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

FINAL REPORT - SUMMARY

commissioned by

European Commission
DG Employment and Social Affairs

presented by

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

June 2001

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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.

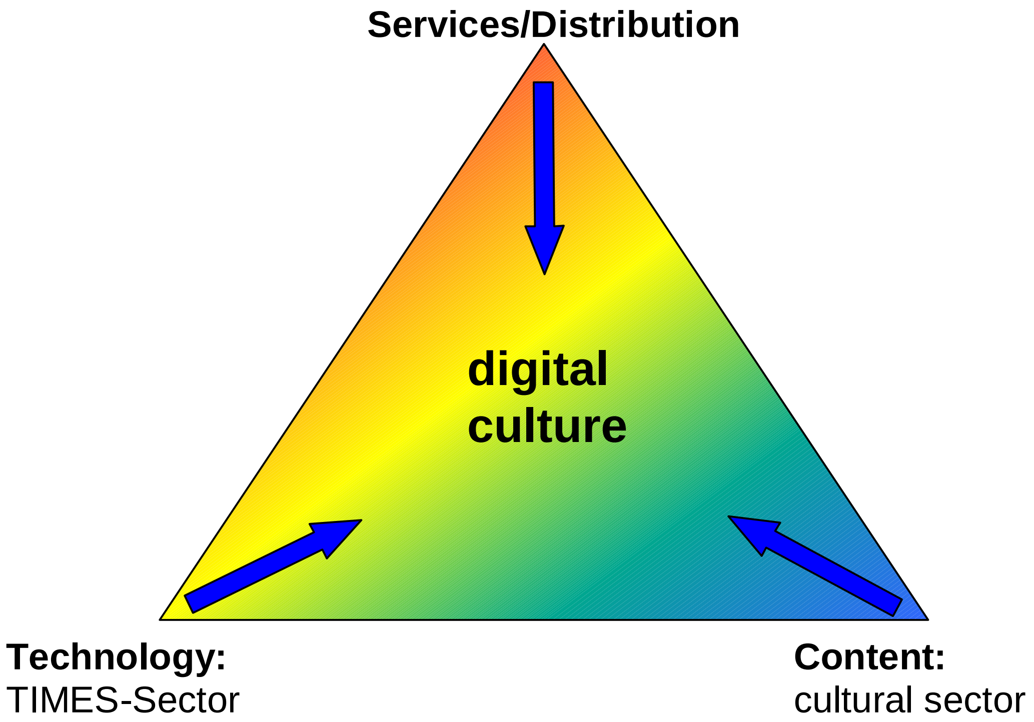
The increasingly used generic term **TIMES sector** (**T**elecommunication, **I**nternet, **M**ultimedia, **E**-commerce, **S**oftware and **S**ecurity) is used to cover the whole audio-visual sector, i.e. the entire multimedia sector, including culture industry areas such as TV, publishing, and the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

