achieved by the creation of a European Information Platform that closes the information gap between workers and employers. In the development of this platform, the high percentage of freelancers within the digital culture must be taken into consideration.
- Such a platform should have the following characteristics:
  - It is Internet-based and easy to find,
  - mediates job vacancies as well as job applicants' CVs,
  - offers presentation services to freelancers,
  - is European-wide in its scope,
  - is available in all major European languages,
  - possesses a state-of-the-art, user-friendly job classification,
  - allows employers and job applicants to register their job vacancies respectively CVs interactively and personally,
  - provides workers with all the necessary information about working and living conditions in all European countries,
  - is highly credible, and
  - offers its services free of charge.
- The instruments necessary for creating such a highly efficient information platform are already available. The most suitable basis for such a platform is the EURES Internet service of the Commission.
- The elaboration of job descriptions in the digital culture is a prerequisite and an integral part of the job-information platform. On the European level, a framework of qualification requirements should be created for core jobs within the digital culture, such as "media consultant" or "multimedia project manager". At the moment, new jobs like these are emerging, although they still have no defined and transparent job profiles. Therefore, the Commission should monitor and structure these developments within the framework of the social dialogue initiative.

Affirmative Action Programmes

With regard to Action Programmes, the Commission has a broad choice of instruments that can be attuned to the specific situation in the cultural sector and within digital culture. Training and qualification developments are important concerns in the cultural sector which can be tackled by the European Social Fund. This also includes training measures with the aim of strengthening entrepreneurship in the respective sectors. There is also room for improving the access of marginalised groups and regions to products of digital culture. Here, existing programmes can be used as a basis for further progress.

In addition, there is a broad range of possibilities for new programmes, such as a joint programme for cultural investment, or the creation of decentralised media labs.

• Training and qualification

The exploitation of the job potential in digital culture requires a broad scope of measures related to training and qualification:

- State-of-the-art training must be available to workers in digital culture in all stages of their professional lives ("life-long learning"). In order to achieve this goal, it would be useful to establish a network among training organisations accessible to all workers in digital culture.
- Particular attention should be paid to the needs of freelancers, part-time workers, workers on short-term contracts and volunteers. The need for the continual development of management skills also requires an investment in the education of trainers who have an understanding of and experience within the sector.
- The provision of state-of-the-art training could be supported in three ways:
  - support of the introduction of state-of-the-art training courses in existing training institutions;
  - support of the establishment of new training institutions;
  - encouragement of the development of new good practices by the creation of a European Award for innovative training programmes.

In order to increase the number of state-of-the art training institutes and to improve the training infrastructure, the **exchange of knowledge and experience** between state-of-the-art and "traditional" training institutions should be facilitated:

- This could be achieved by the organisation of a "European Platform of Digital Culture". Such a platform would have the task of linking state-of-the-art institutes, of organising sponsorships between state-of-the-art and traditional training institutes ("water-on-oil-effect") and of organising partnerships between research, training and industry, thus creating new bridges between science/art and technology.

• Strengthening Entrepreneurship

A large share of company start-ups in the cultural sector and in digital culture fail. In order to combat this phenomenon, specific measures focused on developing appropriate skills are required:

- Within the context of an "information initiative for entrepreneurship", courses should be established at universities and academies providing students with the necessary knowledge concerning the economic and organisational aspects of life as a freelancer or entrepreneur (e.g. the GO-Kult-Initiative in the German state of North Rhine-Westphalia).

- A European-wide network of “incubators” should be established in order to provide one to two year training programmes which would offer the required entrepreneurial knowledge and skills to cultural and multimedia workers who intend to start as entrepreneurs. In these courses, cultural workers would receive basic training in management, law, finances etc. The aim of these incubators is not to provide business ideas, motivation and money, but concepts on how to realise business ideas. The courses should be organised as evening classes in order to enable participants to work in normal jobs, and structured as public-private-partnerships between training institutions and local communities. Existing funding of the European Social Fund should be extended for this purpose (e.g. for the ARABUS incubator in Helsinki).

The **creation of new businesses** by workers in the cultural sector and in digital culture should be supported by the following measures:

- Strengthening of the cultural industries production chain and cultural services in the context of national, regional and trans-national development strategies.
- Creation of centres of competence for art, culture and media: central places where artists and cultural workers can go to look for information on consultation offers, particularly concerning economic support programmes, and further education opportunities.
- Access to capital is a major problem for small cultural enterprises (SMEs and micro businesses). Stronger private and public ‘real risk funding’, as well as the establishment of a venture capital fund, would be vital in realising the goal of the creation of new businesses.

• New Programmes

Additional employment effects can be stimulated by new, tailor-made Action Programmes such as:

- A joint programme for cultural investment

  The European Fund for Regional Development (ERDF) and the European Social Fund (ESF) should initiate a joint programme for social cohesion through cultural activities. In particular, this programme would have to include projects of cultural tourism and the improvement of the technological infrastructure in the cultural sector. Within this context, particular attention should be paid to placing the subsidisation emphasis on long-term, sustainable and employment effective projects instead of on one-time events.

- Creation of decentralised media labs

  The equipping and running of regional media and cultural centres (public communication centres for the arts, culture, media and ICT) should be promoted within the entire EU region. These media and cultural workshops, which represent a further development of the Cultural Initiatives Model, must be accessible for every individual (local access to new technologies).

- In particular, cross-border projects should be taken into consideration within the context of such initiatives, since considerable employment potential exists within the inner-EU border regions – a potential which, due to under-developed cross-border collaborations, has hardly been exploited.

• Access of marginalised groups and regions to products of digital culture

It must be taken into consideration that currently a large share of EU citizens do not participate in the use of multimedia/ICT technology and in the exploitation of the job potential in digital culture. This phenomenon has two aspects:

- From a social perspective, it is primarily senior citizens, unemployed persons and women who have no or insufficient access to products of digital culture.
- From a geographical viewpoint, EU citizens that live in marginalised/peripheral regions (mostly rural and/or economically depressed) are disadvantaged in terms of the availability of ICT infrastructure when compared to citizens of the large European metropolitan agglomerations.

The integration of these marginalised social groups and regions into the digital society requires the attuning of a new set of measures to existing programmes of the European Social Fund, such as ADAPT and EMPLOYMENT, with its four strands of EMPLOYMENT - NOW (New Opportunities for Women), HORIZON, INTEGRA and YOUTHSTART.

The European Commission, as well as national authorities, should strongly focus on creating the prerequisites for an “online-society”, in other words, Internet access for all social groups and in all European regions, in order to prevent a division of EU citizens into “online” and “offline” classes. The most productive way to achieve this aim would be to implement a joint programme of financial support on European, national and regional levels, extending existing initiatives like “e-learning” and “e-Europe”.

CONCLUSION

The traditional cultural economy and the digital culture can become a lasting motor for the creation of new jobs in Europe. This has already been proven in the past:

- Strong, above average employment growth has been observed in the cultural sector in the past years.
- Large, above average employment potentials exist in the area of new media and digital culture.

All of this has been achieved in the wide-spread absence of active policy initiatives. The promotion of the cultural economy plays a role in many important programmes such as Interreg, IST and Culture 2000. Nevertheless the actual organisations responsible for financial and infrastructural support, in other words, the motors behind employment development, have, to a large extent, not been included within the context of such programmes.

We have sought in the preceding sections, to translate the economic trends and structures within EU countries into measures for the job market at a strategic and operative level. Although it is not within the study's terms of reference, we cannot avoid emphasizing in this connection – as the entry of candidate countries approaches (especially CEEC) and also the freedom of movement which is also expected with these countries in a few years – that it would be urgently necessary to prepare a compendium similar to the study presented here, on the situation and development of both the digital economy and traditional, cultural sector in these countries. There is also an enormously dynamic development in the cultural sector and digital economy areas in candidate countries – also emanating from their politico-social past – which is still far too little researched than it has been in the EU however. The preparation of such a compendium should be begun as early as possible, both for the purposes of integrating these countries as smoothly as possible and of exploiting the employment potentials that are locally available.

Therefore, in the first place, it is necessary to make fundamental political decisions. In the course of this study we have demonstrated that digital culture represents an important employment motor when employment-oriented subsidisation policies are implemented which focus on the first sector of the labour market.

One can only hope that policy-makers will be able to do justice to this sector and its employment policy potential and will take the steps necessary to make available the corresponding subsidies and support structures which are suitable for taking up and monitoring these real economic developments. It is our hope that this study will at least have made a contribution to the realisation of this goal.

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Exploitation and development of the job potential in the cultural sector in the age of digitalisation

FINAL REPORT

Employment in the cultural sector: Literature and research – an overview

(Module 1)

commissioned by

European Commission

DG Employment and Social Affairs

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1. Introduction

Since the 1980s and 1990s – also characterised as the post-Fordist age – and parallel to the rapid growth in significance of finance-capital markets, life-styles and forms of work have also changed. The talk is of the end of the employee society, of structural change in the welfare state and the necessity of a new mix of public and private responsibilities. People are increasingly seen as consumers of and customers for services. Following the information society, we are now living in a knowledge-based society in which creativity has become a desirable and coveted form of capital. Growth in the "invisible" economy (including intellectual and copyright industries) is largely based on the creative cultivation of information resources and "management" of symbolic meanings, rather than on traditional production factors. Business is thus ever more intensely interested in and requires ever more "creativity". The "creative economy / creative industry" as a concept is also an expression of a development affecting the whole of society, which can be outlined in the following key words:

– increasing significance of the service sector

– structural change in the labour market

– flexibility

– deregulation / globalisation

– transformation of nation-state economic policies

– culturalisation of the economy and economisation of culture

– everything is culture and everything is business

– industrial "ruins" become cultural sites

– convergence of production spheres and policies

– rapid increase in atypical employment

– legitimisation crisis and transformation of the welfare state / national austerity budgets

– culture, science and educational budgets face legitimisation pressure

– constant search for content

– culture as a competition factor

– telecommunications markets; new networks and alliances

– concentration on (marketable) entertainment

– employment effects and increasing consumption (lifestyle)

– growth in the invisible economy (intellectual and copyright industries)

– new professions – job-profiles

– law of market share

A 1998 EU paper, *Culture, cultural industries and employment*, provided a Europe-wide impetus to deal with the employment potential of the cultural sphere in a more concentrated way. The employment potential in culture and the cultural industries throughout the EU is estimated at approximately three million jobs. In Spain, employment in the cultural sector grew by 24 per cent between 1987 and 1994, in France by 37 per cent between 1982 and 1990, and in Britain by 34 per cent (1981-1991). These figures do not indicate whether gainful employment in general has grown so strongly or whether it is simply a case of more

workers sharing less work. The audio-visual sector has clearly shown the highest growth rates (key word, deregulation of the TV markets). The question therefore arises of what can be said transnationally concerning such a vague field as employment in culture, the cultural industries and the media if the clearly defined categories for such a survey do not exist. The very differently structured cultural statistics in the various individual EU states do not usually include any data on employment and also seldom cover cultural industry data, but orient themselves on public spending on the arts and culture, on an understanding of cultural support based on artists' and non-profit-making organisations.

In the general discussion and driven by research in recent years, the emergence of the significance of creative and cultural industries both for nation-state and for European development is clear evidence that it is an issue of a new kind of interdependence between the arts, culture, the economy and the labour market. At the centre is the economic, i.e. the commercial marketing of cultural products and the contribution of a rapidly growing sector to gross national product. At the same time, however, it is the subject of at least five different ministerial areas of responsibility – arts/culture, science, new technology/information society, social affairs and the economy – which ought to arrive at new forms of cooperation and remixes in order to be better able to utilise any possible convergences. Until recently, in the period of the welfare state, economic or labour-market policy arguments have been of little interest for the arts and cultural sector, because it was not assumed that the creation of art and culture could be calculated economically; it was rather seen as a public service and duty for the aesthetic development of the general public. In most countries, the state has been responsible for the promotion of art, culture and literature and has had to fulfil this duty. Today, in the context of public austerity budgets, this consensus is no longer taken for granted. The cultural budgets are coming under increasing pressure to justify themselves and new funding models are being sought.

In universities and colleges people are being educated who will later be active in the cultural and creative sphere. A broad accessibility to academia is thus an important precondition for the potential workforce available to the cultural and creative market. The link between academia and the arts is additionally particularly highlighted and strengthened by the transformation of art colleges into universities of art. The introduction of management and economics into arts university curricula is an expression of the gradual penetration of a closer relationship between arts education and business expertise.

Changes in the means of work and production resulting from the digital revolution, as well as the artistic and creative concern with new technology, are among the responsibilities of culture, commerce and technology departments. Thus the historically clearly growing significance of and reference to culture in the context of information-society research, as for example in the IST 2001 EU programmes (key action III: multimedia content and tools: heritage for all, next generation digital collection) or in the new "e-content" programme, very clearly shows that the word "culture" has established itself much more strongly in technological contexts in recent years. This is first and foremost to do on the one hand with the increased demand for content production for the deregulated audio-visual markets since the 1980s (more TV channels need more programmes produced by cultural and media workers), and on the other with the new virtual networks since the mid-1990s (design of homepages (graphic artists, web-designers). Further, the national and supra-national authorities responsible for social affairs have been confronted with the demand for cultural and media qualifications much more frequently in recent years. The spectrum of new educational curricula and short courses (see "good practices") has grown rapidly, as too, in general, has the evidence of atypical employment and a high proportion of self-employment. Economic policy has long paid little attention to "culture". But in the 1990s, as a result of globalisation and the change in the service society as well as the increased demand for symbolic and cultural goods, it has more often been confronted with "culture" and the increasingly obvious economic importance of culture, that is, the cultural industries had outstripped the previously important basic industries. It should also be noted that the

repeated emergence of "cultural diversity" in the WTO negotiations signals the increasing importance of the cultural argument in economic developments. New support concepts that better correspond to the commercial realisation of creative and artistic services have therefore become necessary.

The increasing significance of culture for European policy, which can be observed at all these policy levels and parts of the economy, is reflected in the process of a "culturalisation of the economy" and the "economisation of culture" which became visible in the western industrial states in the 1990s. In the following we will discuss these processes of the repositioning of "culture" and of "culture and employment" from different perspectives, which also give rise to different types of results. On the one hand we will in general historicise the link between culture and the economy in the humanities, and deal in brief with the Cultural Studies approach at a cultural theory level based on Adorno's culture-industry modell as well as referring to basic sociological texts that should be included in the "culture" and "employment" knowledge context even if they do not deal with the specific question of "employment in the cultural sector".

In the research literature, three very different levels of discussion of the subject can be discerned which are inspired by different specialist levels of understanding. It is interesting that this structure reflects the ordering of knowledge inherent in research – first that of the culture-critical cultural studies in the arts and humanities, second the labour-market sociological socio-political approach in social sciences and, thirdly, employment-policy or interest-group studies of "employment in the cultural sector" or the cultural sector as a job creator.

a) Humanities or cultural-studies texts that are the outcome of researchers' interest in addressing the changing regimes of working culture. These provide different forms of interpretation of paid labour in general (e.g. Beck, Gorz, Hoffmann/von Osten, Sennett). The changing working and living conditions for the individual or specific societal groups (e.g. workers/employees/women) are at the centre of these studies. They do not focus on the economic exploitation of the employment potential. The researchers address social and symbolic transformation processes in which they also question fundamental issues of global division of labour along gender, class and ethnic lines (McRobbie). General topics are addressed such as reduction of working hours (Gorz), honorary work becoming civic work in the "civil society" (Beck), the economisation of culture and the culturalisation of the economy (du Gay, Hoffmann/von Osten, McRobbie, Scott/Urry), and the end of "normal employment" (Sennett). It concerns new political conceptions, such as for example the de-coupling of gainful employment and income and the introduction of a basic income (Gorz).

b) Social science labour-market research dealing with changes in general or specific labour structures resulting from the application of new technology. These studies and texts are often focused on terms like flexibility, mobility and atypical employment conditions and those it affects (Flecker, Tálos). With regard to the question of who commissions or who is interested in general labour market studies and surveys, it should be said that the following bodies are mainly active in this field: the trade unions, workers' and consumer organisations or ministries for social affairs, which are responsible for general conditions in the sector. The cultural sector has not yet been covered by general studies and surveys by labour-force analysts, because of the lack of employment statistics in the cultural sector owing to the different systems of counting labour and employment, on the one hand, and different definitions of the arts and cultural sector on the other.

c) The specific topic of "employment in the cultural sector" has not emerged from cultural research or Cultural Studies undertaken at universities or colleges and is also not the product of labour market surveys – it is very much a politically influenced area of interest. Obviously, cultural employment studies have often been commissioned by public authorities or interest groups in the cultural sector in order to obtain a better

overview of employment data and potential owing to the need for arguments in favour of supporting subsidising the arts and culture or to raise public awareness of problems in a cultural domain such as music (cf. European Music Office). The aim of many of these studies is to develop or support and bring forward state or international authorities' new political framework programmes for a growing sector which cannot be measured in terms of arts versus commerce (Greffe 1995, 1999, Hacklett/Ramsden). This breakdown of barriers between high and low culture has left open the question of new support systems for cultural entrepreneurs. Moreover, it is the in-between situation of the cultural industries which is of interest for new concepts and economic support schemes (Fleming, O'Connor 1998, 1999). Summarising, it is our hypothesis that the emergence of the topic of "employment in the cultural sector" is an outcome of the increasing importance of economy-driven studies in all societal fields, including areas which have been previously been regarded as basic welfare-state issues such as culture, the arts, education, the humanities and the health system. State budgets are under pressure and new sources of financial support have to be found for the arts and culture as much as for other fields of public activity. Concepts of the new economy mean that new initiatives and entrepreneurship are very much welcomed in the cultural and creative sector, but support schemes are neglected.

2. Culturalisation of the economy – economisation of culture

Historically, the link between the economy and culture has long been met with scepticism or outright rejection in the European tradition of cultural criticism. There was a general common sense consensus that commercial business interests and the creation of culture and art were simply contradictory. The economic marketing of art and culture was left to the commercial cultural industries. The deciding factor was quality not quantity. In this sense, specifically in the German-speaking countries for example, a conception of culture that maintained a strict separation of culture and industry, culture/arts and business was long dominant, which again refers back to the culture-theory discourse that established this separation theoretically (the Frankfurt School). The principle was simple and clear. Business is responsible for earning money, culture for the "other side" of life – analysis, contemplation, personal forms of expression or the provision of opportunities to escape from commercial marketing pressure. The arts and cultural sphere was seen as a socio-political field that could not be subject, so-to-speak, to a "normal" economic cost-benefit analysis, because the economic evaluation criteria were not regarded as being compatible with culture. This position can be characterised as part of the European welfare-state reading of culture and the arts, which was closely associated with a prospering system of public subsidy for culture and the arts. And it is and was *actually* the case that the fields of the arts/culture and commerce in all their forms of expression could be located in very different societal systems and fields of production. It was not without reason that, when he made an extensive analysis of the forms in which French society treats art at the end of the 1960s, Pierre Bourdieu found that cultural and economic capital are almost mutually exclusive (Bourdieu 1981). In her study of the "fashion industry" in Britain (1998), Angela McRobbie comes to the conclusion that the players were attempting to replace the missing economic capital with cultural and social capital (McRobbie 1998, 1999).

2.1 A cultural-theory digression: From the Adorno culture industry model to the "cultural economy"

Until the 1980s, German language cultural criticism and the arts and humanities were marked by the very complex interpretation of the connection between industry and cultural commodity products in the tradition of the "critical theory" of the criticism of ideology of the Frankfurt School. The chapter on culture-industry in *Dialectic of Enlightenment* by Theodor W. Adorno, written in US exile in 1944, "The Work of Art in the Age of Mechanical Reproduction", by Walter Benjamin and the criticism of consumption by Herbert Marcuse in *The One-Dimensional Man*, were very influential: "The culture industry perpetually cheats its consumers of what it perpetually promises," (Adorno). For Adorno, the term culture was a solecism, an imposition. Only art was to be spoken of, and in Adorno's words it was just that: "It is the promise of art to make possible valid and useful new experiences by which to stimulate the development of sensibilities and to keep intact the sense of possibility with which and for which the masses are deceived by the culture industry." (Steinert 34.) Historically seen, the term "culture industry" thus does not derive from economics but from a socio-critical trend of philosophical thought and is intended to specify the commodity nature of culture and cultural events by bringing together two such different concepts as "culture" and "industry". The American film industry served as an example. As early as 1932, using the example of music, Adorno had sharply criticised the process of the economisation of art: *"Seen from the social perspective, the present practice of music, production and consumption, can be drastically divided into that which has no trouble recognising its commodity character and, dispensing with any dialectical intervention, is oriented on market requirements, and that which as a matter of principle does not orient itself on the market,"* (Theodor W. Adorno, *Gesammelte Schriften 18,* Frankfurt/Main 1981, after Steinert, 29 f.)

In this culture-industry text, which is fundamental to cultural theory and gripping even today, we are confronted with a strict separation of art and commodity, art and commerce. “In their view, the cultural industry is a clear illustration of the breakdown of culture and its degeneration into commerce. To place a monetary value on a cultural act is to destroy its critical impact and to rob it of all traces of authentic experience” (Mattelart/Piemme 52).

This critically analysed description of the connection between the industrial production of art/culture and the economic marketing interests now, one the one hand, seems antiquated in its categorical rejection of the commercial aspects of artistic production but, on the other, may illuminate contexts that have already become generalised to such an extent on the basis of general capitalist development.

Changes in interpretation of high and popular culture

In the tradition of the criticism of ideology of the Frankfurt School, the cultural-theory literature was dominated up until the 1970s by an impenetrable barrier between analytical/passive, demanding/repetitive, good and bad, through the opposing pair of (bourgeois) “high culture” versus “low/popular” culture.[1] The close association between quality and high culture, and trash, kitsch and popular culture was part of the standard repertoire of both conservative cultural policy discussions and of progressive cultural critical discussions. Activities like leading the broad “mass of the population” to high-culture artistic productions were understood as “the spreading of culture”. But parallel to the emerging social movements at the end of the 1960s (the peace movement, women’s movement, environmental movement) and to the youth movement shaped by pop music, the levels of cultural criticism and, to some extent, of cultural policy also changed. These social movements also understood themselves as cultural movements. Attempts at an interpretation of culture that conflicted with the bourgeois understanding of art had thus developed. Among these was the workers’ movement as a cultural movement, and a generally much increased general interest in everyday culture and women’s history. In this context, cultural policy opened the structures of cultural subsidy to the alternative area of socio-cultural centres, within which a new cultural self-image of young people was manifesting itself. The relaxation of arts subsidies, which had previously been exclusively oriented on high culture, and their relocation on cultural-policy support lines transcended the practice of strict separation and hierarchy.

What is interesting is a parallel process of change in cultural theory analyses and studies, which increasingly concerned themselves with everyday and cultural consumption questions, not least because of the development of new media and technology. Women’s and, later, gender studies contributed much to the integration into university and college curricula of subjects that were long regarded as not worthy of research, such as unpaid work (housework), the history of private life, the critical investigation of so-called high-culture and popular culture material. In the context of the current work discussion (Beck, Gorz, Sennett) of meaning-creating and often unpaid work in areas of the “third sector” versus paid employment, the topicality of the history of unpaid housework as a “labour of love and love as labour” – a central topic of women’s studies and the women’s movement of the 1970s – cannot be denied. The structural relevance of the fact that it was and is mainly women who have to carry out unpaid work such as child care and care of the elderly, which is socially important but not incorporated in the economic sphere, is of particular significance for the analysis of all labour markets, but particularly for the cultural labour market.

[1] Feminist theory, above all feminist literature theory, contributed substantially to unravelling this mystery of connotations and classifications which is deeply based on the essentialisation of gender differences: Cf. Tania Modleski “Femininity as mas(s)quarade: a feminist approach to mass culture”, in: *High Theory / Low Culture*, ed Colin McCabe, Manchester 1986, 37- 52; Mary Ann Doane, *The Desire to Desire: The Women´s Film of the 1940s*, Bloomongton 1987.

The British Cultural Studies, which emerged in the context of adult education in Britain in the 1950s and slowly established itself in the 1970s, turned against the cultural pessimism of the Frankfurt School in that it attempted to link economic and cultural analyses and argued in the tradition of Antonio Gramsci for the integration of the cultural dimension, of the use of cultural products and practices in a critical analysis of capitalism (Hall 1992). In Cultural Studies, however, the emphasis was relocated away from political economy as the main model of analysis and onto a broad spectrum of research forms and ways of working – from semiotics, Foucaultian discourse theory and psychoanalysis to qualitative methods of social sciences, which originated primarily in cultural anthropology. It concerned the analysis of culture as a conceptually clearly differentiated connection of material forms and ways of behaviour in which symbolic meaning is produced and circulated and cultural identities are produced.

With the term "cultural economy" an attempt is made to describe the transformation of the production-oriented economy to a consumption-oriented one, as well as the greater importance of cultural and symbolic goods as "invisibles", material and immaterial cultural products. For the classical political economic critics of mass culture, the origins of cultural hegemony lay in the structure of capital, and political struggles aimed at changing the economic relations of ownership and control. In Cultural Studies, in contrast, cultural power relations are accorded a dynamic independent of economic production and market developments even if they often mutually condition each other in practice. In *Production of Culture / Cultures of Production* Paul du Gay clarifies this approach as follows**:** "On the one hand, this term (cultural economy) is used to signify a break with 'political economy' concerning the importance allocated to meaning in the conduct of economic life. For whereas 'political economy' has tended to emphasise features such as the distribution of income, patterns of corporate ownership and control, the dynamic nature of market economies, capital accumulation and the generation and uses of economic surplus, it has rather less to say about the meanings these processes come to have for those involved in them. Because political economy approaches tend to represent economic processes and practices 'as things in themselves' – with certain 'objective' meanings – people are seen mainly as 'bearers' of these. As a result this process of 'objectivation', the 'cultural' dimensions of economic activities – the meanings and values these activities hold for people – are evacuated." (du Gay, 3) This reading shows the distance between cultural theoretical interpretations and traditional economic readings, and should point to the particular importance of the interpreters and users of products in general and of "cultural products" in particular in order to position them as active participants, as actors in the process of the manufacture of meaning and change. In this interpretation, the "use of things and technologies" is accorded just as great a significance as the products themselves.

The new communications and information structures "which displace the more traditional social structures are at the same time knowledge/power structures and underpin what Foucault called normalisation and 'individuation'. Isolated from the bedrock of social networks, the 'specialised consumption' of cultural or other commodities is not so much a matter of 'difference' or 'pluralised life worlds' or even 'neo-tribes', but instead a matter of niche marketing and disembedded lifestyle enclaves" (Lash/ Urry 142). The forms of social critique have therefore also changed, say Lash and Urry in *Economies of Signs and Space,* published in 1994: "Critique today must be launched primarily from the cultural precisely because social life today is increasingly culture laden; because the society of a not yet completed modernity is in the process of being replaced by a 'culture-society' (Schwegel). This is more than an aestheticisation of everyday life. It is a *Vergesellschaftung* (societalisation) of culture, rather similar to an earlier societalisation of the industrial principle. The societalisation of culture is the principle even of an ever more information-intensive industrial production. That is, though manufacturing decidedly matters, it itself is increasingly information- (hence culture-) intensive." (Scott/ Urry 143). After these remarks on the cultural-theoretical discussion of the transformation of culture and economy, we will return to the cultural policy readings.

2.2 Changing relationships: Culture / policy / economy

The "economisation of culture" means that economic categories are being drawn on to an increasingly noticeable extent in the discussion and evaluation of the cultural sphere, which further leads to the general question of subsidy and of the value canon and selection criteria that lie behind support for the arts and culture in the European states. There are widely varying interpretations of the way in which the state, the "community" should place its cultural policy emphasis, make cultural policy or support culture and the arts. The subject of "culture and the economy" is approached differently according to the different historically developed traditions (liberal, conservative, paternalist) (Ellmeier/ Rasky). In the liberal tradition of the Anglo-Saxon countries, culture has long been interpreted as a private matter and is rather seen as obliged to serve the freedom of the individuals, who should choose between the various possibilities for themselves. In the 1980s Stuart Hall made this distance between culture and the state the subject of *Mass Culture and the State*:" The class-cultural relations institutionalised through free press/free market principle have survived into the twentieth century. The principle that culture should largely organised on the private choice/ market competition/ private profitability system, outside the state, remains a powerful one. Thus, even today, the British state plays a far less extensive role in cultural matters than in other European societies." (Hall 1986, 37) In recent years, however, says the cultural policy expert Robert Hutchinson, "culture" – in Britain too – has emerged in the everyday usage of politics and public life, and indeed above all through the concept of the cultural industries or creative industries. The historically deep-rooted British penchant to talk of "the arts, "sport" and "the press and television" rather than "culture" is still prevalent (Hutchinson). In contrast, in the paternalistically formed cultural policy understanding of continental Europe, such as for example in France and Austria, it is seen as precisely the task of the state to promote the arts and culture in the interests of the general public good.

"Culture as commodity" and commercial cultural products were long absent from public cultural support plans and departments – these were the responsibility of commerce and industry. This has changed. Pop and consumer culture has established new relationships and semantic systems. Individualisation and pluralisation of lifestyles, and "culture" as a reservoir of differences and distinctions have further contributed to the fact that the differentiation between high and low culture has lost much of its significance. In the process the criteria of the arts and culture subsidy system have also shifted. The traditional strict separation between a publicly subsidised non-commercial cultural sector and the cultural industry has been increasingly "softening" in favour of mixed forms. Public establishments are called on to adopt market-oriented behaviour (partial/full legal independence of museums in all EU member states – although with very different discussions on this in the individual member states, for example the very successful Tate Modern in London and on the other hand the difficult separation of the Austrian museums from the federal administration) and the definition of the function of public cultural establishments and their programmes can be undertaken on cultural economic as well as artistic criteria. Every branch of the arts has thus "fallen under the cultural industry's wheel of fortune" (Steinert), as for example exhibitions without museum shops and cafes are no longer conceivable.[2]

[2] According to cultural studies researcher Heinz Steinert, the forgetting or non-registration of the history of the analysis of cultural industry interests and penetration strategies in the sense of "critical theory" typifies the cultural industries discussion of the 1990s ". . . it is characteristic of the broader discussion that an enterprise-oriented way of speaking of cultural industries has become a matter of course. In May 1997, a major international conference, 'Research Perspectives on the Management of Cultural Industries' took place at New York University where the name of Theodor Adorno (except where mentioned by myself) practically did not occur. And even in a laudable introductory text such as Diana Crane's *The Production of Culture* (London 1992) the talk is naturally of cultural industries and Adorno is finished with in a paragraph in the introduction. The cultural industry has passed "The Culture Industry" by. This cannot be held against the concept and the text." (Steinert, 203). Armand Mattelart and Jean-Marie Piemme considered the effects of the late translation of *Dialectic of*

In a broader public, however, *one* reading of the arts and culture – namely, that they only cost money – obstinately persists. In the public discussion, the broad range of supported, subsidised "arts and culture" has long hardly been associated with innovative productive effects, although the specific benefit of this public support for private enterprise is obvious in the interrelationship between public support for the arts and cultural productions and their marketing in the private-enterprise culture and media economy, the cultural industries. Thus *The Politics of Culture: Policy Perspectives for Individuals, Institutions and Communities* – a book dealing with the interest in cultural policy that has emerged in US policy in recent years – points to the use in the commercial sector of cultural productions developed in the non-profit-making field (cf. President's Committee, 74).

In cultural policy discussions in the 1980s, works on the economic benefit of "art and culture" increasingly emerged, as well as its significance as a "soft" location factor (Hummel, Myerscough), which was the subject of controversial public discussion. In her study on West Germany, *Volkswirtschaftliche Bedeutung von Kunst und Kultur* [*The economic importance of arts and culture]*, published in 1988, Marlies Hummel showed that alongside its prominent social significance the cultural field is also an important economic sector and, contrary to popular opinion, is not a "scrounger on the state, but [makes] a considerable contribution to public funds" (Hummel 1988, cf. also Scheuch 1988, 2000).

Talking of the arts, culture and employment in the same breath here reflects the new social and economic significance of the production of symbolic goods. It also signals less state, more private and the penetration of private enterprise structures where they did not previously exist. The context for this is the forced monetarisation processes in previously not widely monetarised areas of the (publicly funded) welfare state, potentially accessible "to all", such as education, science, health and culture. "The profitability of universities, music academies and museums is increasingly often measured by the same criteria as for brickworks or screw factories" (Mandel quoted after Volkart). The reduction of state budgets or the austerity budgets have necessitated new legitimisation strategies for culture and arts subsidies that are not exactly known for commanding widespread public support.

The "marketisation" of culture and the "culturalisation" of the market means that on the one hand high culture is becoming increasingly commercial and, on the other, cultural content increasingly shapes commodity production. These processes run concurrently and are part of a general trend of postmodern society (cf. Kotro/ Koivunen). The authors point out, however, that the significance of the cultural industry should not be seen solely with regard to its economic significance, as, because culture is present above all as something immaterial and abstract its effects on society often only emerge indirectly, and cause-and-effect relationships are difficult to discern. In this sense, it is also difficult to measure the influence of cultural industries precisely. The cultural industry namely also creates relationships where previously there was little connection, for example in fashion. "The elevation of fashion to art and the apparent devaluation of art to fashion, however, beyond the traditional discourse of ennobling effects of art, are also examples of the inherent functional relationship of the cultural industry. The Australian cultural theoretician McKenzie Wark wrote: 'Fashion can be regarded as a social rhythm that is both culturally and industrially determined . . . The enormous concentration of media, design and cultural knowledge and capital in the First World can function as an anchor for creative and cultural added value in the clothing industry.'" (Volkart 81.)

"On the one hand, from the perspective of art, nothing seems so remote as economics. This separation builds on a cultural historical tradition within capitalist societies, in which the economy represents the rationalised and functional, and art the non-alienated, emotional exchange relationships" (Hoffmann/ von Osten, 7), says the preface to a recently published collection with the promising title *Das Phantom sucht seinen Mörder: Ein Reader zur*

Enlightenment into French (1973): ". . . in discussions of the media in France between 1950 and 1970 the idea of culture as an industry did not really take hold." Cf. Mattelart/ Piemme, 62).

Kulturalisierung der Ökonomie [the phantom seeks his murderer, a reader on the culturalisation of economy]. “Under the cover of so-called neo-liberalism, the economic has become a paradigm for cultural, national, municipal and educational policy decisions. Above and beyond this, the increasing importance of cultural processes and images in late capitalism is also quite eloquent testimony to the mutual conditioning of culture and political economy . . . could we still at all assume that culture and economics are opposing pairs?” (Hoffmann/ von Osten, 8.)

Despite all the findings of the rapprochement and mutual conditioning of economics and culture, in this maelstrom of all-embracing commercialisation interests and commercialisation pressures one of the greatest and most gripping nation-state and supranational (cultural) political challenges is to demand and maintain space for arts, cultural and knowledge products that are not immediately marketable or to position socio-political arguments more deeply and forcefully in a field of public discussion that has largely been abandoned to economics. It can namely be assumed that art and science have always, among other things, *also* been situated in an economic environment.

3. Culture and the labour market The emergence of culture in employment policy contexts

Since the publication of the EU Commission working document *Culture, the Cultural Industries and Employment* (European Commission 1998a), all EU member states have shown a growing political interest in the question of culture and employment. The transformation of a production-oriented to a consumption-oriented society has also led to the fact that human labour, creative potential in particular, has acquired much greater importance. The cultural sector is among the new employment-growth sectors. Nevertheless, one can assume that the level of intensity with which this subject is handled varies from one EU country to another. Most of the works on the set of topics described, as well as the most fundamental studies, have appeared in the United Kingdom, France, Germany and Finland. The cultural field and new technology are here entering into new alliances leading to new cultural and economic policy emphases: new programmes and support channels are being developed. At the centre is the cultural sphere's innovation potential.

Culture and the labour market were long classified under separate spheres and codes. Until the second half of the 1990s, cultural policy had very little interest in labour market issues just as "art and culture" appeared little if at all in labour-market policy concepts – perhaps under the motto: "work in the cultural sphere/cultural work isn't provided through the employment office anyway." Labour-market research, too, long showed little interest in the cultural sector as an object of research. In recent years conditions have changed. The economic policy framework conditions (Maastricht criteria) led to extensive national budget cuts as well as to the accompanying structural unemployment. This in turn led to the "creative" extension of the search for employment to all social spheres – thus also in the arts and cultural sphere, above all, however, in the media. Culture as a service (that is, culture in its broadest form, including cultural industries) has been among the absolute growth areas in the turnover charts since the 1980s (key word: leisure society, new service sector). The digital revolution reinforced this trend, because traditional culture operations – cultural locations and institutions – had to introduce new technology and, on the other hand, the digitalisation of the cultural heritage represented a great employment potential for cultural workers.

3.1 European developments

This changed relationship between the cultural sphere and the labour market is also evident in a range of events and publications co-sponsored by the European Commission in recent years taking up and discussing the subject of "culture and employment": *A Working Culture* (London May 1998, British EU presidency), *Cultural Competence: New technologies, culture & employment* (October 1998, Austrian EU presidency) (Ellmeier/ Ratzenböck), *Cultural Industries in Europe*, Essen/Germany 1999 (Kulturwirtschaft in Europa), A Working Culture II (Berlin 1999, German EU presidency), *New Information Technologies: Training, qualifications and professional profiles*. International Conference on Cultural Work within the Information Society, Rome 1999 (Il lavoro culturale nella società dell'informazione), *New Media: Working Practices in the Electronic Arts* (conference, London School of Economics 1999) (Dodd/ Gil), *The Long Run: Long-Term Developments in the Arts and Cultural Industries* (conference, Rotterdam 2000) and *European Cultural Industries in the Digital Age* (conference Lyon 2000).

The European employment strategy was agreed in December 1997 at the Luxembourg summit of the European Council on combating unemployment, as a result of which "the whole policy of the Community" was to be "mobilised for employment more systematically and consciously than previously" and the following four guidelines were agreed:

- developing entrepreneurship

- improving employability
- encouraging adaptability of businesses and their employees (modernisation of work organisation)
- strengthening equal opportunities policies

The great relevance of the subject of “culture and employment” is evident in the Commission document *Culture, the Cultural Industries and Employment* presented jointly by the former DGV, now DG Employment and Social Affairs, and DGX, now DG Education and Culture, in early 1998, in which the employment potential of the cultural sector (arts, culture and the audio-visual sector) was explored. Since then, the culture and employment discussion has been unimaginable without the rough estimate of approximately three million employees in the cultural sector being quoted. In German the title is *Kulturwirtschaft*, in English *cultural industries*, and it includes the areas of cultural heritage, cinema, music, performing arts, television, radio, publishing, video, audio and multimedia, but not, for example, software development, which is included in the “creative industries”. It is assumed that the Internet and online services mean that completely new cultural practices are emerging which are structurally transforming the whole cultural field. The market for multimedia products is described as being extremely dynamic and relevant to employment, with new forms of cooperation being observed between the major multimedia concerns and small enterprises developing niche products.

The very poor data situation on the cultural sector, the great white hope for employment, and the very differently structured national cultural statistics necessitate activity at the European level. A working group for cultural statistics (LEG) has been set up at Eurostat with cultural employment as one of its main objects of attention.

In recent years the European Union has possibly been more noticeable for its efforts to integrate culture (in the broadest sense) into European employment strategy than through its as always extremely financially modest arts and culture support programmes in the narrow sense (EU programme: *Culture 2000*).[3] A programme equipped with these very limited financial resources cannot point the way forward for the cultural industries. As early as a Bates & Wacker study in 1993 it was pointed out that much more funding may flow into the cultural sector in the widest sense through EU programmes that are not specifically cultural, i.e. the community initiatives and structural funds. The precondition for participation, however, is the economic relevance of the project (Bates&Wacker, Morina). Particular attention has been attracted in recent years by opportunities in the framework of the programmes promoting the information society such as Info 2001, e-content etc.

The repositioning of culture in economic and employment policy contexts has also been taken up by the Council of Europe and Unesco. The Council of Europe has recently published a policy note *Cultural Employment in Europe* (Feist 2000). The landmark report of the Council of Europe expert group on cultural policy *In from the Margins* (European Task Force), already included a whole chapter on cultural employment.

In EU Europe, Britain is the country with the most extensive work on employment in the cultural sector at the interconnected research and political levels. Since the beginning of the 1990s the British Arts Council/the Arts Council of England have dealt with the issue of labour markets in the cultural sector. Here the evaluation of the 1991 British census undertaken by Jane O’Brien and Andy Feist should be mentioned particularly (O’Brian/ Feist). Before the employment argument was placed at the centre of discussion, the issue was embedded in the more general reflection on "culture and economy" (Myerscough et al 1986,1994; Hummel et al 1988, 1992, 1994; Dane et al, Heinze, KMPG Management Consulting, Seaman, Council of Europe 2000a). The close connection between the employment potential and the

[3] A total of €167m are available for 2000-2004, or €33.4m per year (by comparison the Vienna city cultural budget for the year 2000 was a little over €167m).

economic impact of the cultural sector can be assumed. (Djian, Coopers & Lybrand Corp. Finance, Scheuch 1989, 2000) Interestingly, the search for new employment potential and possibilities has been connected with regional or local policy impacts in order to exploit European programmes for restructuring declining industrial areas/cities such as Manchester or Merseyside (Liverpool) (Lucchese). Particularly worth mentioning are the studies and projects of the Manchester Institute for Popular Culture concerning cultural industries: Ciren (*Cultural industries research: employment NOW*) dealing with the status of women in the cultural industries) (Milestone 1998), ICISS (*Information for Cultural Industries support services*) and Cultural industries and the city (co-operation with six European cities) (see O'Connor 1999, 2000 and Wynne 1992). These projects attempt to find new ways of understanding the cultural sector as a job bearer and creator, a detailed understanding of the dynamics, needs and potential of the sector to inform strategies for intervention and support. Those involved are part of a new university scene which is teaching popular culture in university courses in sociology. The pervasive impact of the classification system into "art" and "non-art" which are defined by a small arts community is addressed and criticised. "A review of available statistics indicates that the cultural sector is part of a wider pattern of new labour market and working conditions, which have positive and negative elements. There are wide disparities across the sector in terms of earning and conditions. The sector has volatile conditions of employment but, as all employment is now risky, cultural employment has become relatively so." They also stress the fact that the sector is overwhelmingly made up of small businesses (less then 10 staff) and micro-businesses and self-employed/freelancers. (Fleming, O'Connor). Several characteristics of the sector are distilled: micro, flexible, multi-skilled, educated, creative, entrepreneurial (to find a way to balancing the conflicting needs of creation, of selling, of innovation and known quantities), urban, networked, new media networks, funding and finance (access to finance is a perennial problem for cultural businesses), equal opportunities). The report on "banking culture", published later, also finds similar employment characteristics in the sector: mobility, seasonal variations, discontinuous career development, short-term contracts and multiple jobs leading to an accumulation of work both inside and outside the cultural sector (Hacklett/Ramsden, 34).

Since 1997, when the Labour Party came to power, the field of cultural industries has been widened to "creative industries", which has resulted in a further expansion of the employment areas under consideration (advertising, software, etc.) (DCMS, 1998). To underline this new governmental policy the highest political representative of the arts and culture – secretary of state Chris Smith – published a book, *Creative Britain*, in 1998 promoting the new connectivity of culture, arts, new technologies and future markets (Smith). Moreover, the London Royal Theatre is presently working together with other European co-operation partners on a mobility study in the European performing arts sector (Tiller).

Applied research repeatedly points to the great capital weakness of creative micro enterprises in the cultural sector – that is, on the one hand the great cultural industries (media empires) and on the other the many small content producers.

Of particular interest for the focus of our project is also the study, *"Arbeitsmärkte für Künstler und Publizisten – Modelle einer zukünftigen Arbeitswelt?"* [labour markets for artists and journalists – models of a future working culture?], published in 1999 by the Berlin Research Centre (*Wissenschaftszentrum*), which poses the question of the extent to which the labour markets of artists and journalists might serve as models for employment systems of the future and might be able to provide tips for general changes in other professions and fields of employment. The focus on a narrower definition of the cultural sector including artists and journalists is only because of the availability of statistics (Haak/Schmid).

The Austrian Labour Market Service (AMS Austria) has already shown interest in culture and employment and the co-operation between labour market and cultural researchers is gradually intensifying. At the Institute for Labour Market Research (*Institut für Arbeitsmarktforschung*) in Vienna, a study was conducted on *Qualification needs in the cultural sector (Schiffbänker/Kernbeiß).* This is the result of two previous studies highlighting

the cultural sector as a new field of qualification with significance for labour-market policy. On the one hand, the study discusses "qualification needs in selected industries" and, on the other, "new media, information and communications technologies, the development of qualification needs and job potential," (Schernhammer/ Schiffbänker; Schiffbänker/ Kernbeiß 1999). Norbert Geldner has completed a study on job development in the cultural sector in Vienna for the country's Chamber of Workers. Geldner suggests that it is not rising employment figures in the cultural sector but the connectivity of cultural and economic support schemes that can provide better results for both sides (Geldner 2000).

Since about 1995, the *Council of Europe* has also dealt more intensively with the question of "changes and challenges in labour and culture" and discussed "cultural work" in the context of "new technologies". The "cultural worker" is addressed, as too is the "knowledge worker" (cf. Vitiello, Aulake, Il lavoro culturale nella società dell'informazione). A recommendation entitled "Cultural work within the Information Society. New professional profiles and competence for information professionals and knowledge workers operating in cultural industries and organisations" was agreed. The aim of the "book on demand" project[4] was the further development of the bookseller's profile in taking on board new technology. New technology poses a major challenge for the whole book-selling sector, which is made up of many small businesses. If these small businesses are not to disappear from the map, new working practices such as networking between independent booksellers may be necessary for their survival. Economies of scale apply here. It is suggested that political and interest group representatives will have to develop intelligent niche strategies to assist small businesses. (Kralupper).

Summarising, firstly, in many studies the difference between publicly funded arts and non-publicly funded cultural industries is a crucial point of emphasis. Second, the increasing importance of the issue of employment in the cultural sector should be also situated in the context of falling state cultural budgets in every European country. Today there is a greater need to legitimate the expenditure of public money on the cultural sector, and employment creation is a widely used and accepted argument. We can therefore say that the increasing frequency and more in-depth examination of the employment potential in the cultural sector is a result of changes in economy as well as of the restructuring process of public administration management in general and cultural and social affairs management in particular.

The "economisation of culture", which became clear in the western industrial states in the 1990s and which also changed the structure of the labour market. Precisely because jobs and working conditions in the culture and media area can or have to be described as atypical, and because atypical jobs and precarious employment have also become more interesting for the labour market in general (Tálos), the cultural sphere (including the media), which has not previously been sufficiently recorded, discussed and integrated either statistically or in terms of labour-market policy, has become a new, many-sided variable in the competition for new employment opportunities in Europe.

The EU's interest in the question of culture and employment is also a chance that the multiplicity and ambivalence of the cultural labour market will be more forcefully registered in European employment policy conceptions. All these new approaches to and forms of discussion about arts and culture, however, change nothing in the fundamentals for it – on the contrary: it is precisely in view of the rapidly increasing importance of arts and culture, of cultural material and immaterial products and "content", that public recognition and public support for contemporary art, innovative cultural projects and emancipating science are

[4] The New Book Economy project has been running since 1995, initiated by the Council of Europe and sponsored by the community initiative Adapt of the European Social Fund. The project started with three countries (Italy, Germany and the Netherlands) and was expanded in the second phase to include eight projects in six EU countries (Austria, Finland, France, Germany (2), Netherlands (2) and Sweden) (Kralupper).

indispensable preconditions for a civil society that wishes to and can "afford" a general critique and discursive capacity.

3.2 Definitions and Terms

3.2.1 Cultural industries and creative industries

The ever more frequently addressed field of "creative industries", "*Kreative Wirtschaft*" and "cultural industries" – as it appears in the policy programmes of the EU states of Britain (DCSM 1998), Germany (Gnad et al, Arbeitsgruppe Kulturwirtschaft 1995, 1998) and Finland (Ministry of Education, Cultural Industry Committee) – is extremely heterogeneous and still largely not clearly positioned. There is no fixed definition of the cultural industry and the cultural economy in the literature. The definition applied is very heavily dependent on the research context in which it is used – as mentioned above, the interpretation and use of the term "culture" differs in cultural theory, labour-market sociology and economic research contexts. In this sense, the Adorno definition of culture industry was obviously never the description of an economic quantity but of the hegemony of a power structure of capital in the US in the 1940s.

In the cultural economic and cultural-policy literature, the attempt is made to arrive at more practicable solutions; the sector must simply be defined. So far the starting point has been a colourful mix of the most diverse attempts at a definition.

Why the term *Kulturwirtschaft*? "The 'cultural and media industry' as a differentiated group of often interwoven economic sectors (economic clusters) covers in the narrow, broad and complementary sense all economic enterprises and economically gainful activities that provide essential services or manufacture or sell essential products for preparation, creation, maintenance and safeguarding of artistic production, culture production and/or media dissemination." (Arbeitsgemeinschaft Kulturwirtschaft 1995 11). In German, the connotations of word *Industrie* are restricted to mass, industrialised production and, subjectively at least, this was for long regarded as almost the antithesis of culture. *Kulturwirtschaft,* on the other hand, covers both the concrete activities and processes of production understood in the English term cultural industries, as well as the broader abstract sense of an economy as a system. According to Hofecker and Söndermann, the term *Kulturwirtschaft* concerns a "sectoral mix that refers to the private enterprise cultural and media sector and companies. What is not meant is the relationship between culture and industry à la arts sponsoring, and nor does the whole publicly funded cultural undertaking in the form of national, provincial and municipal theatres, public libraries, museums etc. count as part of the cultural industry. The decisive definition and recording criterion is the economically gainful character of the companies and self-employed activities" (Hofecker/Söndermann 2). The economist Norbert Geldner is of the opinion that covering private enterprise alone is not productive for the employment question (Geldner 2000).

For Andy Pratt, the definition of the cultural industry sector starts from its products. As part of the sector he includes performing arts, fine art and literature and the reproduction of them, books, magazines, newspapers, film, radio, TV, disc and tape recordings, and activities that link art forms, such as advertising, for example. Thus the production, distribution and display processes of printing and broadcasting are also considered, as well as museums, libraries, theatres, night clubs and galleries (Pratt 1997,7).

In Finland it is pointed out that the cultural industry is not dependent upon size. "Thus, the cultural industry is seen to comprise areas which seek profit and mainly produce art for mass audiences. Another thing these fields share is that they make use of technologies and can copy products for several concurrent presentations. If a large audience is a decisive criterion in the definition of the cultural industry, then it inevitably focuses on certain central branches

of the cultural industry. In Finnish conditions – in a small market – it is difficult to speak of a the cultural industry in this sense. In a country of the size of Finland, the national mass audiences are fairly small in international comparison, and therefore there are no mass-audience cultural industries in the domestic market. Film may be an industry in Hollywood, but Finnish film production does not fulfil the size criterion." (Kotro/ Koivunen) In the final report of the Finish Cultural Industry Committee the concept of cultural industries was defined on several levels: "According to the most general definition, cultural industry is production based on meaning contents. This general definition covers traditional commodity production marketed by cultural meaning, e.g. clothing or any kind of brand product. As a form of exchange of symbols and social meanings cultural industry is by no means new; on the contrary, it is an ancient action concept of human communities. In the long run the focus is shifting more and more from commodity production to production of symbols," (Ministry of Education, Cultural Industry Committee 34).

Now, the term "creative industries" is increasingly present in international cultural and labour-market policy discussions as a result of the activities and programme of the British Labour government, and appears often to be closely related with the search for new jobs intended to integrate the cultural sector into the media and technology context of the labour market. The term "creative industries" signals the continuation of the earlier term "cultural industries", extended through the inclusion of structural changes that have arisen with new technology (in the inclusion of new products produced with and by new technology that belong to the broad sector of the leisure industry). In the British mapping document (DCMS 1998), advertising, architecture, the art and antiques market, artistic handicrafts, design, designer fashion, film, interactive leisure software, music, performing arts, publishing, software, TV and radio are counted among the "creative industries". It concerns a mixture of traditional branches of the cultural industry with parts of the telecommunications sector, that is, the integration of new forms of production and distribution that have arisen as a result of the digital revolution. Interdependencies on sectors such as tourism, museums, galleries and heritage are referred to, but interestingly these are accorded the "creative" attribute only in a secondary sense.

3.2.2 The cultural sector across Europe

The figures/data given below are intended on the one hand to indicate the scale of the sector, but make no claim to reliability of data, because at this point it is only a question of demonstrating that the endeavour has already been made for several years to provide policy-relevant and reliable data material. On the other hand, we would like to interpret these various attempts, and Jean Michel Guy's proposal for a new definition of the "cultural sector" as an effort to get a view of a sector that has only recently crossed the attention threshold of labour-market policy.

In many countries, the definition of the "cultural sector" is based as previously on the traditional art forms – performing arts, visual arts, literature and fine arts, film and video – i.e. arts production. States' attitudes to cultural subsidy also affect their definitions of the cultural sector at member-state level. Modes of subsidy differ between member states and, *within* member states, between art forms. Public bodies tend to notice and value more the "culture" that they finance and, as a result, member states tend to know more about the subsidised cultural sector than the commercial cultural sector. Exceptions to this view are beginning to emerge, such as, for example, the UK Government research in its *Creative Industries Mapping Document* (DCMS 1998, 2001), the work on *Kulturwirtschaft* in the German *Bundesland* (state) of North Rhine-Westphalia (Söndermann) and the Cultural Industry Committee's initiatives in Finland.

Thus the Finnish Cultural Industry Committee has shown that outside Europe new alliances have already formed between the subsidised arts/cultural sector and cultural industries. "The concept of cultural industry is more frequently used outside Europe than in the cultural

policies of the European countries. For example in Canada and Australia cultural industry is part of cultural policy. Canada is planning production and marketing support for cultural industry enterprises on a ministerial level. As early as 1993, Australia had launched a development programme of cultural industry, the results of which are now evident in the international success of Australian cinema for example. In Japan there is, among other things, a design unit for multimedia programmes operating under the Ministry of Education, Science and Culture" (Ministry of Education, Cultural Industry Committee 17).

3.2.2.1 Cultural employment varies

Counting the numbers employed in the cultural sector in EU Europe is something that has been frequently addressed since the beginning of the 1990s, and it is a very difficult and vague business. Every study produced in this time has tried to put its finger on this definitional problem but none has provided findings of general validity. In the end, only political decisions for more adequate national cultural industries statistics and harmonised European cultural statistics can cover this gap. The situation varies from country to country depending on the specific cultural tradition. "Only the obvious and more formal employment in the cultural sector is counted in official labour market statistics and the particular non-traditional employment characteristics of much of the cultural sector impede the ability of governmental agencies to identify all those employed in culture. This is particularly the case in the performing arts and music and also in the crafts sector, where self-employment is large scale" (Hackett/ Ramsden 10). The different traditions and wide range of definitions in counting the number of employees in the cultural sector in the European countries is an oft-quoted argument in understanding the big difficulties in measuring arts and culture in terms of the economy and employment. The cultural sector, by definition, develops new characteristics, practices and forms of expression over time. Technological change is having a huge impact on current definitions of culture, as well as on the processes of cultural production, and some art-form definitions have failed to accommodate these emerging new forms of cultural expression.