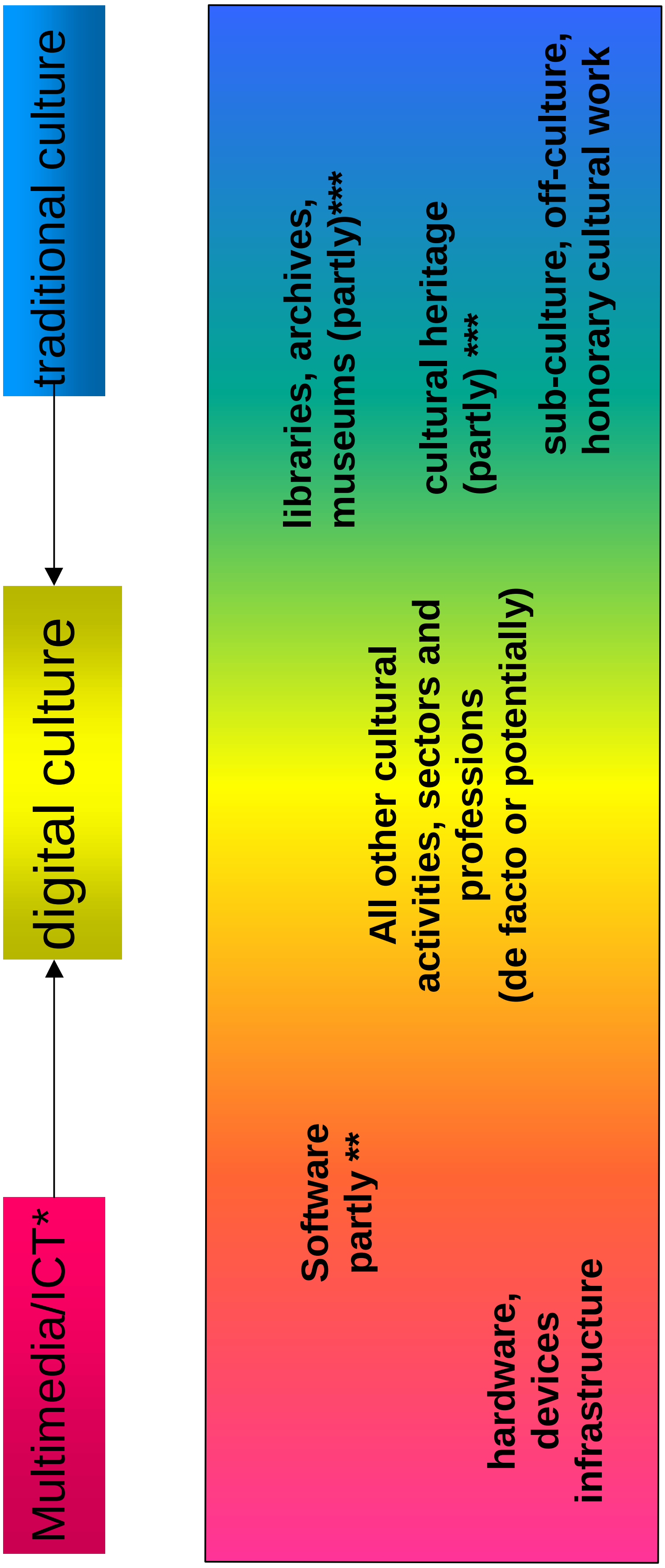
The difference between traditional and digital culture is important in this context because in the new or digital culture, new jobs are emerging at the interfaces between the different sectors, and not within the classic segments.

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.

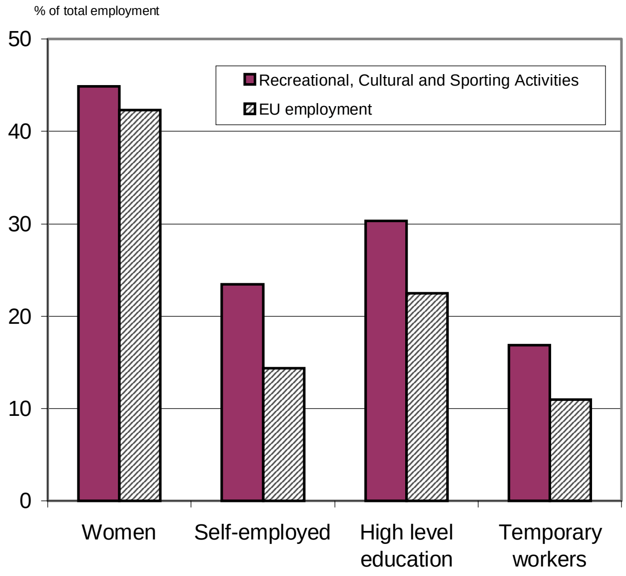
However, women are more used to atypical working conditions than men. One could even go so far as to say that the increase of atypical working conditions is, in fact, an extension of typical women’s employment conditions to all those who are employed or are seeking work (Fink, Kocka/Offe, Neyer).

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.