In the British *Creative Industries Mapping Document* (DCMS 1998), it is assumed that the creative industries in Britain have a turnover of £60bn (€89,44bn) and "employ" a total of 1.4m people, or 5 per cent of the employed population. According to these figures, the value added is around £25bn (€37,26bn), or 4 per cent of gross national product.

In Canada the subject of "cultural employment" is treated more comprehensively than in the EU. In 1995 the *Cultural Human Resources Council* was founded in Toronto for the specific purpose of studying this topic. In addition, there are numerous publications, annual reports and extensive statistical material on employment in the cultural sector – data bank, talent gallery, cultural workforce programmes. It is said that 670,000 people work in the cultural sector (20 July 1999) and that it has a turnover 24bn Canadian dollars (€14,58bn)[5]. (Human Resources Development Canada). Recently, *Arts Sector Profile*, an interesting new publication edited by the Canada Council for the Arts has been established. The first two issues, focusing on the definitions and growth of arts and culture occupations, 1971 to 1999 *(Arts Sector Profile* 1) and the artistic labour force (*Arts Sector Profile* 2) have already been published. In 1996 there were 445,725 people working in the 45 Canadian arts and culture occupations, accounting for 3.1 per cent of Canadians in the labour force (Canada Council for the Arts, *Arts Sector Profile* 1, 2).

In Finland, too, the importance of cultural entrepreneurs is particularly highlighted. 13,600 Finnish companies are counted as being in the cultural industry sector, which corresponds to 7.2 per cent of all Finnish companies (1995). In 1995 the total turnover of all cultural industry enterprises was approx. FIM 48bn (approx. €8bn) with more than 66,000 people employed.

[5] For further details see the homepage of the Canadian Cultural Human Resources Council http://www.culturalhrc.ca, for publications see http://www.culturalhrc.ca/english/index.htm

Typical Finnish cultural industry companies are relatively small, however, both with regard to their turnover and number of employees. In 1995, 83 per cent of Finnish cultural industry companies employed a maximum of four people, and a third of these companies had an annual turnover of less than FIM 199.000 (€33,469) (Ministry of Education, Culture Industry Committee 26). Sari Karttunen links "cultural occupations and cultural industries by means of the "cultural sector" concept and comes to a total of 106,000 people – equivalent to 5.5 per cent of the national total – employed in the sector in 1995. Approximately 69,100 people held cultural occupations, 55.8 per cent of them in cultural industries" (Karttunnen 29).

In North Rhine-Westphalia, the total turnover of the cultural industries in 1994 was over DM 72bn (€36,81bn) – almost 4 per cent of total economic income in the state (in 1980 it was 2.7 per cent), i.e. a growth of approximately 180 to 214 per cent in 16 years. In comparison, the total economy grew by only 100 per cent (Söndermann 1999a). According to Wiesand, if the self-employed are also taken into account, in 1994 around 300,000 people worked in the fields mentioned as creative, or performing artistic and media professionals and probably one million altogether in all professions related with the arts, heritage institutions and media market (4-5 per cent of the total workforce in the *Bundesländer* (states) of former West Germany, depending on classification (Wiesand 144)).

For Austria there was even a 93 per cent growth in employment in the culture, media and sport sector from 1971 to 1991, with employment in general growing only by 19 per cent and less strongly in the service sector than in the culture and media sector. The cultural researchers Otto Hofecker and Michael Söndermann speak of 98,000 people employed in the cultural and media sector, or 3 per cent of the economically active population (Hofecker/Söndermann 2). The economist Norbert Geldner arrives at a figure of approximately 140,000 (Geldner 2000).

The following figures are taken from Carla Bodo and Rod Fisher's publication *New Frontiers for Employment in Europe: the heritage, the arts and communication as a laboratory for new ideas* and are intended to give some conception of the scale of employment in the cultural sector.

For Britain, Andy Feist arrives at a figure of 420,000 employed in the cultural sector (according to the 1991 microcensus) (Feist 1997, 180). Carla Bodo speaks of 274,000 for 1991, representing just 1.14 per cent of the country's total labour force according to the population census (cultural occupations) (Bodo 156). In France around 400,000 people – 2 per cent of the economically active population – were employed in the cultural sector (Cardona 1997, 134). These figures refer to all persons regardless of professional qualifications (artistic, technical, administrative, etc.) and the type of labour contract, 53 per cent, or approximately 220,000, work in the cultural industries. For 1994 in the former West German *Bundesländer*, Andreas Wiesand gives the figure of 194,000 persons (with social insurance) working in the artistic, literary, journalistic and related professions, making this little less than 1 per cent of the total employed workforce (Wiesand 143). According to this study, in Finland the cultural sector employs approximately 27,000 people. These figures exclude, among other things, museums and libraries, but include the advertising business. The growth of the workforce in the cultural sector between 1988 and 1995 was over 10 per cent. As a proportion of the whole labour-force it remained the same between 1988 and 1995 at approx. 1 per cent (Karhunen/ Ristimäki 117). Carla Bodo thus concludes that there is a wide range of definitions of cultural employment. In Germany, definitions include craftspeople and the manufacture of mass-culture products, such as televisions, while in Finland the method of counting largely included only those people defining themselves as artists (Bodo).

It is often pointed out that most people working in the cultural industries are not artistically engaged. On the contrary, non-artistic qualifications and professions play a major role in the development of cultural industries (Casey).

3.2.2.2 Meeting new challenges - suggestions for new definitions[6]

Some recent research has sought to develop alternative frameworks capable of defining the cultural sector across the European Union outside an analysis of art-form or cultural content. One example, outlined by Michel Guy (1997), argues for the identification of coherence within the cultural sector across Europe. He suggests that culture does not have the coherence of a typical industrial sector with clearly defined roles in a national economy, such as agriculture or financial services. Instead, it is a variegated sector consisting of a mosaic of elements, each with its own specificity. The only characteristic common to these elements is their participation in a stage of the production or reproduction of cultural works – works that are themselves diverse.

Further, Michel Guy states that culture does not display coherence in terms of employment and employment practices. Levels of employment differ between sub-sectors, and employment practices – such as recruitment, knowledge requirements for work, occupational prestige and remuneration, gender balances – all differ considerably. “The occupational components of cultural employment are similarly diverse, with a high degree of differentiation typifying cultural occupations and professions. These include industrial and craft occupations and service occupations; permanent and part-time jobs; artistic, professional and administrative occupations; employees and self-employed; public and private occupations; occupations requiring highly advanced training alongside others based upon personal creativity; jobs with small local associations and in multinational organisations, and occupations with more established origins and others invented only recently.” (Hacklett/Ramsden.)

Where the sector does display significant coherence is in the pattern of work and employment. “Mobility, seasonal variations, discontinuous career development, short-term contracts, multiple jobs leading to an accumulation of work both inside and outside the cultural sector: all these are identified as characteristic of employment found throughout the various sub-sectors of the cultural sphere. Their emblematic form is the intermittent nature of the work in the performing arts sector.” (Guy 45.) It is stated that “there is general interest in their identification through appropriate analytical methods. Thus, on account of its characteristics, diversity and complexity, cultural employment seems to be a ‘laboratory’ for studying and experimenting with new forms of employment and specific methods that can be applied to them” (ibid.). Interestingly, the empirical work of the study which this text is a part of does not support this argument. Kurt Vogler-Ludwig (see module 2 in this study) could find no evidence for this argument in the data. A range of reasons for these contrasting results and analyses should be briefly addressed: Officially statistics do not count unpaid artistic and cultural work; creative work is often hidden in general self-employment; short-term contracts are not counted by statistics, and so on. This means that new forms of collecting data on the cultural sector should be of interest for all decision makers concerned, at supranational, national and regional level.

“The incomplete nature of official employment information available is evident when the *European Commission Working Paper* (European Commission 1998a) is examined. The paper provides total employment estimates for the cultural sector in 1995, but places caveats against individual member-state totals. The German figures include almost half a million craftspeople; the Danish figures cover only heritage, education, cinema and the audio-visual sector. Greece and Luxembourg could provide figures only for cinema and the audio-visual

[6] For the following cf. Hackett/Ramsden http://www.bankingonculture.com/pages/publications/pdfdownloads/boc1english.pdf (16.10.2000), 2000, 14-16.

industry, while the UK figures include the press, a group omitted by most other member states." (Hacklett/Ramsden.)

4. Main themes

The subject areas addressed in the following reflect the main argumentation in the literature.

4.1 End of the employee society? / fragmentation of the world of work

The general literature on the transformation of employment, the increase in leisure time or unemployment, the change in the structures of employment and unpaid work, the extension of typical women's conditions of employment to all those in work or seeking work is so numerous and extensive that the following discussion of this literature can be seen as a contribution to a repositioning of paid labour in the western industrial countries, with the question of the redistribution of available work, new forms of work, such as for example tele-working, with all its changes in life practices and ways of life. In this transformation of the identity of paid labour the cultural sector, which reacts quickly to societal processes, acquires a not insignificant role (the avant-garde of new working relations).

It is not a question as Beck describes in "*Die Zukunft von Arbeit und Demokratie*" [The future of work and democracy] (Beck 2000) of the end of the working society but the *end of the "employee society"*. The workers as class warriors in the inter-war period became "contractual partners in matters of work" in social partnership agreements. "After 1945 the employee became the symbol of a society [post-war West Germany] that had neither a bourgeois base nor a collective ideal available to it," (Bude 2000, 123). "Prosperity for all" (Ludwig Erhard) was one of the most effective formulae of the employee society, which was to become typical of the German-speaking welfare states (West Germany, Austria and Switzerland) after 1945. This was a "mixture of mass loyalty and growth dynamics". In the 1980s this model began to crumble, but for most of those dependent on a salary or a wage, the "normal employment pattern" of full-time lifelong employment appropriate to qualifications continued. In the year 2000 however, in almost all European states there is a considerable number of workers in "atypical employment". Thus, for example, in the German *Länder* of Bavaria and Saxony over a third of employees were in "new" forms of employment. Reforms of the social security system both for employers and employees, are up for debate and on the government's agenda in all welfare-state countries. The western European societies – according to the historian Heinz Bude – find themselves in a process of "transformation into flexible, digital capitalism, away from the Keynesian welfare state to a Schumpeterian performance state and a 'variable geometry of individual incentives'," (Bude, 2000, 132). The withdrawal of the welfare state concept is taking place among other things through the positive encouragement of individual input. The term "employability", one of the four guidelines in the European employment strategy agreed in 1997, is an example of this re-introduction or initiation of individual responsibility for education, training and jobs. "Entrepreneurship", the strengthening of individual enterprise initiatives, adaptability and equality of opportunity are also guidelines of the European employment strategy.

A rapid rise in "atypical", precarious forms of employment can be observed in all the EU states. Jürgen Kocka speaks of a "fragmentation of the world of work" and basically even sees a coming together of the working conditions of the genders, because the patchwork biographies that are constantly being discussed – these so to speak patched together, discontinuous employment biographies – represent an historically familiar experience for women, but are now being discussed as a novelty, although they are only new in the discussion of male careers (Kocka/Offe 2000).

The future of work no longer lies in employed labour alone, but concerns new descriptions, new constructions and new models. In the cultural theory "work" literature (Beck, Sennett, Gorz) it is above all a matter of the relationship between work, employment and "non-work" or unemployment, and the need for political policy to resume responsibility for economic

processes. The subject is the third sector, voluntary work, honorary activities and housework, that is, primarily, unrecorded, unpaid work that has mutated into invisible work because of the fact that it is not paid. The best example for this: housework, caring work (care of the sick and the elderly), that is, "classical" women's work. Cultural work can also well fit in to this category of unpaid social work. A further subject is the noticeable income difference between men and women. In almost every European country in recent years this income difference has not reduced but has grown. This is not ascribable to less economic activity by women in general, but to the fact that more women are employed part time. In a comparison between the Netherlands, Germany and Finland, it is shown that part-time work in the Netherlands is very widespread whereas in Finland it hardly exists. In *Kultur und Frauenerwerbstätigkeit in Europa: Theorie und Empirie des internationalenVergleichs*, Birgit Pfau-Effinger attributes these differences first and foremost to the different cultural-historical development – the early establishment of the bourgeois model of society in the Netherlands and in Finland a predominantly agrarian society lasting until the mid 20th century (Pfau-Effinger 2000).

For the labour-market researchers Haak and Schmid there are three different sectors that will shape the work of the future: the low-wage sector, the "third sector" (unpaid voluntary work, unpaid family work, etc. according to the motto "work because it makes more sense than working for the anonymous market") and the self-employed sector (Haak/Schmid).

4.2 The "third sector" – a new level of expectations

The incorporation of the "third sector" – that is, non-governmental and non-profit-making organisations – in the distribution of welfare-state services is a trend that has been under way for some years. This growing significance of the third sector is part of a general shift in social structures which has various causes that are again closely interlinked. The reasons for this growth lie on the one hand in the extension of the service sector. On the other hand, demographic developments (baby boomers) play a role that has led to an increased demand, and, thirdly, the general political circumstances should be mentioned, that is, the way in which demand is shifted to the third sector. There is a structural reason in the changing role of the state itself, in which the responsibilities and competences are renegotiated and positioned between the state and its citizens, as can be shown in the recently coined terms like "third way" (Blair) and the "new centre" (Schröder) (Anheier 1999). The third sector as a mediator between the state and private enterprise remains, however, in a European comparison, as unclear and vague as the cultural sector. As an object of research, the non-profit sector was not created in Europe but by economists in North America. General talk of the "third sector" that does not take appropriate account of the specifics of the respective "third sectors" in the individual European countries ignores the particularities of the national welfare-state cultures and the importance of intermediary organisations (Bauer 2000). In addition there is the fact that the "third sector" in Europe is primarily understood as a collective category of social and political science; the relationship to economics remains secondary in most European analyses. The term "third sector" relates to voluntary associations or businesses with a special status in civil law. In Germany this is the association and the private foundation, alongside the charitable co-operative. In Italy trade unions are also counted in the non-profit area, whereas in Britain the emphasis is on the voluntary action in the voluntary sector. Thus for Britain the social and altruistic operation for the public benefit is particularly important, and in Germany it is the "private welfare care". At the core of the European understanding of the term "third sector" however, is less the formal criteria than the essential orientation such as orientation for the common good, solidarity, social value and social justice. From the results of the comparative international study of the non-profit sector in 12 states, six of them European, it is clear that the focus of the third sector varies from country to country (cf. Salamon/ Anheier). In the Federal Republic of Germany (FRG), 58 per cent of all third sector expenditure was in the services – social services 23 per cent, health 35 per cent – while 12 per cent went on education and training and 7 per cent on arts and culture. In France, non-profit sector expenditures on health and

social services came to 43 per cent, in Italy to 42 per cent, but in Britain only to 16 per cent. In Hungary, 57 per cent of the non-profit sector expenditure went on arts and culture, which made up 21 per cent in Britain, 18 per cent in France, and in Italy and Germany only 9 and 7 per cent respectively. On the income side one sees a high level of public-sector dependence in Germany, with 68 per cent. In France 59 per cent of income was from public-sector sources, in Italy 43 per cent, in Britain 40 per cent and in Hungary 23 per cent. The "third sector" thus assumes thoroughly different tasks in the individual countries.

Although the same term is used to describe them, the "third sectors" in Europe are not identical. This is true both in the comparison between Europe and the US as with regard to the differences between the European countries. The latter are currently facing the challenge of deep-going employment and growth-promoting structural reforms on the commodity, capital and service markets. "From the individual state governments the European Union in this connection calls for a policy that touches not least on the non-profit sector as well. The necessary regulations concern the dismantling of 'superfluous regulations' and among other things should contribute to developing entrepreneurship, [promoting] the adaptability of enterprises and their employees [and strengthening] measures to promote equality of opportunity between women and men, (cf. Employment Policy Guidelines, Luxembourg 1997)" (Bauer). Quite similar arguments also apply to the cultural sector.

The relevance of the third sector for European development is currently being researched. The Directorate-General for Employment and Social Affairs launched a programme entitled "Third system and employment pilot action", which included the "Banking on Culture" project as an innovative action research project to investigate and stimulate new sources of financial investment for the cultural sector in Europe. Working with partners in Italy, the Netherlands, Ireland, Greece, Belgium, Portugal and the UK, Banking on Culture has tested new financial mechanisms with the aim of embedding these within local and regional economic policies and their future investment strategies.[7]

The non-profit sector and the field of organisations and associations with charitable status currently represents a prospective market for creators of culture, alongside the insufficiently developed first sector (market) and the retreating second sector (state, public-sector) (Wagner, Greffe). In Britain and the US, there has traditionally been very close co-operation between the third sector and cultural workers (for example art-community theatre). This is evident in a wide range of projects in the health and geriatric care area, theatre work with prisoners and much more. Thus the Royal National Theatre regularly makes an issue of intersections between the performing arts and the third sector, such as theatre and medicine, theatre in prison, theatre in the schools, theatre work with refugees and the homeless, but also crossovers to the "first sector" such as theatre in the business area (company theatre) etc. The highlighting of these existing working realities are important for younger artists, as no preparation for these different fields of practice is usually provided in the traditional artistic education. On the contrary, artists or cultural workers working in these areas usually have to combat the prejudice that they have failed in their "actual" artistic area. As before, there is an understanding of art or a romanticised image of the artist that assumes a successful artist is someone who has succeeded in making a living from "pure art" (öks/österr. kulturdokumentation). The *Empiric Project* goes in another direction, which shows "that third system activities in the arts provide a unique link in the community cohesion necessary for the formation of social capital and the third system is seen as an experimental field for future scenarios in the creation of social capital. In this context one of the main purposes of the 'third system' intervention is not so much that of politically replacing the state or of improving cost-effectiveness of hitherto 'public' services as that of expanding the distinctive expressive mode of groups," (Interarts, 51).

[7] See http://www.bankingonculture.com

4.3 Getting used to new employment relations : Labour conditions in the cultural sector

Most analyses of the employment potential in the cultural or cultural industry field do not consider the awkward and, from the point of view of survey techniques, practically unanswerable question of the working conditions of people active in the cultural sector. The level of expectations in an emancipatory socio-political reading of the subject of culture and employment should be measured against the living and working conditions of the groups of people concerned, and not so much by the rates of increase in productivity[8] in the expanding cultural and media industries. A range of reports on the social situation, working and living conditions of artists (Angerer et al., Almhofer et al., Baker, Hametner et al, Keseman, Miller/Caye, Schultz, Schulz et al., Vaz da Silva), writers and humanities scholars (Haak/Schmid 1998, Hahn 1998, IG Externe 2000) presents another view in addition to the employment figures. Further, we can draw on the general cultural and social science literature on the increase in atypical, precarious employment and the growing number of small and micro-companies and enterprises for this. These reports come to a surprisingly similar conclusion: artists are highly qualified but on average their income is very low and the situation of women artists is even worse than that of their male counterparts. Comparable to the normal labour market, it is also true of the situation of women in the arts and media professions that although the educational level of men and women has increasingly converged in recent decades (an enormous increase of women students in universities and arts colleges), women are just as rarely represented in top positions as they ever were, and the “glass ceiling” is only broken through with difficulty (Cliche et al. 2000, Harauer et al., Swanson/ Wise, Schulz/ Krings). It is regularly pointed out that precisely the cultural labour market is well suited to designed flexibility but also for all conceivable future work scenarios (the low-wage sector, the third and the self-employed sector (Haak/Schmid)) – here some things come together: a high degree of motivation, good education, a high level of individual responsibility and low income expectations. The distribution of income and turnover among self-employed artists and journalists is very erratic (Hummel 1992).

4.4. Artists/ cultural workers/ media workers/ content workers

As with all other professions, the image of the artist is subject to constant change, with new technology playing a major role. The arts theoretician Boris Groys draws a relatively pronounced picture of the artist, and indeed he sees contemporary artists primarily as “avant-garde consumers” and he assumes that the function of arts, like the figure of the artist, can no longer be described by artistic *production* alone, but that it is now above all a matter of the trend-setting “consumer function” of the artist: “The paradigmatic artist of today is on the contrary less of a producer than an exclusive exemplary consumer of anonymously produced things that are already circulating in our culture. One may say that in our present arts system, it is no longer new products but only new attitudes, consumption patterns and desires that emerge. In present-day art, a form of consumption is invented that is then re-consumed by society. Today, art is no longer at the origin of the work of art but at the end. It is no longer the creation of things, but their exclusive use – with their use certainly including possible artistic treatment and reshaping of the things. Precisely the most successful artists of our time use generally accessible, media-image material that has arisen anonymously in front of everyone’s eyes. If he is successful the artist thereby demonstrates the possibility of coming

[8] In this sense the former Austrian finance minister Ferdinand Lacina once said that the public discussion should concern itself with proactive policies to lead the actual rise productivity and profitability achieved in the 1990s back to a comprehensive social context. Since “a company manager can expect a rising share price if he announces the reduction of at least a quarter of the staff,” it should be time to promote a new economic policy concept not just at national, but precisely at the European level, that counters and refutes the “superficial rationality of such approaches” (Lacina 95).

to terms with the loss of authorship in that he uses the serial, anonymous, impersonal image and object production in such a way that this use is recognised by society as individual, personal and original. An artist's signature no longer means that the artist has produced a particular object, but that he has used this object and, indeed, in a particularly interesting way" (Groys, 22). What is being addressed here once again is the fact that in the arts not only, and primarily, are fewer and fewer products produced, but that, above all, socially relevant processes are initiated. In that the process character is more emphasised, both the self image and the perception of the artist is changing: the artist as a shaper and social manager of society.

A particularly interesting term then crops up in the literature and in employment and cultural-policy debates, namely one no longer speaks of the artist who is creatively active, but of the *cultural worker* (Angerer, Feist, Giroux/ Trend, Grundmann). This term is as problematic as it is interesting, and not least because it has a chequered history. The *cultural worker* is an emancipatory term from the 1970s which has acquired a new interpretation in the employment policy context of the 1990s. The cultural worker has had to become a cultural entrepreneur. What is meant here is a circle of people involved in creative activity going far beyond the narrow concept of artist, who come not only from art colleges and art universities but also from other universities, humanities and Cultural Studies institutes, universities of economics, cultural management courses, culture and arts laboratories, media academies and schools, and who seek work in the field of culture and the media. It is these people who constitute the creative employment potential in the broadest sense and it is also the same people who practice or have to practice these new forms of employment and can be characterised as cultural workers, media workers or content workers.

A cultural worker – according to media theoretician Marie-Luise Angerer's diagnosis – is "on average a 25-30-year-old, multiskilled, flexible person, psychologically resilient, independent, single, unattached to a particular location, who jumps at whatever opportunity there is to be had in the field of the art, music or the media," (Angerer 1999, 26). What is being addressed is, at the same time, everything that the new economy needs: young, unattached, creative (Hewitt). We find the identical profile in a study of the professional profile and job requirements of "free" researchers (i.e. self-employed according to tax law) that was drawn up by the *IG Externe LektorInnen und freie WissenschafterInnen* [interest group for external lecturers and self-employed researchers] (IG Externe LektorInnen 2000). The humanities and social science labour market has a structure of atypical employment and working conditions that is very similar to that of culture and the arts. Graduates in humanities and Cultural Studies form the reservoir of the so-called "content producers" or content workers in the media and information sector. A new field of employment for humanities scholars may, for example, be as an on-line journalist. The form of employment practised often no longer corresponds to the profession envisaged in the qualifications and education.

Andy Feist says that talking and thinking in cultural and employment contexts involve very different systems of reference, and it is very difficult to identify the general characteristics of cultural workers, but it is nevertheless dependent essentially on the discipline in which they work: ". . . how best to make generalisations about the characteristics of cultural workers. This is really a disciplinary issue – we are used to the traditional divisions between the visual arts, drama, dance and music, but in employment terms these are hopeless generalisations. Although we might talk very generally about the occupational profile of a 'musician', this becomes almost meaningless when we compare the employment profile of a country and western singer with, say, an opera singer or an orchestral musician. In fact, if we really want to speak about, 'cultural workers' we should endeavour to explore micro employment sectors, as Ruth Towse has done in her excellent work on opera singers (Towse 1993). Most national research can, sadly, only just scratch the surface," (Feist 1999, 27).

In as much as political policy making has discovered the cultural and media sector as the great white hope in recent years, the positioning of artists and creative workers in the public discourse has changed significantly. The question inevitably arises of whether "creative

workers" of today are the same as what were previously called "creators of culture". Or whom does this actually apply to? In the German-speaking world "creative workers" are generally classified under the commercial advertising sector and are clearly differentiated from those in artistic activities or creators of culture. In the British *Creative Industries Mapping Document*, in contrast, it is much broader: *"Activities have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property,"* (DCMS 1998, 3) – in other words, "everything is possible". This explained in more detail in *"Cultural Value: Creative Industries in Britain"* (Smith, 28-33): "In these creative industries, the raw material for economic success is one thing: people. It is the skills and talents developed over the school years and beyond that determine whether a particular individual is going to have something to offer." (Smith 33.) As ever it is very problematic when material terms are transferred to human working ability. The term "human resources" has penetrated in the EU context with little resistance, which nevertheless does not in itself make the term better or more adequate. Language is a reliable and revealing expression of social thought and power relationships. The term "human resources" is not used in socio-critical cultural-studies analyses or in the humanities in general.

Media workers / content workers

Just as the development of the older mass media (film, radio, television) was closely associated with new cultural products and the emergence of new professions and fields of work, such as radio or TV presenter, radio or TV editor, audio-technician etc., so, too, the new technological opportunities in the field of information and communications technology (convergence of computer, television and telephone; digitalisation) have created new jobs and professions and have led to new possibilities in the production of culture and the arts. "New professions and skills are emerging. The new technologies are also influencing traditional jobs, encouraging the appearance of multi-skilled, more versatile profiles," (European Commission 1998a, 22).

In some definitions the cultural worker is located precisely in this area of association between *arts/culture and new media*. Digitalisation has meant the emergence of new jobs in which cultural skills are applied, which may also represent an area of employment for arts scholars. A few selected jobs or new job profiles are (cf. Schiffbänker/Kernbeiß 2000): * Information broker: this addresses on the one hand the transformation of the documenting profession, on the other hand a new, extensible job niche has emerged – research into specific information in the Internet and contract compositions for web sites. * Online-editor / authoring: writes or edits Internet-quality text. Authoring relates not to the management of web sites but the preparation of content for the Internet. This field is interesting for humanities graduates, journalistic courses etc. * A music software expert advises music creators on new software. * DJ service means advising DJs on current music trends. * Web-site designer / computer graphics artist – a wide field has opened up for artists with the possibilities of web-site design. * An especially large number of graphic designers are employed in multimedia companies (cf. Warta et al 1997). Further there is multimedia designer and multimedia producer, video editor, audio engineer and digital moviemaker.

A list of cultural professions drawn up by Marlies Hummel in her research *Wirtschaftliche Entwicklungstrends von Kunst und Kultur* [economic development trends in the arts and culture] is used in order to illustrate the extent of the transformation in professions, including cultural professions, as a result of the digital revolution: journalist, translator, librarian, musician, performing artist, fine artist, graphic artist, decorative artist and signwriter, artistic professions in stage, image and audio technology, artists, professional sportsperson, auxiliary artistic professions, teachers of music and humanities scholars (Hummel 1992, 244f.). This division corresponds to the classic cultural training and classical cultural professions on which the statistics have thus far been oriented.

The new fields of activity that have only recently emerged, such as web-site design, multimedia producer among others, are not cultural professions in the classical sense and are thus not covered by the cultural statistics. In these jobs we are thereby confronted with the fact that no clear demarcations can be made: artistic, cultural and technical expertise can be separated only with difficulty in these activities (Götzenbrucker). A problem, not only for classification and gathering statistics, is that the educational training and the employment are increasingly diverging, i.e. the education serves as the basis of knowledge but is no longer a guarantee of a specific job.

In general it can be assumed that the digital transmission and linking of text, image, audio, data and software has meant that new professions and opportunities for arts creation as well as for the commercial exploitation of the cultural heritage and arts creation (digital media arts) have emerged. Key words for the field of music are: online distribution, MP3, SDMI, music on demand (MoD music), e-commerce, the Internet etc. Many parameters of the digital era are, indeed, still unclear, but the Internet is increasingly developing into a central hub of cultural provision and marketing. In the publishing field, the production and distribution chain is changing considerably as a result of book-on-demand (Vitiello, Kralupper).

New qualifications are called for

In general the labour market qualification requirements have changed drastically as a result of the introduction of new technology, just as it has restructured the production, distribution and consumption of cultural goods and services. Labour market researchers point out that interpersonal skills and intellectual capital are acquiring an increased profile and significance precisely as a result of the technologising of particular processes. This can also be seen as a big chance for the arts and cultural sphere. It is often pointed out that because of the high proportion of freelancers it has become urgently necessary for government labour market establishments' training plans and education courses for directly employed workers to be opened up to freelancers (Metier 2000a, 2000b, Schiffbänker/Kernbeiß). The art colleges and universities are also being called on to integrate these new challenges in their curricula. Alongside artistic training, the acquisition of marketing, management and social skills (teamworking, interpersonal skills) should be provided (AMS 1999b, 2000, Euclid 2000, Kosa, Parmentier et al, Zimmermann/Schulz). Artists and creators of culture all require ever more technological skills. In this sense the ones with the best chance are those who can offer both – artistic and technological qualifications (as in the manufacture of digital cultural products, for example, there is a symbiosis between artists and computer technicians (Schiffbänker/ Kernbeiß 2000)). Programming artists, for example, have developed an artistic project that reflects and questions the application of new technology; on the other hand, however, the same people have been able to apply their own programming skills commercially. Since the mid-1990s many multimedia training courses have sprung up throughout Europe reacting to these challenges and offering a combination of an artistic and technical training (Colarossi, Llewellyn, see module 3 and good practices in Module 4 of this study).

4.5 Cultural entrepreneurs / freelancer cultures

The strengthening of entrepreneurial initiatives and individual responsibility for education and training has become an increasingly pronounced trend in recent years. In *Was kommt nach der Arbeitnehmergesellschaft?* [What comes after the employee society?] Heinz Bude analyses the process as follows: "The tendencies towards separating gainful employment from companies and professions are making entrepreneurial activism a key qualification in dynamic labour and product markets . . . what is developing here is the guiding concept of the "*entrepreneurial individual*" who does not follow prescribed standards but tries out their own combinations and asserts themselves on the market and in society," (Bude, 132).

"Separation from profession" in this context means that the specific professional training has lost its significance. What counts, first and foremost, is no longer the profession that has been learned, but the skills and abilities one has to offer and which can secure a job.

In almost all studies specific to the subject, it is pointed out that the arts, culture and media sector is heavily characterised by atypical forms of employment: flexibility, mobility, project work, short-term contracts and voluntary or very low-paid activities are the basic criteria for this (Hackett/Ramsden, O'Connor 1999, Pratt 1997, 1999, Schiffbänker/Kernbeiß 2000). In the context of the neoliberal general circumstances of employment (which have been sharpening since the 1990s), these atypical forms of employment have become increasingly interesting for the government and business and are thus moving to the centre of labour-market policy interests, although less so for the activities of interest-group representatives and trade unions. "Normal employment is understood as the kind of job that is typified by direct, full-time and lasting employment with regulated normal working hours, with a continuous income and job guarantee and which essentially applied and continues to apply to male employment histories. The main government social protective norms and provisions are oriented on this normal form of employment," (Tálos). Atypical forms of employment include: part-time work, marginal employment, short-term employment and employee-like pseudo-self-employment. In Britain this last-mentioned form of atypical employment is the most common on European comparison – in 1997, 13 per cent of all gainfully employed were self-employed (much more than in France or Germany, for example). At the same time, the statistics also show that there are fewer employers among these self-employed than in France or Germany, which indicates a high level of pseudo-self-employment – many self-employed who are not employers (Fink, 169/170). The economic researcher Norbert Geldner also argues in this sense that the rapid increase of self-employed creators of culture can be seen as an indicator that the emergence of precarious working conditions in this sector dates back further historically than it does in the economy as a whole. Thus in the 5,200 cultural workplaces counted in Austria, 3,700 work without self-employed workers, 678 with just one, and only 70 have more than 50 (Geldner 2000, 10). These *new self-employed* are on the one hand described heroically as "micro-entrepreneurs", as "entrepreneurs of their own human capital", but also as "job slaves", "day labourers", "migrant workers" or as pseudo-self-employed (Haak/Schmid).

It is precisely this in-between position of the "new worker" / "new entrepreneur", between capital and labour, that is particularly interesting for labour market researchers, cultural studies analysts and politicians, because new socio-political relationships beyond the welfare state are reflected in it. The categories of the full-time-job society – here the worker, there the employer – no longer apply; the (cultural) worker is suddenly also a (cultural) entrepreneur (without capital). "These new kinds of worker are posed midway between labour and capital, doing the job of both at the same time. This means that . . . the re-socialisation of creative and cultural work . . . will not and could not mark a return to the organisational form of 'old' labour but require instead a more imaginative leap, one which has to take into account the fragility of cultural entrepreneurialism and the reality of self-employment," (McRobbie 1998, 188f.). Cultural entrepreneurialism means all-round artistic and commercial/business qualifications, long working hours and fierce competition from bigger companies. ". . . that this kind of livelihood will and does already imply long hours, unpredictable returns, tough competition from bigger companies and retailers. It means being multi-skilled in hand work, design work, publicity and promotions, management and business and having some idea of manufacture, as well as being in possession of creative vision, imagination and all the other qualities associated with fashion design," (McRobbie 1998).

In the transnational ICISS (Information for Cultural Industries Support Services) project, initiated by the Manchester Institute for Popular Culture, it is primarily a question of increasing the visibility and recognition of the many small companies and enterprises in the cultural sector, which is essentially dominated by big media companies (Burnett, European Commission 1999b, Kasvio). These small companies/enterprises move between the public

and private sector (mixed financing) and are trapped in the dilemma that they are classified as commercial by government cultural support, but on the other hand regarded by business as being non-professional. All the studies presented by the Manchester Institute argue that public cultural and arts support concepts should no longer concentrate on the classical support for artists, but should incorporate structures and functions in the support strategies that make it possible for artists to carry out their work in the first place. For the popular music area this means for example that not only musicians but also functions like managers, lawyers, journalists and music-industry impresarios who put life into or promote a local scene should be integrated into the cultural development plans and support concepts (Fleming, O'Connor 1999).

"If paid employment is no longer secure, the self-employed but 'creative' insecurity is often more appealing than uncreative job insecurity in a large company or corporation. The culture industries themselves now comprise a huge but still undocumented sea of freelance workers, funding one more creative project from the proceeds of another more commercial one, and relying on Small Business Support grants to pay for the business card, plans and some of the equipment and overheads," (McRobbie 1999, 27). These micro-companies may also be seen as a chance of escaping unemployment or offering a framework to realise one's own ideas. ". . . the sector of micro-economies of culture which now traverses the boundaries of social class, ethnicity and gender. Many young working-class people now become self-employed in the cultural field (as 'stylists', make-up artists, or by setting up night clubs, or making dance tracks at home in their bedrooms) as an escape from the inevitability of unemployment, or in preference to an unrewarding job in the service sector," (McRobbie 1999, 27).

Angela McRobbie notes, however, that the young "cultural workers" / "cultural entrepreneurs" are well aware of their extremely precarious economic situation. "My own current work reveals young fashion designers to be well aware of the precariousness of their work and their own capacity for self-exploitation. They worry about getting sick and many put off having children because they could not keep up the frenetic level of activity necessary to function and survive in this sector," (McRobbie 1999, 27f.).

In summary it may be said that the cultural and media sector is marked by precarious employment and many new "small" self-employed. This can be seen as an opportunity, but also as a risk. The risk will become smaller and the chances of success will increase if the economic support systems and support for culture recognise the existence of these micro-entrepreneurs and freelancers. Targeted training, advice and support for founders of new companies, as well as the opening up of the public labour-market-service training provision to self-employed/freelancers (Leadbeater/ Oakley, Metier, Raffo et al, Varkam/ Walker) may represent the first step to reducing the wide gulf between cultural and economic capital.

Finally, regarding culture and the labour market, one can say that cultural industries and cultural creation have been placed at the centre of the information society. "They have become strategic growth sectors with increasing economic importance and significant capacities to create new jobs. Convergence has also opened up new perspectives for financing cultural production and distribution. However, that has not taken place entirely without tension as neither public authorities nor the industry itself have been accustomed to approach cultural creation from an economic point of view. Indeed, the prevailing approach used to be a cultural and artistic one, where cultural creation was seen mainly as publicly funded way to build and maintain cultural identity and diversity. ... Although the logic of convergence has brought the economic conditions of creation to the fore. The economic and cultural approaches do not necessarily contradict each other. On the contrary, synergies should be created. (Council of Europe 2000b, 23f.) And "Given the need, within the convergent industries, for cultural products and services, one of the longer-term implications is that building a strong economic base and nurturing the widest possible talent pool for cultural creation is a concern for industry, for cultural and employment policies and for civil society alike." (Aulake 129.).

5. Conclusions/ Summary

Literature on employment in the cultural sector in the European Union:

- Until recently, in the period of the welfare state, economic or labour-market policy arguments have been of little interest for the arts and cultural sector, because *it was not assumed that the creation of art and culture could or should be calculated economically*; it was rather seen as a public service and duty for the aesthetic development of the general public.
- In the research literature, *three very different levels of discussion* of the subject can be discerned which are inspired by different specialist levels of understanding. This structure reflects the ordering of knowledge inherent in research – first that of the arts and humanities (culture-critical Cultural Studies), second the labour-market sociological, socio-political approach and, thirdly, employment-policy or interest-group studies of "employment in the cultural sector" or the cultural sector as a job creator.
- In the last ten years the amount of research work and political programmes on the thematic complex "cultural industries and employment" has increased significantly.
- The thematic connection between economy, culture and the labour market is at the forefront of the new literature. Currently, labour market aspects are still playing a subsidiary role, but this is changing because of increasing need for strategies to legitimise public subsidies in general. The employment argument works as well in the cultural policy context as it does in any other.
- Throughout the EU member states there is no standardised definition of "cultural industries/ *Kulturwirtschaft*" capable of providing an empirically based image of developments in the employment potential of the cultural sector. The European states define the cultural sector differently not least because of different historically developed modes of interpretation of what culture is (arts and culture) and what it is not, in which the segregation in high versus low culture have long played an very important role. What is counted as being part of the cultural sector in one country is not necessarily included in another (different definitions of culture).
- The insufficient quantitative data means that the research literature is predominantly based on non-empirical, qualitative studies.
- As a result of the relatively recent development of cultural industries concepts, the opinion spectrum in the literature is still extremely heterogeneous, so that there is as yet no question of the existence of a "mainstream" approach to the issue.
- The current theoretical debate in the humanities and in policy making is characterised by two processes that mutually condition and reinforce each other: one is the forced economisation of culture, the other is the culturalisation of the economy.
- The cultural sector is marked by a high percentage of freelancers and micro businesses (on a weak economic base). New forms of enterprise and job outline are emerging based on the new guiding concept of the "entrepreneurial individual" (without capital) or the "cultural entrepreneurial worker" who does not fit in the welfare state scheme of full-time employees.
- The emergence of new job profile is constantly changing the outline of the cultural worker, content worker and knowledge worker. But some qualifications and requirements are heavily and constantly in demand: young, multi-skilled, creative and flexible (the whole neoliberal spectrum of an "entrepreneurial individual").

- Micro businesses are typical of the cultural sector and should be better integrated in the system of public arts and culture financing.

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Exploitation and development of the job potential in the cultural sector in the age of digitalisation

FINAL REPORT

Employment Trends and Sectors of Growth in the Cultural Economy

(Module 2)

commissioned by

European Commission
DG Employment and Social Affairs

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1. Introduction

This Module tries to develop the economics of European cultural employment. It uses a quantitative approach and therefore requires a quantitative definition of culture, which is hard to arrive at, as the studies listed in Module 1 revealed. Nevertheless, the section starts with the definitions to be used by the analysis. Based on the available statistical information, it shows the growth and composition of cultural activities, their regional distribution in the European Union and the extent of labour division between cultural and non-cultural sectors of the European economy. It identifies the determinants of employment growth in the cultural industries and occupations, among which the impact of information and communication technology appears to be the most important. Finally, the prospects for employment in the European cultural industries are developed.

On the basis of the Eurostat Labour Force Survey, this Module establishes a standardised statistical description of employment in the European Union. This provides new comparative insights into both the number and the quality of jobs in the cultural economy of the Member States.

2. A practical definition of the cultural sector

Even among the representatives of the cultural sector, the common understanding of culture and cultural activities is far from an operational and measurable definition. Culture as something valuable, extra-ordinary or illustrious is a qualitative rather than a quantitative term. Its measurement, therefore, requires various value judgements which are not applicable for scientific analysis.

Similarly, the modern description of artists as the experts for the invention and development of new consumer needs and desires (Groys 1999: 21) – as the creative and innovative part of the economy – is based on the qualitative notion of innovation. In addition to the relative nature of this definition (it can only be used with reference to the "old world"), it goes far beyond the production of arts and entertainment. Innovative products or services are produced in many areas of the economy, and innovation also happens, for example, in engineering, science, marketing, cooking and many other fields of work. While innovation is certainly an essential factor for market success of cultural activities, this can also be the case for other products. This type of functional definition of the cultural sector, therefore, does not solve the problem either.

The sociological definition of culture as the evolution of human behaviour and interaction is also far too comprehensive (Bendixen 1998: 26). Defining culture as the net of human and social relations leads to an inflation of different cultures – such as the political culture, the business culture, the company culture etc. – which in the end includes the economy as part of the cultural sector. This is not the type of definition needed for a study which analyses the economic impact of cultural activities on the labour market.

To simplify the problems of definition, the identification of cultural workers in the economy has to be restricted to the specificity of cultural products and services rather than inflating the notion of culture. Basically, cultural products and services are arts and entertainment, including the preservation of cultural heritage. They do not include education and training, even when done exclusively for cultural activities. Likewise, they do not include scientific work even if its content, for example, is the history of arts or related subjects. Arts and entertainment related activities within the retail trade and the hotel and catering sector are also excluded. These restrictions are necessary in order to be consistent with the definitions used by statistical classifications. The production of automobiles as defined by the NACE classification, for example, includes neither training of workers nor engineering science, nor retail trade with automobiles. The statistical classification establishes exclusive definitions of products, sectors or occupations, which makes it possible to classify the items unequivocally.

The sorting out of the cultural sectors requires a list of cultural activities indicating what the cultural products and services are. Following the LEG, six different types of cultural activities with different economic conditions can be isolated (LEG 1999: 19):

Table 2.1: Cultural activities

Cultural activity	Production	Distribution
Books and press	Creation of literary work Drafting of articles for newspapers and periodicals	Book production Newspaper and periodical production Press and literary agencies Events, exhibitions
Visual arts	Creation of visual works Production of visual works Restoration	Events, exhibitions, festivals
Architecture	Architectural creation	
Performing arts	Creation of theatrical and musical works Production of live entertainment Activities of orchestras, dance and theatre companies	Organisation of events, festivals
Audio-visual services, Multimedia	Creation of cinematographic and audio-visual works Creation of multimedia works Production of films Production of TV and radio programmes Production of sound and audio-visual recordings Production of multimedia works	Film distribution Cinema management Radio and television broadcasting Organisation of events, festivals
Heritage, archives, Libraries	Protection of monuments Archaeological activities	Museum activities Events, exhibitions

Source: LEG 1999.

For the purpose of economic analysis, the separation of production and distribution related activities is important. Market conditions differ significantly between these two areas and, therefore, labour conditions and levels of earnings do as well. While the distribution sector can be regarded as being driven by economic rules in general, the creation and production of cultural products and services is also motivated by individual and intellectual creativeness. Therefore, the production of cultural products and services is less rigorously dominated by profit rules. Moreover, financial subsidies by public institutions lower the economic pressure on the supply side.

With regard to employment in the cultural sector, only paid employment is analysed, which includes self-employment and all types of temporary and part-time work. The exclusion of voluntary non-paid activities, which are more than negligible in the cultural sector, is due to the fact that these activities are private, non-economic types of work which should rather be classified as leisure activities. The economic impact of the supply of non-paid work must be considered but can hardly be quantified.

As performed by Casey (1999: 40), the quantification of the number of cultural workers can be carried out from two different viewpoints. The sectoral viewpoint looks at the number of workers in companies and establishments which mainly produce cultural products and services, disregarding their specific activity or occupation. From the occupational viewpoint, workers in cultural occupations are identified, disregarding the sector to which their company or establishment belongs. These two dimensions of cultural employment can be combined in a narrow and a broad sense. In the narrow sense, only workers with cultural occupations in cultural sectors are counted as cultural employment. This provides the number of cultural specialists in cultural undertakings. In a broad sense, all workers engaged in the production of cultural products and services are counted, even if they are not employed by companies of the cultural sector. This gives the most comprehensive number of cultural jobs, including not only professionals and specialists, but all supportive staff required to bring cultural products on the markets. This provides a two dimensional definition of the cultural sector which will be applied throughout this section.

2.1 Cultural Sectors

The revised issue of the European sectoral classification NACE rev. 1 (EUROSTAT) hardly allows for a detailed identification of cultural activities. The work of LEG shows that the sectors producing cultural products and services are often parts of 4digit NACE sectors, which means that the exact identification of cultural activities would require a reclassification of the survey material. This is certainly not feasible within this study.

The simpler approach uses the 3digit level of NACE, accepting a less precise measurement and omitting some “hidden” cultural sectors. As listed in Table 2.2, the sub-sector of “Books and Press” is the 3digit section of NACE group 22.1 (Publishing), which also includes publishing of sound recordings but does not include the creation of literary works (part of 92.3) and the activities of news agencies (92.4). The NACE group “Publishing”, however, represents the major part of “Books and Press”. This is also true for “Audio-visual services, Multimedia”, which is largely included in NACE groups 92.1 and 92.2.

Greater difficulties arise with the sub-sector “Architecture”. This is included in NACE group 74.2 and cannot be separated from engineering activities and technical consultancy, which probably represent the majority of activities within this group. Photographic activities are not part of the cultural sector in the LEG classification, but could be included as this business is closely related to press and media.

A further problem is the identification of cultural activities, like the organisation of festivals, public events, and other cultural services undertaken by public institutions and non-profit organisations. In general, NACE classifies the activities of these organisations in separate groups (75, 91), even if they provide the same services as private companies do. Cultural services, however, are hidden in several 4digit groups (like 91.12 “Activities of professional organisations”, or 91.33 “Activities of other membership organisations n.e.c.”), which makes it impossible to aggregate them with services from private companies (74.84 “Other business activities n.e.c.”). The latter groups also include fashion design, interior decoration and other areas of product design which can be regarded as part of the cultural sector.

Table 2.2: Classification of the cultural sector
(NACE rev. 1)

NACE rev. 1	Title
22	**Publishing, printing and reproduction of recorded media**
22.1	*Publishing*
22.11	Publishing of books
22.12	Publishing of newspapers
22.13	Publishing of journals and periodicals
22.14	Publishing of sound recordings
22.15	Other publishing
22.2	*Printing and service activities related to printing*
22.21	Printing of newspapers
22.22	Printing n.e.c.
22.23	Bookbinding and finishing
22.24	Composition and plate-making
22.25	Other activities related to printing
22.3	*Reproduction of recorded media*
22.31	Reproduction of sound recording
22.32	Reproduction of video recording
22.33	Reproduction of computer media
74	**Other business activities**
74.1	*Accounting, tax consultancy, market research, management consultancy, holdings*
74.2	*Architectural and engineering activities and related technical consultancy*
74.3	*Technical testing and analysis*
74.4	*Advertising*
74.5	*Labour recruitment and provision of personnel*
74.6	*Investigation and security activities*
74.7	*Industrial cleaning*
74.8	*Miscellaneous business activities n.e.c.*
74.81	Photographic activities
74.82	Packaging activities
74.83	Secretarial and translation activities
74.84	Other business activities n.e.c.
75	**Public administration and defence; compulsory social security**
75.1	*Administration of the State and the economic and social policy of the community*
75.11	General (overall) public service activities
75.12	Regulation of the activities of agencies that provide health care, education, cultural services and other social services, excluding social security

Table 2.2 continued

75.13	Regulation of and contribution to more efficient operation of business
75.14	Supporting service activities for the government as a whole
75.2	*Provision of services to the community as a whole*
75.3	*Compulsory social security activities*
	Other community, social and personal service activities
91	*Activities of membership organisations n.e.c.*
91.1	*Activities of business, employers' and professional organisations*
91.11	Activities of business and employers' organisations
91.12	Activities of professional organisations
91.2	*Activities of trade unions*
91.3	*Activities of other membership organisations*
91.31	Activities of religious organisations
91.32	Activities of political organisations
91.33	Activities of other membership organisations n.e.c.
92	**Recreational, cultural and sporting activities**
92.1	*Motion picture and video activities*
92.11	Motion picture and video production
92.12	Motion picture and video distribution
92.13	Motion picture projection
92.2	*Radio and television activities*
92.3	*Other entertainment activities*
92.31	Artistic and literary creation and interpretation
92.32	Operation of arts facilities
92.33	Fair and amusement park activities
92.34	Other entertainment activities n.e.c.
92.4	*News agency activities*
92.5	*Library, archives, museums and other cultural activities*
92.51	Library and archives activities
92.52	Museums activities and preservation of historical sites and buildings
92.53	Botanical and zoological gardens and nature reserves activities
92.6	*Sporting activities*
92.7	*Other recreational activities*
	Total sub-sector included
	Parts of the sub-sector included

Source: EUROSTAT

2.2 Cultural Occupations

The definition of cultural occupations as used in this study includes those occupations which are directly engaged in cultural activities and excludes all those which are complementary or peripheral to the production process (see Table 2.3).

The narrow definition of cultural occupations follows the principles used for the sectoral classification and thus excludes managers, teaching professionals, scientists, trade workers, and – most importantly – craftsmen. While for the aforementioned occupational groups, the exclusion from cultural occupations can be justified by the fact that they are not directly involved in cultural production, the last group – craftsmen – is partially involved in the production of cultural products. However, there is no possibility to separate cultural production from non-cultural production, for example in the occupational groups 7113 "Stone cutters and carvers", 7313 "Jewellery and precious-metal workers" or 732 "Potters, glass-makers and related trades workers", to mention only a few.

Once again, the identification of architects is not possible as they are merged with engineers. "Archivists and librarians", however, form a separate group (243), as does the group of "Writers and creative performing artists" (245). "Photographers and image and sound recording equipment operators" are included in group 313, as are "Broadcasting and telecommunications equipment operators". ISCO group 347 "Artistic, entertainment and sports associate professionals" mainly contains cultural workers, with the exception of sportspersons.

Table 2.3: Classification of Cultural Occupations

ISCO 88

ISCO88	Title
1	**Legislators, senior officials and managers**
2	**Professionals**
21	*Physical, mathematical and engineering science professionals*
211	Physicists, chemists and related professionals
212	Mathematicians, statisticians and related professionals
213	Computing professionals
214	Architects, engineers and related professionals
22	*Life science and health professionals*
23	*Teaching professionals*
24	*Other professionals*
241	Business professionals
242	Legal professionals
243	Archivists, librarians and related information professionals
2431	Archivists and curators
2432	Librarians and related information professionals
244	Social science and related professionals
245	Writers and creative or performing artists
2451	Authors, journalists and other writers
2452	Sculptors, painters and related artists
2453	Composers, musicians and singers
2454	Choreographers and dancers
2455	Film, stage and related actors and directors
246	Religious professionals
3	**Technicians and associate professionals**
31	*Physical and engineering science associate professionals*
311	Physical and engineering science technicians
312	Computer associate professionals
313	Optical and electronic equipment operators
3131	Photographers and image and sound recording equipment operators
3132	Broadcasting and telecommunications equipment operators
3133	Medical equipment operators
3139	Optical and electronic equipment operators not elsewhere classified
314	Ship and aircraft controllers and technicians

Table 2.3 continued

315	Safety and quality inspectors
32	*Life science and health associate professionals*
33	*Teaching associate professionals*
34	*Other associate professionals*
341	Finance and sales associate professionals
342	Business services agents and trade brokers
343	Administrative associate professionals
344	Customs, tax and related government associate professionals
345	Police inspectors and detectives
346	Social work associate professionals
347	Artistic, entertainment and sports associate professionals
3471	Decorators and commercial designers
3472	Radio, television and other announcers
3473	Street, night-club and related musicians, singers and dancers
3474	Clowns, magicians, acrobats and related associate professionals
3475	Athletes, sportspersons and related associate professionals
348	Religious associate professionals
4	**Clerks**
41	*Office clerks*
42	*Customer services clerks*
5	**Service workers and shop and market sales workers**
51	*Personal and protective services workers*
52	*Models, salespersons and demonstrators*
6	**Skilled agricultural and fishery workers**
7	**Craft and related trades workers**
71	*Extraction and building trades workers*
72	*Metal, machinery and related trades workers*
73	*Precision, handicraft, printing and related trades workers*
74	*Other craft and related trades workers*
8	**Plant and machine operators and assemblers**
81	*Stationary-plant and related operators*
82	*Machine operators and assemblers*
83	*Drivers and mobile-plant operators*
9	**Elementary occupations**
91	*Sales and services elementary occupations*
92	*Agricultural, fishery and related labourers*
93	*Labourers in mining, construction, manufacturing and transport*
0	**Armed forces**
	Total occupation included
	Parts of the occupation included

2.3 Cultural workers in Cultural Industries

The combination of occupations and sectors gives the set of cultural workers in cultural industries which is the narrowest definition of cultural employment. The set is defined in Table 2.4 using the 2digit levels of NACE and the 3digit levels of ISCO88. The dark area represents the cultural workers in cultural industries. In addition, cultural workers are also included in other ISCO88 and NACE groups. They are indicated as “related occupations/sectors” and marked by shaded boxes. In ISCO88, for example, multimedia specialists, photographers, and architects are included in different occupational groups. The sector breakdown also contains NACE groups which include the production of cultural services either done by private companies (NACE group 74 “Other business services”), public institutions (NACE group 75) or non-profit organisations (NACE group 91). The organisation of cultural events is one of the activities which is undertaken by all three related sectors. The column sums represent the amount of employment in cultural occupations and the row sums the amount of employment in cultural industries.

Table 2.4 demonstrates both the importance of cultural workers and their labour division with other types of activities and sectors. The horizontal or sectoral perspective shows not only how many cultural workers are employed by the cultural industries, but also the amount of non-cultural labour needed to supply the products and services. These complementary occupations range from management of cultural facilities to elementary labourers. The vertical or occupational perspective shows how many cultural workers are employed, not only in the cultural industries but in other industries as well. This is the information needed on the supply side of the labour market and in order for training policy makers to identify the total demand for cultural workers.

In order to calculate the total sum of workers engaged in the production of cultural goods and services, it is necessary to be able to estimate the number of workers who are working in non-cultural sectors and in non-cultural occupations but are linked to the activities of the cultural workers of these sectors. This is indicated by the lower right-hand quadrant of Table 2.4. This estimate is undertaken in Section 2.2.4, where the methodology is also described.

Using the 2digit and 3digit levels of the two classifications is a compromise due to the lack of available data, as will be shown in the next section. The most important points to be taken into consideration are as follows:

- In both NACE and ISCO88, architects cannot be separated from engineers
- Publishing comprises books, newspapers and music. Similarly, the ISCO88 group 245 includes authors, journalists, musicians, and film/stage actors etc. Therefore, the separation of book and music publishing is not possible in the employment data.
- The activities of non-profit organisations and public institutions cannot be identified, which particularly affects the representation of festivals and other events in the data.
- The number of cultural workers in related occupations or sectors cannot be isolated. Therefore, the statistical figures underestimate the actual employment figures. The errors, however, are not very great and will presumably not alter the statistical findings significantly.

Despite the aforementioned issues, the classification nevertheless shows a detailed picture of the cultural industries and occupations which goes beyond the available statistics on the European level. Further improvements are certainly possible, but would require substantial efforts, including the reclassification of micro-data.

Table 2.4: Cultural workers in Cultural Industries

NACE rev. 1		ISCO 88							
		243	*245*	*347*	*213*	*313*	*214*		
		Archivists librarians	*Writers, creative and performing artists*	*Artistic, entertainment professionals, Sportsmen*	*Computing professionals*	*Optical and electronic equipment operators*	*Architects engineers*	*Other non-cultural occupations*	
22	Publishing, Printing, Reproduction of Recorded media	Cultural workers in cultural industries			Supportive workers in related Occupations				Cultural Industries
92	Motion pictures and videos, Radio and television activities, Other entertainment activities, Libraries, archives, museums and other cultural activities								
74	Other business activities (architecture, photography, cultural events)	Cultural workers in related sectors (parts of which are cultural sectors)			Estimate of supportive workers related to the production of cultural goods and services in non-cultural sectors				
75	Public administration (cultural services, cultural events)								
91	Other social services (cultural services, events)								
	Other non-cultural sectors								
		Cultural occupations							Σ

Source: Economix.

3. Employment of cultural workers

3.1 Statistical basis

Upon the request of Economix, EUROSTAT established a data set from the European Labour Force Survey which allows for the creation of time series for occupations and sectors, cross country tabulations and occupation-by-industry matrices for all EU countries. While time series could be established for the time period of 1995 to 1999, occupation-by-industry matrices exist only for 1999, due to a lack of data. 1999 is the first year in which all EU countries provided data for the 3digit occupational classification. For the previous years, data from Ireland and the Scandinavian countries are missing.

This data is available for the following variables:

- Total employment
- Gender
- Self-employment
- Temporary employment
- Formal education
- Average working hours per week

The cross-tabulation of the data is presented in the Statistical Annex.

3.2 Employment in Cultural Industries

While EU employment grew overall by a moderate rate of 1.2 % per year during the second half of the nineties, the rate of employment growth in Recreational, Cultural and Sporting Activities (NACE 92) was threefold, or 3.8 % annually. Since 1995, 98,000 jobs have been created by this sector in the EU every year, and 2.8 million people were working for this industry in 1999 (Table 2.5). This represents 1.8 % of total EU employment.

Growth rates since 1995 show wide variations among the EU member states, with Italy, Finland, Portugal and Germany being at the top, and the United Kingdom, France, and Austria at the lower end. However, as the figures are derived from sample data, these differences should be interpreted cautiously.

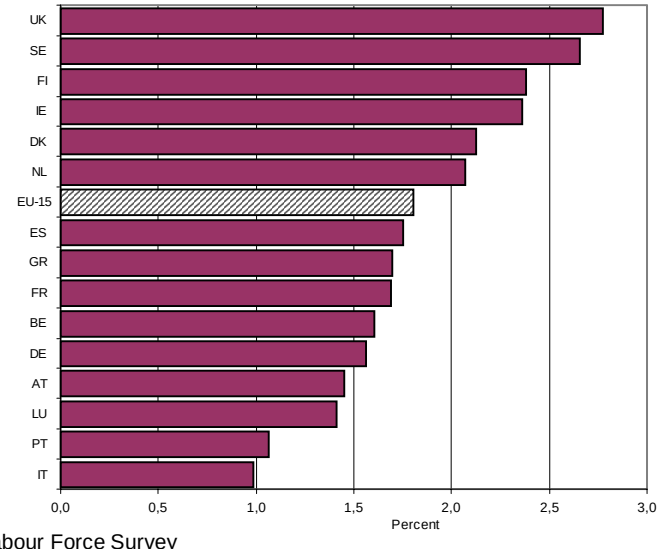
Table 2.5: Employment in Recreational, Cultural and Sporting Activities
(NACE 92)

COUNTRY	1995	1996	1997	1998	1999	Annual % change
	(in thousands)					1995-99
Austria	51	48	54	59	53	**1.1**
Belgium	56	55	62	65	64	**3.4**
Denmark	51	58	58	56	58	**2.9**
Finland	40	52	52	48	56	**8.2**
France	360	363	370	389	384	**1.6**
Germany	433	509	515	524	563	**6.8**
Greece	61	62	61	67	67	**2.1**
Ireland	29	31	32	36	38	**6.4**
Italy	143	157	156	184	203	**9.3**
Luxembourg	2	2	2	2	2	**5.5**
Netherlands	123	122	140	126	158	**6.3**
Portugal	39	53	57	48	51	**7.2**
Spain	209	217	236	240	241	**3.6**
Sweden	107	103	90	97	108	**0.2**
United Kingdom	706	717	725	773	758	**1.8**
EU-15	**2,412**	**2,549**	**2,612**	**2,716**	**2,804**	**3.8**

Source: EUROSTAT Labour Force Survey.

Employment in Recreational, Cultural and Sporting Activities is concentrated in the United Kingdom, where 27 % of the sector's jobs are located. An additional 20 % are in Germany and 14 % in France. The relative importance of Recreational, Cultural and Sporting Activities for the EU countries is presented in Chart 2.1, which shows that in the United Kingdom, the share of the sector is almost three times the share in Italy. In addition, the Scandinavian countries, Ireland and The Netherlands are well above the EU average, while Portugal and Italy are below average.

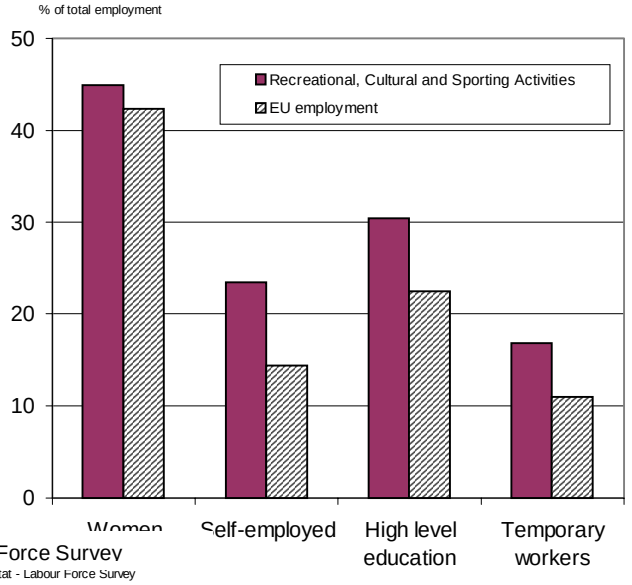
Chart 2.1: Employment Shares Recreational, Cultural and Sporting Activities 1999



Source: Eurostat- Labour Force Survev

Compared to total EU employment, the sector is characterised by a high share of self-employed workers (23.4 %) and workers with a high level of education (30.3 %). At the same time, the share of temporary workers is also well above the EU average (16.9 %). Women are slightly more represented in the sector than in EU employment (44.9 %). The comparison with EU employment is given by Chart 2.2.

Chart 2.2: Working conditions in recreational, cultural and sporting activities in the EU in 1999



Source: Eurostat- Labour Force Survev

rostat - Labour Force Survey

The second cultural sector is Publishing, Printing and Reproduction of Recorded Media (NACE 22). In contrast to the previous sector, here employment was stagnating at the level of 2 million workers over the period of 1995 to 1999 (Table 2.6). Large parts of this industry are concentrated in Germany (26.2 % of EU employment), the United Kingdom (21.9 %) and France (11.4 %). During this time period, employment levels decreased in Germany, France, Italy and Austria, while they grew in Finland, Spain, Belgium, Luxembourg, and Greece.

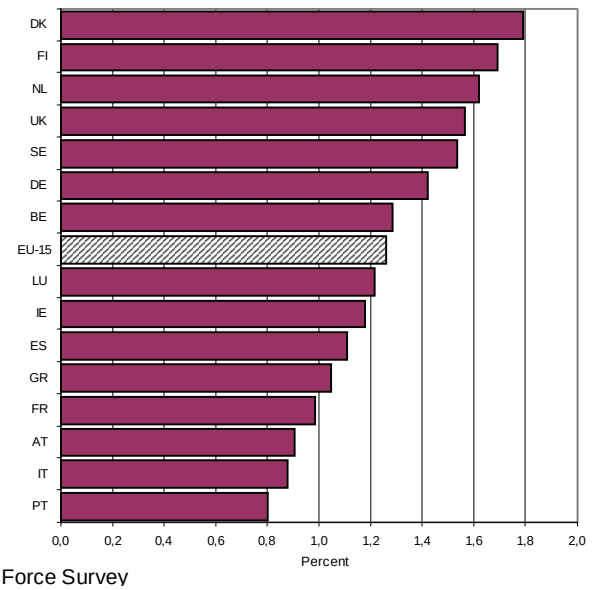
Table 2.6: Employment in Publishing, Printing and Reproduction of Recorded Media (NACE 22)

COUNTRY	1995	1996	1997	1998	1999	Annual % change
	(in thousands)					1995-99
Austria	41	38	39	37	33	**-5.2**
Belgium	42	44	46	50	51	**4.8**
Denmark	46	44	47	53	48	**1.4**
Finland	31	27	31	32	39	**6.1**
France	233	228	229	221	224	**-1.0**
Greece	34	35	37	38	41	**4.7**
Germany	535	541	501	519	513	**-1.0**
Ireland	16	17	19	18	19	**3.5**
Italy	201	202	181	185	181	**-2.6**
Luxembourg	2	1	2	2	2	**8.1**
Netherlands	130	127	127	129	123	**-1.3**
Portugal	41	38	43	36	39	**-1.4**
Spain	121	135	139	145	153	**6.0**
Sweden	71	68	50	55	62	**-3.2**
United Kingdom	424	433	417	415	428	**0.2**
EU-15	**1,969**	**1,979**	**1,907**	**1,935**	**1,958**	**-0.1**

Source: EUROSTAT Labour Force Survey.

Similar to Recreational, Cultural and Sporting Activities, the share of this industry among total employment was the highest in Scandinavia, the Netherlands, and the United Kingdom, and the lowest in Austria, Italy and Portugal. On the average, 1.3 % of EU workers were engaged in the Publishing, Printing and Reproduction of Recorded Media Sector (see Chart 2.3).

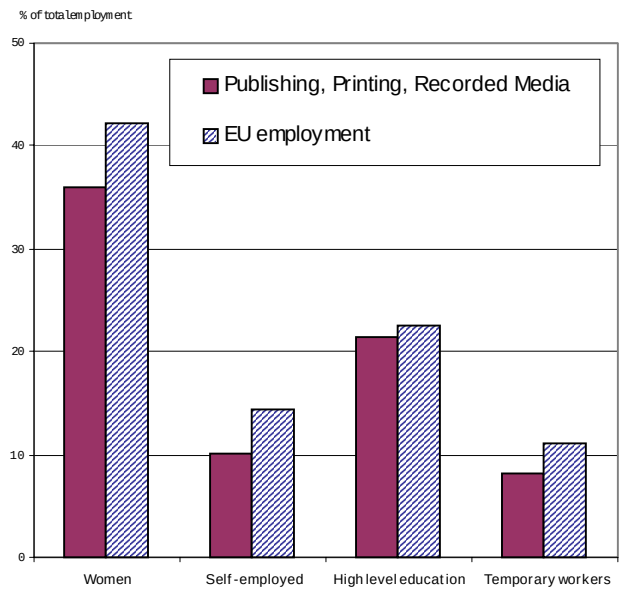
Chart 2.3: Employment Shares Publishing, Printing, Recorded Media 1999



Source: Eurostat- Labour Force Survey

The characteristics of employment, however, are very different to the previous industry (Chart 2.4). The share of women (36 %) is lower than the corresponding EU share, and the same is true for the share of self-employed workers, which is only 10 % in this industry. There are less temporary workers to be found and the proportion of workers with a high level of education is close to the overall EU value.

Chart 2.4: Working conditions in publishing, printing, recorded media in the EU in 1999



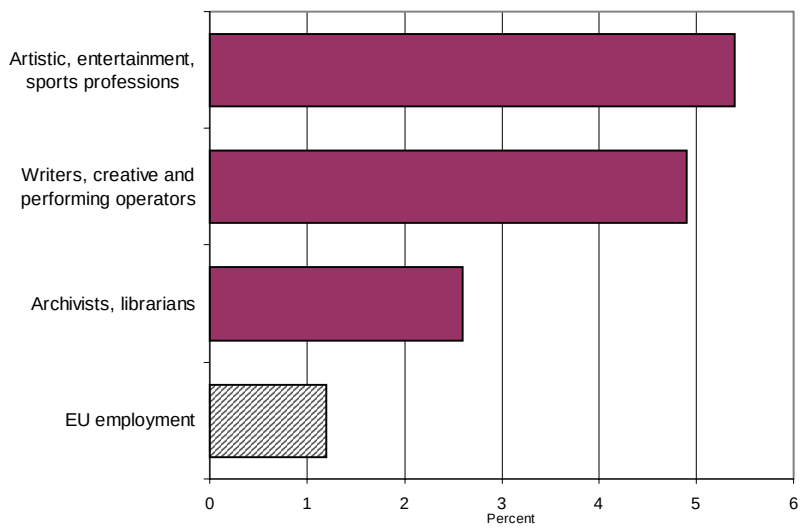
Source: Eurostat- Labour Force Survey

Comparing the statistical findings for the two NACE sectors reveals a pattern of employment transition which is typical for the change from the Old to the New Economy: High growth rates of employment can be observed in Recreational, Cultural and Sporting Activities, where workers are engaged in service activities and in highly qualified jobs, but find themselves in flexible forms of employment. By contrast, the Publishing, Printing and Reproduction of Recorded Media Sector is dominated by the standard type of full-time dependent employment in manufacturing jobs, with lower shares of qualified workers experiencing stagnating labour demand. Of course, these patterns are the phenomena of economic transition and not their determinants. However, they indicate which type of employment is created by the transition. The reasons for the transition – which are connected to de-industrialisation, to the rising importance of information and knowledge, and to the use of information and communication technologies – are to be discussed later in this section.

3.3 Employment in Cultural Occupations

Employment growth in cultural occupations was even stronger than in cultural industries (Chart 2.5). The number of EU jobs in the three occupational groups of cultural employment (Archivists, Librarians; Writers, Creative and Performing Operators; Artistic, Entertainment, Sports Professions) have grown at an annual rate of 86,000 since 1995. The three groups accounted for 2 million workers in 1999. This represents annual growth rates between 2.6 and 5.4 %.

Chart 2.5: Cultural Occupations average annual employment change (%) 1995-99



Source: Eurostat- Labour Force Survev

Employment growth was particularly strong in the Scandinavian countries (except Denmark), in Spain and in Portugal (Table 2.7). A rapid expansion could also be observed in The Netherlands, Germany, Belgium and Italy.

Table 2.7: Employment in Cultural Occupations*

Country	Employment (in thousands) 1995	Employment (in thousands) 1999	Annual % growth 1995-99
Austria	40.2	43.2	**1.8**
Belgium	31.8	38.1	**4.6**
Denmark	44.3	42.7	**-0.9**
Finland **	32.0	47.9	**10.6**
France	224.4	245.8	**2.3**
Germany	331.4	420.3	**6.1**
Greece	38.4	41.9	**2.2**
Ireland **	16.5	25.2	**11.2**
Italy	167.0	200.3	**4.7**
Luxembourg	1.3	1.5	**4.9**
Netherlands	116.3	149.9	**6.5**
Portugal	18.3	26.5	**9.7**
Spain	91.3	129.9	**9.2**
Sweden **	64.6	96.9	**10.7**
United Kingdom	442.0	494.2	**2.8**
EU 15	**1,659.7**	**2,004.3**	**4.8**

* Archivists, Librarians; Writers, Creative and Performing Operators;
Artistic, Entertainment, Sports Professions
** 1995 value estimated.

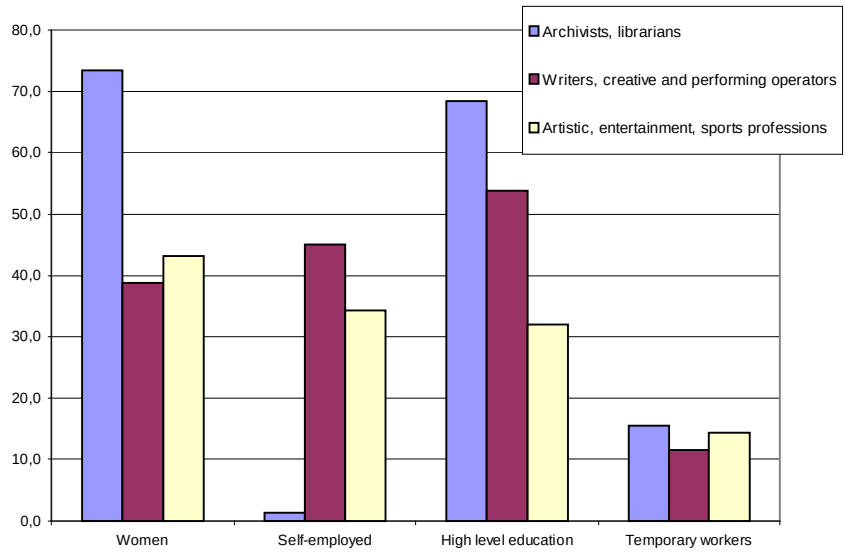
Cultural occupations are all highly qualified. In particular, the categories of “Archivists, Librarians” and “Writers, Creative and Performing Operators” show high shares of well-trained workers (Chart 2.6). In contrast to the cultural sectors, however, cultural occupations are not characterised by high shares of temporary workers. The values observed are only slightly above the share among all EU workers. Self-employment is high in the categories “Writers, Creative and Performing Operators” and “Artistic, Entertainment and Sports Professions”. In contrast, archivists and librarians are mainly engaged as regular employees. This occupational group is dominated by women, while in the other groups female employment is close to the average EU share.

The findings are in contrast to the research results of Module 1, which indicate high shares of atypical occupations (key words: flexibility, mobility, project work, short-term contracts). This is due to different definitions used by the analysis and also to the description of specific segments of the cultural labour market. A broad definition of cultural work as used by this approach obviously results in a different picture which, in general, does not characterise cultural jobs as peripheral jobs. Since the Labour Force Survey includes all part-time jobs (with more than one working hour per week), this result is not due to an under-representation of these jobs in the sample.

The workers are, however, counted by their first job, which means that secondary jobs in cultural activities do not appear in the data. A certain number of these secondary jobs might be considered peripheral. However, employment data for all sectors are looking at primary jobs and, therefore, the findings of this section are consistent with the general approach.

Therefore, the statistical data shows that the cultural sector is characterised by professional activities rather than by marginal jobs which do not allow for full-time engagements. Even if marginal jobs are to be found – in the non-profit sector in particular – this does not characterise the industry as a whole.

Chart 2.6: Characteristics of Employment in Cultural Occupations 1999



Source: Eurostat- Labour Force Survev

Again, these figures are very much in line with the conclusions which can be drawn from the general analysis of occupational restructuring in the European Union (Vogler-Ludwig 1994). Supported by the shift of employment toward knowledge intensive activities, by the rising importance of recreational, cultural and leisure time activities, and by the application of ICT, employment among cultural occupations is rising very fast. We will elaborate on this in detail in the latter portions of this section.

3.4 The Volume of Employment in Cultural Activities

Measuring employment in the cultural economy using the two dimensions developed earlier provides different quantifications of the volume of employment in cultural activities. The results for the EU-15 in 1999 are the following (Table 2.8):

- 7.2 million workers or 4.6 % of total EU employment are engaged in the production of cultural products and services in the most comprehensive sense. This includes the number of workers in cultural occupations and the related workers in non-cultural occupations being engaged in the production of cultural products and services.[1]
- 4.8 million of these workers are engaged in the two cultural industries (3.1 % of EU employment).
- 2 million workers are professionals or technicians with cultural occupations being employed in all sectors of the economy (1.3 % of EU employment).

[1] The number of workers in the „Other sectors“ are estimated by calculating the average share of non-cultural workers in the NACE 92 sector (Cultural and sporting activities) in the period of1997 to 1999. This is applied to the 1999 matrix. The calculation of the growth rates between 1995 and 1999 required the estimate of the 1995 matrix due to missing data for some countries.

- 1.2 million workers have cultural occupations and are engaged by the cultural industries. This represents 58 % of all workers with cultural occupations and 25 % of the workers in cultural industries.

Table 2.8: Employment in Cultural Activities
EU-15 1999
(in thousands)

NACE	Industry	Occupation		
		Cultural occupations	Non-cultural occupations in cultural production	Total
22	Publishing, music recording	1,167	3,595	**4,762**
92	Cultural and sporting activities			
	Non-cultural sectors	837	1,566	**2,403**
	Total	**2,004**	**5,161**	**7,166**

Source: EUROSTAT, Economix. figures estimated

Table 2.9: Growth of Cultural Employment
EU-15 1995-99
(annual % change)

NACE	Industry	Occupation		
		Cultural occupations	Non-cultural occupations in cultural production	Total
22	Publishing, music recording	5.1	1.2	**2.1**
92	Cultural and sporting activities			
	Non-cultural sectors	4.4	1.1	**2.2**
	Total	**4.8**	**1.2**	**2.1**

Source: EUROSTAT, Economix. figures estimated

According to these estimates, cultural employment in the EU has grown annually at an above average rate of 2.1 % since 1995 (Table 2.9). Growth was equally distributed between the cultural and non-cultural sector but heavily concentrated on cultural occupations (+4.8 % annually). Employment growth among the non-cultural occupations, which cover jobs ranging from manager to porter, was no greater than the average EU employment growth (+1.2 % per year).

Applying this type of measurement to the EU member states puts Finland and Sweden at the top. In these two countries, the indicators show levels well above the EU average of 1999 (Table 2.10). More than 4 % of the work force of these two countries were engaged by cultural industries and more than 2 % were working in cultural occupations. The values for the Netherlands come close to these levels. In the United Kingdom, however, cultural industries absorb an even higher share of the work force (4.3 %) while the share of workers with cultural occupations is only slightly above the EU average (1.8 %). Italy and Portugal are at the lower end of the rankings, with low values for all three indicators. In Austria, the share of employment in cultural industries is below average, while the proportion of employment in cultural occupations is close to the EU average value.

Table 2.10: Relative Importance of Cultural Activities
1999

Country	Cultural Industries	Cultural Occupations	Cultural Occup. in cult. Industries
	% share of national employment		
Austria	2.4	1.2	0.8
Belgium	2.9	1.0	0.6
Denmark	3.9	1.6	0.9
Finland	4.1	2.1	1.3
France	2.7	1.1	0.6
Germany	3.0	1.2	0.7
Greece	2.7	1.1	0.8
Ireland	3.5	1.6	0.9
Italy	1.9	1.0	0.5
Luxembourg	2.6	0.9	0.4
Netherlands	3.7	2.0	1.1
Portugal	1.9	0.5	0.3
Spain	2.9	0.9	0.6
Sweden	4.2	2.4	1.5
United Kingdom	4.3	1.8	1.0
EU-15	**3.1**	**1.3**	**0.8**

Source: Eurostat - Labour Force Survey

The figures upon which these calculations are based are presented in more detail in Table A2.6 in the Annex, which shows that the majority of writers, creative and performing operators in the EU have a job in the cultural industries (74 %). Very few are working in public administration and some of them are engaged by business services or other sectors of the economy. In contrast, 64 % of all European archivists and librarians are working in public administration and other sectors of the economy, rather than in the cultural industries. Artists, entertainers and sportspersons are almost equally distributed among cultural industries (44 %) and other sectors. This means that job requirements for cultural workers are defined according to various sectoral conditions and the professional skills of the workers have to be applied to different work environments. The employment of cultural workers does not only take place among cultural industries.

Based on the corresponding tables for the sub-groups of cultural employment in the Statistical Annex (Tables 7 to 10), the shares of these sub-groups among the cultural and

non-cultural workers is cross-tabulated with cultural and non-cultural industries. The results are shown in Table 2.11.

Compared to EU employment in general, the jobs of cultural workers in cultural industries are characterised by high shares of self-employment, high levels of education and temporary work (Table 2.11). These indicators are significantly higher than for cultural workers in non-cultural sectors:

- 40.4 % of the cultural workers in cultural industries are self-employed, while their share in non-cultural industries is 29.5 % and among all EU workers is only 14.4 %.
- 49 % of these workers have a high level of education, while the share among cultural workers in non-cultural sectors is 45 %.
- While the share of cultural workers with temporary jobs in cultural sectors is 14.2%, their share in non-cultural sectors is 11.5 %.

These results confirm the tendencies identified in employment within the cultural sectors and show that these tendencies are even stronger among those workers responsible for the production of cultural goods and services.

Interestingly, women are not over-represented in cultural jobs. In contrast, cultural jobs in cultural industries are often filled by men, while women with cultural occupations take jobs in the non-cultural industries. The difference is significant: While the share of women with cultural occupations is 38.4 % in cultural industries, it is 52.8 % in non-cultural industries.

Table 2.11: Sub-Groups of Cultural Employment

Shares of sub-groups in total employment and/or occupation (in %)	Cultural Occupations	Non-Cultural Occupations	Total EU 15
Women			
Cultural Sectors	38.4	42.2	**41.2**
Non-Cultural Sectors	52.8	42.3	**42.4**
Total EU	44.4	42.3	**42.3**
Self-Employment			
Cultural Sectors	40.4	10.7	**18.0**
Non-Cultural Sectors	29.5	14.2	**14.3**
Total EU	35.9	14.1	**14.4**
High-Level Education			
Cultural Sectors	48.8	19.5	**26.7**
Non-Cultural Sectors	44.9	22.2	**22.4**
Total EU	47.2	22.2	**22.5**
Temporary Workers			
Cultural Sectors	14.2	12.9	**13.3**
Non-Cultural Sectors	11.5	10.9	**10.9**
Total EU	**13.1**	**10.9**	**11.0**

Source: Eurostat - Labour Force Survey

3.5 Hours worked in cultural jobs

Average hours worked in cultural occupations are not very different from what can be observed in other occupations. in 1999, the average usual working week for all workers in the EU lasted for 36.2 hours, including part-time workers, self-employed persons and all other non-standard forms of employment. In cultural occupations, the averages ranged between 33.4 and 35.4 hours per week (Table 2.12). The normal work week for computer specialists or architects and engineers was between 38.5 and 39.6 hours. This direct comparison with other occupational groups shows that there is no significant difference between cultural and non-cultural jobs.

In comparing working hours between the sub-groups of cultural employment, we discover the familiar pattern of self-employed workers having longer working weeks than regular employees and women and temporary workers having shorter working weeks. The differences between these sub-groups are well within the ranges observed for employment in general.

Table 2.12: Hours Worked by Employment Status, Job Duration, Educational Level and Gender 1999
(usual hours worked per week, EU average)

	Occupation							
	243 Archivists, librarians	**245 Writers, creative performing operators**	**347 Artistic, entertainment, sports professions**	**213 Computer professionals**	**313 Optical and electronic equipment operators**	**214 Architects, engineers**	**Other occupations**	**Total**
Employment status								
Self-employed	33.0	36.6	39.8	42.4	43.5	44.9	42.6	**41.1**
Employees	33.5	34.8	32.0	37.7	37.5	38.1	33.8	**34.7**
Educational level								
High	33.9	35.4	34.9	38.9	39.6	40.1	37.0	**37.1**
Low	34.7	34.8	32.5	36.5	38.5	38.5	34.5	**34.8**
Medium	33.1	35.2	34.4	38.4	39.2	38.1	35.8	**36.1**
Job Duration								
Permanent	35.8	36.3	34.7	38.9	38.0	39.2	36.1	**36.7**
Temporary	29.2	32.5	27.7	35.6	35.3	35.7	32.4	**32.3**
Gender								
Female	31.5	33.3	31.3	35.5	36.8	36.1	32.2	**33.0**
Male	36.7	37.3	37.2	40.1	40.7	41.9	39.2	**39.1**
EU 15 average	**33.4**	**35.4**	**34.4**	**38.5**	**39.2**	**39.6**	**35.7**	**36.2**

Source: Eurostat - Labour Force Survey.

4. Employment prospects for cultural workers

4.1 Demand perspectives

Employment growth in cultural activities was initiated by a strong increase of demand in many areas of cultural production. In Table 2.13, some indicators for private consumption are put together which show that the nineties were characterised by substantial growth of demand throughout the European Union.

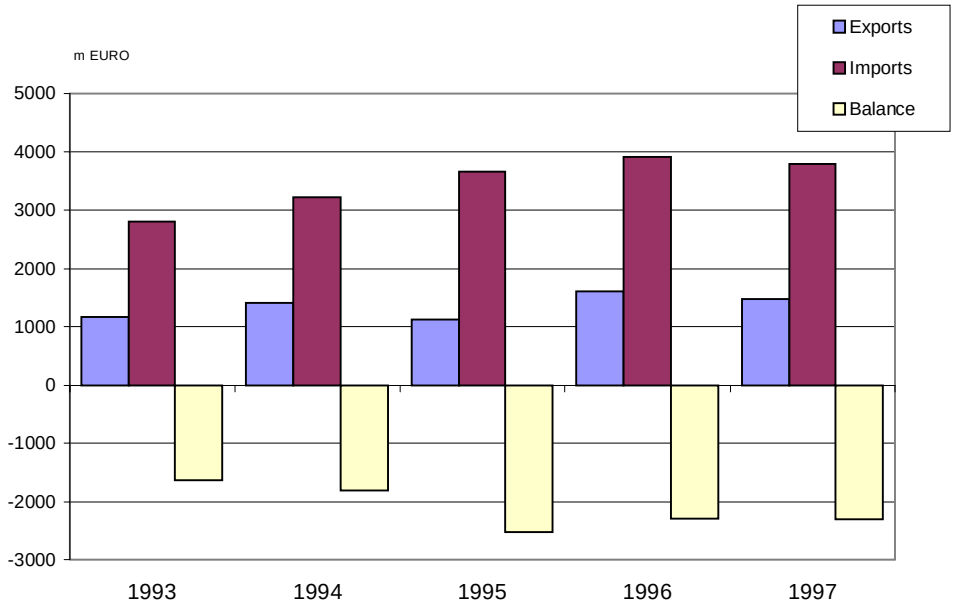
The general consumption indicators from Eurostat coincide with the findings from sectoral employment data, which point to a rapid expansion of real demand for “Entertainment, Recreation and Cultural Services” with annual growth rates between 1 and 6 % since 1992 (Table 2.13, column 2). In contrast, the demand for “Education, Books, and Newspapers” was more heterogeneous, and negative in some countries. Annual book production, however, expanded in all EU countries at growth rates between 0.5 and 12.8 % per year according to the data of the International Publishers Association.

With regard to household equipment for the consumption of entertainment, overall demand for TV receivers declined since 1992 in many EU countries, while the demand for VCRs rapidly increased. Most importantly, this was not at the expense of movie theatre admissions, which grew in all EU countries with annual rates between 0.2 and 17.8 %. Very high growth rates were observed for the private purchases of PCs, where increases ranged between 6.7 and 23.1 % per year. As these figures are measured in current EURO, the actual PC demand can be assumed to be even stronger.

The statistical evidence for the nineties confirms the general trend in private consumption, indicating rapid growth of services. The change is supported by rising incomes and wealth, by declining working hours, by lower prices for technically transmitted cultural services in particular, and, most importantly, by the innovative potential of the arts and entertainment business. In all EU countries, these factors have shifted demand from traditional household consumption (like food, clothes, textiles, furniture etc.) to the consumption of information, recreation, entertainment, arts and other fields of services. The trend is universal and long-lasting, and can therefore be expected to continue during the next decades.

The problem, however, is the fact that European producers can only partially profit from rising demand since the markets for audio-visual services and multimedia products are characterised by negative foreign trade balances. Chart 2.7 shows the figures for the period of 1993 - 1997, which experienced an increase of EU imports from non-EU countries (the USA in particular) of 7.9 % annually. EU exports also increased but were not able to reduce the negative balance. While the foreign trade balance for audio-visual services has not deteriorated further since 1995, this cannot really be seen as a positive signal. When we look at the 1998 top 50 movies in the European Union, we discover only 7 European productions, all others coming from the USA, and among the 1999 movies there were only 6 European productions (European Audiovisual Observatory 2000: 118). In terms of employment, this certainly represents a burden which will in all likelihood continue to arise in the growing markets of the multimedia business.

Chart 2.7: Foreign Trade Audio-visual Services EU / Non-EU countries



Source: Eurostat

Table 2.13: Private Consumption
(average annual growth rates*)

	Purchase of				Number of households with VCR	Admissions at movie theatres	Annual book production
	education, books, newspapers** 1992-97	entertainment, recreation, culture** 1992-97	PCs*** 1992-99	TV receivers*** 1992-98	1992-98	1994-99	1990-98
Austria	0.7	1.0	13.5	-2.1	6.8	3.0	12.8
Belgium	-	1.7	23.1	0.6	6.6	1.2	2.2
Denmark	3.2	4.5	-	0.9	6.8	1.2	2.8
Finland	1.7	3.2	-	12.7	5.5	4.5	2.4
France	-0.2	1.2	20.1	-1.1	6.3	4.5	3.6
Germany	-	-	20.2	-2.3	7.5	2.3	3.1
Greece	0.3	6.1	-	-4.2	10.0	8.4	9.5
Ireland	5.3	5.3	-	6.1	5.3	3.6	-
Italy	0.4	2.6	9.4	-5.3	8.5	1.3	2.8
Luxembourg	-	-	-	-1.6	6.1	12.2	-
Netherlands	0.5	2.8	19.1	4.7	5.4	3.1	3.3
Portugal	-	-	-	-2.8	7.4	17.8	5.2
Spain	-	-	20.3	-3.6	5.3	8.1	4.6
Sweden	-4.2	2.4	18.4	-2.3	5.7	0.2	0.5
United Kingdom	1.0	3.8	6.7	5.4	4.3	2.4	6.2
EU	**-**	**-**	**-**	**-1.0**	**6.4**	**3.7**	**-**

* always latest year available; ** volume index 1990 = 100; *** current EURO;

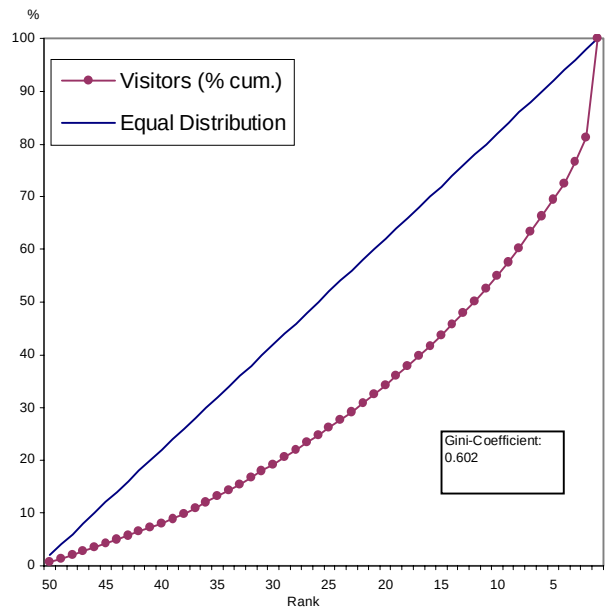
Source: Eurostat, European Audiovisual Observatory, International Publishers Association.

4.2 Economies of scale

In many areas of cultural production, high concentration rates of both supply and demand can be observed. Frey (2000: 98) cites the example of the German opera houses, in which 300 different compositions were performed during the post-war period. 200 of these compositions were written in the 20th century; however, only 9 % of the total of 200,000 performance evenings were dedicated to these works. On the other evenings, the operas of Verdi (15 %), Mozart (12 %), Puccini (9 %) etc. were played. This does not only hold true for government-subsidised opera houses. In the New York Metropolitan Opera, which is privately managed, 53 % of all productions were by four composers.

The concentration of demand can be demonstrated convincingly by more recent figures on the number of visitors of the top 50 movies in Europe. The figures published by the European Audiovisual Observatory show that the most popular movie in 1998 was “Titanic”, with 88.3 million visitors during that year. “Armageddon” ranked second with 21.5 million, and “The Avengers” came in last among the top 50 rankings, with 3.2 million visitors. The concentration rate among the 50 movies is 0.602 (Gini Coefficient, see Chart 2.8). Together, the top 50 films attracted 69 % of the 684 million admissions in the European Union.

Chart 2.8: Visitor concentration among top 50 movies EU 1998



Source: European Audiovisual Observatory, Eonomic

This concentration of demand is due to the fact that consumers are unwilling to substitute less attractive events for highly attractive events, even at a cheaper price. Price elasticities of top events are generally low, as they are for top performances. For example, people buy opera recordings by Placido Domingo at a higher price than the somewhat less expensive recordings performed by unknown tenors. According to Frey (2000: 54), the unwillingness to substitute lesser for greater talent can be attributed to three factors:

- *Information cost:* With the help of mass media, the cost of comparing the performance of artists has dramatically decreased over the past decades. Mass media has served to extend the region for which an artist can become a star. All together, radio, TV, video, and Internet distribute information or the events themselves at very low cost. As a

consequence, a very sharp discrimination exists in the demand among artists and performances, even if the qualitative differences are minimal.

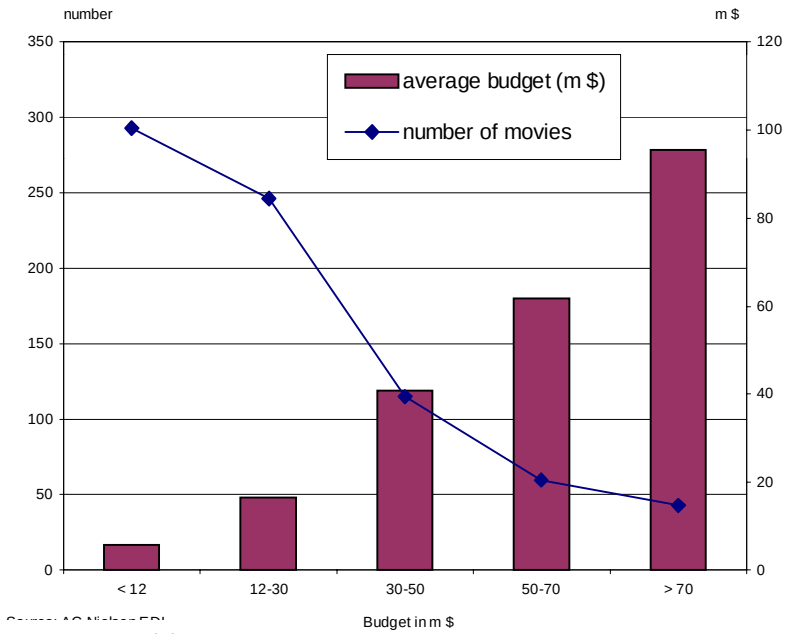
- *Cognitive problems:* It is obviously difficult for the majority of people to remember more than two or three top performers in any specific category. Supported by the mass media, the names of the top performers are repeatedly brought into the minds of potential consumers, which sharpens the focus on a few performers.
- *Sharing knowledge:* Superstars also emerge because art consumption is a socially shared activity. Much of the pleasure derived from art consumption consists of the possibility to share this knowledge with other people. Consequently, discussion focuses on widely known persons, in other words, on the stars.

Together, these demand factors are strong enough to concentrate demand on several top performers even though demand is heterogeneous and supply is differentiated in all areas of arts and entertainment.

On the supply side, the economies of scale can be assumed to be strong. Large portions of cultural production require substantial investments before the product is sold on the market. The supply of movies, CDs, exhibitions, and festivals are all characterised by high fixed costs in production and low variable costs for the reproduction and sales of the products or services. This means that the production unit cost of small editions are high and those of large editions are low.

The amount of investments in movie production can be shown by a sample of international movies which were produced in the period of 1994 to 1998. The majority of movies were produced with a budget below $12 million (Chart 2.9). However, the investments in the most expensive group of movies reached almost $100 million.

Chart 2.9: International Movies



Source: AC Nielsen EDI

Chart 2.10 exemplifies the economies of scale for
another type of arts production, namely that of CD production. Calculations are made based upon the following givens

- Fixed costs of production and marketing amount to 150,000 EURO.
- The price of an individual CD ranges from 12 to 20 EURO, rising with the volume of sales.
- Distribution cost are 50 % of the sales price.
- Variable production cost for one CD are 4 EURO per item.

The calculations show a break even point at the sales volume of 40,000 CDs. From this starting point of profitable production onwards, profits rise rapidly. By sales of 100,000 items, the initial investment of 150,000 EURO is paid back threefold.

In this example, employment rises with production and sales. Assuming a wage share of 30 % in the variable reproduction of CDs and 40 % in the distribution, a volume of 10 full-time working years is required at the break even point to produce and to disseminate the product (assuming average wages for production and retail trade workers). The volume of 100,000 CDs requires a labour input of 18 working years which is a plus of 80 % compared to the break even point. Labour productivity rises by 47 % in real terms and 94 % in nominal terms with the increase of the sales volume.

The cost calculations are done by the following formula:

$$C_s = \frac{I}{S} + (v_s + d_s)\, S$$

with
- C total production cost at sales volume S
- I investment for production and marketing (fixed cost)
- S volume of sales
- v reproduction unit cost (variable cost)
- d distribution unit cost (variable cost)

The returns are given by

$$R_s = P_0\,(1+p)^S\, S$$

with
- R returns from sales
- P_0 base price
- p price elasticity with regard to sales volume S

Reproduction unit cost are decreasing with the volume of sales:

$$v_s = v_0 \frac{1}{(1+\delta)^S}$$

with
- v_0 base reproduction unit cost
- elasticity of production unit cost to sales volume S

Distribution unit cost are proportional to the sales price

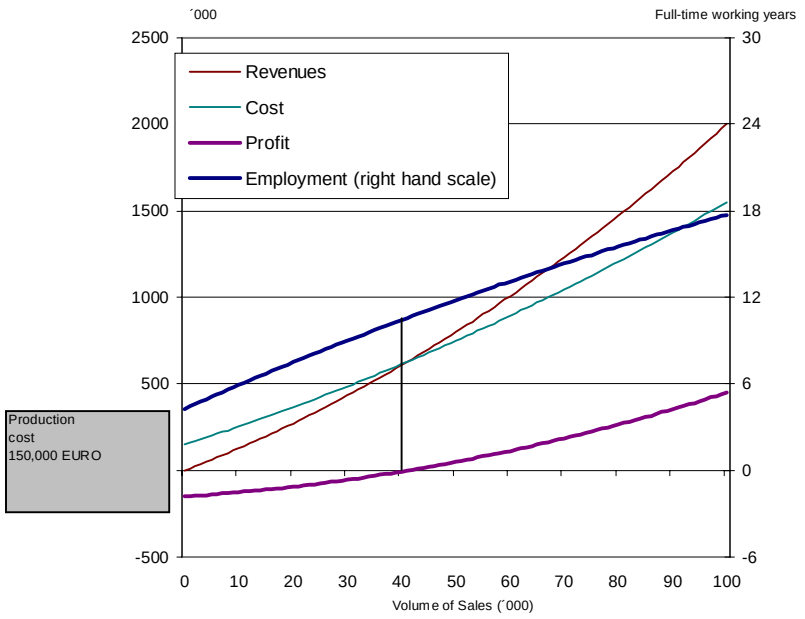
$$d_s = P_s\, r$$

with
- r retail trade share of sales
- P_S price at sales volume S: $P_0\,(1+p)^S$

Based on the aforementioned givens, employment in the distribution sector rises much faster than in the production sector (Chart 2.11). The reason is that the rising sales volume requires increasing labour inputs by the trade sectors, while the economies of scale are mainly with production. The example shows a relation of 1/3 of labour being engaged for production and 2/3 for distribution when the maximum volume of sales is achieved. This result coincides perfectly with the findings of the above mentioned sample data for international movies undertaken by AC Nielsen. The data shows that about 1/3 of gross revenues from the selected international movies is transferred to the accounts of the producers while 2/3 are flowing to distributors and capital spenders.

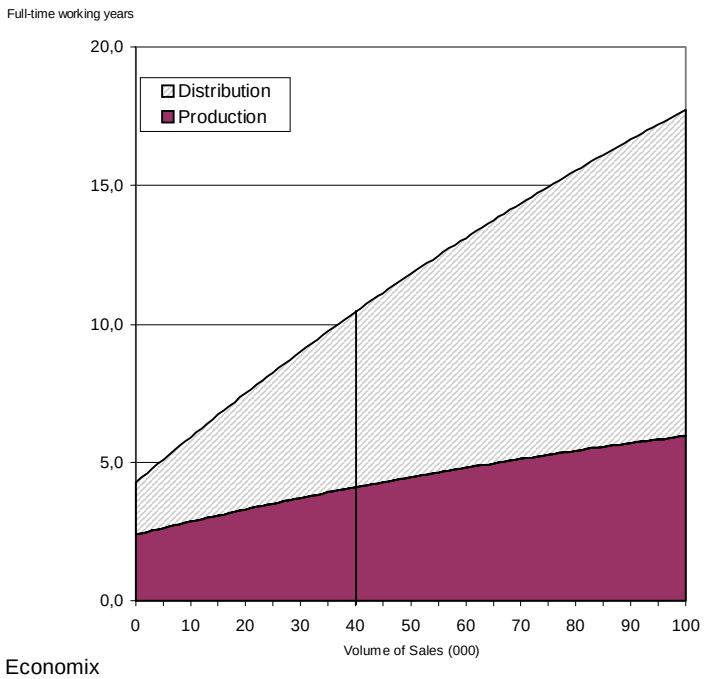
With regard to employment, the economies of scale create the dominance of distribution activities (including marketing, advertising, and the dissemination through the media). Moreover, the distribution sector has a key role in the selection and presentation of cultural products. It is highly concentrated and therefore also has a dominating market position against the huge number of individual artists or the small companies producing cultural products and services. This allows the distribution sector to achieve high premiums for its services.

Chart 2.10: CD Production Example



Source: Economix

Chart 2.11: Employment in Production and Distribution, Example CD Production



Source: Economix

4.3 Information Technology and Employment

There is actually only one technology which is expected to fundamentally change the world of cultural production: information and communication technology. The digitalisation of text, sound, and pictures makes it possible to implement totally different methods in the production, distribution and consumption of cultural products and services. As a result, culture is de-materialised. Multimedia techniques substitute painting and movie production, the Internet opens new channels of distribution, digital TV merges with PCs to connect the consumers to the world of culture.

The present state of ICT is still far away from this vision and the arguments of critics (e.g. Economist, October 7 2000) point out that

- Technology is still unable to show movies, photographs and book texts in a consumable quality.
- Making money in the Internet appears to be difficult for most of the providers.
- The euphoria of investors for the multimedia business has vanished.

This is certainly an accurate description of the state of ICT application, but it focuses on the present obstacles rather than the fundamental trends in ICT developments.

As far as technology is concerned, there is no doubt that storage capacities of chips and peripherals will continue to grow, that transfer rates of the telecommunications networks will rapidly increase, and that hardware and application programs will improve, allowing for increasingly high quality of on-screen information presentation. While this is not yet a matter of fact, it is only a matter of time.

Cultural business will make use of technological possibilities in many different ways. However, the revolution which can be expected will happen neither in the workshops of cultural producers (e.g. the transition from design to multimedia industries) nor in the living rooms of the consumers (e.g. the replacement of analogue by digital TV). It will happen in the distribution sector of the cultural industry: It is the reproduction of cultural products which will be radically changed by ICT. Unlike many other consumer goods, such as clothing, consumer electronics, food etc., the entertainment and arts business is able to deliver their products via the Internet. While retail traders still have to send their goods physically, many cultural products can be transferred electronically. This makes factories and distribution networks redundant.

In the music industry, this is already a reality. The creation of Napster or Gnutella, which are file-sharing systems exchanging music records among PC users, reveals that the existing distribution channels for music can easily be circumvented. Even though the copyright laws are in favour of artists and music publishers, it remains an unanswered question “whether the music industry will ever be able to charge for music again.” (Economist 2000)

The technical reason for this is the fact that digital copies of music records are of the same (or almost the same) quality as the original. The economic reason is that copies can be made very easily – at very low marginal cost. The price differences in relation to the present distribution services create strong economic incentives to use digital rather than hard copies. This is going to result in the exclusion of re-production and trade companies from their own business.

Even if new technologies will be introduced in the future to protect the copyrights – e.g. electronic watermarks for music records which restrict the number of copies which can be made from one file – the prices of music copies will decrease substantially. Consequently, employment in music reproduction and distribution can be expected to shrink in favour of music creation. Lower prices will support the growth of demand. The break even point for profitable production will decrease and thus extend supply. Musicians will make use of the

lower barriers to the markets and distribute their performances on the Internet or at least place their advertisements on the Web. All this can be done at very low cost.

These arguments can also be applied to other sectors of the cultural industries:

- Movies can easily be disseminated on the Internet if the transfer rates of the telecommunications networks increase. The individual selection of videos will also be a challenge TV stations.
- Book production is similarly characterised by high re-production costs. As soon as storage technologies and computer screens will allow for the comfortable reproduction of texts and pictures, book printing will be increasingly substituted.
- Even the services of museums and libraries can be transferred to the Web by providing pictures and historical texts electronically.

None of these options will lead to a complete substitution of traditional reproduction and distribution, as consumer preferences will continue to be heterogeneous. But the economic advantages of digital supply will be strong enough to shift the market flows into the new channels.

However, in the long-run, the supply of cultural products and services will only grow if it is profitable. The difficulty in protecting the reproduction of cultural works is certainly the biggest challenge for the industry as a whole. Conventional copyright regulations seem to be inadequate in providing the necessary shelter. Levies on computer hardware or telecommunications services fail due to the lack of the international co-operation required and will hardly be able to keep production of arts and entertainment profitable. In the digital world, copyright piracy might become the most important element of the black economy if no weapon against it is found. Technical solutions providing copyright protection will, in turn, encourage the development of the respective technical counterpart to circumvent this protection. This is much easier in the digital world than in the physical world. However, much can be done by adjusting the prices to the lower marginal costs of distribution and by providing superior software and hardware for the reproduction of cultural products, as has been done successfully by the software industry in recent years.

4.4 Employment perspectives

Future employment growth in cultural industries and occupations is dependant upon a whole set of determinants:

- Private consumption of cultural services
- Business demand for the presentation of products, services, companies etc.
- Foreign trade through exports and imports of cultural goods
- Innovation of production technologies (ICT in particular)
- Financial inflows through the sale of advertising space or time
- Public subsidies for cultural activities[2]

The impact of these determinants within the next ten years is developed in greater detail in the following section and presented in Table 2.14. Here, cultural industries have been separated into five sectors and split up into production and distribution activities. In addition,

[2] There are other impacts affecting employment growth which could be named, such as wage growth, taxes, market regulation, exchange rates etc. For the following arguments, we assume that these latter factors will remain more or less unchanged, as no specific trend for the cultural industries can be expected to drive employment in the EU over the next years.

for every area, several important occupations are listed which might prove to be the groups of workers most affected by these determinants. The plus and minus signs indicate a significant positive or negative impact of the factor under consideration. If no sign is entered, it is assumed that no strong influence can be expected.

As far as future demand for cultural goods is concerned, there is no reason to assume a significant change in the positive growth trends of the past. The private consumption of cultural products and services will continue to grow and to make relative gains against other areas of consumer goods production. However, the various sectors of cultural activities will be affected differently. The production of books and press products will continue to face positive demand as far as the content is concerned. The products themselves will increasingly be substituted by the provision on the Internet and multimedia products. The media via which these products will be consumed will change and therefore create a very positive impact on the audio-visual and multimedia industries, and a negative impact on book printing and retail distribution. This trend will be supported by the increasing consumption of videos, movies, and TV programs.

The same kinds of changes observed regarding books and press products can be expected for the visual and performing arts. This will result in a favourable labour demand situation for cultural workers, such as authors, journalists, painters, musicians, actors etc. In contrast, the workers employed in distributive activities for the physical products of the cultural industries will face deteriorating labour demand. This will affect printers and sales persons in particular.

The impact of private consumption will be strengthened by business demand, which can also be expected to shift to the new media very rapidly. The demand for printed products will be substituted by the creation of Internet Web-Sites, including presentation through videos, e-commerce facilities, and interactive communication. This will greatly foster labour demand for multimedia designers, Internet programmers, software engineers, and for film directors, actors and many other occupations required by the movie industry. In addition, the distributive sector of the audio-visual and multimedia industries will grow, but not at the same rate as in the production sector. Content providers seem to be more important than marketing and sales persons.

The negative impacts of foreign trade on cultural markets will probably become even more severe due to the transition to audio-visual and multimedia products. The US suppliers are not only very competitive in the film and music industry, but also in the software, Internet and multimedia business. Therefore, a strong negative impact on labour demand from rising imports of these products must be assumed. This will affect the content and software providers in the EU much more than the traders, broadcasters, and Internet providers.

In addition to the enhancement of information and entertainment services, information and communication technology will lead to a significant price reduction of these services, which will foster the shift of demand towards the audio-visual and multimedia sector. The negative impact will be most strongly felt by those industries involved in the publishing of books and press products, but will also affect the visual and performing arts. Even the services of museums and libraries will be partially transferred to the new media. Therefore, we can expect ICT to be the driving force of the labour demand trends.

Shifting demand will turn the flows of advertising expenditures from conventional media to the multimedia. This might also affect radio and TV stations. As financing of media production seriously depends on revenues from advertising, the shift will create further problems in the books and press sector in particular.

Public subsidies which are spent for visual and performing arts, as well as for museums and libraries, will remain scarce although there is no reason to expect any serious reductions. Beyond cultural policy – the financing of which must compete with other policy areas – the financial support of cultural institutions, exhibitions, events etc. will always play an important role, as these cultural activities have very positive external effects on the regional economy.

Public support of cultural activities will, however, grow at a slow rate and thus restrict employment growth. The scope of subsidised culture will nevertheless remain important.

The lack of data for cultural production and employment does not allow for the translation of the qualitative arguments of this section into a quantitative forecast – at least not on the level of the European Union. The very few forecasting exercises which are available for some EU countries, however, confirm the positive employment trends of this paper. In particular, a study undertaken by the Fondaçion Tomillo (2000: 210) reveals a strong expected rise of employment of 50% in the Spanish cultural industries by 2005. This will mainly be driven by audio-visual services, but all other cultural sectors are also expected to extend the volume of employment. The forecasts for the multimedia sector itself are exceptionally positive.