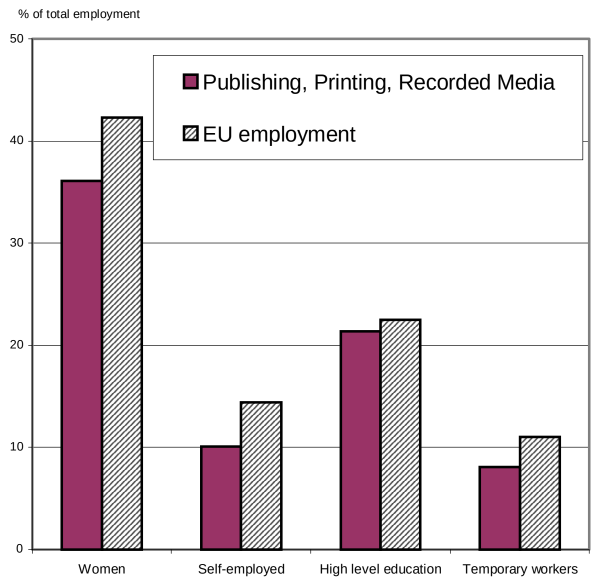
Figure 3: Working conditions in recreational, cultural and sporting activities in the EU in 1999



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 **92**	**Publishing, music recording** **Cultural and sporting activities**	1,167	3,595	4,762
	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)

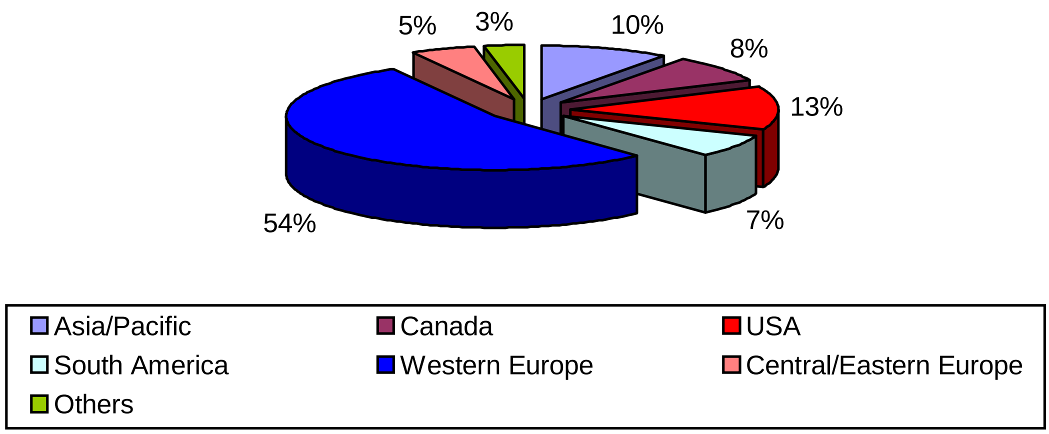
5. Telecommunications
Provider in the area of...
- 5.1 Web Hosting
  - 5.1.1 ASP (Application Service Provider)
  - 5.1.2 ISP (Internet Service Provider)
- 5.2 Call Center
- 5.3 WAP Provider
- 5.4 Telecommunications-Provider (GSM, UMTS)

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

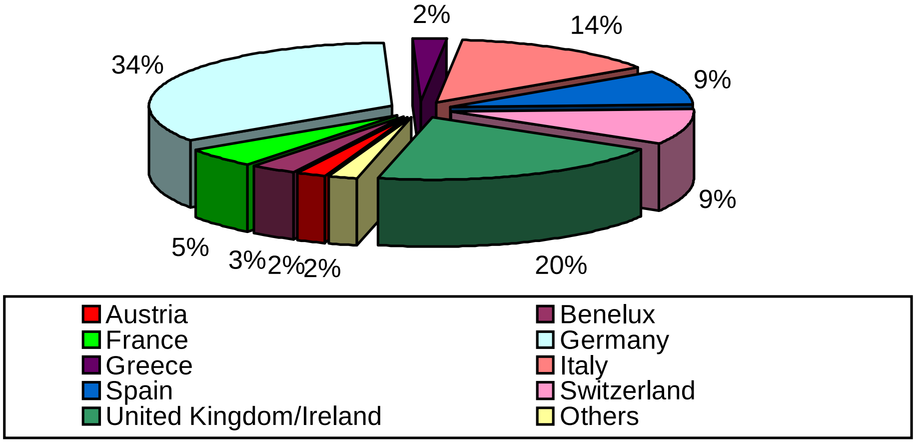


Source: WIMMEX Munich, December 2000

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.