Table 2.14: Trends of Future Employment Growth in the Cultural Industries in Europe

Cultural activity	Function	Selected Occupations	Private Consumption	Business Demand	Foreign Trade	Technology (ICT)	Advertising	Public Subsidies
Books and press	Production	Authors	+			-	-	
		Journalists						
	Distribution	Printers	-	-		--		
		Designers						
		Sales persons						
Visual arts	Production	Painters, sculptors	+		-			-
		Designers						
	Distribution	Sales persons		-		-		
Performing arts	Production	Actors	+		-			-
		Musicians						
	Distribution	CD printers	-			-		
		Sales persons						
Audio-visual services, multimedia	Production	Actors, Directors	++	++	--	++	+	
		Multimedia designers						
		Internet programmers						
		Software Programmers						
	Distribution	Film traders	+	+		+		
		Radio and TV Broadcasters						
		Sales persons						
Archives, Libraries	Production	Historians				-		-
	Distribution	Exhibition organisers	+					

Source: Economix.

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Statistical Annex

Table	Title
A2.1	Employment in the EU
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A2.3	Employment Growth by NACE Sectors 1995-99
A2.4	Employment by ISCO Occupations 1999
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A2.19	Hours Worked by ISCO Occupations 1999
A2.20	Hours Worked by Employment Status, Job Duration and Educational Level 1999

Table A2.1: Employment in the EU

Country	% share of EU employment 1995	1999	Annual % increase 1995-1999
Austria	2.5	2.4	**0.0**
Belgium	2.6	2.6	**1.3**
Denmark	1.8	1.7	**1.0**
Finland	1.4	1.5	**3.7**
France	14.9	14.6	**0.8**
Greece	2.6	2.5	**0.8**
Germany	24.1	23.2	**0.2**
Ireland	0.9	1.0	**6.0**
Italy	13.4	13.3	**0.8**
Luxembourg	0.1	0.1	**2.1**
Netherlands	4.6	4.9	**2.9**
Portugal	3.0	3.1	**2.3**
Spain	8.1	8.9	**3.4**
Sweden	2.8	2.6	**-0.5**
United Kingdom	17.5	17.6	**1.3**
EU	**100.0**	**100.0**	**1.2**
EU (1´000s)	*148,406*	*155,498*	

Characteristics of Employment 1999
(% share of national employment)

Country	Women	Self-employed	High level education	Temporary workers
Austria	43.9	10.9	11.9	6.9
Belgium	42.2	14.8	33.1	8.5
Denmark	46.1	8.3	25.4	9.2
Finland	47.6	13.0	32.6	15.6
France	44.7	10.6	24.6	12.2
Germany	43.6	10.0	24.0	11.5
Greece	37.4	32.0	19.8	7.5
Ireland	40.5	17.8	6.4	3.6
Italy	36.4	24.4	11.9	7.0
Luxembourg	39.0	8.4	20.6	3.1
Netherlands	42.5	10.7	23.8	10.6
Portugal	45.1	24.7	9.2	13.5
Spain	36.3	19.2	25.8	25.6
Sweden	47.6	10.9	29.4	12.2
United Kingdom	44.8	11.7	26.1	5.9
EU	**42.3**	**14.4**	**22.5**	**11.0**

Source: Eurostat - Labour Force Survey.

Table A2.2: Employment by NACE Sectors 1999
(in thousands)

Country	Sector						
	22 Publishing, recorded media	**92 Cultural and sporting activities**	**74 Other business activities**	**75 Public administration**	**92 Other social and public services**	**Other sectors**	**Total**
Austria	33	53	170	216	34	3,170	**3,678**
Belgium	51	64	228	366	18	3,260	**3,987**
Denmark	48	58	148	156	29	2,269	**2,708**
Finland	39	56	137	118	39	1,944	**2,333**
France	224	384	1,363	2,070	280	18,434	**22,755**
Germany	513	563	1,984	2,996	418	29,615	**36,089**
Greece	41	67	179	277	16	3,360	**3,940**
Ireland	19	38	91	74	13	1,358	**1,593**
Italy	181	203	1,055	1,813	100	17,265	**20,618**
Luxembourg	2	2	10	16	1	144	**176**
Netherlands	123	158	627	541	68	6,087	**7,605**
Portugal	39	51	169	298	28	4,244	**4,830**
Spain	153	241	742	884	57	11,696	**13,773**
Sweden	62	108	258	201	50	3,375	**4,054**
United Kingdom	428	758	1,911	1,632	241	22,391	**27,361**
EU	**1,958**	**2,804**	**9,071**	**11,659**	**1,391**	**128,614**	**155,498**

Source: Eurostat - Labour Force Survey.

Table A2.3: Employment Growth by NACE Sectors1995-99
annual % increase

Country	Sector						
	22 Publishing, recorded media	**92 Cultural and sporting activities**	**74 Other business activities**	**75 Public administration**	**92 Other social and public services**	**Other Sectors**	**Total**
Austria	-5.2	1.1	6.1	-2.3	2.8	-0.1	**0.0**
Belgium	4.8	3.4	7.3	-1.3	-6.2	1.2	**1.3**
Denmark	1.4	2.9	5.5	-0.2	-2.8	0.8	**1.0**
Finland	6.1	8.2	7.1	-0.4	5.7	3.6	**3.7**
France	-1.0	1.6	3.4	0.0	1.0	0.7	**0.8**
Germany	-1.0	6.8	5.9	-1.2	-0.4	0.0	**0.2**
Greece	4.7	2.1	7.3	0.5	9.3	0.4	**0.8**
Ireland	3.5	6.4	11.4	1.4	1.3	6.0	**6.0**
Italy	-2.6	9.3	11.6	4.2	2.0	0.0	**0.8**
Luxembourg	8.1	5.5	9.1	0.9	20.6	1.7	**2.1**
Netherlands	-1.3	6.3	5.7	-0.1	4.2	2.9	**2.9**
Portugal	-1.4	7.2	1.2	-2.3	9.5	2.6	**2.3**
Spain	6.0	3.6	9.1	3.6	5.6	3.1	**3.4**
Sweden	-3.2	0.2	2.6	-1.6	-5.2	-0.5	**-0.5**
United Kingdom	0.2	1.8	4.0	1.4	1.1	1.1	**1.3**
EU	**-0.1**	**3.8**	**5.8**	**0.5**	**0.9**	**0.9**	**1.2**

Source: Eurostat - Labour Force Survey

Table A2.4: Employment by ISCO Occupations 1999
(in thousands)

Country	Occupation							
	243 Archivists, librarians	**245 Writers, creative performing operators**	**347 Artistic, entertainment, sports professions**	**213 Computer professionals**	**313 Optical and electronic equipment operators**	**214 Architects, engineers**	**Other occupations**	**Total**
Austria	3	23	17	12	8	20	3,595	**3,678**
Belgium	9	22	8	60	10	60	3,819	**3,987**
Denmark	4	20	19	34	5	62	2,565	**2,708**
Finland	7	28	13	38	4	52	2,190	**2,333**
France	47	129	70	234	33	459	21,782	**22,755**
Germany	40	229	151	248	76	1,102	34,243	**36,089**
Greece	1	17	23	5	12	58	3824	**3,940**
Ireland	3	8	14	19	3	28	1,518	**1,593**
Italy	18	121	62	12	40	163	20,203	**20,618**
Luxembourg	0	1	1	2	0	4	168	**176**
Netherlands	10	86	54	110	29	178	7,137	**7,605**
Portugal	3	9	14	7	11	40	4,745	**4,830**
Spain	14	50	66	70	29	166	13,378	**13,773**
Sweden	11	53	33	76	14	42	3,826	**4,054**
United Kingdom	65	210	220	474	85	651	25,657	**27,361**
EU	**233**	**1,007**	**764**	**1,400**	**361**	**3,085**	**148,648**	**155,498**

Source: Eurostat - Labour Force Survey.

Table A2.5: Employment Growth by ISCO Occupations 1995-99
annual % increase

Country	Occupation							
	243 Archivists, librarians	**245 Writers, creative performing operators**	**347 Artistic, entertainment, sports professions**	**213 Computer professionals**	**313 Optical and electronic equipment operators**	**214 Architects, engineers**	**Other occupations**	**Total**
Austria	12.3	-0.2	3.5	15.3	8.1	2.8	-0.1	**0.0**
Belgium	15.2	2.0	3.4	11.3	6.6	-2.3	1.2	**1.3**
Denmark	-1.1	2.2	-3.7	13.4	-6.6	6.4	0.8	**1.0**
Finland *	1.8	12.1	13.3	28.0	14.7	1.0	3.4	**3.7**
France	-2.0	2.2	5.9	6.9	0.0	2.2	0.7	**0.8**
Germany	-0.2	5.5	9.3	14.6	8.4	3.2	0.0	**0.2**
Greece	12.4	-2.0	5.3	-2.1	4.1	5.5	0.7	**0.8**
Ireland *	4.3	19.7	8.8	16.1	4.3	4.2	5.9	**6.0**
Italy	1.1	5.4	4.4	4.1	8.8	7.5	0.7	**0.8**
Luxembourg	23.6	4.5	-1.3	16.4	5.8	1.8	2.0	**2.1**
Netherlands	34.2	11.2	-1.3	14.7	5.2	16.2	2.4	**2.9**
Portugal	32.1	-1.5	17.5	19.7	-7.6	-1.3	2.3	**2.3**
Spain	2.2	9.1	11.2	22.6	3.1	7.8	3.3	**3.4**
Sweden *	18.1	8.0	13.3	9.5	-2.7	-0.8	-0.8	**-0.5**
United Kingdom	2.0	3.2	2.8	15.6	-1.9	1.1	1.1	**1.3**
EU	**2.6**	**4.9**	**5.4**	**13.4**	**2.6**	**3.4**	**1.0**	**1.2**

* 1995 value estimated

Source: Eurostat - Labour Force Survey.

Table A2.6: European Union
Occupation by industry matrix 1999
(in thousands)

NACE	Industry	Occupation							
		243 Archivists, librarians	245 Writers, creative performing operators	347 Artistic, entertainment, sports professions	213 Computer professio-nals	313 Optical and electronic equipment operators	214 Architects, engineers	Other occupations	Total
22	Publishing, music recording	3	217	45	16	10	13	1654	**1,958**
92	Cultural and sporting activities	84	525	294	13	98	13	1,777	**2,804**
74	Other business activities	7	90	184	91	95	745	7,858	**9,071**
75	Public administration	48	21	11	61	15	204	11,299	**11,659**
91	Other social services	7	29	8	5	4	12	1,328	**1,391**
	Other sectors	84	125	223	1,214	138	2,099	124,732	**128,614**
	Total	**233**	**1,007**	**764**	**1,400**	**361**	**3,085**	**148,648**	**155,498**

Relative Importance

		Employment (in thousands)	% of total employment
	Cultural industries	4,762	3.06
	Cultural occupations	2,004	1.29
	Cult. occup. in cult. industries	1,167	0.75

Source: Eurostat - Labour Force Survey.

Table A2.7: Women in Cultural Activities
EU-15 – 1999
(in thousands)

NACE	Industry	Occupation							
		243 Archivists, librarians	245 Writers, creative performing operators	347 Artistic, entertainment, sports professions	213 Computer professio-nals	313 Optical and electronic equipment operators	214 Architects, engineers	Other occupations	Total
22	Publishing, music recording	3	217	45	16	10	13	1,654	**1,958**
92	Cultural and sporting activities	84	525	294	13	98	13	1,777	**2,804**
74	Other business activities	7	90	184	91	95	745	7,858	**9,071**
75	Public administration	48	21	11	61	15	204	11,299	**11,659**
91	Other social services	7	29	8	5	4	12	1,328	**1,391**
	Other sectors	84	125	223	1214	138	2,099	124,732	**128,614**
	Total	**233**	**1,007**	**764**	**1,400**	**361**	**3,085**	**148,648**	**155,498**

Relative Importance

		Employment (in thousands)	% of total employment	% share of women
	Cultural industries	4,762	3.06	100.0
	Cultural occupations	2,004	1.29	100.0
	Cult. occup. in cult. industries	1,167	0.75	100.0

Source: Eurostat - Labour Force Survey.

Table A2.8: Self-employed Persons in Cultural Activities
EU-15 1999
(in thousands)

NACE	Industry	Occupation							
		243 Archivists, librarians	245 Writers, creative performing operators	347 Artistic, entertainment, sports professions	213 Computer professionals	313 Optical and electronic equipment operators	214 Architects, engineers	Other Occupa-tions	Total
22	Publishing, music recording	0	41	10	0	3	1	143	**198**
92	Cultural and sporting activities	1	308	113	1	23	2	210	**658**
74	Other business activities	1	55	92	8	62	349	1,633	**2,200**
75	Public administration	0	0	0	1	0	2	31	**34**
91	Other social services	0	4	1	0	0	0	47	**52**
	Other sectors	2	45	47	106	18	175	18,901	**19,293**
	Total	**3**	**453**	**263**	**115**	**106**	**530**	**20,964**	**22,434**

Relative Importance of Self-Employment

		Employment (in thousands)	% share of EU self-employment	% share of employment in cultural ind./occup.
	Cultural industries	855	3.81	18.0
	Cultural occupations	719	3.21	35.9
	Cult. occup. in cult. industries	472	2.10	40.4

Source: Eurostat - Labour Force Survey.

Table A2.9: High Level Education in Cultural Activities
EU-15 1999
(in thousands)

NACE	Industry	Occupation							
		243 Archivists, librarians	245 Writers, creative performing operators	347 Artistic, entertainment, sports professions	213 Computer professionals	313 Optical and electronic equipment operators	214 Architects, engineers	Other occupations	Total
22	Publishing, music recording	2	129	16	9	4	7	251	**418**
92	Cultural and sporting activities	59	278	86	8	34	10	375	**851**
74	Other business activities	6	47	84	67	24	659	2,520	**3,407**
75	Public administration	30	14	4	36	1	173	2,888	**3,146**
91	Other social services	5	16	2	5	0	11	475	**513**
	Other sectors	59	58	52	822	52	1657	23,937	**26,638**
	Total	**160**	**542**	**245**	**947**	**116**	**2,517**	**30,446**	**34,973**

Relative Importance of High Level Education

		Employment (in thousands)	% share of EU empl. with high level educ.	% share of employment in cultural ind./occup.
	Cultural industries	1,269	3.63	26.7
	Cultural occupations	946	2.70	47.2
	Cult. occup. in cult. industries	570	1.63	48.8

Source: Eurostat - Labour Force Survey.

Table A2.10: Temporary Workers in Cultural Activities
EU-15 1999
(in thousands)

NACE	Industry	Occupation							
		243 Archivists, librarians	245 Writers, creative performing operators	347 Artistic, entertainment, sports professions	213 Computer professionals	313 Optical and electronic equipment operators	214 Architects, engineers	Other occupations	Total
22	Publishing, music recording	0	17	2	1	2	1	136	**158**
92	Cultural and sporting activities	12	70	65	0	17	2	306	**473**
74	Other business activities	1	4	13	7	3	30	863	**921**
75	Public administration	9	6	2	7	1	21	1,282	**1,328**
91	Other social services	1	5	1	1	1	2	191	**203**
	Other sectors	12	15	27	83	11	145	13,679	**13,972**
	Total	**36**	**116**	**110**	**99**	**34**	**202**	**16,458**	**17,055**

Relative Importance of Temporary Workers

		Employment (in thousands)	% share of EU temporary workers	% share of employment in cultural ind./occup.
	Cultural industries	631	3.70	13.3
	Cultural occupations	262	1.54	13.1
	Cult. occup. in cult. industries	166	0.97	14.2

Source: Eurostat - Labour Force Survey.

Table A2.11: Publishing, Printing, Recorded Media
NACE 22

Country	% share of national employment 1995	% share of national employment 1999	% share of sectoral EU employment 1995	% share of sectoral EU employment 1999	annual % increase 1995-99
Austria	1.12	0.91	2.1	1.7	-5.2
Belgium	1.12	1.29	2.2	2.6	4.8
Denmark	1.76	1.79	2.3	2.5	1.4
Finland*	1.54	1.69	1.6	2.0	6.1
France	1.06	0.98	11.8	11.4	-1.0
Germany	1.49	1.42	27.2	26.2	-1.0
Greece	0.90	1.05	1.7	2.1	4.7
Ireland (1995 estimated)	1.30	1.18	0.8	1.0	3.5
Italy	1.01	0.88	10.2	9.3	-2.6
Luxembourg	0.97	1.22	0.1	0.1	8.1
Netherlands	1.92	1.62	6.6	6.3	-1.3
Portugal	0.93	0.80	2.1	2.0	-1.4
Spain	1.01	1.11	6.2	7.8	6.0
Sweden (1995 estimated)	1.72	1.54	3.6	3.2	-3.2
United Kingdom	1.63	1.56	21.5	21.9	0.2
EU-15	**1.33**	**1.26**	**100.0**	**100.0**	**-0.1**
EU (in 1'000s)	*1,969.1*	*1,958.2*			

Characteristics of Employment 1999
% share of Publishing, Printing, Recorded Media

	Women	Self-employed	High level education	Temporary workers
Austria	38.1	11.7	10.9	6.6
Belgium	31.6	15.9	36.1	4.7
Denmark	34.0	8.6	17.1	7.7
Finland	44.5	6.9	30.1	9.9
France	36.6	7.8	27.7	10.5
Germany	41.6	7.0	18.2	7.6
Greece	41.7	17.0	18.4	4.6
Ireland	35.5	11.7	7.4	2.4
Italy	29.4	20.8	7.7	5.5
Luxembourg	24.0	8.4	13.8	3.1
Netherlands	31.9	9.7	17.5	13.5
Portugal	34.8	11.0	12.7	15.2
Spain	25.2	13.4	28.7	18.4
Sweden	38.0	7.2	27.4	5.7
United Kingdom	36.3	8.7	25.7	4.1
EU	**36.1**	**10.1**	**21.4**	**8.1**

Source: Eurostat - Labour Force Survey.

Table A2.12: Recreational, Cultural and Sporting Activities
NACE 92

Country	% share of national employment 1995	% share of national employment 1999	% share of sectoral EU employment 1995	% share of sectoral EU employment 1999	annual % increase 1995-99
Austria	1.39	1.45	2.1	1.9	**1.1**
Belgium	1.48	1.60	2.3	2.3	**3.4**
Denmark	1.98	2.12	2.1	2.1	**2.9**
Finland*	2.01	2.38	1.7	2.0	**8.2**
France	1.63	1.69	14.9	13.7	**1.6**
Germany	1.21	1.56	18.0	20.1	**6.8**
Greece	1.61	1.70	2.5	2.4	**2.1**
Ireland*	2.33	2.36	1.2	1.3	**6.4**
Italy	0.72	0.99	5.9	7.3	**9.3**
Luxembourg	1.24	1.42	0.1	0.1	**5.5**
Netherlands	1.82	2.07	5.1	5.6	**6.3**
Portugal	0.88	1.06	1.6	1.8	**7.2**
Spain	1.74	1.75	8.7	8.6	**3.6**
Sweden*	2.58	2.66	4.4	3.8	**0.2**
United Kingdom	2.72	2.77	29.3	27.0	**1.8**
EU-15	**1.63**	**1.80**	**100.0**	**100.0**	**3.8**
EU (in 1,000s)	*2,412.1*	*2,804.1*			
* 1995 estimated					

Characteristics of Employment 1999
% share of Recreational, Cultural and Sporting Activities

	Women	Self-employed	High level education	Temporary workers
Austria	36.2	36.1	24.2	7.6
Belgium	45.5	21.1	32.3	19.5
Denmark	42.3	8.6	26.7	16.4
Finland	54.1	15.7	32.6	25.1
France	44.3	17.4	35.8	24.6
Germany	46.9	26.2	33.9	15.6
Greece	37.3	23.1	25.3	15.7
Ireland	43.1	19.6	6.9	5.1
Italy	40.7	37.7	16.8	15.2
Luxembourg	34.7	11.3	20.0	2.6
Netherlands	47.0	34.6	36.4	13.4
Portugal	40.2	17.5	15.3	24.6
Spain	39.8	16.1	32.0	30.1
Sweden	51.3	18.5	30.7	22.6
United Kingdom	46.2	23.0	29.8	10.1
EU	**44.9**	**23.4**	**30.3**	**16.9**

Source: Eurostat - Labour Force Survey.

Table A2.13: Archivists, Librarians
ISCO 243

Country	% share of national employment 1995	1999	Annual % increase 1995-99
Austria	0.05	0.07	**12.3**
Belgium	0.13	0.22	**15.2**
Denmark	0.17	0.16	**-1.1**
Finland	0.31	0.29	**1.8**
France	0.23	0.21	**-2.0**
Germany	0.11	0.11	**-0.2**
Greece	0.02	0.03	**12.4**
Ireland (estimated)	0.18	0.17	**4.3**
Italy	0.09	0.09	**1.1**
Luxembourg	0.08	0.18	**23.6**
Netherlands	0.04	0.13	**34.2**
Portugal	0.02	0.06	**32.1**
Spain	0.11	0.10	**2.2**
Sweden (estimated)	0.13	0.26	**18.1**
United Kingdom	0.23	0.24	**2.0**
EU	**0.14**	**0.15**	**2.6**
EU (in 1'000s)	*210.9*	*233.4*	

Characteristics of Employment 1999
% share of Archivists, Librarians

	Women	Self-employed	High level education	Temporary workers
Austria	50.5	0.0	51.1	0.0
Belgium	76.4	5.8	69.9	5.1
Denmark	69.6	0.0	100.0	5.7
Finland	85.8	0.0	62.1	18.8
France	85.6	0.0	75.6	25.7
Germany	64.5	1.1	64.4	14.2
Greece	79.1	0.0	100.0	12.6
Ireland	74.9	3.8	15.0	3.7
Italy	72.7	5.2	38.9	17.0
Luxembourg	47.7	0.0	92.8	0.0
Netherlands	77.9	3.3	95.5	1.3
Portugal	81.7	0.0	51.6	19.4
Spain	73.3	5.7	88.8	36.1
Sweden	67.9	0.0	73.5	17.6
United Kingdom	70.1	0.0	66.0	8.5
EU	**73.5**	**1.3**	**68.4**	**15.5**

Source: Eurostat - Labour Force Survey.

Table A2.14: Writers, Creative and Performing Operators
ISCO 245

Country	% share of national employment 1995	1999	Annual % increase 1995-99
Austria	0.64	0.64	**-0.2**
Belgium	0.53	0.55	**2.0**
Germany	0.52	0.64	**5.5**
Denmark	0.69	0.73	**2.2**
Spain	0.30	0.36	**9.1**
Finland*	0.87	1.19	**12.1**
France	0.54	0.57	**2.2**
Greece	0.49	0.44	**-2.0**
Ireland*	0.32	0.53	**19.7**
Italy	0.49	0.58	**5.4**
Luxembourg	0.37	0.40	**4.5**
Netherlands	0.83	1.13	**11.2**
Portugal	0.22	0.19	**-1.5**
Sweden*	0.95	1.31	**8.0**
United Kingdom	0.71	0.77	**3.2**
EU	**0.56**	**0.65**	**4.9**
EU (in 1'000s)	*830.0*	*1,006.9*	

* estimated

Characteristics of Employment 1999
% share of writers, creative and performing operators

	Women	Self-employed	High level education	Temporary workers
Austria	30.9	59.5	45.3	3.1
Belgium	33.6	41.0	60.8	7.8
Germany	38.5	43.0	56.0	13.3
Denmark	41.8	26.7	56.1	11.8
Spain	41.2	35.8	69.7	23.2
Finland	47.0	28.3	42.8	13.7
France	34.9	31.2	58.1	20.4
Greece	42.5	35.2	36.7	11.9
Ireland	37.9	36.7	4.4	6.3
Italy	39.1	62.6	29.8	6.4
Luxembourg	31.4	22.7	70.9	4.1
Netherlands	43.0	48.5	64.1	12.2
Portugal	43.7	47.0	31.4	21.1
Sweden	49.3	27.7	57.2	8.3
United Kingdom	35.7	54.6	59.4	5.5
EU	**38.7**	**45.0**	**53.8**	**11.5**

Source: Eurostat - Labour Force Survey.

Table A2.15: Artistic, Entertainment, Sports Professions
ISCO 347

Country	% share of national employment 1995	1999	annual % increase 1995-99
Austria	0.41	0.47	**3.5**
Belgium	0.18	0.19	**3.4**
Denmark	0.83	0.69	**-3.7**
Finland (estimated)	0.41	0.58	**13.3**
France	0.25	0.31	**5.9**
Germany	0.30	0.42	**9.3**
Greece	0.49	0.59	**5.3**
Ireland (estimated)	0.80	0.89	**8.8**
Italy	0.26	0.30	**4.4**
Luxembourg	0.33	0.29	**-1.3**
Netherlands	0.84	0.71	**-1.3**
Portugal	0.17	0.29	**17.5**
Spain	0.36	0.48	**11.2**
Sweden (estimated)	0.48	0.81	**13.3**
United Kingdom	0.76	0.80	**2.8**
EU	**0.42**	**0.49**	**5.4**
EU (in 1'000s)	*618.7*	*764.0*	

Characteristics of Employment 1999
% share of Artistic, Entertainment, Sports Professions

	Women	Self-employed	High level education	Temporary workers
Austria	45.4	27.3	18.3	18.7
Belgium	22.8	17.7	12.9	40.7
Denmark	62.3	24.4	18.7	4.6
Finland	42.5	21.6	27.3	26.6
France	40.6	24.5	37.7	16.4
Germany	44.5	42.5	39.8	12.3
Greece	39.9	19.6	35.2	26.6
Ireland	45.1	32.9	7.5	4.6
Italy	38.2	37.2	18.8	17.5
Luxembourg	24.2	6.5	0.0	17.5
Netherlands	52.8	29.4	13.7	13.5
Portugal	28.4	28.8	17.1	25.5
Spain	39.1	25.2	27.7	36.7
Sweden	42.5	38.3	20.5	20.0
United Kingdom	43.3	39.4	41.5	4.5
EU	**43.1**	**34.4**	**32.0**	**14.4**

Source: Eurostat - Labour Force Survey.

Table A2.16: Computer Professionals
ISCO 213

Country	% share of national employment 1995	1999	annual % increase 1995-99
Austria	0.18	0.32	**15.3**
Belgium	1.03	1.50	**11.3**
Denmark	0.78	1.25	**13.4**
Finland (estimated)	0.70	1.63	**28.0**
France	0.81	1.03	**6.9**
Germany	0.40	0.69	**14.6**
Greece	0.13	0.12	**-2.1**
Ireland (estimated)	0.82	1.18	**16.1**
Italy	0.05	0.06	**4.1**
Luxembourg	0.70	1.18	**16.4**
Netherlands	0.94	1.45	**14.7**
Portugal	0.08	0.15	**19.7**
Spain	0.26	0.51	**22.6**
Swede (estimated)	1.28	1.87	**9.5**
United Kingdom	1.02	1.73	**15.6**
EU	**0.57**	**0.90**	**13.4**
EU (in 1'000s)	*846.5*	*1,400.0*	

Characteristics of Employment 1999
% share of computer professionals

Country	Women	Self-employed	High level education	Temporary workers
Austria	6.6	2.4	100.0	4.6
Belgium	18.7	4.2	83.0	4.5
Denmark	11.0	9.1	53.8	0.2
Finland	22.4	3.5	57.2	11.5
France	20.0	0.0	83.8	4.2
Germany	16.3	10.3	60.5	8.3
Greece	16.1	3.9	100.0	2.4
Ireland	30.7	11.2	5.9	0.5
Italy	26.2	25.8	100.0	5.8
Luxembourg	18.2	9.2	92.3	4.7
Netherlands	13.7	6.6	65.9	4.8
Portugal	16.0	11.3	82.9	25.2
Spain	12.6	3.7	72.0	23.0
Sweden	25.4	7.2	69.2	4.6
United Kingdom	21.2	12.8	63.0	7.0
EU	**19.0**	**8.2**	**67.7**	**7.1**

Source: Eurostat - Labour Force Survey.

Table A2.17: Optical and Electronic Equipment Operators
ISCO 313

Country	% share of national employment		annual % increase
	1995	1999	1995-99
Austria	0.16	0.22	**8.1**
Belgium	0.20	0.25	**6.6**
Germany	0.15	0.21	**8.4**
Denmark	0.27	0.20	**-6.6**
Spain	0.22	0.21	**3.1**
Finland (estimated)	0.13	0.19	**14.7**
France	0.15	0.15	**0.0**
Greece	0.26	0.30	**4.1**
Ireland (estimated)	0.19	0.18	**4.3**
Italy	0.14	0.19	**8.8**
Luxembourg	0.20	0.23	**5.8**
Netherlands	0.35	0.38	**5.2**
Portugal	0.34	0.23	**-7.6**
Sweden (estimated)	0.38	0.35	**-2.7**
United Kingdom	0.35	0.31	**-1.9**
EU	**0.22**	**0.23**	**2.6**
EU (in 1'000s)	*324.9*	*360.6*	

Characteristics of Employment 1999
% share of Optical and Electronic Equipment Operators

	Women	Self-employed	High level education	Temporary workers
Austria	32.1	40.3	24.0	4.3
Belgium	22.7	46.0	47.2	0.0
Denmark	27.1	9.8	25.0	22.3
Finland	24.9	36.8	20.5	8.5
France	30.5	26.1	31.3	26.5
Germany	45.6	22.4	34.6	12.4
Greece	28.7	30.3	13.6	7.8
Ireland	41.4	22.0	4.9	2.4
Italy	17.9	53.8	6.8	6.1
Luxembourg	16.7	27.9	14.0	0.0
Netherlands	54.0	27.0	46.3	0.0
Portugal	44.4	9.7	12.4	3.6
Spain	25.8	23.5	55.2	21.5
Sweden	18.9	42.5	29.5	6.4
United Kingdom	41.0	26.5	36.3	3.4
EU	**35.9**	**29.4**	**32.2**	**9.5**

Source: Eurostat - Labour Force Survey.

Table A2.18: Architects, Engineers and Related Professions
ISCO 214

Country	% share of national employment 1995	1999	annual % increase 1995-99
Austria	0.49	0.55	**2.8**
Belgium	1.75	1.52	**-2.3**
Denmark	1.86	2.28	**6.4**
Finland *	2.50	2.24	**1.0**
France	1.91	2.02	**2.2**
Germany	2.71	3.05	**3.2**
Greece	1.22	1.47	**5.5**
Ireland *	1.91	1.78	**4.2**
Italy	0.61	0.79	**7.5**
Luxembourg	2.42	2.39	**1.8**
Netherlands	1.44	2.34	**16.2**
Portugal	0.95	0.82	**-1.3**
Spain	1.02	1.20	**7.8**
Sweden *	1.04	1.03	**-0.8**
United Kingdom	2.41	2.38	**1.1**
EU	**1.82**	**1.98**	**3.4**
EU (in 1'000s)	*2,700.3*	*3,085.5*	

* estimated

Characteristics of Employment 1999
% share of architects, engineers

Country	Women	Self-employed	High level education	Temporary workers
Austria	15.8	22.1	99.0	3.2
Belgium	10.0	23.3	96.9	3.4
Denmark	13.2	11.9	96.5	2.4
Finland	11.0	4.2	84.0	10.2
France	11.5	7.6	73.0	4.3
Germany	13.3	14.8	86.9	8.2
Greece	18.5	45.3	100.0	2.6
Ireland	15.1	16.8	2.9	3.1
Italy	13.4	60.1	100.0	3.3
Luxembourg	9.9	19.1	94.2	2.3
Netherlands	19.9	14.6	66.6	7.8
Portugal	20.3	11.1	97.7	15.4
Spain	10.3	20.9	100.0	15.8
Sweden	19.9	10.1	90.2	4.7
United Kingdom	6.5	16.0	70.0	4.0
EU	**12.0**	**17.2**	**81.6**	**6.5**

Source: Eurostat - Labour Force Survey.

Table A2.19: Hours Worked by ISCO Occupations 1999
(usual hours worked per week, average)

Country	Occupation							
	243 Archivists, librarians	245 Writers, creative performing operators	347 Artistic, entertainment, sports professions	213 Computer professionals	313 Optical and electronic equipment operators	214 Architects, engineers	Other occupations	Total
Austria	38.6	38.4	35.2	42.8	37.9	42.0	38.1	**38.0**
Belgium	37.9	38.0	32.6	38.7	40.6	45.5	38.4	**38.7**
Denmark	34.6	34.4	28.8	39.2	38.4	40.0	34.6	**34.8**
Finland	35.6	34.9	31.9	37.9	39.9	39.0	36.6	**36.3**
France	32.0	37.4	37.6	42.9	42.4	42.9	37.2	**38.6**
Germany	35.2	36.5	37.5	39.6	37.8	40.4	34.7	**36.9**
Greece	31.5	38.9	35.6	41.0	41.9	41.9	41.3	**39.9**
Ireland	31.6	31.8	34.4	37.5	36.7	40.8	34.2	**34.8**
Italy	31.3	36.1	33.9	39.7	39.1	39.2	37.0	**36.5**
Luxembourg	40.2	42.1	35.5	38.8	42.2	41.1	37.3	**38.5**
Netherlands	30.3	28.2	32.3	30.1	35.5	31.0	30.6	**30.8**
Portugal	35.6	33.4	33.4	37.7	41.3	39.7	37.7	**37.1**
Spain	34.6	34.5	33.0	39.4	40.0	38.8	37.3	**36.6**
Sweden	34.8	37.9	33.0	40.6	36.3	38.0	32.5	**34.9**
United Kingdom	30.2	34.2	34.3	37.6	38.6	40.0	32.1	**34.4**
EU	**33.4**	**35.4**	**34.4**	**38.5**	**39.2**	**39.6**	**35.7**	**36.2**

Source: Eurostat - Labour Force Survey.

Table A2.20: Hours Worked by Employment Status, Job Duration and Educational Level 1999
(usual hours worked per week, EU average)

	Occupation							
	243 Archivists, librarians	**245 Writers, creative performing operators**	**347 Artistic, entertainment, sports professions**	**213 Computer professionals**	**313 Optical and electronic equipment operators**	**214 Architects, engineers**	**Other occupations**	**Total**
Employment status								
Self-employed	33.0	36.6	39.8	42.4	43.5	44.9	42.6	**41.1**
Employees	33.5	34.8	32.0	37.7	37.5	38.1	33.8	**34.7**
Educational level								
High	33.9	35.4	34.9	38.9	39.6	40.1	37.0	**37.1**
Low	34.7	34.8	32.5	36.5	38.5	38.5	34.5	**34.8**
Medium	33.1	35.2	34.4	38.4	39.2	38.1	35.8	**36.1**
Job Duration								
Permanent	35.8	36.3	34.7	38.9	38.0	39.2	36.1	**36.7**
Temporary	29.2	32.5	27.7	35.6	35.3	35.7	32.4	**32.3**
Gender								
Female	31.5	33.3	31.3	35.5	36.8	36.1	32.2	**33.0**
Male	36.7	37.3	37.2	40.1	40.7	41.9	39.2	**39.1**
EU average	**33.4**	**35.4**	**34.4**	**38.5**	**39.2**	**39.6**	**35.7**	**36.2**

Source: Eurostat - Labour Force Survey.

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Exploitation and development of the job potential in the cultural sector in the age of digitalisation

FINAL REPORT

European Digital Culture – employment situation, job potential and job requirements

(Module 3)

commissioned by

European Commission
DG Employment and Social Affairs

presented by

MKW Wirtschaftsforschung GmbH, Munich

WIMMEX AG, Munich

June 2001

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1. Introduction

The aim of this Module is to provide an in-depth analysis of the new skills required in the cultural sector. In doing so, specific emphasis must be placed on new professions and their skill requirements in the audio-visual, multimedia and music industries. This should also prove helpful in identifying the practical steps to be taken in creating an international comparative data base.

The following approach proved to be of key importance in achieving the goals of this study:

To begin with, a world-wide panel was put together portraying as accurately as possible all relevant multimedia industries. Here, the study's emphasis was on companies in the EUR-15 region. By collecting information from individual businesses concerning their main area(s) of activity, it was possible to derive an extremely in-depth aggregate classification of industries and sector structure (cf. Tables). This was imperative, since no official public statistics are able to provide us with usable relevant data for our specific sphere of study.
In addition, data was collected on the share of creative workers, women and freelancers among the total workforce, as well as information on expectations for future business and employment developments. In order to identify the most current qualification requirements, we surveyed companies, asking them to rate various given qualification features in terms of their relative importance for their company, as well as in terms of their present and expected future demand for these qualifications.

In a second step, within the framework of a total survey, WIMMEX determined the total number of companies in the EUR-15 region which are active in the sectors under study. In addition, approximately 400 million (!) web sites were identified, analysed and evaluated. Due to the limitations of the study's prescribed budget, it was not possible to realise an in-depth classification similar to the one derived for the WIMMEX Panel. This, however, is not significant for addressing the central questions defined in the commissioning of this study.

With the help of the WIMMEX total survey, projections could be made for all of the qualitative and quantitative variables determined from the WIMMEX Panel. Therefore, all of the statements made in this study are representative, particularly with regard to the expected job potentials within the areas studied. Nevertheless, within this context, we urgently recommend continual, ongoing observation, since these market segments have proven to be extremely dynamic in nature.

Although the initial plan was to conduct two surveys, in agreement with the European Commission it was finally decided to carry out only one survey, which, however, would be much more detailed in its structure and would be run among a much higher number of companies. The Expert Panel was finally expanded on a world-wide scale to include, in particular, member companies from North America and the Asian-Pacific region. Consequently, the panel was named "**WIMMEX** Panel" (**W**orld-wide **I**nternet **M**ulti-**M**edia **Ex**perts).

The survey of the WIMMEX Panel was conducted between August and December. At the time of the survey analysis, the panel already included 2,970 member companies.

2. Digital Culture and TIMES sector in the EUR-15 countries

In order to create the WIMMEX Panel, it was initially necessary to define a precise categorisation of industries whose companies should be included in the panel. A necessary prerequisite of this categorisation, however, was a redefining of the cultural sector, which is closely interconnected to the audio-visual, multimedia and music industries. This was necessary because the existing definitions of cultural sector and cultural industries (see Module 1) were too heterogeneous and imprecise when it came to studying interconnections to the new media industries and issues such as job potential and new training and skills requirements.

Therefore, it was not our intention in this study to take up one of the various existent demarcations and categorisations of the cultural sector as described in Module 1. In order to talk about the development of job potential, it was necessary to leave the classic, more narrowly defined art and culture sector, and look instead for new synergetic effects between old and new culture.

When taking into consideration the central questions of this study, we were able to arrive at no better working definition than that of **digital culture** (DIGICULT). DIGICULT, by the way, is also the title of a programme run by the Directorate General "Information Society".

We have chosen to define the sphere of digital culture as those sectors of business and culture which

1.) are already very closely related to the multimedia sector qua definitionem (e.g. the whole film industry) or

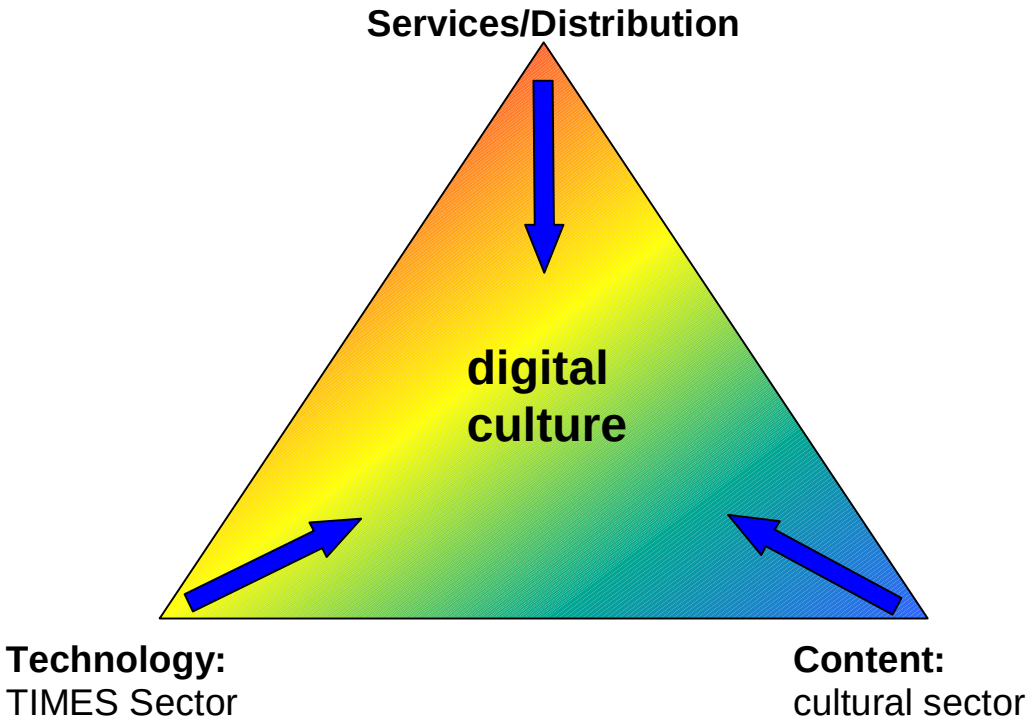
2.) those sectors of industry and culture which have received new expanded possibilities by implementing these technologies. These are sectors which have had to make use of the new technologies in order to achieve their social, cultural or economic tasks, whether this refers to museums and libraries or to the preservation of historical monuments.

The increasingly used generic term **TIMES sector** (**T**elecommunication, **I**nternet, **M**ultimedia, **E**-commerce, **S**oftware and **S**ecurity) is used to cover the whole audio-visual sector, i.e. the entire multimedia sector including cultural industry areas such as TV, publishing, and the music industry.

The great advantage of this sectoral definition is that it covers all value adding chains – horizontal and vertical - i.e. not only the sector we are interested in, with its content-oriented, creative activities, but also the whole sector of infrastructure suppliers and devices. We find this is important insofar as the borders between these area of activities are fading even in smaller companies. In addition, the content-oriented, creative share of employees in companies which traditionally have had a more technical focus is also constantly increasing.

Digital culture in this context is the result of an interaction between traditional culture (content), the TIMES sector (technology) and services/distribution (see Figure 3.1).

Figure 3.1: Digital culture - joint forces of content, technology and services



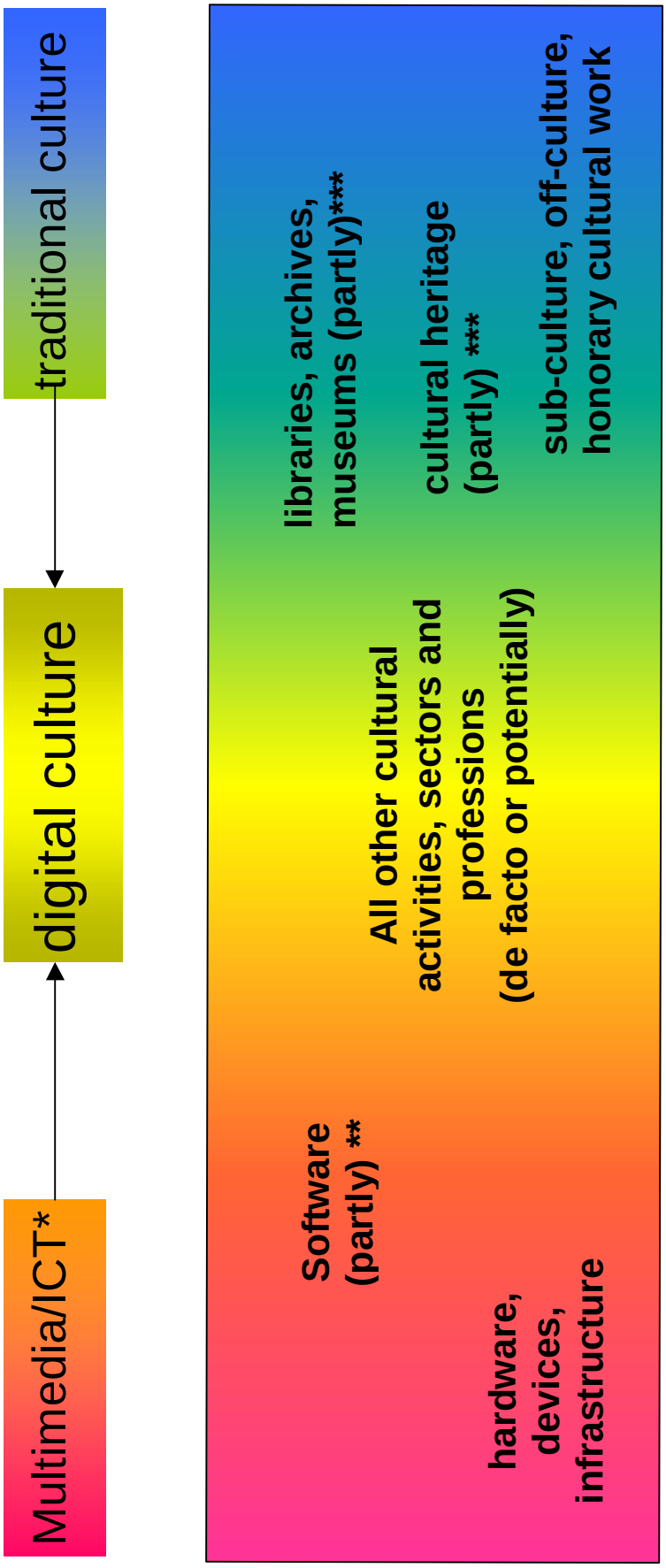
It goes without saying that not all sectors defined according to this demarcation can be studied equally. From the aspects of employment policy, which is central to our discussions here, only those sectors and areas can be taken into consideration which **work market-oriented in the long run and, accordingly, also see themselves as part of the regular labour market (regardless of whether this is public-based, public-private or private)** – although this is certainly not always the approach taken by many creative artists and those who represent their interests.

The corresponding creative artists and their sectors are rarely accessible, making it difficult to include them in labour market and employment policy discussion: to a certain extent they are intangible, certainly for the framework of this study.

The difference between traditional and digital culture is important in this context, because in the new or digital culture, new jobs are emerging at the interfaces between the different sectors, and not within the classic segments.
Traditional cultural sectors can profit from the developments at the interfaces, with additional jobs also being generated in traditional culture as a result of the developments in digital culture.
The borders here between old and digital culture are just as fuzzy as those between industry and services. The decisive element is to focus on the activity and its integration in the value adding chain.

Figure 3.2 illustrates this complex interaction. Traditional culture and multimedia are like two ends of a spectrum which "flow together" in the broad sector of digital culture. There are no distinct separations and limits, the transitions are fluid. The proximity of the different sub-sectors of multimedia and traditional culture to digital culture varies and cannot be located precisely. Only a few sub-sectors can be excluded from digital culture (e.g. parts of cultural heritage), at least in terms of their relevance to employment potential.

Figure 3.2: Digital Culture - interface and synergy between traditional culture and Multimedia/ICT*



* ICT = Information and Communication Technology

** e.g software for e-business applications doesn't belong to digital culture, neither does software for the development of embedded systems. On the other hand, software for training and qualification activities belongs to digital culture.

*** Regarding museums, archives and libraries, digitalisation is in full swing. Nevertheless, in many cases this is merely an operational, technological process (needing new qualifications but not more staff). On the other hand, if a museum is presented via the Internet, this could mean that new forms of presentation have to be developed with the possibility of reaching formerly marginalised social groups. Such examples would be part of digital culture. The same also applies, in part, to cultural heritage.

As already mentioned, the job potential in the cultural sector cannot simply be reduced to the digital culture, since new developments are not generated by an "artistic big bang" but by interaction between actors in the old and digital culture. This also has clear dimensions when it comes to the actual physical location:

In the boom towns of the New Economy, the traditional culture scene is also in high gear. Festivals and events offering consumers a mixture of original and elite culture are enjoying new broad-based demand from Sicily to Finland. In these centres, the New Economy is giving clear growth signals to the traditional culture sector, i.e. the scene in the New Economy also induces traditional demand.

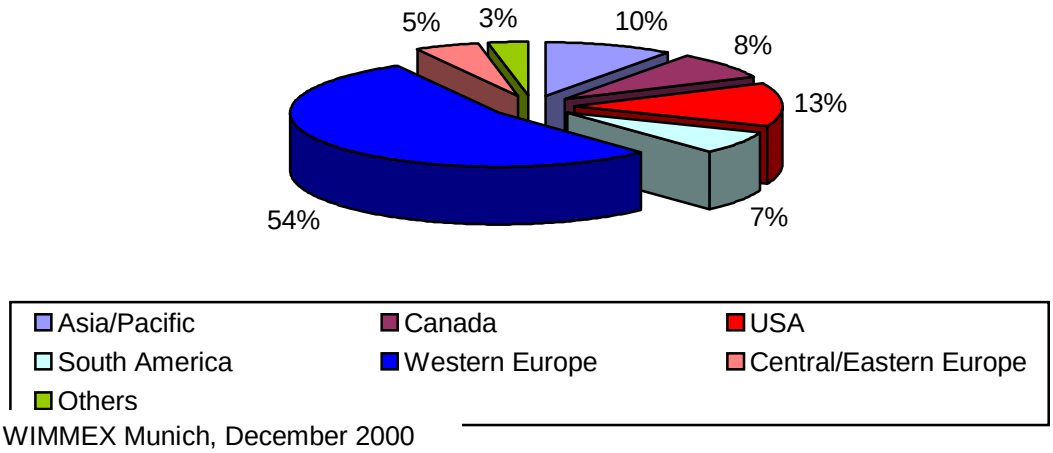
However, one problem for both traditional and digital cultures is that the digital culture has already reached a degree of regional concentration which can be seen as unhealthy, at least in the growth phase.

3. Structure of the WIMMEX Panel

3.1 Regional and sectoral structure of the WIMMEX Panel

The majority of the 2,970 WIMMEX Panel member companies, namely 54%, are located in Western Europe (see Figure 3.3).
In light of its regional composition, the Panel is naturally not representative from a global standpoint. However, due to the nature of the tasks presented by this study, the over-representation of the EU region was necessary in order to achieve the most satisfactory composition possible within the individual European countries. Particular emphasis was laid on gaining a sizeable share of companies from the USA, in order to be able to compare the most recent developments in the EU with those from the main competitor in the TIMES sector and digital culture, the USA.

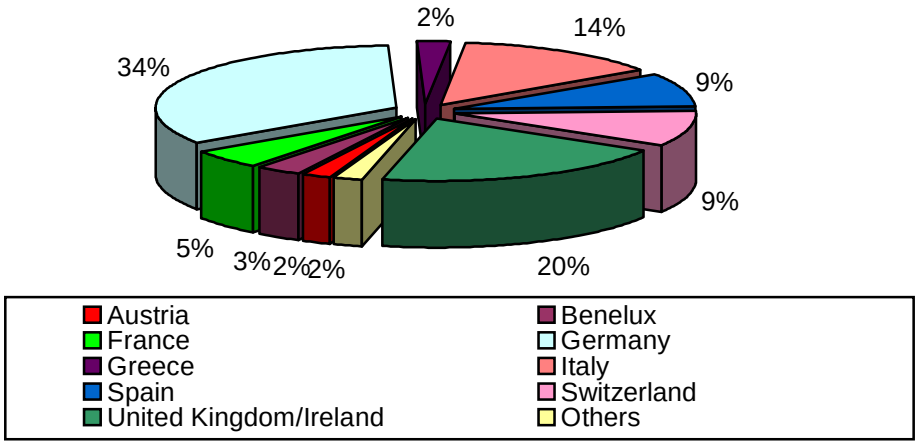
Figure 3.3: Panel composition according to World Regions
Population: 2,970 TIMES companies world-wide



Source: WIMMEX Munich, December 2000

The biggest share of the Western European companies is to be found in the EU (see Figure 3.4). To a large degree, the regional composition of the Western European WIMMEX partners corresponds to the respective economic strengths of the European countries in question. At present, it is merely the French companies which are comparatively under-represented.

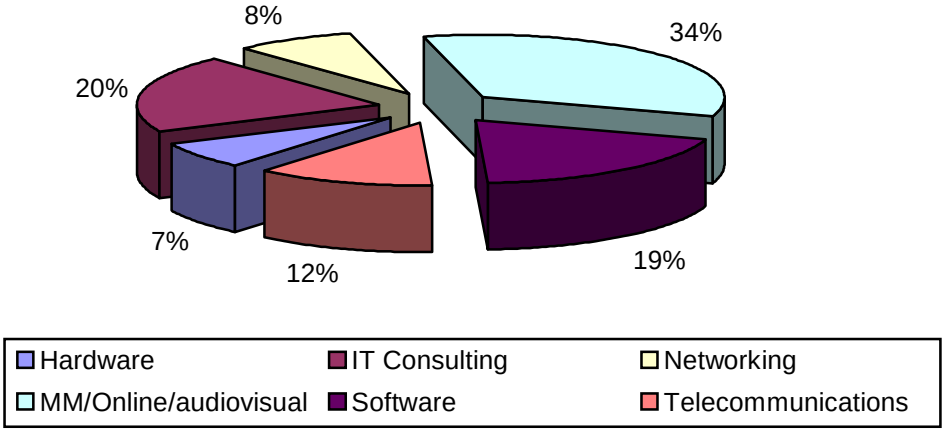
Figure 3.4: Regional structure of panel companies in Western Europe
Population: 1,604 TIMES companies



Source: WIMMEX Munich, December 2000

The **sectoral structure** of the WIMMEX Panel according to the main areas of activity of its member companies is shown in Figure 3.5. With 34%, the companies from the "Multimedia/Online/Audio-visual Industry" are most strongly represented. It was our intention to make sure that this area of activity was well-represented in the panel for several reasons. On the one hand, a large job potential for cultural workers is concentrated within this sector and on the other hand, the total share of Multimedia/On-line/Audio-visual companies within the TIMES sector is only 9.2%, making this steering intervention absolutely necessary in order to achieve a sufficient representation of this significant sub-sector.

Figure 3.5: Main areas of activity of companies in the WIMMEX Panel
Population: 2,970 companies world-wide

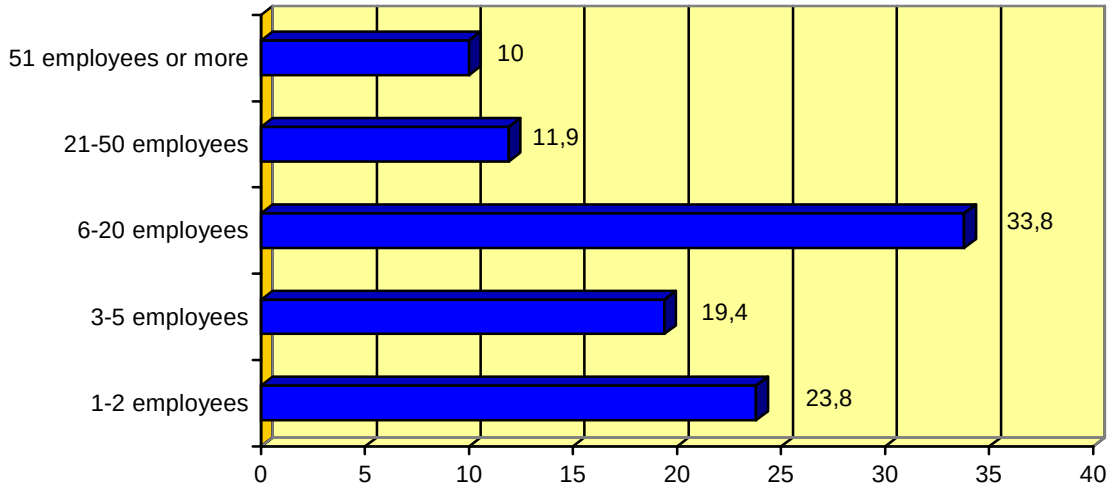


Source: WIMMEX Munich, December 2000

3.2 Size of EUR-15 TIMES companies in the WIMMEX Panel

The EUR-15 TIMES companies in the WIMMEX Panel are characterised by the existence of a great number of small and medium-sized enterprises (SMEs). Only 10 percent of the EUR-15 companies in the WIMMEX Panel have more than 50 employees (see Figure 3.6).

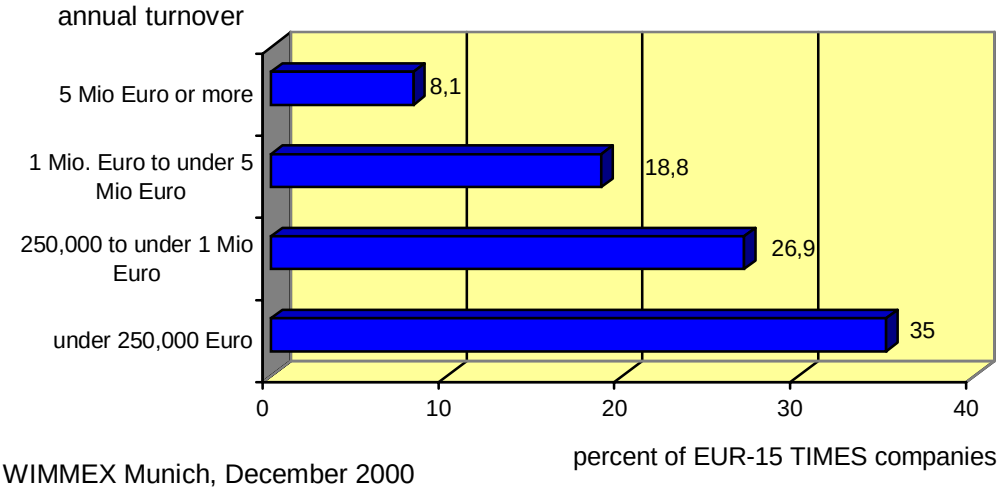
Figure 3.6: Size of EUR-15 TIMES companies, according to number of employees
Population: EUR-15 TIMES companies (unweighted)
Unit: number of employees



Source: WIMMEX Munich, December 2000 percent of EUR-15 TIMES companies

As a result of this structure, the annual turnover of most of the TIMES companies is not very high, or rather not yet. Figure 3.7 clearly shows that 61.9 percent of the TIMES companies in the European Union have an annual turnover below one million Euro, while 35 percent of the TIMES companies have a turnover which is even less than 250,000 Euro.

Figure 3.7: Size of EUR-15 TIMES companies in the WIMMEX Panel according to annual turnover
Population: EUR-15 TIMES companies (unweighted)
Unit: annual turnover



Source: WIMMEX Munich, December 2000

4. WIMMEX total survey: size and structure of the EUR-15 TIMES sector

At present, there are no statistics available to even come close to reliably describing the size and structural composition of the TIMES sector in the EUR-15 countries. Therefore, WIMMEX carried out an empirical total survey of all EUR-15 TIMES companies in March 2001. This total survey, based on an analysis of 400 million (!) web sites, represents, at the same time, an important methodological addition to the WIMMEX Panel. With the help of the complete compositional overview of the EUR-15 TIMES sector derived from this total survey, it is possible to weight all of the qualitative and quantitative results from the WIMMEX Panel survey, thus making them representative for the entire TIMES sector.

This total survey resulted in a total number of 1,551,908 companies which are active in the TIMES sector in the EUR-15 countries (status: March 2001). Just under 90% of these companies employ at the most 50 workers (see Table 3.1).

Table 3.1: Structure of EUR-15 TIMES companies by number of employees in March 2001

Population: 1,551,908 companies

Classes by number of employees	Number of companies	Share in percent
1-2 employees	295,568	19.0%
3-5 employees	233,678	15.1%
6-20 employees	566,081	36.5%
21-50 employees	252,262	16,3%
>50 employees	204,318	13,2%
Total	**1,551,908**	**100%**

Source: WIMMEX Munich, March 2001

In addition, with the help of the results of the WIMMEX Panel survey, it was possible to project the numbers of workers within the various main areas of activity of the TIMES sector for the EUR-15 countries. These main areas of activity within the TIMES sector were initially put together by WIMMEX as a foundational prerequisite for this study (see Figure 3.8).

Figure 3.8: Detailed Structure of the WIMMEX Panel

Numerous expert interviews held during the course of this study have shown that among the detailed list of areas of activity found in Figure 3.8, the areas „Multimedia“ and „Software“ are most significant for cultural workers, since these two areas require the greatest amount of creativity and content. With approximately 12 million employees, they represent over half of all employees in the EUR-15 TIMES sector (see Table 3.2). Therefore, we will concentrate on these two main areas of activity in the remaining course of the study.

Table 3.2: Number of employees in selected EUR-15 TIMES companies in March 2001
Population: 1,551,908 companies

Areas of activity	Number of employees	Share of total EUR-15 TIMES employees
Multimedia	1,952,437	9%
Software	10,426,629	48%
Total	**12,379,066**	**57%**

Source: WIMMEX Munich, March 2001

The high share, as well as the actual total number of small businesses and multimedia companies in the TIMES sector does not contradict current official statistics but can be explained when taking into consideration the following factors :

- Statistical offices on the national and transnational level only include companies with a particular number of employees in their official statistics, which means that a large portion of the small and medium-sized enterprises (SMEs) in the TIMES sector are not recorded.
- Due to the lack of options for statistical categorisation, multimedia and/or TIMES companies are often not recorded as such, but more frequently categorised under other business groups. For example, a company which carries out market research exclusively through the Internet is registered as a market research institute or as a management consulting firm. An advertising agency which specialises in presentations via the Internet is statistically recorded as a „company-related service“ The same is true for companies which have shifted their emphasis to the TIMES sector in response to market demands.

These deficits are overcome by the WIMMEX total survey and the WIMMEX Panel survey, since data on the main areas of activity are collected (for details, see Figure 3.8). This system of categorisation, which is both up-to-date and functional, is indispensable for a reliable observation and assessment of an extraordinarily dynamic area such as the TIMES sector.

5. Personnel situation in the TIMES sector

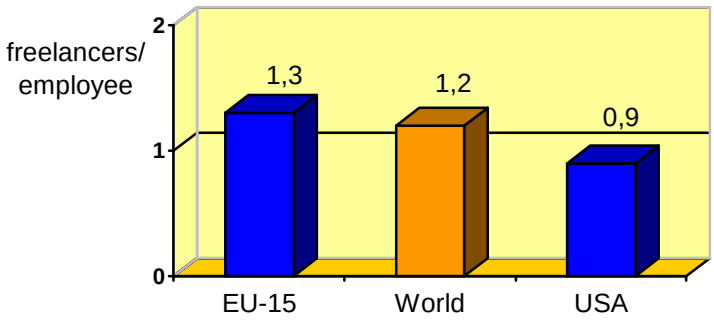
5.1 Freelancers in TIMES companies – a world-wide comparison

The survey carried out by the WIMMEX Panel ascertained for the first time the extent to which freelancers are working in the TIMES sector, in relation to regular employees in the companies. A world-wide comparison to other major regions showed that the share of freelancers is highest in the European Union, only just exceeded by Eastern Europe (see Figure 3.9). For every one regular employee in the TIMES sector, there are 1.3 regularly working freelancers.

Therefore, when compared world-wide, the number of free-lancers per regular employee in the EUR-15 region is above average and almost 50% higher than in the USA.

Figure 3.9: Freelancers per employee in TIMES companies in a world-wide comparison

Population: TIMES companies world-wide (weighted by company)
Unit: freelancers per employee



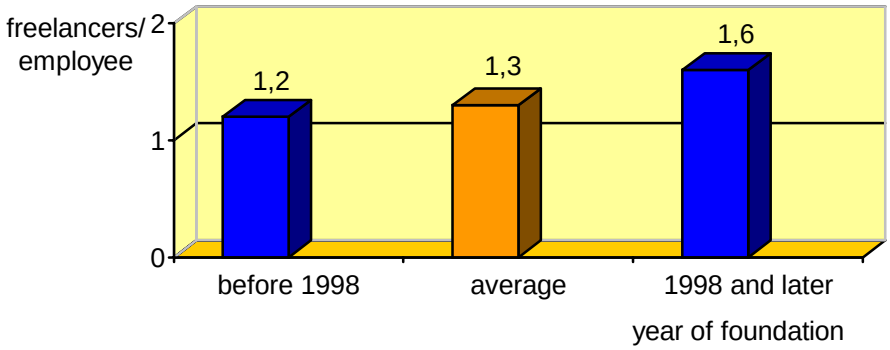
Source: WIMMEX Munich, December 2000

In our opinion, this is due, among other reasons, to the fact that the US market in the TIMES sector is already gradually consolidating – on a very high level – whereas the dynamic growth in the EUR-15 region caused by the immense need to catch up with global developments will continue to increase in the coming years.

One additional factor indicative of this is that the younger a company is, the greater its share of freelancers (see Figure 3.10). In the EU, there are 1.6 freelancers per employee in companies founded 1998 or later, while in companies founded before 1998, the ratio is 1.2:1.

Figure 3.10: Freelancers per employee in EUR-15 TIMES companies, according to year of company foundation

Population: EUR-15 TIMES companies (weighted by company)
Unit: freelancers per employee



Source: WIMMEX Munich, December 2000

The results of the WIMMEX Panel survey conclude that start-up companies which are still small and young have the highest share of freelancers, while the demand for freelancers within established companies which are already older and larger is lower.

These results were confirmed by two other facts:

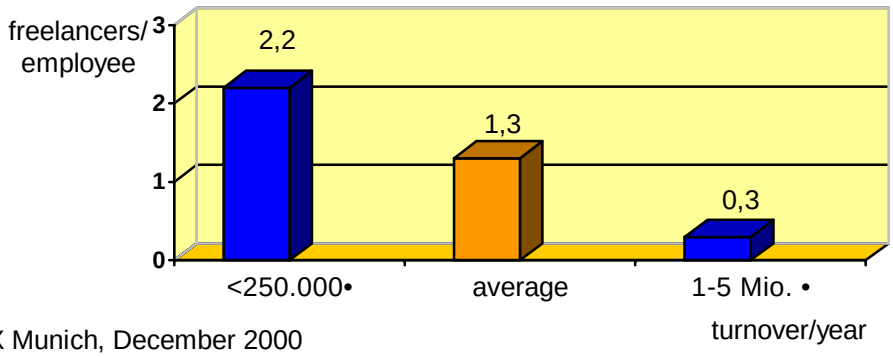
- **Annual turnover**

  Companies with less than € 250,000 annual turnover have the largest share of freelancers (see Figure 3.11). In the EU, there are 2.2 freelancers per employee. By comparison, once turnover reaches a value of € 1 – 5 million, the number of freelancers per employee falls to 0.3.

  Thus, in small and medium-sized companies, the share of freelancers is indirectly proportional to company turnover.

Figure 3.11: Freelancers per employee in EUR-15 TIMES companies, according to company turnover

Population: EUR-15 TIMES companies (weighted by company)
Unit: freelancers per employee



Source: WIMMEX Munich, December 2000

- **Investment as percentage of turnover**

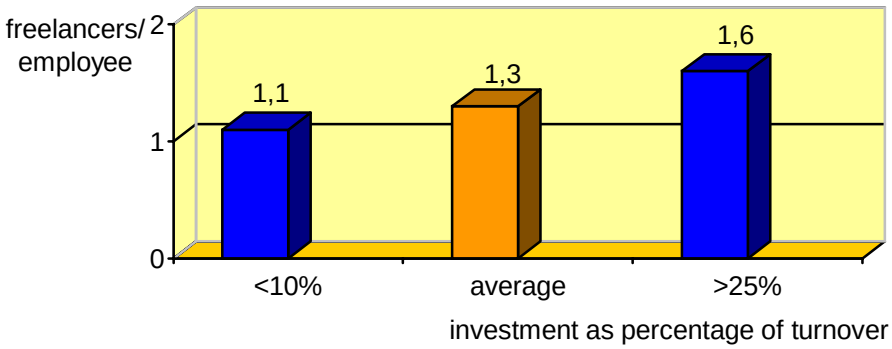
  Companies with the highest investment in terms of percentage of turnover also have the highest share of freelancers (see Figure 3.12). In the EU, the number of freelancers per regular employee in companies with investments representing less than 10% of their turnover is only 1.1, while this number is 1.6 for companies whose investments exceed 25% of their annual turnover.

  It is obvious that companies with high investments co-operate more with freelancers than less investing companies. In the TIMES sector, the highest investments are necessary among start-up companies whose turnovers have not yet reached high levels and which therefore can't afford the salaries of full-time regular employees. To the same extent to which turnover increases, the share of investment as measured by percentage of turnover decreases and the more a company is able to hire regular employees.

Figure 3.12: Freelancers per employee in EUR-15 TIMES companies, according to investment as percentage of turnover

Population: EUR-15 TIMES companies (weighted by company)

Unit: freelancers per employee



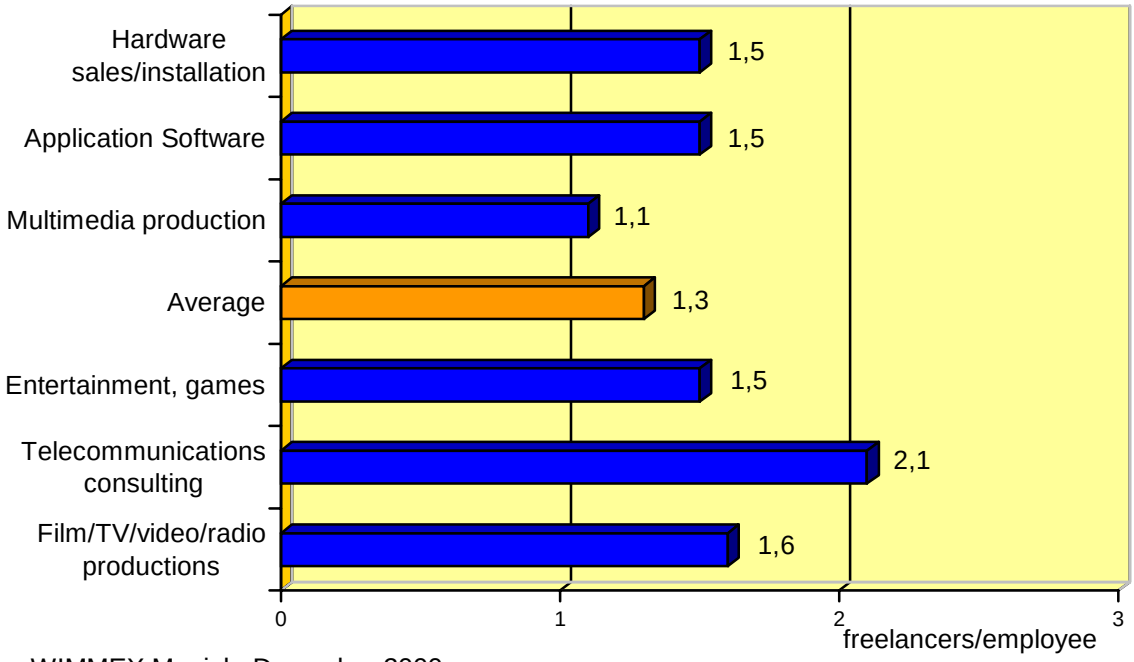
Source: WIMMEX Munich, December 2000

5.2 Freelancers in TIMES companies – a sectoral comparison

With regard to the share of freelancers, significant differences can be found between the products and services areas of TIMES companies (see Figure 3.13). The highest share of freelancers is in Telecommunications consulting, with 2.1 freelancers per regular employee. Multimedia production represents the only products/services area with a share of freelancers below the European average, which indicates that the level of production in this area is the largest of all products/services subdivisions, as is clearly indicated by its statistical weight.

Figure 3.13: Freelancers per employee in EUR-15 TIMES companies, according to products/services

Population: EUR-15 TIMES companies (weighted by company)
Unit: freelancers per employee



Source: WIMMEX Munich, December 2000

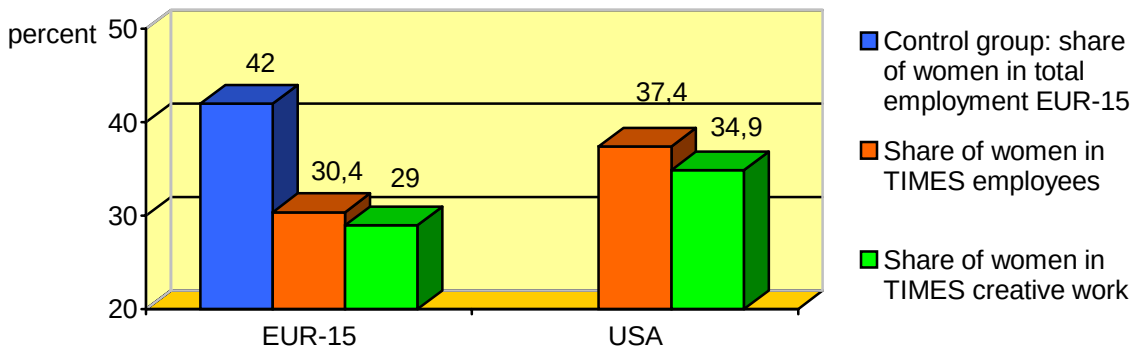
5.3 Women clearly under-represented in the whole TIMES sector

The percentage of women working in the TIMES sector in the European Union is only 30.4% (see Figure 3.14). This is about 11 percentage points less than the women's share of all European jobs, which is indicated by the control group in Figure 3.14. The situation is even worse when it comes to **creative occupations** within the companies. Here women account for only just over 29% of these jobs.

Compared to the USA, which globally has the highest share of women employees (women account for 37.4% of all jobs in the TIMES sector, and for 34.9% of the creative jobs within the TIMES sectors), the EU is far behind, lagging by about 6 percent points in each case.

Figure 3.14: Percentage of women employed in the TIMES sector (red) and in TIMES creative occupations (green), in economic world regions

Population: TIMES companies world-wide (weighted by company)
Unit: percent



Source: WIMMEX Munich, December 2000

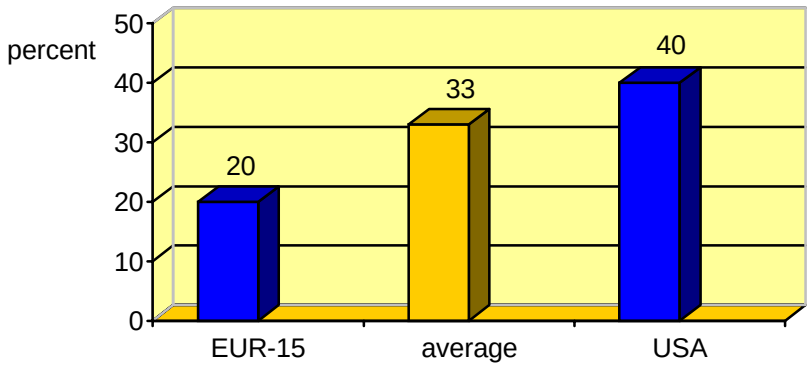
This disturbing development also continues when it comes **to setting up new businesses.** Taking into account the results of GEM[2)], we estimate that the percentage of new companies set up by women in Europe is approximately one third of that in the USA.

In the USA, 40% of all new companies in the TIMES sector are set up by women, compared to a global average of 33% and a European average of only 20% (see Figure 3.15). Germany shows the poorest figures in this category, with women making up only 13% of total company start-ups.

[2)] cfr. Wirtschaftswoche, no. 33 dated 10.8.2000

Figure 3.15: Percentage of companies set up by women in the TIMES sector (EUR-15 and USA)

Population: TIMES companies world-wide (weighted by company)
Unit: percent



Source: WIMMEX Munich, December 2000

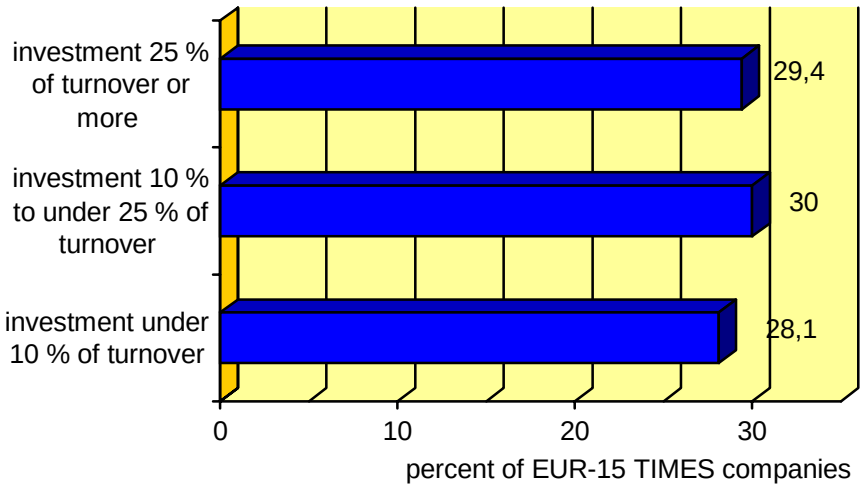
The discussions held throughout this study with educational establishments, Public Employment Services and companies have also shown that **women are completely under-represented throughout the whole education and further training sector.** Even in courses and training events with comparatively little technical content (as it is often presumed that women have poorer access to technical matters) but with more creative, content-oriented subject matter, women only account for 20-25% of the work force.

6. Economic situation and trends

Despite the stock exchange crash on the New Market in the second half of the year 2000, the economic situation of companies in the TIMES sector is still quite good. The losses can be seen as a compensation for the previous year's extremely high profits and don't alter the fact that the TIMES sector remains the sector with the most dynamic growth rates in the European Union.

This fact is clearly confirmed by the results of the WIMMEX Panel survey. The TIMES companies in the European Union reinvest a very high amount of their annual turnover (see Figure 3.16). More than half of the companies in the panel reinvest more than 10 percent of their annual turnover, while about 30 percent of the companies invest more than 25 percent of their annual turnover.

Figure 3.16: Investment of EUR-15 TIMES companies as percentage of turnover
Population: EUR-15 TIMES companies (weighted by company)
Unit: percent

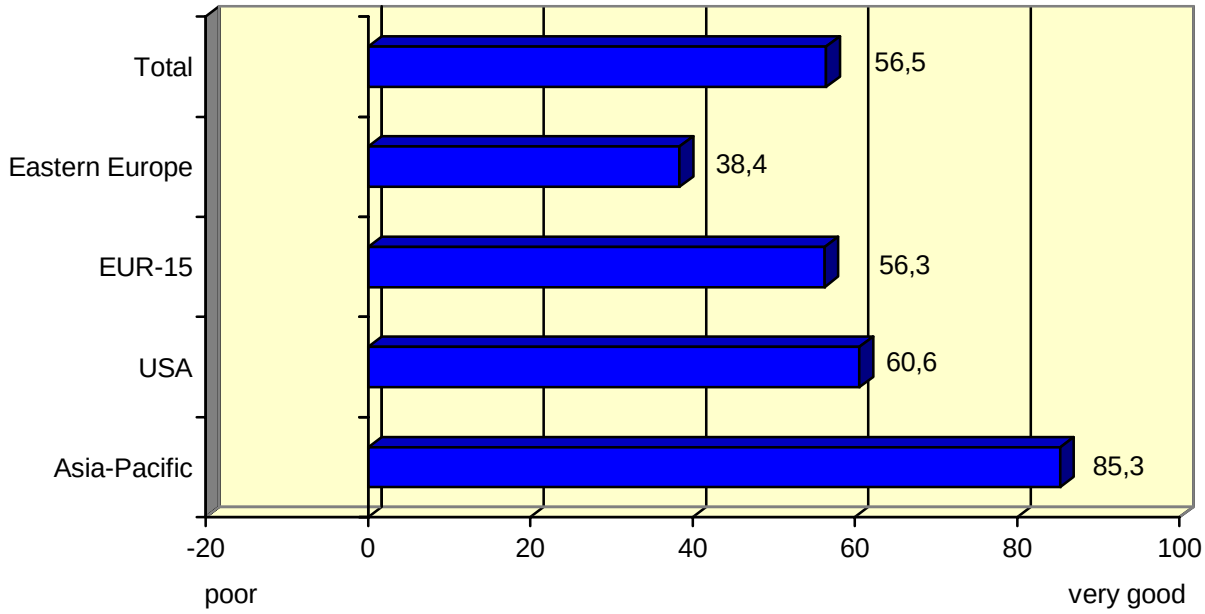


Source: WIMMEX Munich, December 2000

In view of these high investments, it is not surprising that expectations concerning the development of the business situation in the companies of the TIMES sector are quite positive. Figure 3.17 clearly shows that in the most important economic world regions positive business expectations prevail, although the European TIMES sector is clearly behind the USA and, even moreso, behind Asia. Nevertheless, with 56.3, its balance on a ranking scale between –100 (poor) and + 100 (very good) can still be described as extremely good.

Figure 3.17: Business situation in TIMES companies in the next three months (October – December 2000), according to economic world regions

Population: TIMES companies world-wide (weighted by company)
Balance: -100 (poor) to +100 (very good)

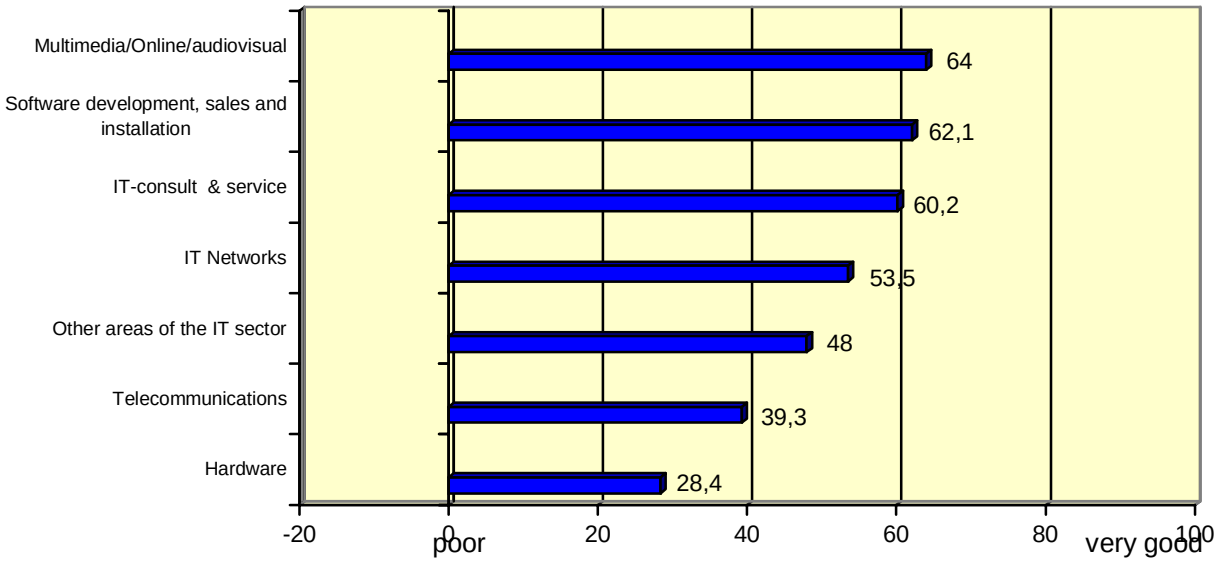


Source: WIMMEX Munich, December 2000

If we look at the business expectations in the TIMES sector of the European Union, we can see that there are big differences in the various main areas of activity (see Figure 3.18). The most positive expectations can be found in the “Multimedia/online/audio-visual” and “Software development, sales and installation” sectors, i.e. in the most content- and creativity-oriented areas of activity (see Chapter 4). In comparison, while positive expectations can also be found in highly technically oriented areas such as Hardware and Telecommunications, they are clearly at a lower level.

Figure 3.18: Business situation in EUR-15 TIMES companies in the next three months (October – December 2000), according to main areas of activity

Population: EUR-15 TIMES companies (weighted by company)
Balance: -100 (poor) to +100 (very good)



Source: WIMMEX Munich, December 2000

Figures 3.16, 3.17 and 3.18 show the results of the survey on business expectations for the last quarter of the year 2000, whereby it should be mentioned here that these are only values of short-term validity, since long-term business developments are subject to unforeseeable variations. A valid long-term prognosis would require regular and continual economic monitoring. The WIMMEX Panel is quite able to provide such regular monitoring.

However, even when taking into consideration the short-term validity of the results described above, positive tendencies can clearly be observed in the EUR-15 TIMES sector.

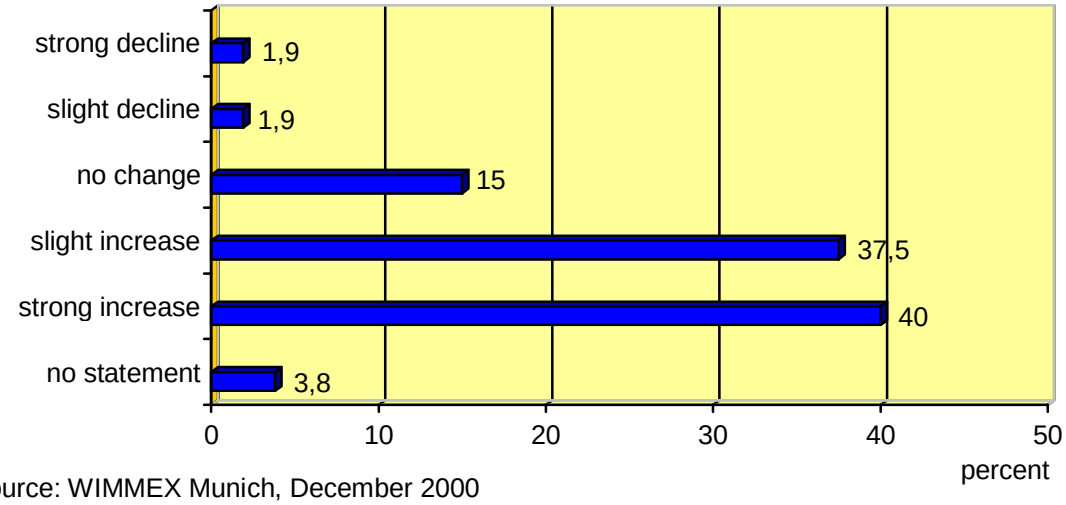
7. Employment situation and job potential

Experience in the United States shows that 40 - 60% of all newly created jobs (depending on demarcation) in recent years are to be seen directly or indirectly within the context of the TIMES sector. The expectations for a similarly high job potential in the TIMES sector of EUR-15 countries are confirmed by the results of the WIMMEX Panel.

According to our survey, the EUR-15 TIMES companies see quite positive opportunities for development in the years to come (see Chapter 6). This is related to their expectations for the future development of employees in their companies: Almost 80 % of all EUR-15 TIMES companies expect some increase in mid-term employment, with most of them even expecting a strong employment increase (see Figure 3.19).

Figure 3.19: Medium-term employment expectations in EUR-15 TIMES companies in percent

Population: EUR-15 TIMES companies (weighted by company)



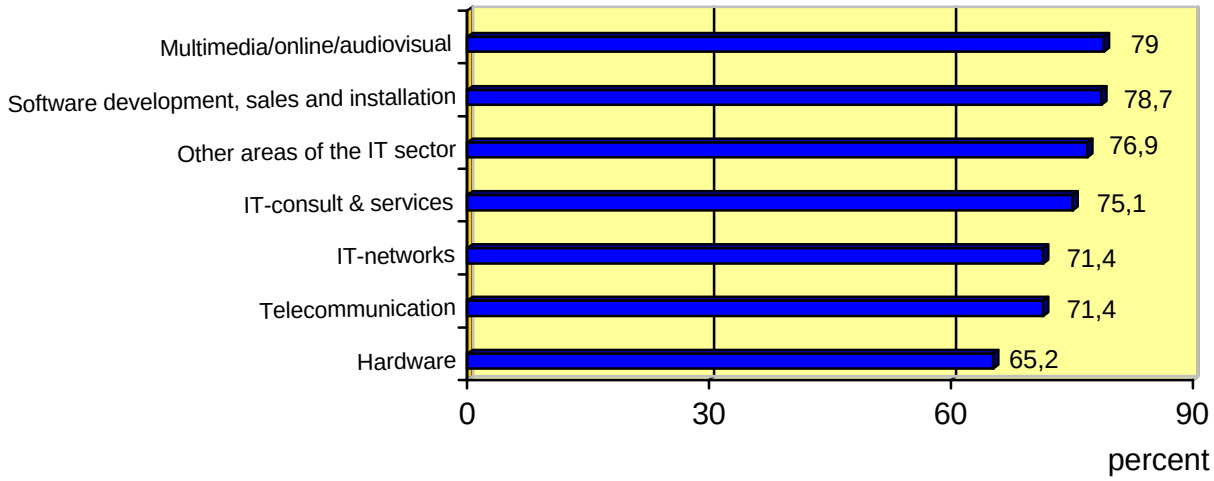
Source: WIMMEX Munich, December 2000

Expectations are particularly high in those companies whose main areas of activity are in “Multimedia/online/audio-visual” and “Software development, sales and installations” (see Figure 3.20), which is no surprise since these are the same two areas of activity in which business expectations are most positive (see Chapter 6).

When considering job potentials of cultural workers, it is important to note in this context that these areas with the highest demand for personnel are also the most content- and creativity-oriented areas of activity (see Chapter 4). This development results in good employment possibilities for cultural workers, who bring with them a great potential for creativity and content.

Figure 3.20: Medium-term expectations of employment growth are to be found in ...% of EUR-15 TIMES companies

Population: EUR-15 TIMES companies (weighted by company)
Unit: percent



Source: WIMMEX Munich, December 2000

It is not sufficient simply to say „The future outlook for employment in digital culture is good." It is much more essential to ask the question „How good?" In other words, how many new jobs will be created in EUR-15 TIMES companies in the foreseeable future, let's say, within the next 10 years? Within this context, we are especially focusing on the areas „Multimedia" and „Software", which are the most interesting sectors for cultural workers. As we know from Chapter 4, the current number of employees in these two areas is 12.4 million (WIMMEX, March 2001).

Most studies performed in the last few years assume that the annual employment growth rate in the TIMES sector within the next years will range between 10 and 15 percent. However, since we must count on saturation effects and economic fluctuations, we have chosen to develop an extremely conservative prognosis (see Table 3.3). For the next 3 years, we chose a relatively small figure of 10 percent employment growth, while for the next ten years we assume a steady decline in employment growth from 10 to 3 percent.

Table 3.3: Employment growth in EUR-15 Multimedia and Software companies between 2001 and 2011 in percent and total number of employees

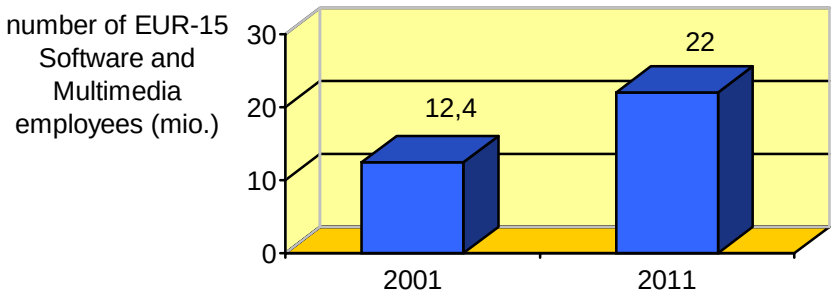
Population: 1,551,908 companies

Year	Annual employment growth (in %)	Annual employment growth in total numbers (in millions)	Total number of employees in EUR-15 Multimedia and Software companies (in millions)
2001			12.4
2002	10 %	1.2	13.6
2003	10 %	1.4	15.0
2004	10 %	1.5	16.5
2005	6 %	1.0	17.5
2006	6 %	1.0	18.5
2007	6 %	1.1	19.6
2008	3 %	0.6	20.2
2009	3 %	0.6	20.8
2010	3 %	0.6	22.4
2011	3 %	0.6	22.0
Total		**9.6**	**22.0**

Source: WIMMEX Munich, March 2001

Based on the March 2001 figure of 12.4 million employees in EUR-15 Multimedia and Software companies, and assuming a declining annual growth rate over the next 10 years from 10 percent in 2001 to just 3 percent in 2011, we can estimate 22 million jobs in the year 2011. Thus, approximately 9.6 million new jobs will be created in the TIMES sectors of multimedia and software in the next decade (see Figure 3.21).

Figure 3.21: Number of EUR-15 Multimedia and Software employees in 2001 and 2011 (in millions, weighted)



Source: WIMMEX Munich, March 2001

It goes without saying that not all of these 9.6 million new jobs are suited for cultural workers. Only those jobs that truly require creativity and content are of interest in this context, not

those jobs representing the organisational and technical overhead that is necessary for the creation and distribution of any product (e.g. secretary, cleaning personnel, pure technicians etc.).

Therefore it is necessary to

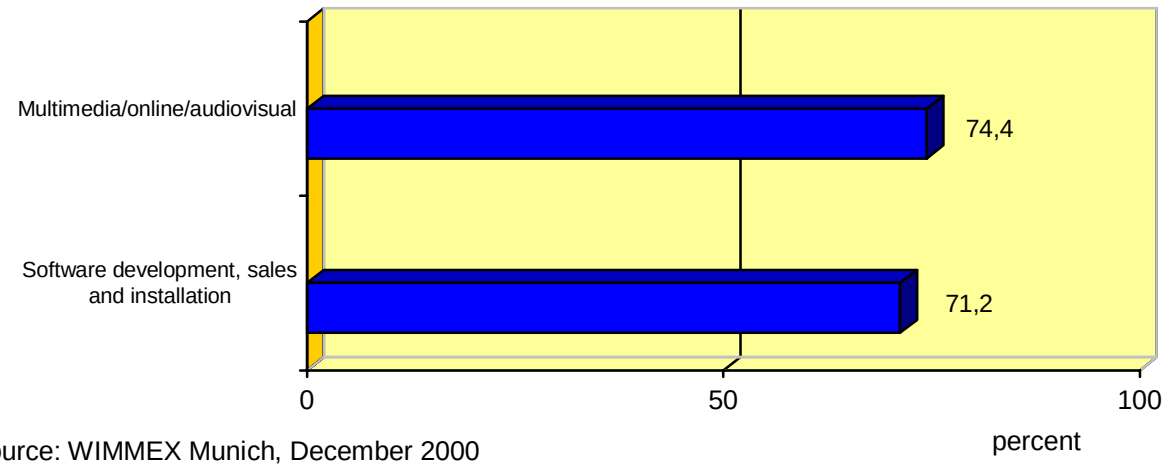
- define which workers are to be counted as “creative workers”
- and to determine the actual number of creative workers in Multimedia and Software.

We define “creative workers” as those workers who spend at least 50 percent of their working time for creative occupations. “Creative occupations” are all those occupations that focus on the creation of new products and services, not on the administration of existing ones. According to our definition, the design of a web site is considered a creative occupation, whereas the update of a data base is not creative work. It has to be pointed out, however, that it is extremely difficult to distinguish between “creative” and “non-creative” work. For example, it is not clear if a programmer is a creative worker or not, since this usually depends on the actual work that a programmer is doing.

This differentiation can not be done by a researcher at his or her desk. Only the employers and employees themselves can assess the actual share of creative workers in their workforce. Therefore, in the WIMMEX survey we asked employers to do exactly this, namely to assess the share of creative workers in their total number of employees. The results of the survey are depicted in Figure 3.22, which shows the share of creative workers in EUR-15 multimedia and software companies.

Figure 3.22: Share of creative workers in EUR-15 Multimedia and Software companies in percent

Population: EUR-15 Multimedia and Software companies (weighted by company)
Unit: percent



Source: WIMMEX Munich, December 2000

Based upon these results, we can assume that approximately 30 percent of EUR-15 Multimedia and Software employees are not involved in **any** type of creative work. Among the remaining 70 percent, it is clear that not all creative occupations are related to the creation of cultural products and services.

However, it is practically impossible to distinguish on a European scale between creative occupations that are culturally related and those which are not culturally related. This is particularly true for the huge number of small and medium-sized companies (SMEs) in this sector; when there are just three or four employees in a company, every employee must be able to cover several different occupations within the team, creative as well as non-creative,

those which are culturally related as well as those which are not. Therefore, we can assume that, in all likelihood, the figure of 70% is an accurate estimation of the share of workers who are expected to perform creative work.

We can now use this percentage to determine the total number of expected new jobs in Software and Multimedia, the main areas of activity which can be considered suitable for cultural workers.

As shown in Figure 3.21, we can assume approximately 9.6 million new jobs in these two main areas of activities. Taking 70 percent of these 9.6 million jobs , we arrive at approximately 6.8 million potential new jobs for creative workers.

These figures already reveal plenty of scope for action in employment policy, particularly in view of the fact that the lack of qualified personnel within the EUR-15 region, when compared internationally, constitutes a major obstacle to growth in the TIMES sector (see Table 3.4).

Table 3.4: Hindrance to Business Activity in the TIMES sector in economic world regions

Population: TIMES companies world-wide (weighted by company)

Economic world regions	Lack of available qualified personnel an impediment to growth for ... % of companies	
	1st Half of 2000	2nd Half of 2000
Asia/Pacific	41%	38%
Central/Eastern Europe	19%	22%
Western Europe	41%	40%
USA	36%	33%
Germany	*37%*	*41%*
WORLD	38%	36%

Source: WIMMEX Munich, December 2000

On a global scale, there is a very high demand for personnel in all branches of the TIMES sector, although a slight easing of the situation could be ascertained for the second half of 2000 in comparison to the first six months of the year. Nevertheless, a shortage of qualified personnel remains the number one hindrance to growth.

In Western Europe, the situation is not as uniform as on a world-wide scale. Significant demand for additional personnel can be ascertained in Great Britain/Ireland and in Germany, while in contrast, declining trends can be observed, in particular in Italy (although here, too, shortage of personnel remains the greatest obstacle to growth).

For the EUR-15 region, the shortage of qualified workers in the IT sector in 1998 was estimated at 500 thousand persons. According to EITO, this personnel deficiency could possibly increase to 1.6 million jobs by 2002, if the necessary training and adjustment initiatives are not implemented (Source: EU Commission, EITO 1999).

8. Qualifications required by the TIMES sector

8.1 New qualification requirements

According to the results of our study as described in Chapter 7, we can count on at least 6.8 million new content and creativity-oriented job positions within EUR-15 TIMES companies being made available in the next 10 years, positions which could be filled by cultural workers. In the same chapter, however, we underlined the fact that there is already a great shortage of qualified workers in the TIMES sector on the European job market.

Thus, those shaping future European employment policy are faced with the opportunity to solve two problems at the same time:

- to reduce the shortage of qualified workers in the TIMES sector,
- by opening up new TIMES-oriented areas of activity to cultural workers.

In order to achieve both employment policy goals (reduction of the need for qualified workers in the TIMES sector, development of new employment potentials for cultural workers), it is essential to recognise which key qualifications are expected from employees in the TIMES sector. Therefore, within the framework of the WIMMEX Panel survey, we gathered information on the most sought-after qualifications in TIMES companies. The seven most sought-after qualifications are listed in descending order of importance in Figure 3.23.

Figure 3.23: The 7 most sought-after qualifications in the TIMES Sector (in descending order of importance)

Population: 2,970 companies world-wide

Source: WIMMEX Munich, December 2000

When analysing these most sought-after qualifications, two important facts should be should be taken into consideration:

- **Short-term validity of results**

The validity of these results are only short-term since the TIMES sector is subject to very rapid changes in technology and personnel. Consequently, the requirements for the qualifications of staff are also changing continuously. For this reason, it is important to analyse the qualification requirements on a regular basis and take them into account for the development of respective training measures.

The key qualifications of the TIMES sector shown in Figure 3.23, which were analysed in the context of the WIMMEX Panel survey, are valid for the second half of the year 2000. The key qualifications for the year 2001, however, could already be different. For example, as a result of UMTS technology and m-commerce (mobile commerce) which has developed out of this technology, completely new professions are presently coming into being which are still almost totally unknown. This means that only regular monitoring is able to register these changes. The WIMMEX Panel is capable of doing this, due to its flexible nature regarding the classification and the qualifications features of the TIMES sector.

- **Growing importance of creativity and content**

At first glance, it may seem that the qualifications listed in Figure 3.23 are purely technical in nature; however, they often require a large measure of creativity and content. This is particularly true for the two qualifications which are currently most sought after, namely WEB Publishing and WEB Design, although it also applies to WEB Multimedia and even to Java Programming.

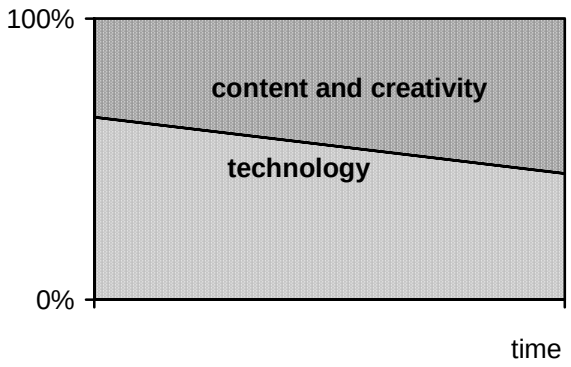
This is not surprising when one takes into consideration that all types of software products require a strong communicative element. In other words, it is already necessary in the development stage of these products to consider how a PC user will receive and implement a particular product. This ranges from such simple things as making sure that help texts within the program are easy to understand or that the icons used are visually appealing, all the way to more complicated issues such as the designing of complex customer-oriented products. Creativity which is ideally oriented to customer needs is, in the end, a crucial prerequisite for the successful marketing of a multimedia or software product.

This also explains why, within the context of numerous expert interviews and the analysis of hundreds of good practices in the area of training and further education (see Module 4), we discovered that the relationship between basic technical knowledge and creativity is currently being turned upside down in the cultural sector. While content-oriented activities and qualifications are becoming increasingly important, the demand for the "pure" technician is decreasing.

The processes of market adjustment currently taking place within the so-called New Economy are merely a development which underlines this shift in emphasis. The euphoria which was still breaking out last year has been followed by disillusionment. The trend toward quality is unmistakable. This can be seen most impressively in the area of e-commerce. Products do not simply sell themselves because they are marketed via the Internet. On the contrary, if products are presented in an unappealing way and are poorly marketed, they have contra-productive consequences for the company. If a company is unprofessional in the way it presents itself on the Internet, the image of the total company suffers. While for the Old Economy, product design was the motor behind sales in a tight market, in the meantime, the importance of WEB Design has been identified as the decisive marketing instrument for the New Economy. This is resulting in a disproportionately strong shift in the direction of creative workers, unfortunately even at the expense of conventional programmers.

The rule of the thumb which can be applied to this sector is that the entire technical segment including technology, infrastructure, hardware and printing will undergo a period of relative stagnation or even decline (with regard to both jobs and contribution to the value adding process), whereas all content-oriented (i.e. creative) occupations and areas (Web design, advertising, publishing, media, education, entertainment, etc.) will continue to show high growth rates (see Figure 3.24).

Figure 3.24: Growing importance of content and creativity in the TIMES sector



This development offers excellent employment opportunities, above all to cultural workers. They have content-oriented and creative skills which are imperative for the further development of digital culture and the TIMES sector.

8.2 Consequences for the training of cultural workers

The new qualification requirements of the TIMES sector do not in any way mean that culture is being put at the service of technology. Much more this points to a “culturalisation” of the New Economy.

As a result of the interaction with multimedia technologies, job profiles for cultural workers are changing. Cultural workers can only participate in the exploitation of the job potential existent within digital culture when they adapt their qualifications and their working methods to the continuously developing qualification requirements of the digital culture.

This development has three important aspects for the training of cultural workers:

- **New job profiles of cultural workers**

  The “old” job profiles of cultural workers are rapidly developing into new profiles which are often not yet regulated. This means that no official and certified training courses exist. These new job profiles are also much more diverse in character than the “old” ones. In addition, there are completely new job profiles emerging, such as “creativity consultant”, for which no equivalent among the “old” profiles can be found. These completely new profiles do not require a specific education - they are principally open to all artists who are flexible enough to take on new opportunities. Table 3.5 gives an overview of these developments.

Table 3.5: Examples for the development of "Old" into "New" cultural job profiles

"Old" cultural job profiles	"New" cultural job profiles
Actor	Media actor • Camera actor • Acoustic actor • Virtual studio actor • Motion capture actor • Moderator in virtual media sets
Journalist	Multimedia editor Video reporter
Author	CBT-Author
Designer	• Installation designer (galleries, museums, night clubs etc.) • Multimedia designer • Screen designer • Computer Animation designer • Lighting designer • Performance designer
Typesetter	Media editor
Printer	Online publisher
Cutter	Film-/Video editor

Completely new cultural job profiles
Creativity consultant Arts consultant Media communicator Multimedia conceiver (Multi-)Media project manager ....

- **Specialised cultural workers are becoming multi-skilled**

  There is a clear trend toward cultural workers becoming multi-skilled. It is no longer sufficient to be proficient in only one single art form. Instead, it is of growing importance to be able to combine and integrate different forms of art. Also, there are two other types of skills, in addition to creative and/or artistic skills, that must not be underestimated: technical skills and support skills (see Table 3.6)

Table 3.6: Multi-skill requirements for cultural workers

Creative skills	Technical skills*	Support skills
Acting Dance Music Design Performance Community arts	WEB Publishing WEB Design Java Programming WEB Multimedia ..... * see Figure 3.23	Company management Production Marketing Self-Presentation Interpersonal skills, social competence, communications skills ...

Source: MKW Munich, April 2001

Obviously, training in state-of-the-art technical skills is essential for cultural workers. However, support skills like management, marketing and self-presentation cannot be forgotten if cultural workers are to be truly prepared for the employment market, especially if they would like to be self-employed. This is the reason why highly advanced training institutions like the Deutsche Schauspieler Akademie (DSA) so strongly emphasise training in support skills. We will present more examples such as this in Module 4, where we analyse good practices in training and qualification.

- **Multidisciplinary teamwork**

  There is a growing number of artistic services that require a multidisciplinary and integrated approach. This means that a single artist is not able to provide a specific service on his own, but instead must co-operate with other artists and non-artists such as technicians, economists or social scientists. An example of one such service could be the complete design of complex web sites, including acquisition, design, programming, composing of melodies, motion capture acting, networking, marketing, administration etc. Integrated services such as this can only be created and offered by a team of artists and non-artists.

  Therefore, Interdisciplinary teamwork is essential for cultural workers in order to make use of the employment potential in digital culture. For this reason, courses in teamwork and project-oriented work are already part of the curriculum in advanced training institutions like the Liverpool Institute of Performing Arts (LIPA).

Good practices that take into consideration these three trends are described in detail in Module 4. Nevertheless, we would already like to emphasise some essential characteristics of successful good practices here:

- Their focus of activity is in playing a mediating role between artists, the cultural and multimedia industries and the public sector (such as the Public Employment Services).
- They create entirely new job descriptions (like ”media actor”).
- They offer training not only in creative skills, but also in technological (state-of-the-art multimedia technology) and supportive skills (management, marketing, interpersonal skills, social competence etc.)
- They train students in the important aspect of interdisciplinary co-operation and team work between various artists, technicians and economists.
- They provide training in close connection with the industry in order to integrate state-of-the-art multimedia proficiency in training and to establish personal contacts between training organisations, students and companies.
- They offer classes with qualifying certifications, according to the new job descriptions.
- They comprise the entire value added chain of cultural production

In adapting to these trends, cultural workers do not give up their original occupational identity by including technological and support skills in their qualifications. Instead, they gain new levels of competence, allowing them to present their skills and potentials for interaction with multimedia technology on the labour market, thus opening up a larger field of employment activity for them. This can best be described as an **“oil-on-water-effect”: in the same way a small drop of oil spreads out on the water surface, a relatively small degree of multimedia and management expertise is already sufficient to open up employment possibilities for cultural workers in a wide range of related occupations.**

Therefore, the exploitation of the job potentials in digital culture will depend decisively on addressing the issues of whether a successful integration of technology and management, on the one hand, and content and creativity, on the other, is possible, and if so, how this can best be achieved. To overstate the case, the question is whether the necessary basics have been established to combine cultural content with new technological possibilities and forms of communication. Based on the expert interviews which were carried out within the framework of this study, we can only conclude that we are just at the beginning of this development.

Employment policy makers are confronted with the challenge of improving the necessary preconditions by introducing and supporting methods of training and updating these regularly. These will aid cultural workers and allow them to gain the basic technical knowledge that is prerequisite for employment in the TIMES sector.