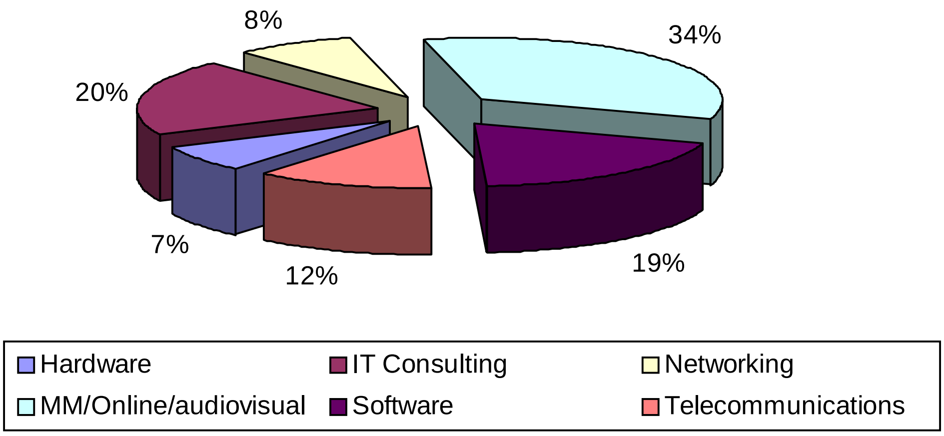
Figure 7: Regional structure of panel companies in Western Europe
Population: 1,604 TIMES companies



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.

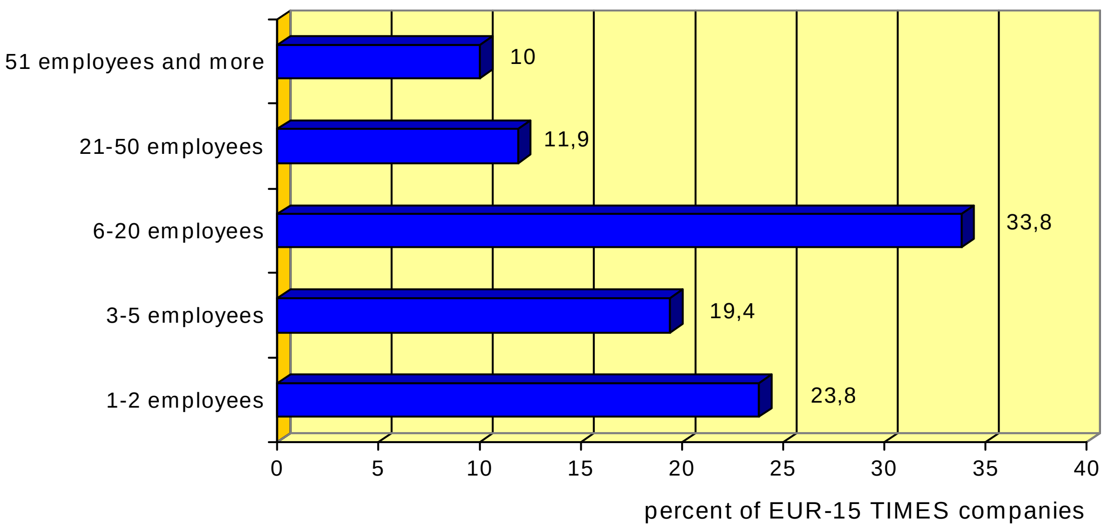
Figure 8: Main areas of activity of companies in the WIMMEX panel
Population: 2,970 companies world-wide



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.