Statistical Annex

1. Employee structure in TIMES companies in economic world regions

Table A3.1: Employee structure in TIMES companies by economic world regions
Population: WIMMEX panel, all respondents (2,970 companies world-wide, unweighted)
Unit: Ratio and percent

Employee structure	Economic world regions					
	Asia/ Pacific	Eastern Europe	EUR-15	USA	Other	World
Freelancers per employee	*1.29*	*1.25*	*1.33*	*0.94*	*1.15*	*1.20*
Share of TIMES employees among total employees (Percent)	76.9	78.4	71.6	63.2	63.7	70.5
Share of women among total employees (Percent)	33.2	29.4	30.4	37.4	31.3	31.5
Share of female TIMES employees among total employees (Percent)	22.9	18.1	20.2	23.6	16.5	20.4
Share of female TIMES employees among total TIMES employees (Percent)	26.9	19.9	29.0	34.9	28.4	28.9
Share of female TIMES employees among total female employees (Percent)	61.0	43.5	49.2	56.9	40.0	50.1

Source: WIMMEX Munich, December 2000

2. Employee structure in EUR-15 TIMES companies

Table A3.2: Employee structure in EUR-15 TIMES companies by year of company foundation

Population: WIMMEX panel EUR-15 respondents (1,450 companies, unweighted)
Unit: Ratio and percent

Employee structure	Year of company foundation			
	Before 1998	1998 and later	Unknown	Total
Freelancers per employee	*1.12*	*1.62*	*1.05*	*1.33*
Share of TIMES employees among total employees (Percent)	70.4	72.4	88.4	71.6
Share of women among total employees (Percent)	32.7	27.3	26.0	30.4
Share of female TIMES employees among total employees (Percent)	20.7	19.5	22.3	20.2
Share of female TIMES employees among total TIMES employees (Percent)	31.8	25.4	24.4	29.0
Share of female TIMES employees among total female employees (Percent)	52.7	43.4	72.2	49.2

Source: WIMMEX Munich, December 2000

Table A3.3: Employee structure in EUR-15 TIMES companies by turnover
Population: WIMMEX Panel EUR-15 respondents (1,450 companies, unweighted)
Unit: Ratio and percent

Employee structure	Turnover-classes of TIMES companies					
	Under 250.000 Euro	**250.000 Euro under to 1 million Euro**	**1 million Euro under to 5 million Euro**	**5 million Euro and more**	**Unknown**	**Total**
Freelancers per employee	*2.19*	*1.15*	*0.30*	*1.08*	*0.84*	*1.33*
Share of TIMES employees among total employees (Percent)	71.4	76.9	55.2	76.4	82.4	71.6
Share of women among total employees (Percent)	27.6	35.0	26.3	34.6	30.2	30.4
Share of female TIMES employees among total employees (Percent)	16.1	24.9	16.8	19.9	27.4	20.2
Share of female TIMES employees among total TIMES employees (Percent)	23.5	32.1	31.7	28.1	34.2	29.0
Share of female TIMES employees among total female employees (Percent)	32.1	65.6	45.6	56.5	61.7	49.2

Source: WIMMEX Munich, December 2000

Table A3.4: Employee structure in EUR 15-TIMES companies by investment as percentage of turnover

Population: WIMMEX Panel EUR-15 respondents (1,450 companies, unweighted)
Unit: Ratio and percent

Employee structure	Investment-rate (as percentage of turnover)				
	Under 10%	10% under to 25%	25% and more	Unknown	Total
Freelancers per employee	*1.10*	*1.48*	*1.61*	*0.68*	*1.33*
Share of TIMES employees among total employees (Percent)	68.4	72.3	71.6	79.0	71.6
Share of women among total employees (Percent)	30.4	34.7	27.1	27.3	30.4
Share of female TIMES employees among total employees (Percent)	17.6	24.5	18.0	22.9	20.2
Share of female TIMES employees among total TIMES employees (Percent)	26.6	33.4	25.4	33.8	29.0
Share of female TIMES employees among total female employees (Percent)	42.7	56.5	46.8	55.0	49.2

Source: WIMMEX Munich, December 2000

Table A3.5: Employee structure by main area of activity in EUR-15 TIMES companies

Population: WIMMEX Panel EUR-15 respondents (1,450 companies, unweighted)
Unit: Ratio and percent

Employee structure	Main area of activity							
	Hardware & hardware -system	IT-consult & service	IT- net-works	Multimedia/ online & audio-visual media	Software Develop-ment/ sales & installation	Tele-com-mu-nica-tion	Other areas within the IT Sector	Unknown
Freelancers per employee	*1.89*	*1.28*	*1.76*	*1.18*	*1.04*	*2.69*	*1.51*	*1.04*
Share of TIMES employees among total employees (Percent)	61.2	73.8	65.1	73.4	74.1	70.4	64.7	59.7
Share of women among total employees (Percent)	34.5	31.0	32.3	31.0	27.4	31.0	34.0	23.1
Share of female TIMES employees among total employees (Percent)	15.3	20.3	17.4	21.6	18.6	9.4	20.6	10.3
Share of female TIMES employees among total TIMES employees (Percent)	26.2	27.8	25.8	30.2	25.7	16.1	32.0	19.4
Share of female TIMES employees among total female employees (Percent)	42.0	49.3	44.8	51.5	51.8	27.0	48.6	40.7

Source: WIMMEX Munich, December 2000

Table A3.6: Employee structure by products/services of EUR-15 TIMES companies
Population: WIMMEX Panel EUR-15 respondents (1,450 companies, unweighted)
Unit: Ratio and percent

Products/ Services	Employee structure					
	Freelancers per employee	**Share of TIMES employees among total employees (Percent)**	**Share of women among total employees (Percent)**	**Share of female TIMES employees among total employees (Percent)**	**Share of female TIMES employees among total TIMES employees (Percent)**	**Share of female TIMES employees among total female employees (Percent)**
Operating systems (sales & installation)	*1.92*	64.8	27.5	15.2	24.1	42.7
Service program (sales & installation)	*1.85*	70.5	31.6	17.8	24.6	42.8
Application software (sales & installation)	*1.48*	70.1	31.5	17.7	25.6	50.8
Software in general (sales & installation)	*1.78*	71.4	29.6	16.4	22.9	42.6
EDP systems (sales & installation)	*1.76*	65.0	25.6	10.2	18.0	38.0
IT consulting and services	*1.39*	68.9	29.9	17.9	24.6	46.8
EDP services	*2.12*	71.1	30.9	19.6	30.6	47.2
Maintenance services	*1.26*	64.0	27.6	15.1	22.6	40.2
Training and further education	*1.21*	75.9	35.1	24.9	31.3	55.0
Multimedia software (sales and installation)	*1.17*	73.9	28.4	18.6	26.3	49.7
Multimedia production	*1.12*	75.0	28.7	20.9	27.6	52.5
Entertainment. games	*1.46*	64.1	32.5	16.4	25.4	47.1
New media design/screen publishing	*1.48*	74.7	31.1	21.4	27.9	50.0

Table A3.6 continued

	Employee structure					
Products/ Services	***Freelancers per employee***	**Share of TIMES employees among total employees (Percent)**	**Share of women among total employees (Percent)**	**Share of female TIMES employees among total employees (Percent)**	**Share of female TIMES employees among total TIMES employees (Percent)**	**Share of female TIMES employees among total female employees (Percent)**
Film/TV/video/ radio productions	*1.58*	76.7	28.7	19.9	24.3	56.4
Internet Service Provider	*1.18*	78.2	29.3	16.6	21.7	46.8
Online service	*1.62*	75.3	33.9	20.9	30.3	50.9
Hardware in general (sales & installation)	*1.46*	60.9	27.1	10.1	17.8	33.4
Hardware in general (development & installation)	*0.30*	52.5	28.7	13.9	28.0	50.0
Peripheral devices (sales and installation)	*1.40*	59.7	28.4	10.1	21.0	36.2
Network technologies and systems (development & installation)	*1.31*	70.7	30.0	13.4	20.4	39.2
Network solutions (development & installation)	*1.22*	71.1	27.8	17.1	25.4	50.9
Mobile and stationary tele-communi-cations	*1.98*	66.4	37.7	12.9	18.1	39.5
Telecommuni-cations solutions and consulting	*2.10*	65.7	34.1	13.7	21.9	41.0
Other IT products/ IT services	*1.96*	69.6	30.6	18.6	27.0	48.3
No response	*1.05*	88.4	10.9	8.9	11.1	38.9

Source: WIMMEX Munich, December 2000

3. Employment expectations and qualification trends

Table A3.7: Importance of information and communications/multimedia qualification features in TIMES companies by economic world regions

Population: WIMMEX panel all respondents (2,970 companies world-wide, unweighted)

Balance: ***1 = very important; 5 = not important***

	Other				
	(Average)	Eastern Europe	EUR-15	USA	Total
Qualification features	3.0	(Average)	(Average)	(Average)	(Average)
Operating systems	4.0	2.5	2.4	2.3	2.5
CAD	2.6	3.6	4.0	3.8	4.0
Internet protocols	2.7	2.2	2.5	2.5	2.5
Java programming	2.0	2.6	2.6	2.6	2.7
WEB publishing	2.5	2.6	2.0	2.2	2.2
WEB server	2.8	2.7	2.4	2.8	2.5
WEB security	2.5	2.3	2.5	3.1	2.6
WEB multimedia	3.7	3.3	2.7	2.4	2.6
Desktop publishing	2.7	2.7	3.0	3.0	3.1
Graphic and image processing	3.8	3.6	2.5	2.7	2.6
3D modelling	3.7	3.0	3.4	3.4	3.3
Visualisation techniques	3.9	3.3	3.0	3.3	3.1
Digital film and video processing and editing	3.0	3.4	3.5	3.1	3.4
Computer animation	2.8	3.4	3.2	2.9	3.1
Audio/visual design	2.5	3.5	3.1	2.9	3.0
WEB design, screen design	2.3	2.5	2.3	2.4	2.3
CBT techniques	2.9	3.2	3.5	3.1	3.4

Source WIMMEX Munich, December 2000

Table A3.8: No additional needs for personnel with specific qualification features at present in ...% of TIMES companies by economic world regions

Population: WIMMEX panel all respondents (2,970 companies world-wide, unweighted)
Unit: percent

Qualification features	No additional needs for personnel with specific qualifications at present in ...% of TIMES companies by economic world regions				
	Asia/ Pacific (Percent)	Eastern Europe (Percent)	EUR-15 (Percent)	USA (Percent)	Total (Percent)
Operating systems	61.8	50.0	60.0	76.3	64.9
CAD	58.8	56.3	58.1	73.7	59.1
Internet protocols	61.8	56.3	52.5	57.9	58.1
Java programming	50.0	31.3	41.3	50.0	45.4
WEB publishing	52.9	31.3	38.8	44.7	45.7
WEB server	41.2	43.8	48.8	52.6	50.2
WEB security	50.0	37.5	47.5	60.5	51.5
WEB multimedia	44.1	43.8	47.5	60.5	50.5
Desktop publishing	52.9	56.3	58.8	68.4	58.4
Graphic and image processing	55.9	50.0	50.6	65.8	54.6
3D modelling	44.1	68.8	52.5	71.1	55.0
Visualisation techniques	58.8	56.3	49.4	65.8	52.9
Digital film and video processing and editing	55.9	50.0	51.9	65.8	54.6
Computer animation	47.1	50.0	52.5	68.4	55.0
Audio/visual design	55.9	50.0	50.0	65.8	53.3
WEB design, screen design	50.0	37.5	45.0	50.0	49.8
CBT techniques	58.8	62.5	52.5	60.5	52.9
Unknown	23.5	18.8	21.3	15.8	19.2

Source: WIMMEX Munich, December 2000

Table A3.9: In the near future expected lack of personnel with specific qualification features in ...% of TIMES companies in economic world regions

Population: WIMMEX panel all respondents (2,970 companies world-wide, weighted)
Unit: percent

Qualification features	In the near future expected lack of personnel with specific qualifications in ...% of TIMES companies in economic world regions				
	Asia/ Pacific (Percent)	Eastern Europe (Percent)	EUR-15 (Percent)	USA (Percent)	Total (Percent)
Operating systems	14.7	12.5	21.9	10.5	18.6
CAD	5.9	6.3	3.1	5.3	5.5
Internet protocols	5.9	25.0	23.1	18.4	19.2
Java programming	14.7	50.0	36.3	26.3	30.9
WEB publishing	23.5	37.5	44.4	34.2	36.8
WEB server	20.6	43.8	31.3	31.6	29.9
WEB security	11.8	50.0	29.4	18.4	25.4
WEB multimedia	23.5		27.5	26.3	26.5
Desktop publishing	8.8	25.0	6.9	7.9	9.3
Graphic and image processing	17.6	6.3	20.6	13.2	18.6
3D modelling	11.8	6.3	13.1	5.3	13.7
Visualisation techniques	8.8	6.3	18.1	10.5	16.5
Digital film and video processing and editing	5.9	12.5	11.9	5.3	11.0
Computer animation	20.6	12.5	13.1	10.5	15.1
Audio/visual design	8.8	18.8	15.6	13.2	16.2
WEB design, screen design	29.4	12.5	31.3	26.3	30.6
CBT techniques	5.9	50.0	8.8	5.3	9.3
Unknown	50.0	31.3	36.3	47.4	38.8

Source: WIMMEX Munich, December 2000

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Exploitation and development of the job potential in the cultural sector in the age of digitalisation

FINAL REPORT

Professional training and qualification: Trends and good practices

(Module 4)

commissioned by

European Commission
DG Employment and Social Affairs

presented by

empirica Delasasse, Cologne

interarts, Barcelona

MKW Wirtschaftsforschung GmbH, Munich

österreichische kulturdokumentation.
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1. Introduction

By the end of January 2001, the project team members responsible for carrying out this module (MKW, interarts, Österreichische Kulturdokumentation and empirica) had collected more than 300 best practices (long list) and evaluated 154 of them (short list), which were outstanding in

- preparing the traditional cultural sector for the challenges of the digital economy, primarily through the training and/or further education of cultural workers, not only in technical skills but also in skills such as management, marketing, public relations etc. and/or
- offering marginalised groups of the digital society (women, long-term unemployed, unemployed young people etc.) the possibility to be a part of digital development and/or
- methods of public-private-partnership of local/regional development related to training and job creation and/or
- creating employment in economically depressed areas.

The overall aim was to initiate adequate training policies.

During the course of this investigation, it became clear to the team members that it is impossible to extract the truly ”best” examples of education and qualification projects from the huge number of European projects in this field. Furthermore, the concepts of the various interesting projects differ so much that they cannot be assessed as ”best” and ”non-best”. Therefore, the term ”best” practices was replaced by ”good” practices.

It was not the team’s intent to create a representative list of good practices from a regional or sectoral standpoint. We consider it more important to provide an overview of the varieties of interconnections and relationships between the cultural sector and the multimedia sector in the field of qualification and education, in particular for disadvantaged population groups.

Specific attention had to be paid to disadvantaged or marginalised groups in the digital society, which constitute a new form of poverty in industrialised countries. This poverty is not to be defined so much by income, but in terms of the degree of availability of basic multimedia technology, particularly access to the Internet.

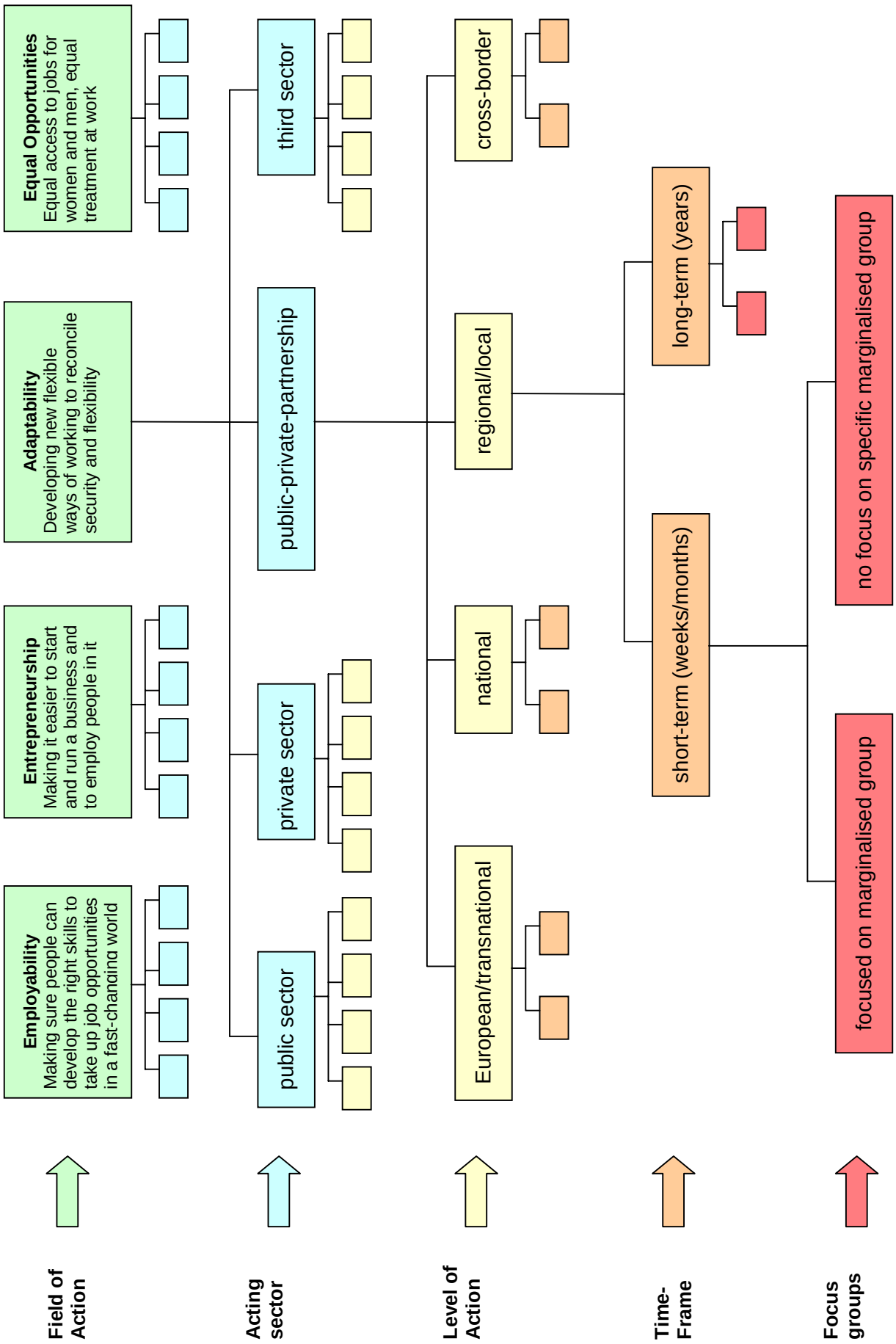
2. New systematisation of good practices in digital culture

In order to simplify and standardise the good practice research, the team members created a best practice questionnaire together with guidelines for filling out the questionnaire (see March monthly report). All best practice projects were to be classified according to

- their field of action (e.g. training and qualification of workers in the sector of digital culture),
- the acting sector (public, private, public-private-partnership or third sector),
- the level of action (regional, national, EU) and
- specific focus groups (e.g. reintegration of long-term unemployed).

Throughout the project, this standardised registration of good practices proved to be very valuable. The standardisation was set up from the beginning so that it could be modified later on, for it was clear that the systematisation would have to be modified in response to knowledge gained during the course of the project, which indeed proved to be the case. In the course of this study, it was further developed and improved. Figure 4.1 shows the new improved systematisation.

Figure 4.1: Systematisation of Good Practices in training and qualification



2.1 Field of action

During the course of the study, the following original ”fields of action” proved to be too ambiguous for the classification of the projects being investigated:

- Successful initiatives in the traditional sector in terms of employment and job creation
- Training and qualification of ”old” and ”new” cultural workers in multimedia proficiency
- Mutual benefits for ”old” and ”new” culture industry through integration of multimedia into the traditional cultural sector
- Training of certain population groups with previously limited access to/use of multimedia

Using the above classification system, numerous projects could be placed in more than one category, which made a clear overview and the evaluation of the project more difficult. In addition, these fields of action were not directly applicable to the European Employment Strategy (EES), which serves as the political foundation of the entire project.

Thus, a new system of categorisation was necessary which would allow for an unambiguous classification of the projects as well as guarantee a direct connection to the EES. Both of these criteria were best fulfilled by the four main pillars of the EES, namely Employability, Entrepreneurship, Adaptability and Equal Opportunities.

These four main pillars are highly significant, particularly for digital culture. Table 4.1 illustrates this significance.

Table 4.1: Significance of the main EES pillars for digital culture

I. Employability *Making sure people can develop the right skills to take up job opportunities in a fast-changing world* Significance for digital culture: • Prevention of long-term unemployment • Activation of the stock of unemployed • Employability agreements of social partners (employers, trade unions) • Enabling life-long learning • Raising skill levels of young people • Integration of marginalised groups of the digital society (women, older people, unemployed etc.)	**II. Entrepreneurship** *Making it easier to start and run a business and to employ people in it* Significance for digital culture: • Encouraging self-employment and entrepreneurship • Local development • Development of the service sector
III. Adaptability *Developing new flexible ways of working to reconcile security and flexibility* Significance for digital culture: • Digitalisation of cultural services • Modernisation of working life within and between companies • In-house training and recruitment	**IV. Equal Opportunities** *Equal access to jobs for women and men, equal treatment at work* Significance for digital culture: • Gender mainstreaming • Facilitation of re-entry to the labour market • Reduction of gender gaps in the use of multimedia technology

Nevertheless, left unchanged, these four pillars did not represent a suitable categorisation of good practices, for this system also resulted in a certain overlapping of content.

For example, under the category ”Employability” also fall those projects with the goal of integrating marginalised groups of the digital society. These measures could also be classified under the pillar ”Equal Opportunities”. In addition, many measures which promote adaptability automatically result in better employability.

In order to avoid such overlapping and to achieve an unambiguous classification of good practices, the following additional criteria were introduced:

- Projects which aim to integrate marginalised groups of the digital society are classified exclusively under the category ”Equal Opportunities”.
- Projects with the goal of **adapting workers** to the new requirements of digital developments, are classified under the category ”Employability” (e.g. training of cultural workers in multimedia proficiency).
- Projects with the goal of **adapting organisations** to the new requirements of digital developments are classified under the category ”Adaptability” (e.g. creation of new networks between organisations, digitalisation of cultural content etc.)

After adding these evaluation criteria to the four pillars of the EES, the result is a first class system for categorising good practices.

In the following section, an exemplary project for each of these four categories will be briefly presented. The descriptions are short summaries of the detailed descriptions found in the Access Data Base ”best practices”.

Employability: FH Salzburg/Austria

Established in 1988, Techno-Z is a cluster of IT-enterprises in Salzburg, Austria which share common buildings. Today it consists of 80 high-tech enterprises. In the beginning of the 90s these enterprises founded an IT-oriented "Fachhochschule" (FH) as a GmbH. The FH (college of applied science) is mainly financed by federal and state funds. The approximately 600 students contribute an annual fee of 100 € .

The FH has three main study courses (all 4 years in duration):

- MultiMediaArt (MMA): since 1996; degree "Dipl.-Ing." This study course has a strong transversal approach to graphic arts, design, video, music.

- Information economy and management (IWM): since 1998; degree "Magister"

- Telecommunications technology and systems (TKS): since 1995; degree "Dipl.-Ing."

In 1999, an additional course of further vocational training for working persons/professionals was added, with the degree "Dipl.-Ing."

Each semester, there are 50 new openings available for every study course. On the average, there are 4 applicants for every vacant position. The students are chosen on the basis of test results.

The study is strongly practice oriented. During the total eight semesters, one internship semester in an enterprise is required, in addition to study project work in co-operation with enterprises. Therefore, there is a strong link to enterprises, particularly to those of the Techno-Z.

Entrepreneurship: ARABUS incubator; Helsinki/Finland

The ARABUS incubator is an organisation that assists cultural workers in the Helsinki region who are intending to set up their own enterprises in acquiring the necessary entrepreneurial knowledge and skills. The problem that led to the founding of the ARABUS incubator was the high failure rate of start-up companies established by art graduates in the Helsinki region. The founding organisations in 1996 were the University of Helsinki and the city of Helsinki, in co-operation with the European Social Fund.

The business incubator of ARABUS created a concept for training and consulting entrepreneurs in order to create the conditions for a good business start-up. What ARABUS can't provide are the business idea, the motivation and the necessary capital. The courses provide cultural workers with basic knowledge about management, law, finances etc. The most important part takes place the beginning of the process with the development of a business plan. 50-60 entrepreneurs apply each year and about 20 of them are selected for training based upon the quality of their business plan. If an applicant has problems with the formulation of a business plan, he or she is given the opportunity to take part in a 3-month-course providing instruction in business plan development.

All courses (usually evening classes) are led by external experts. The usual 2 year incubator course consists of one evening class per week. Thus, participants can work a normal job and attend classes for the set-up of their company. Often they have already established a well-running company before the completion of their 2 year course.

Adaptability: Pitchpoint; European

Pitchpoint.org is a communication instrument of the film community which responds in a flexible way to the developments in this professional sector. It provides a virtual "lounge" for script authors and producers of film, TV and multimedia productions. Authors (mostly young) present their ideas and excerpts of scripts, while producers formulate their wishes and demand on a daily basis. The more producers, writers and script consultants participate in this forum, the better the results will be. This free-of-charge service significantly improves and facilitates the work of both writers/authors and producers.

Pitchpoint.org is a European-wide initiative, initiated by FOCAL (Stiftung Weiterbildung Film und Audiovision, Lausanne/Switzerland), Filmboard Berlin-Brandenburg GmbH/Germany, Master School Drehbuch/Berlin/Germany and SUISSIMAGE (Bern/Switzerland).

Its aim is to combine as many media institutions, organisations, writers and producers from as many European countries as possible into a network, thus establishing Pitchpoint.org as the leading internet "stock exchange" for media content.

Equal Opportunities: Agendum, Sweden

Agendum is an information co-operative in the sparsely populated rural northern inland of Sweden. Originating from a local women's computer network, it was set up in 1995 with the intention of organising projects and actitivies to improve women's situation in the area, focusing on IT, Culture and women's business support.

An early project was MUWIC - Multimedia for Women in Cultural Industries (Employment-NOW), coordinated by Manchester Institute for Popular Culture. A training course in multimedia, tailor made for women, was piloted, and baseline research of women in the Cultural Industries was made. This was Agendum's first contact with the concept of CI, and Agendum strongly believes in its importance for regeneration of a rural region, where one of the main problems is migration out of the area, especially by women and young people.

On behalf of the County Administration, Agendum has recently made a regional action plan for competence building and business development of the CI sector, and a number of projects will start during the next years, funded under the Objective 1 programme.

2.2 Acting sector

The categories of the acting sectors level haven't been changed because they have proven their worth in the course of research. Therefore, we will continue to distinguish the good practices under study distinguished according to

- Public Sector
- Private Sector
- Public-Private-Partnerships and
- Third Sector

The most promising of these various acting sectors are public-private-partnerships, which organisationally combine public interests with private money and expertise. The results of the research clearly shows that the majority of the most interesting and successful projects are organised as public-private-partnerships.

In the following section, four good practices are briefly presented which serve as examples for each of these sectors. The complete, detailed project descriptions have been taken from the Access-Data Base "best practices".

Public Sector: IMAC Institute; Paris/France

The IMAC Institute, part of the Université Panthéon-Assass Paris II, was founded in 1988 to offer professional study programmes for audio-visual media and multimedia production. It is unique in France, with only the Ministry of Culture offering more artistic study courses. IMAC offers

- a Diploma in Engineering (Diplome d'Ingénieur d'Etat (Ingénierie des Media et Architecture de la Communication): the three-year course is completed with an individual project and various internships. Each year, 25 participants are accepted for the course.

- a Diplome de Maitrise Sciences et Techniques (Audiovisuel et Multimedia). A two-year study programme combined with internships. (25 participants)

Scientific research and analysis on the implications of new information and communication technologies is one of the essential elements of the Institute's programmes. The study courses change almost annually in order to integrate the latest audio-visual media and multimedia developments and advances in theory.

IMAC benefits from its unique independent status which allows internship contracts with enterprises, for example with Sony Music, Air France, Alcatel, France Telecom, Media LabCentre National de la Cinématographie, etc.

Private Sector: DSA Ltd.; Munich/Germany

In 1999, a new media centre, Media Works Munich (MWM), was created in Munich/Bavaria. In the buildings of a former factory, several media enterprises and institutes founded a place for developing innovative and synergetic media concepts. One of these is the DSA Ltd., the German Actors Academy, the first European academy for the training and further education of actors in new media techniques. The traditional actors academies focus on training for theatre, which is inadequate for working in new media industries such as TV and radio. Furthermore, many more jobs can be found in the new media sector than in theatre and film.

The DSA considers itself to be an innovative contributor to quality management for creative media workers. Its "master classes" offer European-wide acknowledged certification in such professions as "media actor". The actors are trained for possible engagements beyond just those within the fields of theatre or film, for example, as an advertising announcer, business trainer etc. DSA offers 16 training positions per semester.

Co-operation partners for the DSA are the Creative Business Academy (CBA), the 2050 AG and The Group. These partners provide direct and constant contacts between DSA and DSA trainees and employers/enterprises in the media sector. They also develop new employment possibilities for media actors in the business sector such as working as professional trainers for managers, thus promoting the transfer of knowledge between creative media workers and managers).

Public-Private-Partnership: Liverpool Institute for Performing Arts; Liverpool/United Kingdom

LIPA offers artists, performers and other culturally creative people the opportunity to learn not only to be creative in their profession but also to manage, organise and acquire the technical skills for their own work. For example, the programme of the BA Honours Degree in Performing Arts is multi-disciplinary and integrated and allows participants to combine specialised subjects (acting, dance, enterprise management etc.) with a range of support skills.

The initial development of LIPA started in 1989. Paul McCartney and the Liverpool City Council - in co-operation with the Schools for Performing Arts Trust (SPA Trust) - arranged the forthcoming start-up of LIPA. In the years 1990 to 1995 they did a lot of publicity and encouraged involvement from the public sector (Government and the European Commission), so that in 1996 the first students were able to begin their degree programmes. In the course of time, the support of many private companies (including Grundig, Sennheiser, Gibson et. al.) could be won for the LIPA Trust.

Third Sector: Gulliver's Connect Programme; Netherlands

The Gulliver's Connect Programme, initiated by the Felix Meritis Foundation, is a flexible learning framework aiming to facilitate international co-operation between professional artists from Central and Eastern Europe, the Former Soviet Union and Mongolia. The programme's aims are twofold:

1) to develop collaborative partnerships between artists within the region of the former communist states and

2) to encourage the process of 'learning by doing'.

This is the only programme in Europe which provides a framework to not only stimulate international co-operation between the former socialist states but also to further diversify training and career development opportunities. In order to participate, professional Central and Eastern European arts practitioners can apply as a "visitor" or as a "host". The programme aims to attract potential visitors who have 2 - 3 years working experience in project co-ordination, arts development or management at the regional level in their country and who wish to expand their career opportunities and add an international dimension to their work.

The work placements of the Gulliver's Connect programme are funded for a minimum period of 3 weeks and a maximum period of 8 weeks.

2.3 Level of action

The system of differentiation for the level of action was slightly altered and made more precise, enabling every project to be clearly classified under one of the following categories:

- European
- national
- regional/local and
- cross-border

According to this system, a project which is carried out on a regional level but has been established in a cross-border region and has a sphere of activity which goes beyond national borders will be classified under the category ”cross-border”.

The following brief examples illustrate the regional differentiation implemented in the categorisation of good practices. The complete project descriptions can be found in the Access-Data Base ”best practices”.

European Level: ELIA; European

Founded in Amsterdam in 1990 and with members in 43 countries, The European League of Institutes of the Arts (ELIA) is an independent network of 359 Arts Education Institutes covering all the disciplines of the arts: Dance, Design, Theatre, Fine Art, Music, Media Arts and Architecture. ELIA’s aims include:

- the promotion of international co-operation between students and teachers of academic art institutions
- the collation and dissemination of information among European schools of art
- the advising of national, international and supranational organisations concerned with international co-operation in the fields of arts education.

National Level: Fabrica; Catena di Villorba/Italy

Fabrica offers one year scholarships to creative young people during which they can develop communication projects in graphics, design, video, new media etc. The artists/researchers learn by doing, they explore new languages and forms of visual and aural communication. Fabrica’s aim is to reach a wider public by using the power of existing channels of communication. Finally, language, experience and different cultural backgrounds come together to confront themes such as racism, fear, world hunger etc.

Participant selection is based on a broad range of research carried out using information from the best art schools, the suggestions of a network of consultants, as well as input from less official channels.

Regional/Local Level: European City of Music; Réthymnon/Greece

The city of Réthymnon/Crete plans to use the buildings of a former hotel, recently closed due to bankruptcy, as a new centre for musicology research and as an artistic residence to host musicians specialising in popular and traditional music from all over Europe.
Réthymon regularly hosts the Greek National Orchestra during its training visits. Furthermore, it has a very lively popular music tradition primarily transmitted through oral and non-conventional channels.

The project aims to take advantage of all these potentialities, and to use the tourism infrastructure of the island of Crete to make the city of Réthymon a new centre in musicology research. An auditorium (seating 400) is also planned to be built on land offered by the Réthymnon City Council, as well as an open-air theatre. The whole project is managed by a non-profit organisation who acts independently of public institutions.

Cross-border Level: Furniture Restoration; Austria/Italy

In the Italian and Austrian parts of Tyrol there is an urgent demand for personnel highly qualified in the restoration of antique furniture, a profession which is a crossover between the cultural and hand crafts sectors. For this reason the Landesberufsschule Brixen/Italy, the Tiroler Fachberufsschule Lienz/Austria and the Tiroler Fachberufsschule für Holztechnik in Absam/Austria organised a joint cross-border project to provide participants with further training in furniture restoration techniques.

The project, with 22 participants from Southern, Northern and Eastern Tyrol, began in October 1999. The courses not only include lessons about design but also about the use of multimedia techniques such as Computer Aided Design (CAD).

2.4 Time-Frame

The subdivision ”Time-Frame” was added to the systematisation of good practices since it turned out that all projects needed to be differentiated according to their length of duration. In

this context, two clear trends can be observed:

- short-term projects (weeks/months) and
- long-term projects (years)

While, as a rule, further education projects last only a few weeks to a maximum of one year (short-term), there are other projects which extend over several years (long-term), such as courses of study offered at academies or co-operative efforts between European colleges/universities.

The following two brief examples underline these two different types of projects. The detailed project descriptions can be found in the Access-Data Base ”best practices”.

Short-Term project: artlab; Kopenhagen/Denmark

"artlab" is a training institute of the Danish Musicians' Union (DMF), in co-operation with the Danish Public Employment Service. It was established in 1998.

Unemployed professional artists (musicians, singers, dancers, actors and directors) can make use of a wide variety of courses, which aim at the "updating" of artists' skills in response to the requirements of the steadily developing and changing market. The courses cover skills such as computer upgrading, computer based music teaching, computer based notation of music, music performance, composition and arrangement, music theory, technology, career development etc. Strong emphasis is placed on familiarising artists with state-of-the-art technology, because here artlab recognises a growing job potential for artists, due to their ability to implement their creative skills within a structured working context, both on their own and in teams. Each participant can choose between different courses of various lengths, between short-term training and 22 week courses.

Furthermore, artlab uses "pro-active job development" by constantly monitoring development tendencies relevant to artists regarding new types of jobs, new niches and so-called "bottleneck areas" (shortages of labour force), thereby establishing job contacts through a personnel network.

Long-Term project: transitart; Spain

The aim of transitart is to create a successful reference online Magazine on Multimedia Culture and Arts. It is based on three main activities:

- Information collection and dissemination
- Project development
- Events organisation

The web-site transitart.com had 300 subscribers at the end of the year 2000 (Multimedia companies, museums, cultural agents, designers, etc), with 1,000 expected by the end of 2001.

They have worked for the "Spanish Association of Modern Art", "Fundació la Caixa "Mediateca", "La Sal(House music)" concert hall, etc) on different web developments. They have organised 3 different conference series on Multimedia development, Interactive TV and Electronic Commerce in collaboration with various organisations.

2.5 Focus groups

The original "Focus groups" subdivision was revised and simplified, as it proved to be too detailed in nature. Projects are now categorised based on whether they focus on marginalised groups or not. Marginalised groups are to be understood as population groups which, up until now, have had limited access to the use of multimedia technology (for example, women) and/or have been affected by unemployment. The main emphasis among unemployed is on long-term unemployed persons and unemployed youth.

The following brief examples illustrate the difference between these two categories. In-depth project descriptions can be found in the Access-Data Base "best practices".

No specific focus: Forum Dança; Lisboa/Portugal

Forum Dança is a place for the meeting, study and creation of performing arts, with special focus on contemporary dance. It is a non-profit cultural association whose main concerns are pedagogic and artistic education, research, choreographic creation and performance production.

Forum Dança has developed several courses for the dance community in Portugal, each one oriented to different target groups:

1. Young students seeking to work in the professional sector.

2. Training courses for students to work as professional dancers.

3. Train educators and dance animateurs to work with wide range administration.

The field of contemporary arts has especially benefited from these courses.

Specific focus: Manchester Youth and Creative Arts Training; Manchester/United Kingdom

The aim of the project is to develop, implement and disseminate, via appropriate transnational and local partnerships, a vocational training curriculum that increases the number of disaffected and disadvantaged Manchester youngsters(over 16 years of age), particularly from ethnic minority groups, entering the cultural industries. This_would occur by means of a community-based public arts project serving to raise public awareness._It would then be developed via an enhanced further education, work-related GNVQ/NVQ curriculum that includes appropriate beneficiary support mechanisms with strong and significant work experience under the mentoring of entrepreneurs/professionals in the cultural industries. The innovative element of this project is the way in which it seeks to connect an effective cultural industries training context capable of reaching and empowering disaffected and disadvantaged youngsters with growing employment/self-employment opportunities in these particular business sectors. For this to be fully implemented, cultural entrepreneurs will be trained as mentors via a national and transnational programme.

3. Assessment of good practices

Each of the 154 projects were analysed and evaluated according to the following four criteria:

- project organisation
- financing plan/cost-benefit analysis
- evaluation of the impact on the labour market
- overall assessment

Project organisation

Within the context of project organisation, a large number of questions were of particular interest. The following list includes a selection of the most important questions. Obviously, the questions are not comprehensive and it was not possible to answer all the questions raised.

- When did the project start?
- Who developed the project concept?
- Has there been any feasibility research undertaken before the project started (curriculum design, strategic or marketing plan)?
- Who is the body responsible for the project?
- Who put the project into practice?
- If the project is a public-private-partnership, how is the organisation to be delegated to the partners (responsibilities, common organisations, share of costs and benefits etc.)?
- If the project is a cross-border or trans-national initiative, who are the partners and how is it organised (responsibilities, common organisations, share of costs and benefits etc.)?
- Is the project a member of any sustainable European network?
- What is the field of activity of the project? E.g. stage arts, visual arts, heritage, crafts, cultural management.
- What is the project's field of intervention (steps of the creative process - creation, production, distribution, mediation)?
- Has the project a transversal approach within the cultural sub-sectors?
- Has the project a strategic link to other sectors (e.g. social inclusion, education, tourism, leisure, urban neighbourhoods)?
- Does the project undertake advocacy measures towards local-regional-national-European authorities?
- Does the project provide new skills required by new professions in the multimedia industry to cultural workers? If yes, which skills?
- Does the project provide adequate flexible multimedia-training for cultural workers? If yes, what kind of training?
- Does the project improve the applicability of multimedia by special social groups? If yes, how?
- How does the project combine multimedia and culture? Is there a mutual benefit for traditional culture and multimedia through the project? What is this benefit?
- How many participants are involved in the project?
- Are there certain unemployed groups integrated? If yes, which groups?

Financing plan, cost-benefit-analysis

One of the most interesting parts of the analysis was the financing plan. Those organisations providing funding and infrastructural support for future projects are naturally interested in knowing what costs and what cost-benefit ratio they can expect. However, this data was also the most difficult to attain. Not only do many of the project organisations treat their financial data as confidential, but often the projects were organised in such a way that an accurate, detailed breakdown of costs was not possible. The following questions were of particular interest as we investigated the area of cost-benefit analysis:

- What are the costs of the project (overall costs, costs per participant, costs per fiscal year, costs per new job created etc.)?
- Who funds the project?
- Is the project partly funded by national/EU subsidies? If yes, how much?
- Are there proceeds through the project? Do the proceeds cover the costs? Is the project self-financing or does the project management intend to get the project independent from subsidies?

Evaluation of the impact on the labour market

Since the present study takes place within the context of labour market policy, it was obviously necessary to analyse as much as possible the impact of the projects on the labour market. In most cases, however, this was even more challenging than the cost-benefit analysis, since it was extremely difficult to estimate the impact on the labour market. The following questions were of particular interest for this analysis:

- Is there any ex-post research analysing the impact of the project?
- Is there a notable success like number of new jobs created, number of persons reintegrated in the labour market or number of new enterprises set up through the project?
- Are there reports about the professional future of the participants?

Overall assessment

At the conclusion of the analysis, an overall assessment of each project was carried out. This assessment focused for the most part on the issues of what conclusions and recommendations can be drawn with regard to policy/strategy options for the EU and whether the project concept can be transferred to other EU regions/EU countries.

As much as possible, the assessment was carried out quantitatively. In other words, comparable statistics were collected, such as costs incurred and the number of project participants. Nevertheless, due to various reasons, it was not always possible to collect all the needed information. In most cases, this was due to the fact that the contact persons did not make all the necessary information available. As a result, among the 154 projects studied, there are those for which not all assessment categories are filled out. Nevertheless, well over 100 projects were able to be analysed completely, covering the entire range of approaches for the training and further education of cultural workers currently being implemented in the EU with regard to the exploitation of job potential within the TIMES Sector.

4. Further categorisation of cases studied

Based on the cases selected by the project partners, five different categories have been established which facilitate the initiation of adequate training policies:

- training centres
- technological laboratories of artistic creation
- urban renewal projects
- digitalised projects
- cultural projects in the process of digitalisation

For each of these categories, we will offer a detailed description of the activities being performed, their relationship to theory being developed, and the global potential of the projects included.

Before describing the study categories in detail, it is important to point out that these are not exclusive categories. Therefore, given the diverse characteristics of the projects selected, it may become apparent to the reader that the same cultural project is included in different categories.

4.1 Training centres

In order to adapt to the new economic determining factors in the cultural sector, which include new aptitudes in project management and in the use of new technologies, there is an urgent need for retraining. Therefore, in recent years, retraining and further education have been carried out on a regular basis for professionals in the cultural sector. Many cultural projects have included further training in the services they offer in order to adapt to the new needs within the sector. Thus, training centres can be considered an extremely valid category of cultural projects that create employment.

It is necessary to consider the potential of the new jobs generated by these types of projects. This will be described later on. Moreover, we must bear in mind that just as these projects serve to create new jobs, these new jobs, in turn, result in the development of new projects. Many professionals within the cultural sector have found that such training provides additional knowledge for their own activities. As we will see, this training goes beyond merely artistic and technological training. In fact, it involves training in new skills, which represents a new development for the cultural sector.

Some project examples included in this category are Euroskills in Greece, a training centre for trainers, Forum Dança in Portugal, which offers specialised artistic training, Fak d'Art in Spain, which provides training for the multimedia technology sector, or the DSA in Germany, which offers actors training in order to become media actors.

All of these centres display the following characteristics:

- **Training offered by the cultural sector itself.** Since the cultural centres take advantage of their own resources to offer training, this training is supported by the experience gained by the centre itself. In the case of Forum Dança, for example, the experience gained has allowed them to offer a specialised course in the field of dance for training project managers. As a result, this type of training offers exceptional knowledge of the sector, such as providing first-hand contacts with the persons and professionals whom participants should address when the training is completed.

- **Support of the public authorities.** Since unemployment has been one of the major concerns of the European public authorities, it is not unusual that many of these centres have been supported by public authorities.
- **Creation of an employment bureau and advice on the job search.** The students who take advantage of this type of training opportunity often share a concern for the promotion of cultural activities. Therefore, when they finish these courses, a community of professionals is generated which is then integrated into the job market. They have a highly similar profile, which should act to promote collaboration in generating jobs. The case of Cassefaz merits special mention. The project has not only created this type of employment bureau, but has also promoted the creation of a venture capital fund that provides financial support for the projects generated by the students. This type of initiative is especially important in supporting emerging projects which are not yet fully consolidated and which are facing difficulties in gaining private support.

At this point, a differentiation must be made between cultural projects that promote training for new aptitudes in the cultural sector, and those which promote new artistic skills in the use of new technologies. Whereas the former respond to the demand for new professional aptitudes in the cultural sector, the latter respond to the need for most emerging fields of artistic creation to adapt to new technologies.

First of all, let us take a look at the cultural projects that have made an effort to develop new skills regarding the management and direction of cultural projects for professionals within the cultural sector. Often these tasks have been carried out by management professionals with limited experience in dealing with the cultural sector. This type of training opportunity is in response to the interest shown by the professionals of the cultural sector themselves to professionalise their management skills.

These centres offer training in many different skills. We would like to point out the following:

- skills in obtaining sources of financing for cultural and artistic projects
- skills in conducting marketing and promotional studies for these projects in business environments
- foreign language skills to establish links of international co-operation
- communication skills to promote these projects
- knowledge in the use of new technologies for management of cultural projects
- knowledge in adapting service sectors (leisure and tourism) to the requirements of cultural projects

It is mostly private centres which offer training in new artistic skills related to new technologies, and these educational opportunities are currently very expensive. It is difficult for traditional artistic training centres to integrate newly emerging artistic forms, such as multimedia or web-art, into their curriculum. Therefore, this lack is normally covered by small private centres that offer this type of teaching. Paradoxically, in spite of the truly marginal nature of these centres, the training opportunities they offer have been much more well-received on the job market than the teaching related to the professionalisation of cultural management previously described.

The type of training offered by these centres has been introduced widely in the audio-visual and multimedia sector. Audio-visual projects, as well as Internet-related projects, require an increasing level of artistic effects such as animation, graphic design, 3D effects, special effects, etc.

In this sense, when analysing the category of technological laboratories of artistic creation (*media labs* or *art labs*) in the following section, we will see that the development of new

communications technologies leads to the development of the cultural industry and of new artistic forms which offer a tangible content to these new industries.

While training opportunities in technical multimedia proficiency are already relatively common in the European Union, this does not apply to training centres which provide cultural workers with knowledge such as management, marketing and public relations. The ARABUS incubator in Finland is one of the rare organisations in the EU that assists cultural workers who intend to set up their own enterprises in acquiring the necessary entrepreneurial knowledge and skills. The aim of the project is to reduce the high failure rate of start-up companies established by art graduates.

4.2 Technological laboratories of artistic creation

This category represents a new approach for artistic work which, due to its nature, has been able to establish bridges between the cultural and multimedia industry. Therefore, these types of projects have had a direct impact on the creation of jobs. This category involves areas of artistic creation that make use of new technologies and, due to their creative and innovative character, have often been able to take on a leading position in the technological industry in the creation of new products.

Several different cases are included in this category. FOURNOS, for example, has been working in Athens for years in connection with different networks of multimedia artistic creation in Europe. In Barcelona, L'Hangar has promoted the establishment of a community of artists who work in multimedia, and MIDE (located in Cuenca, Spain), has gained a central role in multimedia artistic creation in Spain due to the use of new technologies, in spite of the fact that Cuenca has not been considered among the traditional Spanish centres of contemporary artistic creation.

When looking at the characteristics that distinguish the centres in this category, it is first of all important to emphasise that they are centres with a broad connection between the cultural sector and the new technologies sector. In tracing their origin and development as centres of artistic creativity, one can observe an obvious parallel to the technological development and progress of the telematics industry. This is possibly the reason why artistic forms related to new technologies are acquiring increasing vigour, especially among younger artists.

In most cases, the recent creation of these types of centres has been largely due to the need for sharing the technological resources that are available. In fact, due to the high cost of the technologies involved, artists are almost obliged to work in such centres: in the long run, the co-operative involvement and networking made possible by these types of centres enable them to develop into high quality creative centres, both on the artistic and technological levels.

Although there is great disparity in the organisational criteria found in these types of centres, we have attempted to establish a series of characteristics common to them all:

- **Innovative character.** Creativity is perhaps one of the most important characteristics of these centres. The artistic forms related to new technologies are still being used on a limited basis. Therefore, these centres are characterised by a high level of innovation which often parallels the technological innovations emerging from the industry.
- **Commitment to experimentation and research.** Although they are often presented as centres of artistic creation, due to their innovative nature, they have also become experimental laboratories for new technologies. In the case of MIDE, for example, the industries related to new technologies often turn to these types of centres in order to verify the performance of equipment that has not yet been introduced on the market.
- **Multidisciplinary working teams.** The combination of technical progress and artistic discipline requires a close collaboration between different types of professionals, such as

designers, technicians, producers, etc. Moreover, it is increasingly common for professionals from the cultural sector to go to these types of centres to enrich their artistic work, especially in the case of the dramatic arts. For example, in L'Hangar there are artists from other ”non-technological" disciplines who collaborate with multimedia artists in various areas of creation.

- **De-localisation.** Due to the innovative nature of this type of creative work, there is still a certain lack of ties to specific locations which is facilitated by the transferability of these centres. This allows them, for example, to work far from the traditional creative centres concentrated in large cities or to work in non-urban contexts. Therefore, a wider sector of the population can be given the opportunity to join such projects.
- **Support of the technological industry.** As indicated previously, due to the high aptitude levels of the professionals who work in these centres, they are the best ”testers” of the technological equipment they use. Therefore, the technological industry often gives them their equipment to verify its efficacy. The professionals who work in these centres collaborate actively with the industries which turn to them for advice during the various stages of product development. Thus, industry is becoming increasingly active in supporting the creation of these types of centres with high technological aptitudes. This practice is widespread in the United States and is being introduced progressively in Europe. As we have pointed out, the limited ties to specific locations characteristic of these centres also allow them to collaborate closely with industry in spite of the geographic distance which often separates them.

The potential for growth among these types of centres is one of the most significant among the five categories established by this study. Nevertheless, it is quite probable that their development will be linked to the technological development of the telematics industry. Therefore, it is difficult to estimate how this type of project will influence the job market.

Paradoxically, in spite of the fact that they are closely connected to a growing industry like the TIMES sector, the employment conditions for workers in these types of centres still resemble those of professionals in the cultural sector more closely than those of workers in the multimedia industry. Due to their status as creative workers, there is a certain lack of continuity in their work which, as in the case of the cultural sector, allows one to speak of a certain precariousness in their working conditions. However, this condition seems to be linked to the work of artistic creators in general.

4.3 Urban renewal projects

In this category we are referring to cultural projects that seek to have a multiplier effect on the territory where they are introduced. Focused on economically depressed urban areas, their aim is to bring about economic development and renewal through the introduction of co-operative efforts between the cultural sector and the emerging economic sectors of the New Economy.

Among the projects selected for this study, there are several different examples that could be included in this category. In Marseilles, La Frîche Belle de Mai represents an example of urban renewal based on the creation of new cultural infrastructures. The European City of Music project, on the island of Crete, offers an example of a project which aims to create a cultural infrastructure to serve as the basis for a new centre of tourism.

In fact, as can be observed in the description of these centres, they are cases in which a cultural project has been used as a centre of attraction in order to achieve the urban renewal of an economically depressed area. Many of these projects not only seek the restoration of the district itself, but also the participation of its inhabitants in the restoration process. Therefore, culture, and specifically the cultural projects, fulfil a dual function: offering new

activities to districts that have had a limited cultural infrastructure and acting as an element of social integration for marginal sectors of the population.

Since in many cases they are projects of great magnitude, it is often difficult to estimate the impact on the job market, due to the extensive scope of the indirect consequences of such projects. For example, in forecasting the employment that could be generated by a project such as La Frîche, the figures estimate nearly 1,300 jobs. Evidently, this implies a scope of employment that reaches beyond the cultural sector. Moreover, it also includes the service sectors that are necessary to support such a large project.

Within this context, it is appropriate to point out that a wide range of different types of jobs are generated by these kinds of projects:

- Jobs requiring a high level of technological qualifications: due to the support received by these types of urban projects, they can include highly ambitious cultural initiatives that would not have been able to develop in a normal context. This type of qualified work also receives investments and initiatives from the private sector, which act as a driving force for new proposals.
- The investments generated by these centres also generate cultural employment. These are usually artistic training centres that have an impact on the population. They are local cultural services whose primary beneficiaries are the residents of the districts where the centres are located. The impact of these types of activities should be assessed in terms of the training of human capital.
- It is important not to overlook employment in leisure management / services. Given the scope of these types of operations, the infrastructure generated requires personnel from the service sector (for example, restaurants, hotels) to direct the centres. Once again, it is the residents of the surrounding area that benefit from the employment generated.

All of the cases falling under this category have the following characteristics in common:

- **Visibility.** All of the projects act as ”beacons” for activities on a more global scale. The attraction generated by these types of projects is cost-effective from an internal point of view (transformation of the citizens’ attitudes towards their region) as well as from an external point of view (new visitors come to take advantage of the new cultural opportunities available).
- **Sustainability.** The utilisation of existing resources is one of the foundational principles for these types of projects. This refers to the material/natural resources available, as well as to human resources. In fact, generating employment within the territory is one of these projects’ primary characteristics, since they act as elements that revitalise the area.
- **Multiplier effect.** This effect is particularly relevant in non-urban, decentralised areas where these projects have had a multiplier effect on the region where they were introduced. Nevertheless, there is difficulty in evaluating the impact generated by these projects and determining their real capacity to generate lasting employment.

In spite of the fact that all of the projects in this category are characterised by strong ties to the area where their activities take place, new information technologies allow them to adopt new occupations and develop highly qualified skills without being dependant on a central location. This is true, for example, for those working in the area of publications or operations, as well as for telecommunications technicians who, due to the cable infrastructures developed in recent years, can produce at a distance with no need for a significant amount of logistics support. The Virtual Reality & Multimedia Park Project works in this way, promoting employment in new technologies by working in a economically depressed area of the city of Torino, where the public authorities have introduced urban renewal projects. The necessary synergies established between both sectors should provide a highly important added value

for the creation of new cultural products. Therefore, it is the ”decentralisation” facilitated by the new technological tasks which makes it possible for them to approach the most creative areas within the cultural sector and offer new products.

Likewise, the interaction between the cultural sector and new technologies represented by this type of project can also be observed when one examines the role that new technologies are able to play with regard to cultural heritage and, more specifically, to the restoration of this heritage. Using the Urban Pilot project of the city of Valladolid as an example, we can see how the Polytechnic Departments of the University in this city have had to work closely with those in charge of the artistic restoration of the city’s old district in implementing new methods that facilitate the battle against the effects of environmental pollution. The lessons learned from this process have served to generate new jobs within the cultural sector, with a high potential for growth.

4.4 Cultural projects based on digital processing

Undoubtedly, the most novel projects are those related to the digital processing of content. They are represented by the kinds of projects that we have seen appear through the Internet network and which have led to a revolution in the distribution and dissemination not only of cultural content, but of all types of content. Their organisational structure, as well as their capacity for growth, are still unknown at present. In many cases, they still need to demonstrate their capacity to develop from virtuality to reality.

The cases which fall under this category are primarily projects linked to the Internet, whether they are web sites with a high level of interactivity such as the Virtual Forum in Barcelona, or magazines that base their activities on the distribution lists, such as the ”Transitart.com” magazine, which is related to the world of artistic creation. However, this category also includes projects involving the digital filing of content such as Infocentro Digital in Huesca (Spain), which is linked to the network of public libraries in this city.

There are reasonable doubts regarding the long-term feasibility of these projects. Currently, the Information Society is undergoing a process of progressive introduction into the traditional economic sectors. Despite the fact that culture has been considered a leading sector within the development of the Information Society, it is still too early to estimate the repercussions that the digital revolution will have within the cultural sector.

The digitalisation of content, which facilitates a continuous flow of information, represents a radical change in the dissemination of cultural products from that which we have been accustomed to up until now. The cultural industries should be the first to take notice of this transformation. Recently, this has been seen in the debate that has emerged regarding the status of the author’s copyright and the necessity for its re-evaluation due to challenges by the new digital technologies. Ownership of information is becoming a much vaguer concept, while access to this information and its processing is now a key factor in the processing of content.

As we have seen in the cases considered, this implies a transformation in the structure of the cultural sector and in the emergence of new agents who participate in the distribution of cultural content. We have also observed the emergence of new consumers of culture, especially among the youth, who represent the population group most accustomed to these new technologies. In the years to come, it is quite probable that new jobs will emerge in the cultural sector and an in-depth process of retraining existent aptitudes will take place. Nevertheless, it seems to have been demonstrated that these new cultural professions cannot grow by turning their back on the so-called ”traditional” cultural projects, and that the they are the ones who presently control the content that is later circulated through the network.