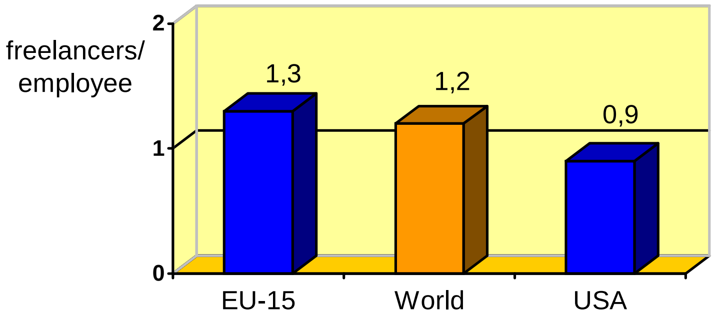
<u>Freelancers in the TIMES sector</u>

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

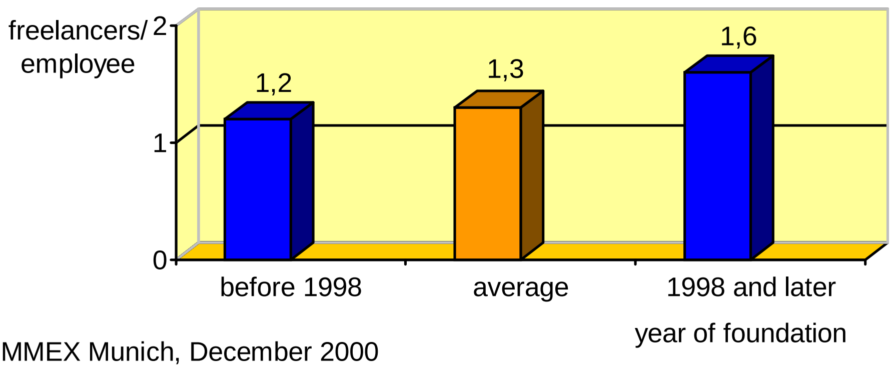


Source: WIMMEX Munich, December 2000

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.

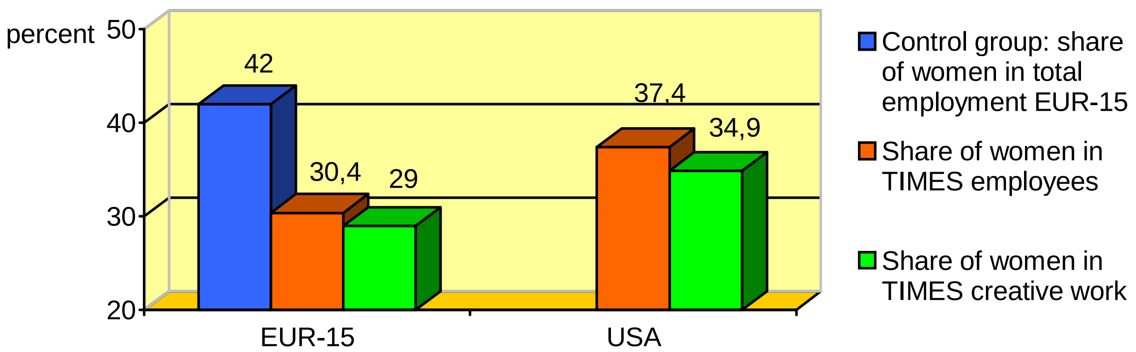
Women in the TIMES sector

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

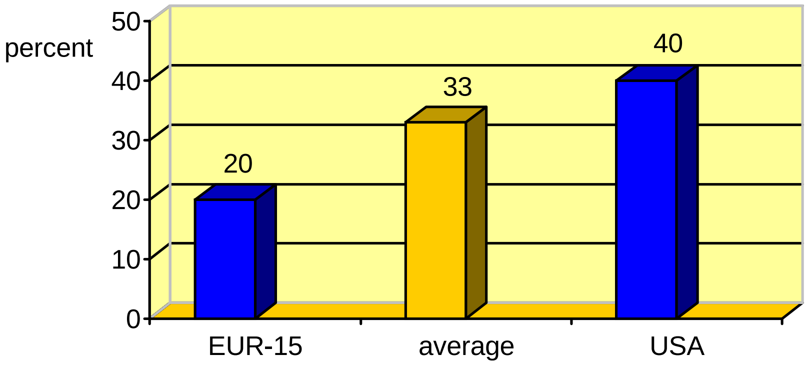
This disturbing development also continues when it comes **to setting up new businesses.** Taking into account the results of GEM[2)], we estimate that the percentage of new companies set up by women in Europe is approximately one third of that in the USA.

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%**

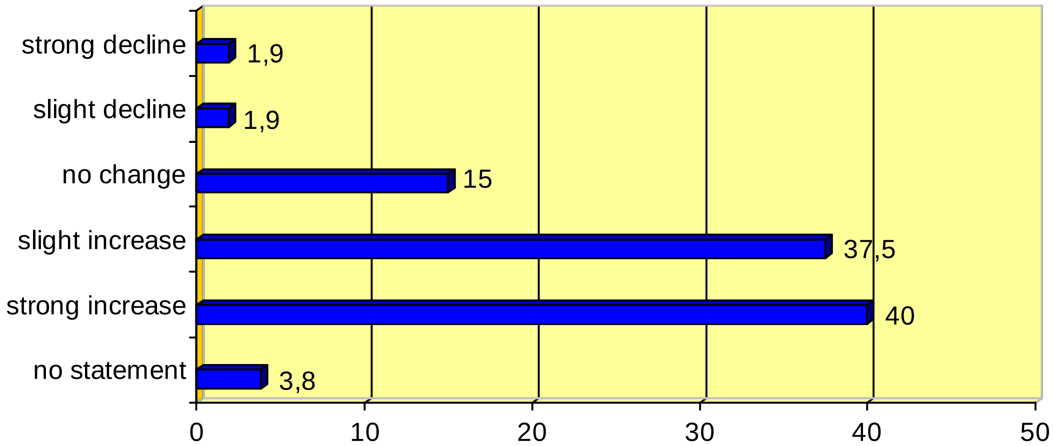
Source: WIMMEX Munich, March 2001

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)