Upon examination of the cases selected for this study, there are some common characteristics that are especially noteworthy:

- **New products, new consumption.** In spite of the fact that many of these projects are accustomed to requiring expensive technology, these types of cultural projects facilitate the creativity of new products to a degree which was unthinkable up until now. An example is the case of Infocentro Digital in Huesca, Spain, where the municipal library system offers new multimedia content for use by its citizens. In response to the development and introduction of these products, we can also observe the emergence of new cultural consumers, since not only the ”packaging” of content has changed but also its accessibility.
- **Multidisciplinary working teams.** The contribution of this type of activity to the cultural sector in the form of technological capital implies collaborative creative efforts with artists and other professionals from the cultural sector. Often, the interaction between the cultural and new technologies sectors leads to the development of new digital processing products. This confirms that new digital products are not developed through contributions from the technology sector alone, but are a result of close collaboration with professionals from the cultural sector. In the cases studied, it is apparent that the professionals included in this category have succeeded in integrating both of these characteristics: usually they are professionals from the cultural sector who have acquired additional training in content digitalisation.
- **Interactivity.** One of the most widespread and central characteristics of digitalised products and specifically of those distributed through the Internet, is the possibility of interaction between the transmitter and the recipient. This characteristic, which has been widely recognised as one of the unique qualities of the new communications media, is especially relevant when we consider the dissemination of cultural content. Much of the success of digitalised cultural products in the cultural sector is based on the interaction possible with the consumer.
- **Virtuality.** One of the major problems with these types of projects is their virtuality. They are projects which tend to be short-lived and characterised by a certain degree of instability, as well as a lack of clarity in their definition and organisation. It is true that quite often their creativity is related to their short-lived nature. Nevertheless, due to this virtuality, in conjunction with their innovative nature, all too often these projects become undefined and their impact on the job market remains quite limited.
- **Autonomy of action.** It is precisely the virtual nature of many of these projects and the possibility of implementing new technologies which leads to their characteristically high level of functional autonomy. Often, they may even be directed by a single person.

4.5 Cultural projects in the process of digitalisation

Keeping in mind the foundations of this study, special emphasis has been placed on the fact that jobs are not generated exclusively by the automatic interaction between new technologies and what we might refer to as the ”industry of content”. Often, it is the changes in management, or the introduction of new creative areas on the market that enable cultural agents to generate employment. There is no doubt that the introduction of new technologies is one of the most noteworthy aspects characterising these changes, but it is not the sole aspect involved. Therefore, we have chosen to also include a category covering those projects which could be referred to as ”traditional”, since they reflect the characteristics displayed by all types of cultural projects which are still in a phase of adaptation to new digital technologies.

This involves a wide range of different cases, including centres of artistic creation such as residences for creators like Les Ateliers des Arques (France) or professional guides to the

sector such as GAE (Portugal). Although their activity is not yet based on expertise in new technologies, these are examples of projects that have begun to use such technologies to increase their creative capacity, their channels of communication or their distribution capacity.

The singularity of the projects included in this category is based on the fact that they have successfully evolved from cultural projects with a high level of artistic vocation to cultural projects with a business aspect to their profile. The inability of cultural projects to adapt in order to become projects capable of generating employment is one of the most significant areas of weakness which needs to be addressed in restructuring the cultural sector. This subject has also been the focus of a great deal of literature.

As has been pointed out repeatedly, there is an obvious need for retraining among professionals within the cultural sector. These needs include new aptitudes in cultural project management, in re-implementing existing resources to extend and diversify cultural offers, in communications to seek new ”consumers” and, as is evident from the previous categories, in the use of new technologies in order to adapt them to the needs of the sector. In spite of this apparent need, it must be pointed out that there is an unnecessary hesitancy on the part of cultural sector professionals to make use of the new technologies. Their capacity for innovation and creativity should allow them to adapt to these technologies in a short period of time.

The cases included in this category have the following characteristics in common:

- **Support for creation.** They are structures which, although not directly involved in creation, support the creative process, either in logistics, communications or dissemination. Due to the diversity of applications, this support can be used to establish the framework for generating new employment in the sector.
- **Networking.** At present, the projects in the cultural sector base their development to a large degree on effective co-operation and networking. The interchange of creative resources is one of the main sources of input in the development of these projects. Therefore, their operating structures (autonomy, project-oriented activities etc.) are increasingly focused on networking. Many of the projects that are presented in this study already work in a network.
- **Cultural services.** A very frequent characteristic of these projects is that they offer services for citizens. These services are usually focused on the local/regional in nature and seek to increase the enjoyment and well-being of the consumers who use them.

5. Conclusions

Based on the different projects analysed, our field work has identified some trends in the evolution of the job market and we have been able to arrive at some valid conclusions which are presented in the following section:

- **Demand for content.** It has been clearly shown that in the new information era, the demand for content and knowledge has been stimulated. Therefore, those projects capable of offering and circulating information through the telematics networks are particularly valuable. These networks are a highly favourable context for making use of the added value represented by the creativity and artistic sensitivity of products from this sector. In this regard, it has been observed that increasing numbers of economic and financial agents are showing interest in promoting and supporting this type of project. For example, telecommunications operators or hardware and software manufacturers are interested in investing in the development of products offering consumers experiences with a high level of artistic content
- **New creative possibilities.** The growth of digital culture increases the creative possibilities of the cultural sector. This has been observed in each of the areas of activity where the cultural sector works: the research and development of artistic products, the distribution of such products and their consumption, as well as audience participation. With regard to the creative processes involved in the development of artistic products, new technological instruments facilitate new possibilities of creative development which have yet to be fully explored. It is important at this point to emphasise that the innovative and often experimental profile that characterises the cultural and artistic sector facilitates its capacity to adapt to the new opportunities of expression, production and dissemination that have emerged with the introduction of ICTs. Moreover, the increase in the possibilities of interchange brought about by the introduction of new communications technologies also reinforces their creative capacities. This represents a typical example of positive feedback, which is stimulated by the development of new contacts, connections and interchanges.
- **New possibilities of dissemination.** The possibilities of dissemination of such projects has been increased by new communications technologies. Increased distribution leads to a quantitative increase (attraction of new consumers) and also acts as a driving force for an improvement in quality (new possibilities of selection, participation and interaction).
- **New audiences.** By including ICTs in their activities, many of the cultural projects become more attractive for new audiences, particularly youth, who recognise that the cultural project includes an innovative, progressive element which it didn't have previously. If we also add the possibility of interacting with the creator-artist, it becomes clear that, in specific circumstances, ICTs grant the cultural project a greater potential for transmitting knowledge, since they imply a much greater level of active participation on the part of the consumer or project audience. In other words, the mere integration of technological aspects into cultural projects makes them singular, particularly attractive projects. They are emblematic projects which have attracted the attention of the public authorities, as well as investors and new consumers. Moreover, they are able to obtain a high level of capital due to the fact that new technologies are introduced in the creative process.
- **New bridges between science and art.** In studying the cases selected, it is clear that the presence of digital culture in cultural projects has particularly served to generate a new relationship between scientific culture and conventional art. Due to these circumstances, which promote interdisciplinary transfer, new bridges have been created between the cultural sector and the new technologies sector, resulting, for example, in the emergence of new fields of employment.

- **New professions.** New professions are emerging which have yet to be clearly defined. Their most relevant characteristics are their interdisciplinary profile and the autonomous nature of their activities. These professionals are accustomed to a certain lack of continuity in their work and the need to work on segmented projects, and are capable of implementing broad relational and informational networks and adapting to changing and evolving contexts. In short, these professions involve the ability to create and to improvise. In many ways, the working conditions of these new professionals can be compared to those who work in sectors of the new economy, which are characterised by a certain degree of precariousness and where flexibility, adaptability, project-oriented work, seasonality, creativity, as well as innovative abilities, are increasingly necessary. In this regard, the opportunities for development and deployment of professionals within the cultural sector seem to be much greater than in the past, although their job opportunities do not necessarily involve artistic projects as such.
- **Market orientation.** It is clear that the introduction of new technologies within the cultural sector does not automatically result in the generation of employment. The introduction of technology must be accompanied by other supplementary measures, such as the formation of interdisciplinary working teams, greater orientation towards the market to generate resources that can cover the high cost of the investments in technological infrastructure, as well as continuing education that is more effectively adapted to the new opportunities of multimedia work, including artistic-humanistic training for technologists as well as technological and project management training for artists.
- **Virtual nature of projects.** The introduction of ICTs grants many cultural projects a virtual nature. Since it makes operations more flexible, this phenomenon blurs and makes it more difficult to define a project's contours. Virtuality is a two-way street, which stimulates the possibility of development and expansion of cultural projects, while at the same time making it harder to define their level of implementation and their working structure. Therefore, certain difficulties emerge in assessing the impact of these projects on the job market as well as on the their area of activity.

Summarising the aspects described above, the most successful projects in the field of training cultural workers in multimedia proficiency can be characterised as follows:

- Their focus of activity is in playing a mediating role between artists, the cultural and multimedia industries and the public sector (such as the Public Employment Services).
- They create entirely new job descriptions (like "media actor").
- They offer training not only in creative skills, but also in technological (state-of-the-art multimedia technology) and supportive skills (management, marketing, interpersonal skills, social competence etc.)
- They train students in the important aspect of interdisciplinary co-operation and team work between various artists, technicians and economists.
- They provide training in close connection with the industry in order to integrate state-of-the-art multimedia proficiency in training and to establish personal contacts between training organisations, students and companies.
- They offer classes with qualifying certifications, according to the new job descriptions.
- They comprise the entire value added chain of cultural production

The European Employment Policy can significantly facilitate the exploitation of the job potential in the TIMES sector for cultural workers by stimulating the creation and expansion of the kind of state-of-the-art training institutions described above.

Annex

Instructions for use of the good practices Access database

(see next page for the master copy of the evaluation questionnaire)

The good practices database is a Microsoft Access application. Once access has been gained to the database a screen will appear enabling the user to read at a glance all the important details regarding entry to the good practices:

- Basic information about the good practice (project title, contact address, country)
- Categorisation of the good practice (Field of action, acting sector, level of action, time frame, target groups)
- Description of the good practice (project description, financing plan)
- Assessment of the good practice (evaluation of the impact on the labour market, overall assessment)

By using the appropriate keys marked with an arrow, the user can click backwards and forwards through the good practices database. The number of a particular practice entry is displayed allowing the user to see where he/she is in the database. Leaving the main screen is possible by clicking the button marked with the symbol depicting a door.

The button marked with the symbol depicting binoculars enables the user to go directly to a particular good practice entry. A search screen is opened. A search word can then be entered in the upper search box. The search area can also be reduced. By clicking on prior to the search, it is possible to determine in which section the search is to take place.

An Access-table allows for new entries to be added to the database at any time.

Master copy of the evaluation questionnaire

Project title, country	**Contact Organisation**	
	Adress	
	homepage	

Field of action	☐ Employability	☐ Adaptability	☐ Entrepreneurship	☐ Equal opportunities
Acting Sector	☐ public sector	☐ private sector	☐ private-public-partnership	☐ Third sector
Level of action	☐ European/transna-tional	☐ national	☐ regional/local	☐ cross-border
Time-Frame	☐ short-term (weeks/months)		☐ long-term (years)	
Focus groups	☐ focused on marginalised group		☐ no focus on specific marginalised group	

Aim/objective of the project

Short project organisation (responsiblity, network, field of activity, training, focus groups etc.)

Financing plan (costs per participant, costs per jobs created etc.)

Evaluation of the impact on the labour market (effects on regional/local economy etc.)

Overall assessment (Transferability to other countries, recommendation for European policy etc.)

List of 154 in detail evaluated good practices according to field of action

Table A4.1: Adaptability

Project title	Acting sector	Level of action	Country
Advanced Music	private sector	regional/local	Spain
Apollonia	public-private-partnership	European	France
APTE - pour une éducation à l'image et aux media	Third sector	national	France
ARCADE-quality and development for small enterprises in crafts and design sector	public-private-partnership	national	Finland
Ars Electronica Center	public-private-partnership	national	Austria
ART 3000 - Arts and New Technologies	public	national	France
Art+Com GmbH	private sector	regional/local	Germany
ARTCRASH	public-private-partnership	European	Denmark
Artec (The Arts and Technology Centre) Multimedia Learning Resource Centre European Multimedia Labs	public-private-partnership	national	United Kingdom
ARTHOUSE Multimedia Centre for the Arts	public-private-partnership	national	Ireland
Artistic Act Centre	public sector	regional/local	Greece
Ateneu Popular de Nou Barris	Third sector	regional/local	Spain
Big Torino - International Biennial of Young People	public sector	European	Italy
Bilbaoarte	public sector	regional/local	Spain
Butxaca	private sector	regional/local	Spain
CADREMPLOI	private sector	national	France
CAHRISMA	public sector	national	Switzerland
CAS '2000	public-private-partnership	national	Switzerland
cat- communication, art & technology Netzwerk für Kunst, Kultur und neue Medien	public-private-partnership	European	Germany
Celtica Gallery	private sector	national	United Kingdom
CICV Pierre Schaefer Montbéliard Belfort	private sector	cross-border region	France
Cortex - Culturemploi Art + Université + Culture	Third sector	national	France
CYPRES	Third sector	regional/local	France
Digital Culture	private sector	European	Germany
ELIA online	public-private-partnership	European	Netherlands
eRENA	public sector	national	Switzerland
Espace Culture Multimédia (ECM)	public sector	national	France
European City of Music	public sector	regional/local	Greece
FACT / MITES Foundation for Art and Creative Technology / The Moving Image Touring & Exhibition Service	public-private-partnership	regional/local	United Kingdom
Fios Feasa	private sector	national	Ireland

Table A4.1 continued

Title	Acting sector	Level of action	Country
Forest and History	public sector	regional/local	Sweden
Forum Virtual - Barcelona 2004	public-private-partnership	regional/local	Spain
Freelance Training Fund	public-private-partnership	national	United Kingdom
GAE - Guide for performing arts	public-private-partnership	national	Portugal
GRIFO multimedia	private sector	national	Italy
INA - Institut National de l'Audiovisuel	public-private-partnership	national	France
Industrial itineraries of Terrassa	public sector	regional/local	Spain
Infocentro Digital	public-private-partnership	cross-border region	Spain
IRCAM - Institut de Recherche et Coordination Acoustique/Musique, Centre for Research and Music/Acoustic Co-ordination	public sector	national	France
Joanneum Research	public-private-partnership	national	Austria
KiG – Kultur-in-Graz	Third sector	regional/local	Austria
La Frîche Belle de Mai	Third sector	regional/local	France
LDI	public-private-partnership	regional/local	United Kingdom
Le Fresnoy, Studio national des arts contemporains	public sector	national	France
Les atéliers des Arques	Third sector	regional/local	France
l'Hangar	public-private-partnership	national	Spain
LLE Laboratoire Langage Electronique Electronic Language Lab (plus IMS and AL/AR)	public sector	European	France
L'Orquestra del Caos	Third sector	regional/local	Spain
Marte	public-private-partnership	national	Italy
MEDIA PROGRAMME - TRAINING	public sector	European	Europe-wide
Media-GN - Centre for Emergent Media	Third sector	national	Netherlands
MediaPark Köln	public-private-partnership	national	Germany
MEDICI (Multimedia for Education and employment through Integrated Cultural Initiatives)	public sector	European	Europe-wide
MedienCampus Bayern e.V., Germany	public-private-partnership	regional/local	Germany
MILIA (2001) World Interactive Content Market-Place	private sector	European	France
Netherlands Media Art Institute Montevideo/TBA	public-private-partnership	national	Netherlands
No Frontiere Design GmbH	private sector	national	Austria
Pitchpoint - Masterschool Script	private sector	European	Europe-wide
Proyecto Piloto Urbano	public sector	regional/local	Spain
PURSCH (Plano de Reabilitaçao Urbano do Centro Histórico de Serpa)	public-private-partnership	regional/local	Portugal
RESEO: European network of education departments in Opera Houses	public-private-partnership	European	Belgium
SCRAN Scottish Cultural Resources Access Network	public-private-partnership	regional/local	United Kingdom
SELECT	public-private-partnership	European	Italy

Table A4.1 continued

Title	Acting sector	Level of action	Country
Skillset National Training Organisation (NTO)	public-private-partnership	national	United Kingdom
Softwarepark Hagenberg	Private sector	national	Austria
Sophia-Antipolis Cote d'Azur	public-private-partnership	regional/local	France
steim (Studio for Electro-Instrumental Music)	private sector	European	Netherlands
STOA	private sector	national	Spain
The Gulliver's Connect programme	Third sector	European	Netherlands
The Netherlands Design Institute	public-private-partnership	national	Netherlands
The Society For Old And New Media	public-private-partnership	European	Netherlands
transitart	private sector	European	Spain
Virtual Reality & Multimedia Park	public sector	regional/local	Italy

Table A4.2: Employability

Title	Acting sector	Level of action	Country
Academia de Productores Culturais	private sector	national	Portugal
Accademia di Brera	public-private-partnership	national	Italy
AMS Künsterservice Wien	public sector	national	Austria
Arteleku	public sector	regional/local	Spain
Artlab: education department of the Danish Musicians Union	public-private-partnership	national	Denmark
Bectu Skillsbase (Broadcasting Entertainment Cinematograph and Theatre Union Skillsbase)	public sector	national	United Kingdom
Camp 2000	public sector	European	Germany
CASSEFAZ	private sector	national	Portugal
Centro Internacional de Inteligencia Conectiva	public-private-partnership	regional/local	Portugal
Ceoltoir - European Traditional Music Training	public sector	European	France Ireland
DSA - Deutsche Schauspieler Akademie (German Actors Academy)	private sector	national	Germany
EuroPrix MultimediaArt	public sector	national	Austria
Euroskills	public-private-partnership	national	Greece
Fabrica	private sector	national	Italy
Fachhochschule Salzburg Gmbh/Techno Z Salzburg/Austria	public-private-partnership	cross-border region	Austria
Fak d'Art	private sector	regional/local	Spain
Forum Dança	public-private-partnership	regional/local	Portugal
FOURNOS - Centre for Arts and New Technologies	public-private-partnership	national	Greece
IMAC	public sector	national	France
International Museum of Electrographics (MIDE - Museo Internacional de la Electrografía)	public sector	national	Spain
International Yehudi Menuhin Foundation	public-private-partnership	European	Belgium

Table A4.2 continued

Title	Acting sector	Level of action	Country
IST - Institute for School and New Technology / education highway Upper Austria	private sector	national	Austria
it4career	public-private-partnership	national	Austria
Jobmaster	Public sector	national	Austria
Kalamata International Arts Centre	public sector	regional/local	Greece
L4 Institut für neue Medien	public-private-partnership	regional/local	Germany
La Caldera	private sector	national	Spain
Make Multimedia History	public sector	national	United Kingdom
MECAD	private sector	regional/local	Spain
Metier	public sector	national	United Kingdom
Multimedia Program, University of Karlstad	public sector	national	Sweden
Newstart	public sector	national	Austria
O CENTA	public-private-partnership	regional/local	Portugal
Operaplus	private sector	European	Belgium
SCREAM FACTORY Institute of performing arts	public-private-partnership	national	Germany
Steirische Joboffensive, Die	private sector	cross-border region	Austria
Structural change in the print industry - employment market and need for vocational training	public sector	regional/local	Germany
The Liverpool Institute for Performing Arts (LIPA)	public-private-partnership	national	United Kingdom
The Performing Arts Research and Training Studios (P.A.R.T.S.)	private sector	European	Belgium
Training of joiners in furniture restoration techniques A cross-border co-operation of the Public Employment Service offices in Absam, Brixen and Lienz	public sector	cross-border region	Austria/Italy
TRAM -Training and Research Actions in Multimedia	public-private-partnership	national	France
V 2	public-private-partnership	national	Netherlands
Voices Without Frontiers	Third sector	national	United Kingdom
Werkstätte Kunstberufe	Public sector	national	Austria
World Music Centre (Portugal)	public-private-partnership	regional/local	Netherlands
Zentrum für Publishing und Media Management (Donau Universität Krems) Centre for Publishing and Media Management (Donau Universität Krems)	Private sector	national	Austria

Table A4.3: Entrepreneurship

Title	Acting sector	Level of action	Country
ARABUS business incubator	public-private-partnership	regional/local	Finland
CRAFT (Leonardo Da Vinci)	public-private-partnership	national	Greece
ERNE - Opencultura.com	public sector	regional/local	Spain
Forum Nord - Barcelona NetActiva	public-private-partnership	regional/local	Spain
ICCM International Centre for Culture & Management	Private sector	national	Austria
Industria culturale - APIC, Agenzia	public-private-partnership	regional/local	Italy
New Voices: New Visions	public sector	national	United Kingdom
StartART	public sector	national	Germany
Synergia	public sector	regional/local	Greece

Table A4.4: Equal opportunities

Title	Acting sector	Level of action	Country
Agendum	public-private-partnership	regional/local	Sweden
ARCO Performing Arts and Media Project	public-private-partnership	regional/local	United Kingdom
Certa (Chantier ecole regie technique audiovisuelle)	public sector	national	France
CIREN (Cultural Indutries Research: EMPLOYMENT NOW)	public sector	national	United Kingdom
Creative Arts Partnership in Education	public-private-partnership	regional/local	United Kingdom
cultconcept	private sector	national	Germany
DISCO: Disseminating Career Opportunities	public sector	national	United Kingdom
EntrActes	Third sector	national	France
Girl Power	public-private-partnership	regional/local	Germany
Gunnebo - Reviving the 18 th century	public sector	regional/local	Sweden
Huddersfield MENCAP	Third sector	national	United Kingdom
Integra Euroheritage	public sector	regional/local	United Kingdom
Inter-Media Work Bureau	public-private-partnership	regional/local	United Kingdom
LINK, Local Integration North Kensington	public-private-partnership	regional/local	United Kingdom
Manchester Youth and Creative Arts Training – MYCAT	public-private-partnership	regional/local	United Kingdom
Mmediate,	public-private-partnership	regional/local	United Kingdom
MORA Multilingual Open Radio Association	third sector	cross-border region	Austria
Multimedia for Women in Cultural Industries (MUWIC)	public sector	regional/local	United Kingdom
National Development Team, Art and Power	Third sector	national	United Kingdom
ODYSSEY	Third sector	regional/local	United Kingdom
Public Netbase, Institute for New Culture Technologies	public-private-partnership	national	Austria

Table A4.4 continued

Title	Acting sector	Level of action	Country
Stöbergasse Polycollege - Radio journalism course programme	public-private-partnership	regional/local	Austria
The Halland Model in Olsztyn	public sector	cross-border region	Sweden
Vasikkavuoma Future	Third sector	regional/local	Sweden
web-academy	private sector	national	Austria
WUK Lehrgang Veranstaltungsorganisation und –technik; WUK Course for events organisation and technology	Third sector	regional/local	Austria

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Exploitation and development
of the job potential in the cultural sector
in the age of digitalisation

FINAL REPORT

Obstacles to mobility for workers in the digital culture in the European Union

(Module 5)

commissioned by

European Commission
DG Employment and Social Affairs

presented by

MKW Wirtschaftsforschung GmbH, Munich
WIMMEX AG, Munich

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1. Introduction

The objective of this Module is to identify the obstacles to transnational and cross-border mobility of cultural workers within the European Union in a country-by-country comparison in order to promote transparency and geographic mobility with regard to the cultural labour market.

It is vital to see this objective within the context of the European Employment Policy, the aim of which is to create a single European labour market by eliminating or reducing obstacles to professional and geographical mobility of European workers. Measures addressing the issues of obstacles to geographical mobility and training and qualification are interconnected since both types of measures aim to improve employment opportunities for European workers. While training measures aim to improve professional flexibility and/or mobility of workers, the measures focusing on the reduction of obstacles to mobility seek to extend opportunities for geographical mobility.

Economically speaking, by extending the national labour markets of EU-Member states to a European level, a better allocation of the work force can be expected, which, in turn, means that shortages and surpluses of labour can be more easily balanced out. For the individual European worker, this results in a larger supply of job vacancies on a European level and, thus, better employment opportunities. The same is true for employers, of course. Looking at it from the aspect of regional economics, worker mobility is of specific importance for regional cross-border development, where by far the biggest potential for increased mobility is to be found. The inner-EU cross-border regions can be regarded as the “integration laboratories” for the European Union, since the experience gained in the border regions regarding all the various aspects of integration can be transferred to and used on both the national and European level.

Apart from economic considerations, as one of the four founding “freedoms” of the Single European Market, worker mobility is also a basic right of all EU citizens. In a democratic political system like the EU, an individual’s freedom of movement is a basic right.

In this context, it is important to stress that the aim of reducing obstacles to mobility is not to force European workers to become more geographically mobile. The current number of workers who are actually mobile and the desired level of mobility based upon economic considerations is also of secondary importance. The most important aim of reducing obstacles to mobility is to simply offer additional opportunities to those EU workers and employers who intend to make use of their basic right of freedom of movement.

2. Labour mobility in the EU

2.1 Legal and political framework

Increasing the mobility of workers within the European Union by minimising the obstacles to mobility is a policy of high priority for all EU institutions. This is due to the fundamental legal and political framework of the EU.

2.1.1 Free movement of workers

According to Article 18 item 1 of the "Treaty establishing the European Community" (ECT) "Union citizens have the right to move and reside freely within the territory of the Member States...". This right is an essential part of Union citizenship.

Freedom of movement confers the following rights:

- Right to housing (including ownership or access to low-cost housing)
- Right to import personal goods free of tax and customs duties
- Right to transfer capital without restriction
- Right to retain social security entitlements acquired in other countries
- Right to the same welfare and tax benefits as nationals (interest-free loans, other reductions)
- Right to equivalent education and vocational training as nationals
- Right to employment
- Right to engage in trade union activity
- Etc.

Free movement includes the right to work in all Member States under the same conditions as citizens of those States. Indeed, the "freedom of movement for workers" (Article 39 item 1 ECT) was guaranteed earlier than Union citizenship. It is one of the four founding "freedoms" of the Single European Market. In the founding treaties of the European Union, free movement of workers as human resources in the production process has the same significance and importance for the implementation of a single market as the free movement of goods, services and capital.

A single European labour market with a high degree of geographical mobility of the labour force has significant economic advantages. From an economic perspective, labour mobility is an essential precondition for equilibrated labour market development. The more mobile the production factors are, the better the economic fabric works. Regional disparities in economic and employment development can be more easily balanced out. The exchange of professional know-how can be increased through a higher number of personal contacts on an international level. More personal contacts also provide impulses for creativity, a prerequisite for innovations. All these factors contribute to a more innovative and competitive European economy in a global world.

In addition to these economic considerations regarding freedom of movement, there are other factors which make it a main pillar of the European Union:

- In democratic political systems, an individual’s freedom of movement is a basic right.
- For the individual, migration is a matter of personal choice. The decision to migrate is motivated by expectation, while the specific reasons behind migration may differ.

Nevertheless, there are still a number of considerable obstacles which hinder the regional mobility of European workers. These obstacles not only effect both the workers in question and their families. They also slow down the process of creating a competitive Single European Market.

Therefore, it is a main priority of the European Union to increase the regional mobility of her citizens and to eliminate the obstacles to mobility. A specific service within the European Commission was established in 1994 for this purpose, the European Employment Service (EURES). EURES is a European labour market network aimed at facilitating transnational and cross-border worker mobility in the European Economic Area (EEA). It is dedicated to implementing Article 40 ECT (in particular item d.), which requires the Council to adopt the necessary measures for implementing freedom of movement for workers, in particular by establishing mechanisms designed to put employment supply into contact with demand and to facilitate its balance under conditions which rule out serious risks for the standard of living and employment in the various regions and industries.

EURES links more than 500 Euroadvisers - specialists in employment matters - throughout Europe. Through the Euroadvisers and Internet services, EURES makes information available to potentially mobile workers on the living and working conditions in all countries in the EEA, provides a job placement service for job seekers and offers a recruitment and information service to employers who wish to recruit in other EEA countries.

2.1.2 European Employment Strategy

In recent years, the problem of mass unemployment has become more urgent in most EU Member States, and politicians and citizens across the EU have demanded EU involvement in the efforts to solve this problem. Consequently, as part of the ongoing process of reforming the EU institutions, the legal framework of the EU has been modified accordingly. In addition to being of interest as part of the strategy to increase the competitiveness of the Single European Market, European worker mobility is now seen as a significant aspect in the fight against the huge problem of mass unemployment.

In June 1997, the treaty of Amsterdam introduced a new Title in the ECT on employment (Title VIII). According to this new Title, "Member States and the Community shall ... work towards developing a co-ordinated strategy for employment and particularly for promoting a skilled, trained and adaptable labour force and labour markets responsive to economic change ..." (Article 125). For the first time, employment was considered a "matter of common concern" (Article 126 item 2). The Treaty took an important further step, however, in also providing for action at the Community level, and in making a high level of employment an explicit objective with the full support and commitment of the Union itself. (Article 127 item 2).

Furthermore, for the first time, the Amsterdam Treaty established cultural policy as a common policy of the European Union. Article 151 states that the Community "shall contribute to the flowering of the cultures of the Member States, while respecting their national and regional diversity and at the same time bringing the common cultural heritage to the fore".

The Luxembourg Jobs Summit of November 1997 transferred the framework written down in Title VIII into a clearly defined "European Employment Strategy", built on four main pillars (see Table 5.1):

Table 5.1: 4 pillars of European Employment Strategy

I. Employability - Tackling youth unemployment and preventing long-term unemployment - Transition from passive measures to active measures - Encouraging a partnership approach together with the social partners - Easing the transition from school to work	**II. Entrepreneurship** - Making it easier to start up and run businesses - Exploiting the opportunities for job creation (new sources of jobs, new technologies, innovations - Making the taxation system more employment friendly
III. Adaptability - Modernising work organisation in co-operation with the social partners - Supporting adaptability in enterprises	**IV. Equal Opportunities** - Tackling gender gaps (equal opportunities for women) - Reconciling work and family life - Facilitating return to work - Promoting the integration of people with disabilities into working life

Every year, a set of Guidelines is adopted by the European Council for each of the pillars, which sets a number of specific targets for Member States to achieve in their employment policies. These Guidelines are to be transposed into concrete and administrative measures by each Member State, through their **National Action Plans for Employment** (NAPs).

As a result of Title VIII ECT, the cultural sectors are integrated in these Guidelines. The 1999 Employment Guidelines (Council resolution of February 22, 1999) state that "the role of the cultural sectors in creating sustainable jobs should be considered in the context of the National Action Plans".

Regional, cross-border and transnational mobility of workers within the EU are not explicitly mentioned in the four pillars of the European Employment Strategy. **However, it is obvious that modernisation of work organisation and better adaptability of workers and enterprises to changing conditions of the economy alone are not sufficient to achieve a high level of employment in a Single European Employment Market. A higher geographical mobility is another important factor that has to be taken into consideration.** The best way to increase the geographical mobility of employees is to minimise the obstacles to mobility.

This approach is shared and supported by the European Council. At the summit of Lisbon in March 2000, the heads of states decided, among other topics[1]

- to improve employability and reduce skills gaps, in particular by providing employment services with a European-wide data base on jobs and learning opportunities;
- to define, by the end of 2000, the means of fostering the mobility of students, teachers and training and research staff both by making the best use of existing Community programmes (Socrates, Leonardo, Youth), by removing obstacles and by creating greater transparency in the recognition of qualifications and periods of study and training;
- to take steps to remove obstacles to teachers' mobility by 2002 and to attract high-quality teachers;

[1] Presidency conclusions of the Lisbon European Council (23 and 24 March 2000). Brussels.

- to develop a common European format for curricula vitae, to be used on a voluntary basis in order to facilitate mobility by helping both education and training establishments and employers in the assessment of knowledge acquired.

All these measures clearly aim at increasing the transparency of the European labour market and minimising the obstacles to worker mobility in the EU.

The digital culture sector is no exception under this EU-policy. In addition to a considerable number of programmes which aim to develop the multimedia sector, the cultural sector is mentioned explicitly in the 1999 Employment Guidelines. The European Commission considers it to be an important economic sector within the EU, with potential for increasing employment.

Therefore, an inevitable part of evaluating the employment potential of the digital culture is the analysis of obstacles to mobility for cultural and multimedia workers, as well as the proposal of means and action which have the potential to minimise these obstacles.

2.2 Mobility of workers in the EU in general

Before discussing the geographical mobility of workers in the EU, it is important to distinguish and define two different forms of geographical labour mobility: transnational mobility and cross-border mobility.

2.2.1 Transnational

Transnational labour mobility means that EU citizens move away from their countries of origin, with or without their families, to live and work in other EU countries, either permanently or for a limited period of time. These persons are also called "traditional migrant workers".

Currently there is relatively little transnational mobility of the EU labour force. Although all EU citizens have the right to work and live in other Member States, only 5.5 million citizens - 1.5% of the total population - have opted to settle in another country[2].

Of these 1.5%, not all persons are permanent migrant workers and/or members of their respective families. A significant number of EU citizens settle in another Member State on a temporary basis or for reasons other than employment. The following recent migration trends have to be taken into consideration:

- **Retirement migration**

  A large and growing number of retired EU citizens move to another Member State in order to spend their old age there. This kind of migration is primarily north-south bound, from Northern/Central European countries (frost-belt) to Southern/Mediterranean countries (sunbelt).

- **Education related migration**

  There is also a large and growing number of EU students who stay in another Member State for part or for the entire duration of their studies. In recent years, the EU itself has strongly promoted the geographical mobility of students within the EU. Between 1995 and 1999, more than one million people took advantage of the Socrates, Leonardo da Vinci or Youth for Europe programmes to study, train or do community work in a country other than their own[3].

[2] OECD (1999): EMU (European Monetary Union) Facts, Challenges and Policies. Geneva.
[3] European Commission (2000): A new generation of programs. Brussels.

- **Migration and commuting are becoming more indistinguishable**

  The boundaries between migration, on the one hand, and commuting, on the other hand, are becoming increasingly indistinguishable. In several regions, networking of transport infrastructures within the EU economic region has resulted in larger distances being able to be covered more quickly. Consequently, a worker from Brussels, who would have had to migrate 10-15 years ago in order to work in Paris, can cover the same distance today as a daily or weekend commuter. In all regions where high speed connections within the transport infrastructure have recently been created (for example, the Euro tunnel or the bridge across the Great Belt between Denmark and Sweden), travel times have been dramatically reduced.

  As a result, this means that in some circumstances, particularly in the case of transport connections between metropolitan centres, these commuters may need less travel time than workers who live and work within one of these centres.

- **Corporate Migration**

  In the wake of the Europeanisation of the economy, the temporary use of workers in a foreign country has developed into a permanent component of company policy, especially in the case of large multi-national corporations: ”temporary migration” as an instrument of personnel policy.

- **Temporary Migration**

  In recent years, there has been a trend towards temporary migration. In other words, the percentage of workers taking on employment in another EU country for a limited time and returning afterwards to their country of origin is increasing. This trend, by the way, can be observed not only on the transnational level, but is also increasing on the intranational level. For example, migration from southern to northern Italy has increased dramatically in recent years due to the difficult labour market situation in southern Italy. At the same time, however, it has been documented that many workers have returned to southern Italy after a certain period of time to take on employment in their native region or to start a business of their own. In this way, a considerable re-transfer of capital and knowledge has taken place.

  Consequently, this temporary aspect of migration also means that the boundaries between commuters and migrants are becoming increasingly blurred.

Finally, one must take into consideration that a significant part of transnational labour mobility concentrates on the inner-EU border regions, meaning that EU citizens of a border region move across the border into another Member State in order to live and work there permanently, but not far from their village/town/city of origin. Of course, officially, this is considered transnational labour migration, but in reality it more closely resembles a kind of cross-border migration.

Taking into consideration all these trends, the actual number of true permanent migrant workers is, in all probability, only around 1% of the total EU labour force, or 2.5 million workers.

In contrast, one finds far greater geographical mobility in other monetary zones, such as the United States or Australia. Citizens of these states are more able and/or willing to move great distances, whether to change jobs or to find work.

Even on the national level, most European countries do not demonstrate a level of geographical mobility comparable to the USA. In Italy and Spain, migration rates average about 0.5% of the regional population. In the Netherlands and Germany, migration is almost

three times as high, but is still considerably lower than in the United States, where those migrating between states represents approximately 2.4 percent of the population[4].

In order to achieve a ”healthy” level of labour mobility and to exploit the job potential of the Single European Market, transnational mobility of European workers would have to be 2 to 3 times higher[5]. The term “healthy level of labour mobility” is to be understood as compared to labour mobility on a national level.

The reasons behind the limited degree of geographical labour mobility in the EU will be discussed in Chapter 3.

2.2.2 Cross-border mobility

Cross-border mobility of "frontier workers" is of high economic importance in the inner-EU border regions. In the European countries, frontier regions have usually remained on the economic periphery, compared to the national economic core regions. Their economic development has been hampered for a long time by the existence of national borders. The opening of the borders by the European Union for goods, services, finance and workers presents an opportunity for the inner-European border regions to overcome their structural problems by cross-border co-operation and the creation of cross-border economies. ”Frontier workers” or ”cross-border workers” are playing an important role in this process.

Furthermore, the inner-European border regions function like ”integration laboratories” for the European Union, since experience gained in the border regions regarding all the various aspects of integration can be transferred to and used on national and European level.

In EU terminology, the term "frontier worker" describes any worker who

- pursues his occupation in the territory of a Member State and resides in the territory of another (neighbouring) Member State (= political criterion),
- to which he returns, as a rule, daily or at least once a week (= timely criterion)[1].

The frontier worker has dual national allegiance, stemming from his place of residence and his place of work. Generally, cross-border workers must face a greater risk of having their legal status abruptly modified to their disadvantage.

Up until now, in order to support cross-border mobility, the EU has established 20 **EURES regions** which cover the main part of inner-EU-border-regions. The aim of EURES is to facilitate cross-border commuting of workers. A EURES region is like a "round table", with Public Employment Services, trade unions and employers associations from both sides of a border region meeting together to discuss and work on solutions for diminishing obstacles to mobility within their region.

There are actually no recent EU-wide figures, compiled on the basis of a standardised, harmonised system, on the **extent of cross-border mobility**. No accurate figures have been collected by the European Union, the OECD or the Council of Europe. On the national level, no comparable periodic surveys are carried out in the various EU countries.

The data available mainly comes from the processing of figures provided by social security and population censuses. Social security sources have one major limitation, however: they underestimate the actual number of frontier workers. It must be kept in mind, for example, that in some countries employees earning more than a given maximum or less than a given

[4] OECD (1999): EMU (European Monetary Union) Facts, Challenges and Policies. Geneva.

[5] MKW (2000): Migration trends in Europe. Intra-EU labour mobility and migration flows between the EU and EEA/CEEC. München.

minimum are not subject to compulsory health insurance and are therefore not included in the statistics (as is the case in Germany and the Netherlands).

The source of the data presented in this report is the 1997 working paper "Frontier workers in the European Union" of the Directorate General for research of the European Parliament.

In its report, the European Parliament estimates an average number of 380,000 cross-border workers in Western Europe[6] over the period of 1990-1995 who commuted to work from their country of residence to a neighbouring EU-country. Though this figure is probably underestimated, owing to the limitation of the statistical sources, we will use it for our further research.

In January 2000, 15 of the 20 existing EURES-regions within the EURES-network reported a total number of 249,041 cross-border workers to the Department General Employment and Social Affairs of the Commission, In addition, there were 49,332 cross-border workers between France and Germany on the one side and Switzerland on the other side.

France is clearly the leading "exporter" of cross-border workers in Europe. There are approximately 179,000 French citizens living in France and working abroad, mainly in Switzerland (74,000), Germany (45,000), Luxembourg (27,800) and Monaco (18,000)[7]. France is followed by Italy, with around 40,000 cross-border workers, most of whom work in Switzerland. Almost half of all frontier workers work in non-EU Member Countries.

Despite the recession in recent years, Switzerland provides work for almost half of all the cross-border workers in Europe (around 151,000 in 1995, according to the Federal Aliens Office). As the leading "importer" of cross-border workers, Switzerland is followed by Germany, which is the daily or weekly destination of nearly 78,000 cross-border workers, mainly from France and, to a lesser extent, from the Netherlands and Austria.

As the numbers show, cross-border mobility is concentrated mainly in the economic core regions of the EU. The peripheral regions to the North (the Scandinavian countries) and South (the Iberian Peninsula) are less significant in terms of cross-border work, either because of the geographical configuration of the area concerned, or because of specific features of the local labour market.

Taking into account all available data, the current number of cross-border workers in the EU can be estimated at around 300,000. In a Single European Market with open borders, however, the number should be between 6 and 8 times higher[8].

This means that in the EU, cross-border mobility is even less developed than transnational mobility. However, cross-border mobility covers shorter distances than transnational mobility and, therefore, should be compared with the high level of commuter mobility in metropolitan areas. While there are enormous commuter flows within national agglomerations like Paris, Madrid or Munich, flows of cross-border commuters across borders between EU member states are much lower, even in economically prosperous border regions like Salzburg/Austria, Freiburg/Germany, Kopenhagen/Denmark-Malmö/Sweden or the entire Benelux-region. The highest potential for more geographical mobility within the EU is located especially in border regions such as these.

Within this context, the sector of digital culture is no exception. It is clear that a stronger development of culture and multimedia in inner-European regions, which would lead to higher employment and better competitive advantages, can only be achieved when the currently existing obstacles to mobility in these regions are removed.

6 All 15 EU countries plus Norway, Liechtenstein and Switzerland

7 All figures for 1995, Monaco for 1994

8 MKW (2000): Migration trends in Europe. Intra-EU labour mobility and migration flows between the EU and EEA/CEEC. München.

2.3 EU Worker Mobility in the digital culture specifically

Digital culture can be regarded as the joint sub-sector of the multimedia and cultural sectors (see Module 3). Since we have defined digital culture for the first time in this project, there are still no existing job classifications for workers in the digital culture. Therefore, in this Module the existing job classifications for cultural and multimedia workers will be used.

Cultural workers

The number of cultural workers in the 15 EU countries is about 7.2 million (see Module 2). There are no statistics on the actual number of cultural workers who migrated to another EU country or are cross-border migrant workers but we can estimate this number.

In Chapter 2.2, we concluded that the number of actual migrant workers in the EU was approximately 1% of the total labour force, or 2.5 million workers. Assuming that the situation in the cultural industry is the same, it can be estimated that 1% of all cultural workers (or 72,000) are living in another EU country plus 10,000 who are cross-border commuting.

However, cultural workers traditionally have a relatively high geographical mobility. They often depend on the possibility of working at different places or in different countries as a vital part of their professional activities. This mobility represents a driving force for a deeper integration of the EU, because cultural activities beyond national borders are considered an enrichment and an important impulse for the flowering of the regional and national cultures within the Member States. In recent years, the tendency has been for this mobility to further increase[9].

For these reasons it would be adequate to estimate the actual number of migrating and cross-border commuting cultural workers between 90,000 and 140,000.

Multimedia workers

The same calculation for cultural workers can be made for multimedia workers. We know from the results of Module 3 that there are 11.4 million multimedia workers in the 15 EU countries. Given the assumption that the situation in the multimedia industry is the same as within the entire EU labour force, an estimated 1% of multimedia workers, or 114,000, are living in another EU country, plus 14,250 who are cross-border commuting.

Like cultural workers, however, multimedia workers have a significantly higher geographical mobility than the average worker. They belong to a relatively young industrial sector in the high-tech industry. This sector is dominated by young, highly educated and well-trained workers, whose education reflects a high degree of internationalisation (internships and semesters in foreign countries, English as their international working language etc.). Similar to cultural workers, as a result of their global-oriented education, multimedia workers possess a relatively high ability and willingness to cope with foreign cultures, languages and living conditions.

For these workers, international contacts are a matter of course, which significantly increases their willingness to work abroad. Furthermore, many companies in this sector are hiring their highly trained staff not just on a national, but on an international level. Another factor that lowers obstacles to mobility for multimedia workers is the relative insignificance of problems regarding the recognition of qualifications, since the sector is so young that job descriptions and qualification requirements are still rather unstructured.

As a result of these factors, the geographical mobility of multimedia workers is above average. The actual number of workers in this industrial sector who are living in another EU country or cross-border commuting can be conservatively estimated at between 140,000 and 190,000.

[9] European Commission (1997): Guide Culture, Employment, Europe. Brussels.

Conclusion

Though the mobility of cultural and multimedia workers is already above average, it is still far below an economically desirable level. Table 5.2 shows the estimated numbers of current migrant workers and cross-border commuting workers within the digital culture sector and compares these numbers to the economically desirable numbers (estimates by MKW).

Table 5.2: Mobility of workers in digital culture

	Total number in the EU	Current migrant workers and cross-border commuters	”Healthy” number for a single market
Cultural workers	7.2 million (see Module 2)	90,000 – 140,000	350,000
Multimedia workers	11.4 million	140,000 - 190,000	500,000

Source: MKW Munich, 2001

In a single market, the number of migrating and cross-border commuting workers within the digital culture should be at least three times higher than the current level, taking into consideration the high internationalism of the digital culture and the importance of this sector for future economic growth in the EU.

This estimation of current migrant workers and cross-border commuters in digital culture is very conservative, with a wide range of fluctuation. The range of fluctuation is relatively high because the actual mobility behaviour of workers in digital cultural can not be calculated precisely, due to a lack of reliable data. The estimated “healthy” number for a single market is also very conservative. It is highly probable that the correct number would be even higher, if we were to take more strongly into consideration the extremely underdeveloped mobility in inner-European cross-border regions.

Although we have seen that mobility among workers in the digital culture is slightly above average, we could nevertheless even go so far as to say that digital culture is particularly handicapped by the insufficient geographical mobility of its workers. According to our results in Module 3, the European job potential in the digital culture sector is very high. The European Employment Strategy has also strongly emphasised the need for more development in culture and multimedia. However, up until the present, low worker mobility – professionally as well as geographically - has prevented digital culture from exploiting its job potential. This also makes it more difficult for European digital culture to withstand the tough international competition from other world regions, particularly the USA.

In order for the digital culture sector to be able to exploit its job potential and to withstand international competition, a better use of the available human capital by means of an extended inner-European exchange of knowledge is indispensable. Alongside stronger efforts in education and training, this will require a better allocation of the respective work force on a European level. However, a better allocation of the work force is only possible with a significantly higher level of geographical mobility of workers within the digital culture. Moreover, increased mobility would serve to strengthen European identity in the field of (digital) culture. However, this only means that European workers must be offered more possibilities for mobility. It doesn’t alter the fact that actual mobility is a matter of personal choice.

3. Hindrances and obstacles to labour mobility

As aforementioned, geographical mobility of European workers is low when compared to other monetary zones such as the United States or Australia, despite the fact that theoretically every EU citizen has the right of free movement within the EU. This is also true for cultural and multimedia workers, although their mobility is above average.

Why is there such a big difference between the willingness to move and the number of actual relocations? This phenomenon cannot be explained simply by one reason. In fact, it is a set of several hindrances and obstacles which results in a more or less geographically static labour market in the EU. To begin with, it is necessary to comprehensively discuss those obstacles which confront the entire EU labour force. Next, the hindrances specifically relevant for cultural and multimedia workers will be worked out.

3.1 Hindrances and obstacles in general

Although freedom of movement is clearly guaranteed in the Treaty of Rome, an attempt to study, train or obtain work experience in another country often seems to be beset with obstacles. In 1996, the Green Paper "The obstacles to transnational mobility" by DG "Education, Training and Youth" clearly identified the difficulties and obstacles preventing transnational mobility in the EU area, while proposing matters for consideration.

The European Parliament is also frequently pointing out the obstacles to mobility still existing for European workers, particularly those imposed by various national social security regulations[10].

Yet the most comprehensive description and categorisation of the hindrances and obstacles to labour mobility in the EU can be found in the Working Paper "Obstacles to cross-border mobility within the European Union - The role of the EURES network" of B.E.C. (the Co-ordination office of EURES in the European Commission) released in November 2000. Its systemisation and conclusions are based on a survey in which all cross-border Euroadvisers were asked to gather information from the users of the EURES services in the frontier regions and to identify the major problems which were generally reported to them regarding freedom of movement. While the main focus of the Working Paper of B.E.C. are the obstacles to cross-border mobility, the obstacles described also apply in most cases to transnational migration and can therefore be largely generalised. Another valuable resource concerning obstacles to mobility for European workers is the 1997 report by a committee of the European Parliament on obstacles to mobility within the EU.

3.1.1 Cultural/language problems

While the EU is a monetary zone it is by no means a homogeneous cultural zone. It incorporates a large number of different cultures with specific traditions, religious beliefs and prejudices, due to a long history of separation, conflict and war up until just five decades ago.

The cultural diversity creates significant "mental" or "psychological" barriers for European workers which hinder their geographical mobility. Often a worker in a border region is more likely to be willing to commute 100 kilometres each day to the next major city within his own country than to a city just a few kilometres away across the border. Many unemployed people even resist moving to another region within their own country where a job would be available.

A good example of cultural barriers between neighbouring countries is the case of Denmark and Sweden. Although every Dane is able to read Swedish and vice versa, there are big

[10] E.g. Committee for Social Affairs of the European Parliament (2000): Draft report about the situation of cross-border workers. Strasbourg.

differences, for example, in the mental process of decision making. While a long period of reflection is perceived as a sign of precision and seriousness in Sweden, it is considered inefficient and slow in Denmark.

One of the biggest cultural obstacles to mobility are the 11 official languages in the EU. For example, an unemployed French person who wants to go and find work in the Netherlands, where unemployment is low, would have numerous barriers to surmount, not the least of which would be the language.

Strong efforts have been undertaken during the last decades to diminish this obstacle, particularly by the institutions of the European Union, with a number of exchange programs. The number of student and teacher exchanges between Member States is constantly increasing. Most young people in the EU learn at least one foreign language at school, while those preparing for university studies usually learn two or three foreign languages. At the university level, international contacts and project work in foreign languages are common, in particular in English.

These developments have significantly diminished the obstacle "language", but only for people with a higher level of education. Workers with a lower educational level are usually not able to communicate professionally with colleagues from other Member States and are therefore unable to compete for jobs in these States.

Furthermore, language training usually concentrates on a few major languages: English, French, German, Spanish and Italian. The "minor" European languages are taught and studied in European schools and universities to a much lesser extent. This significantly reduces the chances of EU countries with a "minor" official language of becoming the destination of mobile migrant workers with a high educational level. **Therefore, language programs have the tendency to channel the streams of highly educated migrant workers from the (linguistically) ”minor” towards the ”major” countries of the EU.**

3.1.2 Information shortcomings - lack of transparency

In order for a job applicant or potential employer to go through an optimum decision-making process, he or she must be well informed on the entire spectrum of parameters influencing the pros and cons of the envisaged move. It must be noted, however, that it is definitely more difficult to obtain all the necessary information within a transnational context than within a national context. Even in cross-border regions, workers and employers usually have a surprisingly limited overview of working and living conditions on the other side of the border.

The reasons for information shortcomings are multiple:

- Access to relevant information is more difficult (distances, languages, different legal and social systems, no contact addresses, etc.).
- The cross-border circulation of information regarding job vacancies, as well as applicant presentations, is poor or does not take place at all..
- Job descriptions and required qualifications are different.

Therefore, it is definitely more difficult for a job applicant to get information about employment opportunities and about working and living conditions in other Member States than in his country of origin. When he finally does decide to work in another Member State, he usually knows little about the effects of his decision. The results will be only known a few months or even a few years later.

The main problem for employers is the lack of information on candidates available in other Member States. Furthermore, when they receive applications from foreign candidates, they are often unable to properly judge the qualifications of the candidates.

Particularly the lack of exchange systems for job vacancies has been identified by the Euroadvisers as one of the main obstacles to a satisfactory dissemination of information and,

therefore, as a major obstacle to mobility. A survey in 1999 among the users of services in one EURES cross-border partnership clearly described the informational problems for applicants:

- The informational system is too split up: there is no "one-stop-shop" where applicants can receive all the information concerning aspects of labour mobility. Instead, applicants have to contact numerous addresses/contact points.
- A great deal of problems is created by the lack of knowledge regarding the economic and cultural framework in other Member States. Persons without this knowledge have no precise idea of the local labour market and do not know how to react accordingly in searching for employment and make a successful application. Searching for employment under such conditions does not enable the users to really know what they are looking for.
- Online information about job placements and working and living conditions is still insufficient. There is no state-of-the-art, integrated and comprehensive data base existing on the European level. Furthermore, access to this kind of information is limited to people with the opportunity and experience to use the Internet, while a large portion of the work force does not have this opportunity and is therefore in danger of becoming marginalised. It will be necessary to discuss this problem in more detail in Chapter 3.

3.1.3 Recognition of qualifications

A citizen of a Member State has the right to apply for any vacancies in all other Member States except for specific public services[11]. However, this general right is limited by national laws and regulations.

In many professions, problems with the recognition of qualifications significantly hinder or even prevent mobility of European workers. Not only are the recognition and comparability of diplomas and professions often disputed, but also the recognition and comparability of vocational training, of training periods or the exchange of trainees. The reasons for this major obstacle to mobility are to be found in legal and administrative regulations and practices which vary from one State to another.

When talking about the regulation of professions, one must distinguish between three cases:

- Professional activities in the private sector which are legally regulated
- Professional activities in the private sector which are not legally regulated
- Professional activities in the public sector

Private sector - regulated professional activities

In all Member States, access to specific non-public professions (such as doctors, lawyers, pharmacists) is regulated by law for reasons of public health and security, consumer protection etc. Traditionally, some States tend to regulate professions more than others. In regulating professions, States demand qualifications which can be obtained through their national education system. This makes it difficult for foreign citizens who obtained their diplomas, certificates and work experience in a different country to have access to these professions.

In the meantime, EU regulations have been established for most of these professions which guarantee the mutual recognition of diplomas and time of work experience between Member States. In specific cases national authorities can demand additional training and qualification of applicants for their professional recognition.

[11] Article 39 ECT

While this undoubtedly represents significant progress, major difficulties remain. Diplomas which have been acquired in non-member countries are still not recognised in EU countries. Furthermore, the EU regulations concerning recognition of diplomas have not yet been fully implemented in all Member States, which has served to create a "legal vacuum" for many job applicants. But the worst obstacle is the tendency for national authorities, often under pressure from national professional associations, to turn the exception into the rule. In other words, they require additional qualifications from applicants in most cases instead of in specific cases, as intended by EU law. Sometimes even the education curriculum is checked in detail to see if it corresponds to the national (or regional) curriculum.

An example of this tendency can be seen in the EURES region Interalp. Interalp comprises the entire border region between Germany and Austria. In this cross-border region, a sizeable number of health services and installations located on both sides of the border have a high demand for qualified staff. Yet for several reasons this demand for staff cannot be accommodated by health workers living across the border. First of all, the professions in the health sector are regulated professional activities in both countries, with slight differences in the requirements for qualification and training. This makes it very difficult, for example, for a German physiotherapist to be recognised as a physiotherapist in Austria. Another big problem is the lack of transparency which faces potential employers, who are unable to properly judge the professional experience presented by candidates from across the border.

Private sector - non-regulated professional activities

If a professional activity is not legally regulated it is regulated by the employment market. Though applicants have no legal problems with their diplomas, certificates and work experience, in practice they often face problems similar to their colleagues with regulated professional activities. In many cases, employers are not able to properly judge the professional know-how and experience of foreign applicants. This is still a problem in particular for a number of professions which require a high level of qualification. On the other hand, applicants may have difficulties understanding all the requirements of a job in a foreign country for which they are applying. Furthermore, partly due to pressure from trade unions, there is a tendency in a considerable number of enterprises to prefer national to foreign workers.

These problems can prevent the employment of foreign workers. Furthermore, when an employer does hire a foreign worker, the worker often has the impression that he is paid lower than his local colleagues.

Public sector

With 22 million employees and officials, the public sector in the Member States is impressive in size. This huge employment sector is still only partially accessible to workers from other Member States.

Traditionally, jobs in the public sector are reserved for national citizens. Consequently, EU citizens can not apply for certain public service jobs in other Member States[12]. However, this regulation excludes foreign EU citizens only from public services which execute duties of State like defence, diplomacy, justice or police. The Member States can exclude foreign EU citizens from entering these services but are not obliged to; in theory, they are even free to allow all EU citizens access to State duties.

All other public services (such as the public health sector, the public energy sector, the public cultural sector) must remain open to all EU citizens. The professions in these sectors are either legally regulated (as in the health sector) or non-regulated.

[12] Article 39 item 4 ECT

In recent years, the EU institutions (mainly the Commission and the Court of Justice of the European Community - CJEC) have significantly eased access to the public sector for EU citizens. Nevertheless, all Member States are more or less reluctant to completely fulfil their obligations in this policy field. A EU citizen often has to start his professional career from the beginning when he enters public service in another Member State because either his diploma or years of work experience are not recognised.

Consequently, the CJEC frequently is faced with cases of EU citizens having been denied their right of access to the public service sector. The main issues are the requirements for national diplomas, an exaggerated demand for excellent language knowledge and the refusal to recognise years of work experience.

3.1.4 Economic and financial problems

The most important questions facing a EU worker considering employment in a different EU State are:

- "How much will I earn there?"
- "Will I have at least the same level of social security that I enjoy in my country of origin?"
- "Will the time abroad be recognised in the calculation of my pension entitlement?"

The factors which regulate the answers to these questions are the salaries, the taxes (income taxes, VAT) and the various national social security systems. While salary levels are mainly a question of negotiations between employers and employees (or their trade unions) and are therefore of minor interest to this study, taxes and social security systems are regulated by law and can therefore be influenced by the EU.

Taxes

Every Member State has its own system of taxation with specific direct and indirect taxes and tax rates which it usually strongly defends against EU regulations. On the one hand, it is obvious that an excessively high tax level in a region hinders mobility towards that region, on the national level as well as on cross-border and transnational levels. One should note, on the other hand, that differences in taxation can also represent an incentive to worker mobility.

Taxes alone usually are not a major obstacle to transnational mobility as long as the migrant worker's net wage is not significantly lower than in his country of origin. However, comparatively speaking, differences in taxation represent a bigger obstacle to cross-border mobility. In cross-border regions commuters have to deal with two different taxation systems, including both direct and indirect taxes. They usually have to pay their taxes in the country where their workplace is located. Thus, they are denied a number of tax benefits from their country of residence (e.g. family benefits).

Social Security Systems

National laws which regulate social security usually do not take into consideration the specific situation of foreign workers. Clearly recognising that this would represent a sizeable obstacle to worker mobility within the EU, the EU institutions began early to enact laws to ensure social security for migrant workers. The most important of these was regulation 1408/71 established in 1971, which co-ordinates the national social security systems. According to this regulation, social security for migrant workers within the EU is based on three principles:

- No discrimination based on citizenship.
- In the case of social security, the law of the Member State where a person is working is relevant.

- For a person who has worked in several Member States and paid social security contributions in these countries (particularly into compulsory pension schemes), the years of social security payments in all Member States are cumulated in determining his or her final pension entitlement.

Regulation 1408/71 proved highly effective in resolving most problems for migrant workers related to social security and has been modified several times. But significant problems for migrant workers remain:

- Social security is not the same in all Member States. There are still big differences in the national systems regarding entitlement to benefits (e.g. pensionable age and benefit levels).
- There are still gaps in the social security net, especially for unemployed persons. When someone who is unemployed leaves his country of origin to go and train in another country for over three months, he may lose all his entitlements (contributions to social security and social welfare protection) provisionally or definitively, depending on the country.
- Regulation 1408/71 does not apply to family members of migrant workers, to self-employed and to non-EU citizens who work and live in one Member State. But family is of major concern for the migrant worker. For example, in certain Member States (like Germany), a student is only covered by the social security system when he is covered by the social security of a Member State either as a worker or member of a worker's family.
- Increasingly, employees are choosing additional (non-compulsory) insurance programmes, in particular private pension plans, as their trust in compulsory pension schemes fades. Regulation 1408/71 does not address these types of personal pension plans.
- Every Member State has a different system for taxing stocks, stock option, private pension funds etc. Since the significance of these investments for retirement age is growing rapidly, differences in taxation can impose a huge obstacle to mobility when workers are faced with possible loss of pension entitlements or double taxation.
- Problems also arise where cross-border workers are obliged to contribute (in the State where they work) to certain aspects of Social Security without their contributions resulting in equivalent rights in the country where they reside. An exemplary case is that of the "Pflegeversicherung" (nursing care insurance) in Germany. Cross-border workers employed in Germany are required to contribute to it but cannot benefit from it in their own country.

Those who work just once in their professional career in a different European country – possibly during their younger years and for a limited time –face relatively minor problems with social security. Here European harmonisation of social security systems is coming into effect. However, these problems increase with the number of stays in European countries for employment purposes (multiple migration), and with the number of European countries that one works in.

Overall, the differences in social security systems impose a significant barrier to migrant workers, particularly to the growing number of workers who only want to work in a foreign country for a limited time (temporary migrants).

Differing social regulations are of far greater importance for temporary and multiple migrants than for workers who migrate permanently, because they have to fear potential disadvantages for their future social security, for instance, that periods of employment in a foreign country might not be recognised in their country of retirement.

Combined effect of taxes and social security systems

For a worker intending to migrate or commute, the issue of taxation is, of course, as important as the question of social security. When combined, these two factors can impose a huge obstacle to mobility, in particular to cross-border mobility. The situation between Belgium and the Netherlands is a good example:

"Mrs R. lives in the Netherlands but works in Belgium, while Mrs V. is in the opposite situation. Thanks to her situation, Mrs R. pays a very reduced amount of compulsory levies (low social security contributions in Belgium and low taxes in the Netherlands), while at the same time Mrs V. pays rather high social security contributions and high taxes. Consequently, Mrs R. earns more than Mrs V., although their gross salaries are equivalent. This situation has resulted in a rather large flow of Dutch workers into Belgium, while the opposite phenomenon is marginal, which is partly responsible for to a shortage of manpower in the Dutch part of the border area."

In some Member States, social benefits are funded by taxes. This poses no problem for persons who both work and live in these countries. However, it is a huge problem for commuters in cross-border regions. A good example is the situation between France and Belgium:

"Mr G. is French; he lives in France and works in Tournai in Belgium. The French administration requires him to pay two "taxes": the Contribution to the Refunding of the Social Debt (CRDS) and the Generalised Social Security Contribution (CSG), The first contribution is intended to progressively fill the "Social Security gap". France considers this CRDS as a tax and therefore claims it from Franco-Belgian cross-border workers, who, working in Belgium, are required to pay the totality of their social security contributions there. On 15 February 2000, the CJEC finally ruled against France on this question in the cases C-34/98 and C-169/98."

3.1.5 Legal and administrative problems

Free movement of workers within the EU does not mean that all EU citizens have the right to stay anywhere in the EU and for as long as they want. There are several restrictions which must be taken into consideration.

Residence permit

According to Article 39 ECT, every citizen of a Member State can go to another Member State in order to seek employment and can remain in the territory of a Member State after having been employed in that State. However, this right does not automatically include a permanent residence permit. As a rule, according to the case-law of the CJEC, one may spend six months looking for a job, although in some countries this period may be limited to three months since there is no Community regulation establishing a time limit. When someone stays longer than three respectively six months, he must obtain a European residence permit.

The right to remain in the territory of another Member State is connected to employment within the same State. As soon as a foreign EU citizen loses his job, he is also in danger of losing social welfare protection and may even face expulsion.

While in theory EU workers are free to move and work throughout all Member States, in practice they often have to overcome numerous administrative obstacles. For example, although EU law requires Member States to simplify the procedures for obtaining a residence permit (specifically the language of the documents), applicants often have to provide expensive certified translations of documents.

Another extreme disadvantage is the requirement of a permanent residence permit in order to have access to specific social benefits like childcare payment, interest-free loans, tax

concessions or tax exemptions. In several Member States, due to ponderous administrative bureaucracy, the process of receiving a permanent residence permit can take so long that people are unable to apply for social benefits they are entitled to, thus losing money for a period of time. Sometimes migrant workers are even denied social benefits because these benefits are designed only for nationals. This is a clear violation of EU law, which obliges all Member States to guarantee every EU citizen legally residing in their territory access to all national social benefits.

There is still no EU regulation to standardise and simplify the 15 national residence regulations which differ widely in detail. Frequently, workers have had to take their cases up in the CJEC, which, in turn, often abrogated regulations of national law. When such cases reach the public's attention, they can serve to deter workers from moving to other Member States and consequently hinder geographical mobility.

Family reunion

Current practice with regards to family reunion is based upon the principle that a foreign worker is allowed to be joined by family members[13]. However, this right is limited to spouses, family members of descending line (children, grandchildren...) under 21 years and family members for whom the worker or his/her spouse pays maintenance.

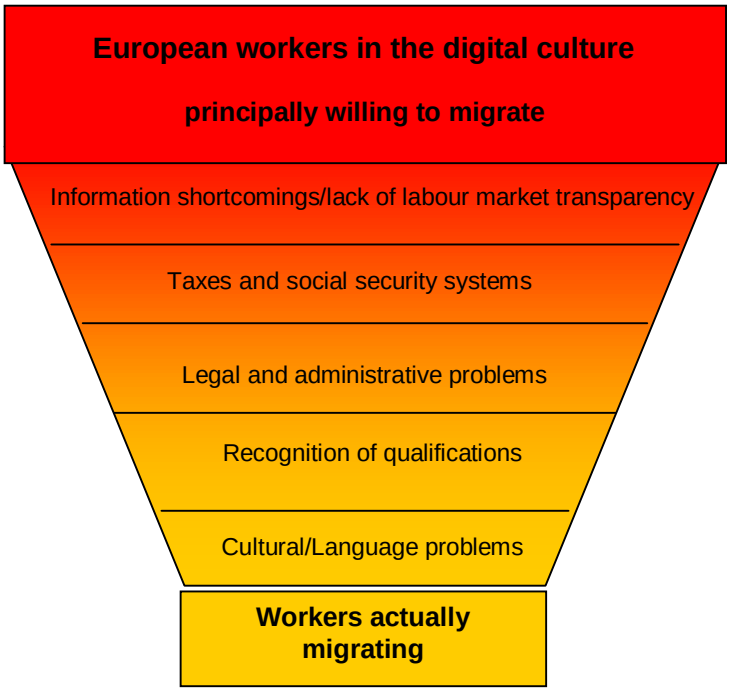
This regulation, originating in the 1960s, is the source of increasing problems today, since the number of family members allowed to join a foreign worker is too restricted. There is no reason to deny children above 21 years and relatives of ascending line to whom a worker and his spouse does not pay maintenance the right to live together with their parents/relatives. Specific problems arise when, for whatever reason, children don't intend to live in the same house and/or city/town as their parents. Furthermore, while common-law marriages are not included under the right to reunion, this type of partnership is becoming more frequent, particularly among highly educated young people, who represent the bulk of the pool of possible migrant workers.

3.2 Hindrances and obstacles specific to workers in the digital culture

The obstacles to mobility for the average worker previously described in Chapter 3.1 have a similar effect on the mobility of workers within the digital culture. These obstacles can be regarded as a series of "filters" which, step by step, reduce the willingness of European workers to migrate and work in other European countries (see Figure 5.1).

[13] Article 10 item 1 Regulation 1612/68

Figure 5.1 : Obstacles to mobility reduce willingness to migrate



However, not all of these obstacles to mobility are of equal significance for workers within the digital culture (see Table 5.3).

Table 5.3: Significance of obstacles to mobility for workers within the digital culture

Obstacle	Significance for	
	Cultural workers	Multimedia workers
Information shortcomings	Very high	Very high
Taxes and social security systems	High	High
Legal and administrative problems	High	Low
Recognition of qualifications	Low	Low
Cultural/language problems	Low	Low

Cultural/language problems

One can assume that the ability of cultural and multimedia workers to cope with foreign cultures and languages is well above average (see Chapter 1.3). Within the sector of digital culture, English, the most common second language for young and highly educated workers, is being used more and more as the language of international communication. Therefore, in general, cultural and language problems represent a minor obstacle to mobility for cultural and multimedia workers.

This, however, is not the case for all professions in the cultural sector. In areas within the broadcasting sector, for example, language represents one of the biggest obstacles to

mobility[14]. In newspapers, traditionally the most interesting reading for subscribers is the local and regional news. Thus, excellent knowledge of the national language or even the regional dialect is indispensable for reporters and journalists in this sector.

Without a doubt, there remains a need for more language and exchange programs on the EU level. But overall, the factor ”culture and language” does not represent an obstacle to mobility significant enough to merit further detailed discussion within the framework of this study.

Recognition of qualifications

Both the cultural and the multimedia sector are characterised by relatively few problems with the recognition of qualifications, since the bulk of the jobs within digital culture can be categorised as non-regulated professional activities in the private sector.

The level of qualification regulation is low, particularly in the multimedia sector. In the case of "new" jobs like web design, diplomas are not as important as practical knowledge and experience, anyway. This sector is almost free of all regulations concerning qualifications: employers usually view practical knowledge as more important than the educational qualifications of potential applicants.

The qualifications required of multimedia workers by new technology are changing so quickly that traditional education and training institutions, such as universities, are not able to keep pace with the rapid development. Therefore, the importance of practical experience and ”life long learning” will continue to increase. In the long run, such an extremely unstructured qualification system may prove to become a problem, but for the near future this is obviously not the case.

The situation in the "old" digital culture sub-sectors, such as the broadcasting sector, is a bit different. Here different job descriptions can constitute an obstacle for foreign broadcasting workers.[15] However, since the growth potential of the digital culture lies mainly in the "new" technologies, one can expect that the already insignificant problems regarding recognition of qualifications will continue to decrease.

As in the multimedia sector, jobs in the cultural sector are rather unregulated. One exception are cultural jobs in the public sector, for example in museums, which are usually associated with detailed regulations. In general, however, the significance of recognition of qualifications for cultural workers can be regarded as minor.

There is a strong correlation between the level of market entry barriers constituted by regulations concerning recognition and qualification, and mobility of workers. Consequently, workers in sectors with a high level of regulation have a lower potential mobility, both within their profession and geographically. On the other hand, the potential mobility of workers within those sectors where there is little regulation is much higher. Examples for several sectors can be seen in Figure 5.2.

[14] Nicola Frank (Advisor European Affairs): European Broadcasting Union (EBU); interview in Brussels 21st of March 2000.

[15] Nicola Frank (Advisor European Affairs): European Broadcasting Union (EBU); interview in Brussels 21st of March 2000.

Figure 5.2: Level of qualification regulation and potential mobility

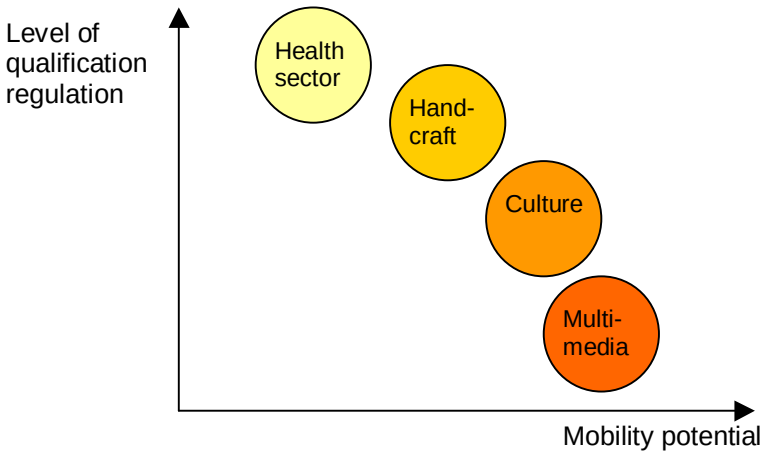


Figure 5.2 illustrates the correlation between the level of qualification regulation and potential mobility. Deregulation of qualification recognition and European harmonisation of qualifications can contribute significantly to a higher potential of mobility, but only in those sectors that are still highly regulated today, such as the health sector. In the culture and multimedia sectors, however, deregulation and harmonisation would not lead to a higher potential for mobility, because the amount of regulation within these sectors is already very limited.

Economic and financial problems

In general, the barriers represented by differing tax and social security systems are not any greater for workers in digital culture than for average workers.

But some cultural workers, such as musicians, are frequently ”multiple migrants” and/or ”temporary migrants”. It is usual for them to work for a limited time in other European countries. These workers in particular have to face many problems with regard to the different national legal systems.

For some cultural workers, such as live performing artists, there are additional tax and social security problems.[16] In every EU country, different VATs and regulations for withholding tax for live music performances exist. Insurance systems for the various contributors to live music (artists, employees, managers, promoters) vary from country to country.

This makes it particularly difficult for live performing artists to perform in other European countries, especially for those not recognised as world stars, who usually just perform on the regional or national level. This is one reason for the limited distribution of European music styles in Europe.

Although this obstacle represents one of the most significant obstacles to cultural worker mobility, we will not analyse it in detail in the course of this study. In light of the fact that a study of the Directorate General “Culture and Education” is currently examining the problem area “Taxation, Law, Social Security” as a major obstacle to mobility, MKW proposed and arranged a division of labour with the colleagues who are carrying out that project. Thus, in our study we will focus on information shortcomings and labour market transparency.

[16] European Music Office (1996): Hindrances and Obstacles to the Circulation of Repertoires, Productions and Artists in Europe. Brussels.

Legal and administrative problems

Cultural workers find themselves in a paradoxical situation: on the one hand, their geographical mobility is traditionally very high. On the other hand, their mobility, which is often short-term in nature (characterised by temporary stays abroad), is exceptionally hindered and sometimes even prevented by the typically slow administrative procedures regarding the obtaining of residence permits and other authorisations/permits etc.

Similarly, live performing artists, also characterised by their extremely temporary stays in single countries, are heavily affected by numerous regulations, such as work permits for live music, performing rights, licences required for promoters, managers and agents, health and safety regulations etc.

However, multimedia workers are not more affected by legal and administrative problems than average workers.

Information shortcomings - lack of transparency

Just like all other workers, those employed within the digital culture are affected by obstacles to mobility, such as cultural/language problems, recognition of qualification, differing tax and social security systems and legal/administrative problems. Nevertheless, cultural and multimedia workers traditionally possess a relatively high level of internationalism and mobility.

For this reason, it can be assumed that workers within the digital culture are more willing than the average worker to overcome the obstacles to mobility, providing they are able to find job vacancies in other European countries for which they are willing to take risks and overcoming obstacles.

However, it is at this stage in the process that they encounter one of the biggest obstacles of all - it is simply extremely difficult to find sufficient information about high quality job vacancies on the European level.

NO INFORMATION ABOUT HIGH QUALITY JOB VACANCIES IN EUROPE

NO MOTIVATION FOR OVERCOMING OBSTACLES

NO MOBILITY.

This obstacle can be considered as extremely significant to inter-EU mobility of workers within the digital culture. Hence, it will be necessary to discuss it in greater detail in Chapter 4.

4. Evaluation of labour market transparency in country-by-country comparison

In Chapter 3, information shortcomings and lack of transparency regarding the European labour market and working and living conditions in other European countries were identified as a main obstacle to the geographical mobility of cultural and multimedia workers in the EU. A wide ”information gap” exists for workers and employers alike which has prevented a higher mobility of workers in the digital culture between European countries. It will be necessary to evaluate this obstacle in greater detail in the following section. Several questions are of specific interest in this context:

- What media are available for transmission of information on labour market and working and living conditions for employed workers and freelancers? The results of this projects clearly show that digital culture is characterised by a high percentage of freelancers. However, freelancers require different information transmission media than employed workers.
- What media have the potential to distribute inexpensively large amounts of labour market information on the European level, thus serving to close the information gap?
- Where do "bottlenecks" for relevant information about the European labour market exist?
- What measures would be necessary to eliminate these bottlenecks and to close the information gap?

4.1 Available media for information about job vacancies and working and living conditions

Information about the labour market and working and living conditions is distributed via four main media:

- Personal contacts
- Print media
- Brokerage offices (headhunter etc.)
- Internet

Personal contacts

Personal contacts are a valuable source of information about job vacancies and job applicants. Applicants with good personal contacts to companies have a significant advantage over competitors in their search for employment. However, the significance of personal contacts in mediating job vacancies and job applicants varies between the different industrial sectors.

The cultural sector in particular makes widespread use of personal contacts for this purpose[17]. This is especially true for freelancers. Furthermore, cultural organisations and artists traditionally maintain an extensive personal network on the international level. This is facilitated by their great ability to cope with foreign culture and language, as well as with foreign working and living conditions. Until now, personal contacts have often been the only suitable means for finding a job or engagement in a foreign country.

[17] Frédérique Chabaud: European Federation of Arts and Heritage (EFAH); interview in Brussels 21st of March 2000.

The multimedia sector represents one of the most internationalised industrial sectors. The number of foreign workers in multimedia companies is high and their time spent in one company relatively short. According to a survey of the Deutsche Multimediaverband (DMMV - German Multimedia Association) dated April 2000, 30 % of the German multimedia companies employ foreign IT specialists whose average length of stay in one company is just 15 months. 23 % of the companies send their employees temporarily to foreign countries. However, this exchange is taking place mainly with non-EU-citizens and companies in non-EU countries! One can assume that the situation in other EU countries is similar. The high fluctuation rate of multimedia workers creates a well-developed personal network on the international level which significantly facilitates the geographical mobility of multimedia workers.

Nevertheless, personal contacts cannot constitute an information channel well-suited to mediate large numbers of job vacancies and job applicants throughout the EU in the cultural and multimedia sectors.

Print media

Print media, such as newspapers and journals, are traditionally one of the most important channels for distributing information about job vacancies. Particularly large newspapers publish weekly thousands of job advertisements each. The number of advertisements in professional journals is smaller, but the advertisements are more specific and therefore of greater interest for certain professions. Nevertheless, print media, in particular large newspapers, have some serious drawbacks:

- The job advertisements of large newspapers are not equally suitable for all branches. While they offer high numbers of jobs for multimedia workers, they are of practically no value for most cultural workers.
- Advertisements of job vacancies in newspapers and magazines are relatively expensive for employers in comparison to other media, such as personal contacts or the Internet.
- Although in the meantime it has become common to find job advertisements from foreign countries in newspapers, the actual number of these advertisements is extremely small in comparison to the number of national job advertisements. **For job seekers with a European perspective, newspapers are of almost no value.**

For these reasons, print media can only play a limited role in transmitting information for European employers and employees.

Brokerage offices/agencies

Employers often use the services of professional brokerage offices ("headhunters") for the recruitment of qualified staff. These relatively expensive services concentrate on highly trained staff with high income.

In specific sub-sectors of the cultural sector, such as the performing arts, brokerage agencies are long and well established. Foreign engagements are usually mediated by these agencies.

A majority of companies in the multimedia sector are desperately seeking highly qualified staff. Many companies are even willing to pay rewards of several thousand Euro per ”head”. This makes professional headhunting a lucrative business, and their numbers are currently increasing rapidly. One can expect that multimedia employers will continue to divert more and more money traditionally spent on newspaper advertising to the services of professional headhunters.

However, the services of brokerage offices, except in the case of the performing artists, are usually geographically limited to one country. Therefore, they are not able to stimulate migration of cultural and multimedia workers on a European level to a satisfactory degree.

Internet

The ”old” forms of job information mediation described above have not been able to close the ”information gap” between employers and workers on the European level. What is urgently needed is a technology that could be used to create a ”European Information Platform” for workers and employers alike. The only currently available technology for this purpose is the Internet.

The Internet is the newest medium among the information transmission media evaluated in the course of this study. Nevertheless, for the purpose of distributing information about the labour market and foreign working and living conditions, it has remarkable advantages over the other media described above:

- It is not limited to national borders, its orientation is world-wide.
- It is able to distribute huge amounts of information over the entire globe in a minimum amount of time.
- It is very inexpensive. Other than telecommunication costs, there are usually no other fees (except for specific Internet services which are not free of charge).
- It is flexible and interactive.

These features make the Internet ideally suited to serve as an information medium for European workers who are willing to work in another European country and who have the motivation to overcome the various obstacles to mobility. It represents a promising medium for "closing the information gap" that hinders labour mobility.

In addition, the Internet "democratises" communication. Before the Internet era, big companies with their own organisational networks and job seekers with extensive personal networks had a considerable advantage over SMEs and "poor" job seekers. Now practically every company and every job seeker has the same informational possibilities available via the Internet.

The digital culture is particularly well suited for making widespread use of the Internet because of the relatively high educational level of its workers. For the majority of them, the use of the Internet is ”business as usual”.

There is already a large number of web sites available on the Internet with job and applicant data bases. One can find public web sites of all Public Employment Services (PES) of the EU countries, as well as several hundred private web sites. However, these services do not yet constitute the type of ”Information Platform” that would be necessary. They still suffer from severe handicaps which, up until now, have prevented a higher mobility of workers within the digital culture. The analysis carried out by MKW in the summer of 2000 has served to help clarify these handicaps.

4.2 Public Employment Services (PES) web sites

In most EU countries, the Public Employment Services (PES) mediate the greatest numbers of job vacancies and job applicants. All PES present their services on the Internet, while many of them include a data base for job vacancies and/or job applicants in their web-site. A portion of these job vacancies are combined to form the Internet data base of EURES, which represents the only real European job data base of any considerable size.

Between April and August 2000, MKW carried out an intensive evaluation of the national PES and EURES Internet services. Included in this research were not only the 15 EU countries, but also Iceland and Norway as EURES members. Of particular interest in this

research was the suitability of the services offered for promoting the geographical mobility of cultural and multimedia workers.

4.2.1 Overall results

The basic features of PES and EURES Internet services make them excellently suited for establishing a European Information Platform with the aim to distribute information on the European labour market and working and living conditions in other European countries, thus closing the "information gap":

- Their service is free of charge.
- They have access to large numbers of job applicants and job vacancies.
- They don't depend on commercials for their funding. As a result, they can afford to offer extensive additional information about working and living conditions in European countries, which most of them actually do.
- They have a high level of internationalism.
  - There are links from most PES web sites to the PES web sites of all other EURES countries via the EURES web site. This makes it possible for job seekers and employers to quickly browse almost the entire EURES region.
  - Most PES web sites offer at least part of their information in various European languages.
  - Most PES web sites offer information about working and living conditions in other European countries. Furthermore, the EURES web site contains an info data base with basic information about working and living conditions in all EURES countries.
- They have a high level of credibility. Workers and employers know that offers from a PES are serious and fair, in no way motivated by commercial interests of the respective PES.

However, the PES and EURES Internet services still are not perfect. There are several drawbacks which have to be taken into consideration in order to optimise information for job applicants and employers:

- Not every PES has a central job data base for its country. Italy, Spain and Portugal don't have data bases integrated in their PES web sites.
- The categorisation of professions varies from country to country and, in most cases, is not practicable for the users. In-depth specialisation of branches is usually lacking.
- ”Traditional” cultural jobs are presented in much more detail in the job data bases than the new multimedia jobs (only exception: Denmark).
- With the exception of Austria, Germany and Sweden, no PES offers data bases whereby freelancers within the digital culture can present themselves. The ”Künstlerservice” of the German Arbeitsamt and the Austrian AMS are excellent best practices in the mediating of artists.
- Most job data bases offered by PES on the internet don't contain a large enough number of job vacancies and CVs to satisfy the needs of the employment market. . As of 10 August 2000, the EURES data base contained just 5,723 job vacancies, the United Kingdom (one of the biggest EU countries) just 3,720[18].
- Information about working and living conditions, in particular in other EURES countries, is not sufficient. In most cases, the PES homepages contain helpful information about

[18] After a major reform, the job data base of the United Kingdom contained 397,375 job vacancies dated 13 March 2001, making it the biggest of all European job data bases.

working and living conditions in other European countries, but every PES has its own distinct system to systemise and provide this vital information.

- Use of foreign languages on the PES web sites is rare. None of the PES job data bases are available in any languages other than the official national languages.
- With the exception of Austria, it is not possible for employers to enter their job vacancies directly into the PES job data bases. The usual way is to send information on job vacancies to the PES which, in turn, enters it into its data base, a slow procedure. The same is the case for the presentation of job applicants.

4.2.2 Results of country-by-country comparison

All national PES web sites of the EURES countries plus the EURES web site have been assessed and compared in a detailed country-by-country comparison. In this evaluation, each web site could earn a maximum of 100 points for the following categories:

- Use of European languages other than the official national languages (30%)
- Quality of the job data base (40%)
  - Differentiation of cultural and multimedia jobs
  - User friendliness
  - Availability of job vacancies from foreign countries
  - Availability of an applicants data base for employers
- Quality of additional information (30%)
  - Availability of links to EURES and other EURES-PES web sites
  - Availability of links to private job data bases
  - Quality of information about domestic working and living conditions
  - Quality of information about working and living conditions in other EURES countries

In addition, the total number of job vacancies in the each of the job data bases was determined as of August 10, 2000.

The results of the overall quantitative assessment are shown in Table 5.4.

Table 5.4: Quantitative assessment of EURES PES web sites

Country/Region	Job vacancies 10 August 00	Language max. 30 points	Data Base max. 40 points	Information max. 30 points	Overall Points
Germany	400,000	9	38	27	**74**
Sweden	32,039	9	33	22	**64**
Finland	5,397	19	22	18	**59**
Austria	26,328	0	30	27	**57**
Greece	0	12	28	14	**54**
Norway	8,049	9	26	18	**53**
Netherlands	42,655	12	16	21	**49**
France	147,039	0	26	20	**46**
Iceland	194	6	14	22	**42**
EURES	5,725	9	10	23	**42**
Denmark	4,880	0	22	19	**41**
Belgium/Flanders	27,848	0	16	22	**38**
Belgium/Brussels	1,451	19	13	4	**36**
United Kingdom	3,720	6	16	14	**36**
Belgium/Wallonia	3,000	0	9	24	**33**
Ireland	1,568	0	18	14	**32**
Italy	0	6	0	24	**30**
Spain	0	0	0	23	**23**
Luxembourg	15,561	0	13	10	**23**
Portugal	0	0	0	10	**10**
Average	**36,272**	**5.8**	**17.5**	**18.8**	**42.1**
Average/Maximum		**19.3%**	**43.7%**	**62.7%**	**42.1%**

Source: MKW Munich, 2000

The aggregated quantitative analysis shows significant differences in the performance of web sites in the three assessed categories. The most interesting figure in this context is the comparison of the average points of the three categories with the maximum points of each category. On the average, all web sites earned 62.7% of the maximum points in the category "links and information about working and living conditions", revealing that the information available about working and living in other EURES countries on the web sites is already relatively good. Performance in the other two categories however, is significantly poorer. The quality of the job data bases received, on the average, just 43.7% of the maximum points, which is partly due to Italy, Spain and Portugal, where no centralised PES job data bases exist yet. However, this category is still rates relatively high when compared to the use of foreign languages, where the average data base earned just 19.3% of the maximum points available. There is still much work to be done in order to achieve multi-lingual information about labour market and working and living conditions throughout Europe. Possibilities for achieving this goal will be discussed in detail in Chapter 5.

The **assessment of the ”quality of the job data bases”** was based primarily on the user friendliness of the web sites and the quality of the job categorisations used by the data

bases. While, in general, the user friendliness is satisfactory, job categorisations for culture and multimedia are still underdeveloped. Some of the PES data bases do not even have a categorisation of cultural and/or multimedia jobs at all. The data base of Belgium-Flanders, for instance, differentiates between a total of just 10 job categories!

It is interesting in this context to note that the differentiation of cultural jobs is usually more detailed than the differentiation of multimedia jobs. Only the PES of Austria, Sweden and, above all, Denmark have good categorisations for multimedia jobs. Yet even these best practices are not state-of-the-art, compared to the job categorisations available on commercial web sites.

In order to provide a detailed analysis of the strengths and weaknesses of the existing Internet services, the previously described quantitative evaluation is not sufficient. This can only be achieved in combination with the following qualitative analysis, which, however, is restricted to the national PES services. The qualitative aspects of the EURES web site will be discussed later in Chapter 4.3.

Austria

- Excellent web site for job applicants with very good German language abilities, but very bad for all others because of the lack of information in foreign languages.
- The categorisation of the job data base is one of the best of all PES. It is very good for cultural workers, while less detailed for multimedia workers.
- Very good data base for freelance artists (”Künstlerservice”).
- Contains the only interactive job and applicants data base of all PES services. Employers and applicants can directly enter their job vacancies and CVs in the data base and contact each other directly, without the need for a contact person from the AMS Austria.
- The collection of links to other public and private job data bases throughout Europe is outstanding, the best of all PES web sites.

Belgium

The main problem is the existence of not one, but three PES (Belgium-Wallonia, Belgium-Flanders and Belgium-Brussels), each with their own individual web site! This differentiation, which was chosen for cultural and political reasons, significantly decreases user friendliness and lowers Belgium’s chances of reaching highly qualified staff on an international level.

<u>Belgium-Wallonia</u>

- The job data base is not comprehensive (cultural and multimedia professions are totally missing) and not very user friendly.
- Information about working and living conditions abroad is very good, but with too few links about more detailed information.

<u>Belgium-Flanders</u>

- The structure of the data base for job applicants is the worst of all analysed data bases. It differentiates between only 10 job categories, with none for culture or multimedia!
- However, the web site contains an additional excellent applicants data base for employers.

Belgium-Brussels

- The job data base differentiates between only 16 categories, which is one of the worst categorisations of all analysed web sites.
- Though the PES is located in Brussels, the web site has no link to EURES.
- The category of "additional information" (links to other PES, information about working and living conditions) is the worst of all web sites, earning just 4 points out of a possible 30 points.

Denmark

- There is no information available in a foreign language on the web site.
- The job data base differentiates between just 23 job categories. There are no categories for cultural workers, but very good job differentiation exists for the multimedia sector, making Denmark's multimedia job categorisation the best of all web sites.

Finland

- The categorisation of the jobs is very good, but multimedia jobs are underrepresented.
- The job data base is not available in any of the "major" European languages, a particular disadvantage for Finland, which, alongside Greece and Iceland, has the most uncommon language of all EURES countries. In order to attract young and highly-trained staff on an international level, making information available in English would be indispensable.

France

- The job data base is the second largest of all EURES-countries, with 147,039 job vacancies (as of August 10, 2000), but differentiates between just 15 categories of professions. This is far from being detailed enough.
- Information on the web site is available only in French. In order to attract young and highly-trained staff on an international level, providing information in English would be indispensable.

Germany

- The Internet service of the German Arbeitsamt is the most comprehensive of all European PES, with by far the largest job data base (ca. 400,000 job vacancies as of August 10, 2000).
- However, the desktop-structure of the information on labour market and working and living conditions is confusing. The link to EURES, for instance, is extremely difficult to find.
- The information about working and living conditions in Germany and other EURES-countries are excellent, but almost impossible to find. There is an outstanding "country report" (the best of all PES) which is "well hidden" among other information of limited value. Links to other EURES-PES are limited to Belgium and Greece, which is not logical to users.
- There is a large amount of information available in foreign languages, but none on the front page! It is only after two more clicks on "German" buttons that the user is able to reach the first alternative language buttons, making the system impracticable for foreign users.

- The user friendliness of the job data base is minimal, mainly due to an exaggerated categorisation of professions: there are 27,014 professions distinguished in the data base! Furthermore, the specific jobs are not ”visible” for the user - he can't see which professions exist in the data base.
- The web site contains an outstanding data base for freelance cultural workers which is unique among all web sites. Here, cultural workers can present themselves and employers can look for cultural workers.

Greece

- The job and applicants data bases are very well structured, but are still "empty". They don't contain any job vacancies or job applicants.
- Furthermore, even when filled, they would be practically useless for increasing geographical mobility of European workers into Greece, since the data bases are only available in Greek, a language rarely spoken in other European countries.

Iceland

- The job data base is extremely small, in actual numbers (just 194 as of August 10, 2000) as well as in terms of job categories. There are no categories for professions within the sectors of culture and multimedia.
- Furthermore, the data base is impracticable for foreign workers since it is extremely difficult for non-Icelanders to find on the web site and is written in Icelandic, one of the most uncommon languages in Europe.

Ireland

- Small and well structured, this web site is not overloaded, but contains all relevant information for applicants and employers.
- The differentiation between cultural jobs In the job data base is not sufficient.

Italy

- There is no central data base for job vacancies and job applicants. On the regional level, small data bases exist. However, these cannot be accessed via the EURES-PES web site network.
- On the homepage of the Italian Ministry for Labour there exists a rudimentary job data base, which, however, is not at all user friendly. It requires a password for each individual job applicant!

Luxembourg

- The job data base is very large for such a small country (15,561 job vacancies as of August 10, 2000).
- The categorisation of the professions in the job data base is very good for cultural workers, but unsatisfactory for multimedia workers.
- The web site doesn't contain a link to EURES and is therefore not suited for increasing geographical mobility of workers from Luxembourg.

Netherlands

- The professions of the cultural sector are very well represented in the job data base. However, this is not the case for professions within the multimedia sector. The professions are differentiated according to branch and professional function, which improves user friendliness.
- For the job applicants data base, however, there is no useful differentiation. The applicants are simply presented in chronological order, which is not practicable for potential employers.

Norway

- The cultural sector is very well represented in the job data base, though this isn't the case for the multimedia sector.
- The category "additional information" is very rudimentary and insufficient.

Portugal

- Based on an overall assessment from the viewpoint of a European worker who is willing to migrate, this is the worst of all PES web sites. There is no information available in a foreign language, no data base, no information about working abroad, no links to other job data bases, not even a link to EURES.

Spain

- Has the potential for being an excellent web site if it would provide some information in languages other than Spanish and if it would contain a job data base.
- No central job data base exists in Spain. On a regional level some data bases exist, but these are not included in the EURES-PES web site network.

Sweden

- The job data base has one of the best structures for differentiating between professions. However, the job categorisation could be improved by adding more selection categories (such as regional, temporal and professional).
- The only one of its kind in the EURES region, a specific data base exists where freelance artists are able to present their arts and crafts.
- In addition, the web site contains a very good link collection which is helpful for cultural workers.

United Kingdom

- The data base contained only 3,720 job vacancies (as of August 10, 2000), which is very limited for such an important European country, and differentiated between just 14 job categories, with no category for cultural workers.
- No applicants data base exists which can be used directly by employers.
- The web site was improved significantly in 2001. By integrating job vacancies mediated by job centres, private recruitment agencies and newspapers, it now contains about 400,000 job vacancies from all over the country, making it the biggest of all European job data bases.

4.3 EURES web site

The EURES web site contains a job data base and a data base with information on working and living in the various EURES countries. The EURES job vacancy system has been in operation for over five years, and the EURES Internet services for three years.

The job vacancies of the EURES system are provided by the national PES. When any local PES office enters a vacancy of European interest into their national system, it can simultaneously send the vacancy to the EURES data base in Brussels. The system also allows vacancies from EURES to be received automatically by the integrated national systems.

So far, four PES (Germany, Austria, France and Italy Southern Tyrol/Alto Adige) have fully integrated with EURES in this way. Five others (Belgium-Flanders, Belgium -Wallonia, Finland, the Netherlands and Norway) are partially integrated and an additional three (United Kingdom, Ireland and Portugal) were preparing to integrate in 2000. This integration brings with it the further benefit that the PES of two neighbouring countries are then able to exchange large numbers of vacancies on the cross-border level.

The number of job vacancies exchanged by EURES between EU-countries has risen steadily since the inauguration of the EURES Internet site - from 43,000 at the beginning of 1998 to 166,000 at the beginning of 2000[19]. However, this is still a small number in comparison to 380 million EU citizens.

In MKW's August 10, 2000 evaluation of all EURES PES web sites and the EURES web site, due to differences in the survey structure, the EURES web site could only earn a maximum of 84 points, instead of the possible 100 for the PES web sites. It received 34 out of 84 points, which is equivalent to 42 of 100, or the EURES PES average.

Nevertheless, a number of characteristics could be improved:

- Though the EURES web site has now a simple name (www.eures-jobs.com) it is extremely difficult to find within the web site "www.europa.eu.int" and within the web site of the DG "Employment and Social Affairs". It is a web site "for insiders only".
- The number of job vacancies offered by the data base on the Internet is much too low, with 5,725 (as of August 10, 2000) for the entire EURES region, compared to a stock of around 220,000 vacancies administered by EURES[20].
- The job data base only exists in three languages (English, French, German).
- The job categories are neither in alphabetical nor another user friendly order. There are, for instance, two main categories with the title "computing, engineering and science". While there are such useless categories like "astrologers", "fortune-tellers" or "faith healers" there is absolutely no category for cultural jobs.
- The information about working and living conditions in the different EURES countries is not very in-depth and doesn't contain sufficient links to web sites with more detailed information.
- The search criteria of the data base are too limited.
- The EURES web site doesn't contain a job seekers data base where job seekers can present themselves and employers can search for workers. In 2000, the goal was to start a pilot programme whereby potentially mobile job seekers could register their CV's via

[19] European Commission: The Commission to the European Parliament and the Council: EURES activity Report 1998-1999 presented by the Commission in accordance with Article 19 (3) of Regulation (EEC) No 1612/68. Brussels.

[20] European Commission (June 2000): The Commission to the budgetary authority Draft report; Future resource requirements of the EURES job vacancy system and the Internet services. Brussels.

Internet. In its initial phase, the pilot will be restricted to certain specific sectors where shortages of skilled labour have been determined. These sectors are ICT, Hotel/Catering/Tourism, Healthcare and the Air Travel Industry. The pilot was developed and will be maintained by the PES Sweden.

- There is no possibility for employers to register vacancies themselves, which goes against the growing trend among employment services to establish facilities allowing employers to register their vacancies on-line. The vacancies are normally advertised on the Internet and other self-service systems with such features as company logos and general information about the employer.
- The EURES site offers no services to freelancers.

The data base "working and living conditions" provides basic information on the working and living conditions in each of the 17 countries involved in the EURES network. The information is short but comprehensive, and simply serves as a general introduction to the countries with addresses and links for further details. In the meantime, it has become available in all EURES languages except for Icelandic and Norwegian.

4.4 Private/commercial web sites

In addition to the job and applicant data bases offered by the PES and EURES, hundreds or even thousands of private as well as commercial web sites can be found throughout the EU which contain job vacancies or information about applicants. A major portion of the job vacancies presented by these web sites are for multimedia workers, but there are also numerous data bases for cultural workers, mainly offered by cultural associations. For example, it is common today for actors to present themselves on an actors web site.

In the summer of 2000, MKW collected and assessed 100 of the best currently available commercial web sites that mediate CVs of job applicants.

There was a specific reason for restricting the analysis to web sites with CVs of job applicants. Most commercial web sites concentrate on offering job vacancies to job applicants. However, services for employers are limited because there are still only a few good web sites where job applicants can present their CVs to employers. Therefore, a high quality data base of applicant CVs on a web site is an indicator for a state-of-the-art web site. Since it was MKW's intention to assess state-of-the-art web sites, the analysis of the commercial web sites concentrated on those that were the most suitable for enabling employers to find highly qualified staff.

The web sites were pre-selected according to the following criteria:

- They contain applicant data bases with situations vacant within the multimedia sector.
- The data bases contain a significant number of applicants and their respective CVs.
- Employers are able to take a prior look at the data free of charge (payment could be due for access or establishing contacts).
- It is possible for a foreign company to register.
- It is possible to perform a search without having previously registered a vacant position.

The pre-selected web sites were assessed according to the criteria shown in Table 5.5.

Table 5.5: Assessment of multimedia applicants data bases

Access to information about the applicants (max. 40 points)	Quality of information about branches and applicants (max. 60 points)
• Are all the applicants` particulars available free of charge? • Is it possible to make direct contact with the applicant free of charge? • Must the employer to fill out one questionnaire for each applicant with whom he wants to get in contact?	• Number of multimedia applicants. • How detailed are the applicants` particulars? • Number of different multimedia industries • How user friendly is the system?

Table 5.6 shows the best private/commercial multimedia applicants data bases (best practices) of several European countries that are currently available in the Internet.

Table 5.6: Best practices of multimedia applicants data bases in Europe

Country	Domains of applicants data bases
Austria	www.jobinteractive.com
Belgium	http://193.121.115.188/CVNet/CGI-bin
Denmark	www.cv.jobavisen.dk
Germany	www.web-worker.de
Finland	www.aarresaari.net
France	www.nomade.fr/cat/enseignement_empl/emploi/offres_demandes_e/emploi_stages_dema/
Ireland	http://uk.dir.yahoo.com/Business_and_Economy/Companies/Computers/Business_to-Business/Employment/Resumes/Individual_Resumes
Italy	www.cercalavoro.it
The Netherlands	www.cacaturebank.nl
Norway	http://jobbsok.aetat.no
Spain	http://clasificados.el-mundo.es/clasificados/busqueda.html
Sweden	www.jobuniverse.se
United Kingdom	http://uk-dir.yahoo.com/Business_and_Economy/Companies/Computers/Business-to-Business/Employment/Resumes/Individual_Resumes

Source: MKW Munich, 2000

The private/commercial web sites have some advantages over their PES counterparts, but also have severe disadvantages (see Table 5.7).

Table 5.7: Private and PES web sites

Web sites	Advantages	Disadvantages
PES	• small number of web sites • free of charge • large numbers of job vacancies and applicants • high level of internationalism • information usually in various languages • additional information about working and living conditions	• certain amount of "low quality" of job vacancies and applicants • usually no in-depth specialisation on specific branches • few services for freelancers
Commer-cial	• often very high quality of job vacancies and applicants • often specialised in specific branches (like cultural sector or multimedia) • more services for freelancers	• too many individual web sites • often not free of charge • small numbers of job vacancies and applicants per web site • usually restricted to one country • usually in just one language • no additional information about working and living conditions

The main advantages of the commercial web sites when compared to PES services are the high quality of jobs that they often offer and the in-depth specialisation that they are able to provide for specific sectors.

The systems of job categorisations found on commercial web sites are usually much more state-of-the-art than the categorisations that can be found on PES web sites, and can therefore be implemented in building a European Information Platform. The job descriptions used by commercial services are more flexible and up-to-date than those of public services since they are not restricted to legally and statistically defined job descriptions.

However, a severe disadvantage is simply the large number of private web sites with job and applicant data bases. It is practically impossible for the average worker or employer to find and browse all relevant private web sites and to find out the best ones. Often data bases contain just a small number of job vacancies, as well as poor information and/or services, which often only prove to be a waste of time for those users searching for information. Often, the services for employers are not free of charge. Job applicants and employers have to spend a great deal of time and money in order to find out the best practices among the vast pool of data bases. Such a system is not user friendly at all.

Furthermore, there are some additional factors which make private web services totally unsuitable for mediating services on a European level:

- Practically all private web sites concentrate on a single country, and they are only available in the national language. A few contain job vacancies from other countries, but these job vacancies represent just a tiny fraction of the total vacancies offered.
- Information about working and living conditions can rarely be found on private web sites.

For these reasons, private web sites can only increase mobility of workers within, but not between, EU States.

4.5 Conclusion

The Internet represents the only medium that is able to close the ”information gap” between European employers and job applicants, when it is implemented in building a European Information Platform for job vacancies and job applicants. However, the web services currently available, whether public or commercial, are not sufficient for this purpose.

A European Information Platform must be a data base which

- **is Internet-based and easy to find,**
- **mediates job vacancies as well as job applicants’ CVs,**
- **offers presentation services to freelancers,**
- **is European-wide in its scope,**
- **is available in all major European languages,**
- **possesses a state-of-the-art, user-friendly job classification,**
- **allows employers and job applicants to register their job vacancies respectively CVs interactively and personally,**
- **provides workers with all the necessary information about working and living conditions in all European countries,**
- **is highly credible and**
- **offers its services free of charge.**

It is obvious that only an Information Platform created by a public service can meet these requirements. Only public services can offer such a service for free, with additional information like data bases on working and living conditions, and can afford presenting their services in various languages. Furthermore, well-run public services still have higher credibility among employers and job applicants.

The two existent EURES data bases regarding jobs and living conditions in the EURES region are the only data base systems presently available that could serve as an Information Platform for European employers and jobs applicants. For this purpose, however, some major restructuring would be required.

The EURES organisation is already discussing measures in order to improve the existing internet services with the aim of removing barriers to mobility[21]. The envisioned measures like creating a one-stop European Mobility Information Site would be without any doubt a significant improvement of labour market transparency. However, important features are still lacking in the current concepts. These features will be described in detail in the following chapter.

[21] European Commission (2001): Communication from the Commission to the Council (28.02.2001): New European Labour Markets, Open to All, with Access for All. Brussels.

5. Recommendations

A higher geographical mobility of workers on a European level within the sector of digital culture can only be achieved by the creation of a European Information Platform that closes the information gap between workers and employers. In the development of this platform, the high percentage of freelancers within the digital culture must be taken into consideration.

All modules necessary for creating such a highly efficient Information Platform are already in existence. The most suitable platform basis would be the existent EURES Internet services, because EURES

- has the only real European job data base of any significant size in the Internet,
- has the most experience within the European employment market,
- integrates all European Public Employment Services,
- can afford offering additional information about working and living conditions,
- offers its services free of charge
- and, as a public service, has a high level of credibility.

In order to upgrade these existing EURES services it would be sufficient to copy, further develop and integrate the already available ”best aspects” of public and commercial web services. The task now is to combine these best aspects and to use them for the creation of a powerful Information Platform for the European employment market.

5.1 Job categorisation

Only a user friendly Information Platform will be accepted by employers and job applicants. The user friendliness depends almost exclusively on the time that a user needs in order to find the job category that he or she is looking for. However, the current systemisation of jobs used by EURES is simply not user friendly enough. This important ”module” for a European job data base can be provided by the flexible and practice-oriented commercial web services.

A state-of-the-art job categorisation should be based on main and sub-categories. A limited number of main categories must comprise all types of jobs in the EURES regions, while for each main category a sufficient number of sub-categories needs to be available.

Table 5.8 shows a system of main categories that seems suitable for a comprehensive and short systemisation of all jobs in the EURES region.

Table 5.8: Main categories for jobs in the EURES region

Agriculture, Forestry, Fishing industry	Education and Research
Mining	Office, Organisation
Industry	Public Service, Law
Handcraft	Health services, Sport, Social services
Construction	Tourism and Gastronomy
Transportation, Shipping, News transmission	Banking and Insurance industries
Nature and environmental conservation	Wholesale and Retail Trade
Multimedia	Other Services
The arts, culture and media	

No matter which system of main categories is chosen, the main categories "culture" and "multimedia" should be represented. One could even consider the possibility of creating special job platforms for these two sectors, separate from the other economic sectors. In any case, a detailed system of sub-categories would be needed for culture and multimedia comprising the entire wide spectrum of jobs within the sector of digital culture. At present, there is no PES web site in the EURES region which contains a comprehensive job systemisation for culture and/or multimedia.

A suitable systemisation for the main category "culture" is displayed in Table 5.9.

Table 5.9: Sub-categories for the main category "culture"

Music, singing, dance, opera, musical Orchestra, Band Musician Singer Dancer Director Music teacher Dance teacher, choreographer Composer, text Producer, Editor Technology, requisite	Theatre, Film, Cinema, TV, Radio Actor Director Scriptwriter Production Manager Producer, editor, dramaturge Technology, requisite
Agencies and Ticketing, Event organisation	Show, Artistic, Entertainment
Cultural management	Models
Publishing houses, multiplication of pictures and sound	Design
Author, Journalist, Translator	Graphical and photographic professions
Architects	Restoration and conservation
Public relations	Sculpture, painting
Music instrument industry	Museums, libraries, archives, archaeology
Audio/TV/Video hardware industry	Culture related wholesale and retail

Source: MKW Munich, 2000

It is more difficult, however, to develop a system of job categories for the main category "multimedia". The qualifications required of state-of-the-art multimedia workers are so multiple and changing so rapidly that it is practically impossible to define a set of traditional job descriptions. Therefore, it would be better to use a system of self-identification of applicants and job vacancies based on a core of state-of-the-art qualifications.

WIMMEX AG carried out a survey in 2000 in order to summarise the state-of-the-art qualifications currently required of multimedia workers. The results of this analysis are shown in Table 5.10.

Table 5.10: State-of-the-art qualification of multimedia workers

Content and Service	Technology
Consulting	Operating systems (Windows, MacOS, Linux)
Marketing/Distribution	CAD
Editing/Text/PR	Internet protocols (TCP/IP, DNS, SMTP, FTP)
Conception	Java programming (OOP, Java classes, applets and servlets)
Project management	WEB publishing (HTML, DHTML, WEB/Java Script)
Support/customer service	WEB server (MS Internet Information Server, Apache Server, Perl)
Training	WEB security (firewalls, encryption)
	WEB multimedia (Real Audio and Real Video, Shockwave, VRML)
	Desktop publishing
	Graphic and image processing (digital imaging)
	3D modelling
	Visualisation techniques
	Digital film and video processing and editing
	Computer animation
	Audio/visual design
	WEB design, screen design
	CBT techniques

Source: MKW Munich, 2000

In developing a system of self-identification, the first step necessary would be to classify every job vacancy based on the qualifications in Table 5.10. Every single qualification would have to be rated according the relative importance of the qualification for the job to be carried out:

1 very important
2
3
4
5 not important

When a job applicant is looking for a job in the data base he would have to rate his abilities in the qualifications of Table 5.10 in the same way:

1 extremely qualified
2
3
4
5 unqualified

Using this system, a job applicant would automatically receive the job offers for which he or she is best suited according to his or her individual qualifications.

5.2 Other aspects of a state-of-the-art data base

In addition to an excellent structure of profession categorisation for organising job vacancies, some additional services would be needed in order to transform the existing EURES data bases into state-of-the-art data bases:

- The two EURES data bases ”job vacancies” and ”working and living conditions in Europe” should be easier to find. A new positioning within the web site "europa.eu.int" and within the web site of DG Employment and Social Affairs should be taken into consideration.
- The EURES job data base must offer a significantly greater number of job vacancies. Therefore, it would be necessary to include a greater number of job vacancies from the national PES and to include in the Internet-based data base all job vacancies administered by EURES.
- In order to further increase the number of job vacancies available in the data base, the technical prerequisites must be created which would enable employers to register their job vacancies personally and interactively, without needing to consult a PES.
- The Internet services of EURES should be extended
  - to include a job seekers data base with the same job categorisation, where job seekers could post their CVs individually and interactively, without needing to consult a contact person from a PES,
  - to include a presentation service for freelancers.
- The EURES job/CV data base should be available in all 13 EURES languages.

The integration of the previously described aspects in the already existing EURES Internet services would result in an effective Information Platform for employers and job applicants on a European level, thus creating the technical prerequisite for promoting a European employment market with a highly mobile European work force.

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