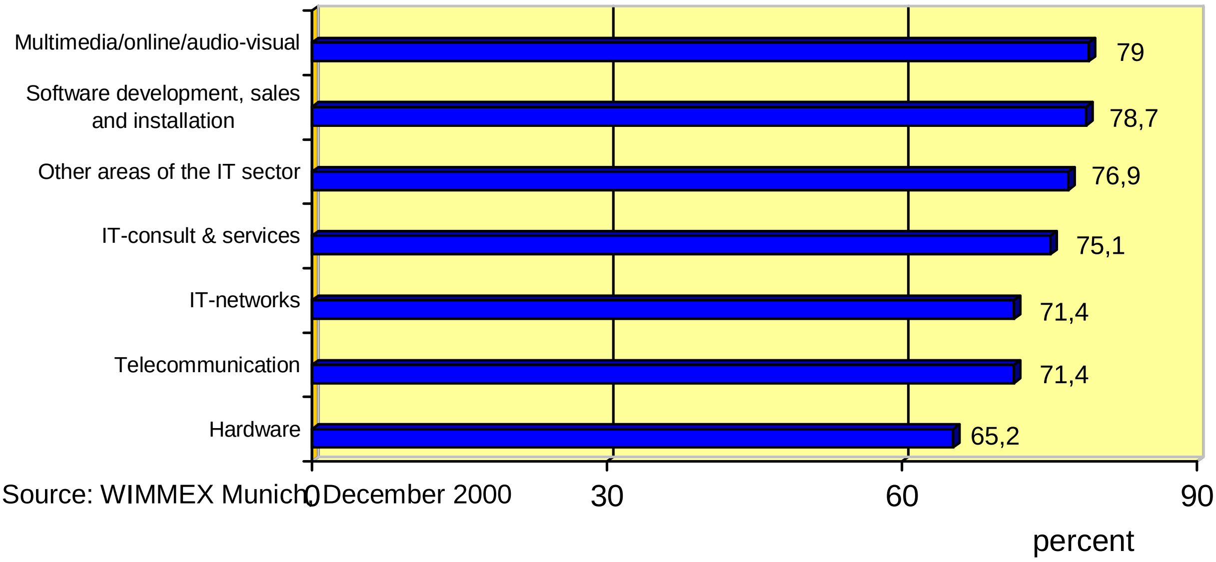
Source: WIMMEX Munich, December 2000

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



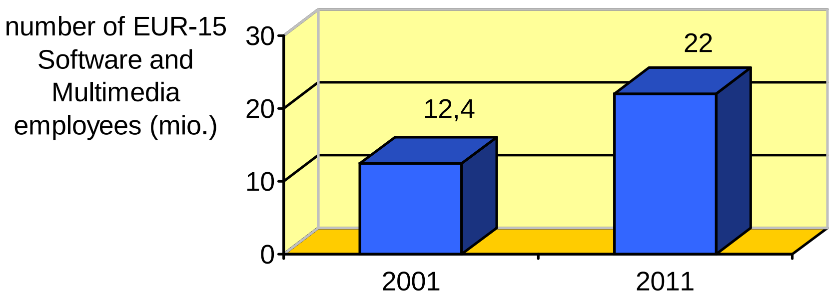
Source: WIMMEX Munich, December 2000

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

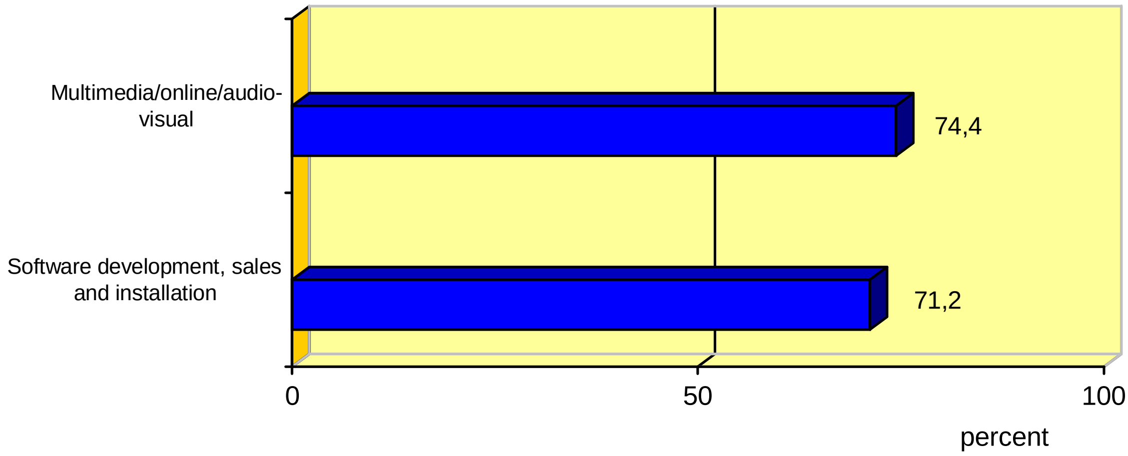
- define which workers are to be counted as "creative workers"
- and to determine the actual number of creative workers in Multimedia and Software.

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**

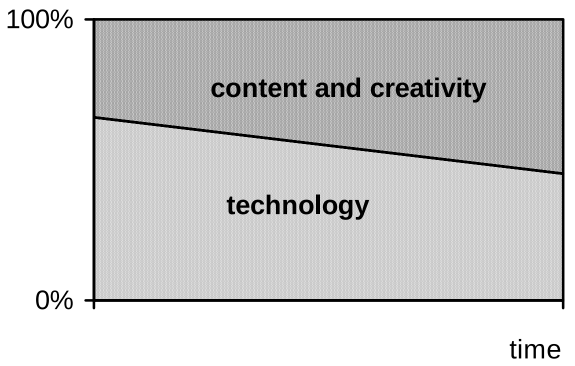
  At first glance, it may seem that the qualifications listed in Figure 3.23 are purely technical in nature; however, they often require a large measure of creativity and content. This is particularly true for the two qualifications which are currently most sought after, namely WEB Publishing and WEB Design,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

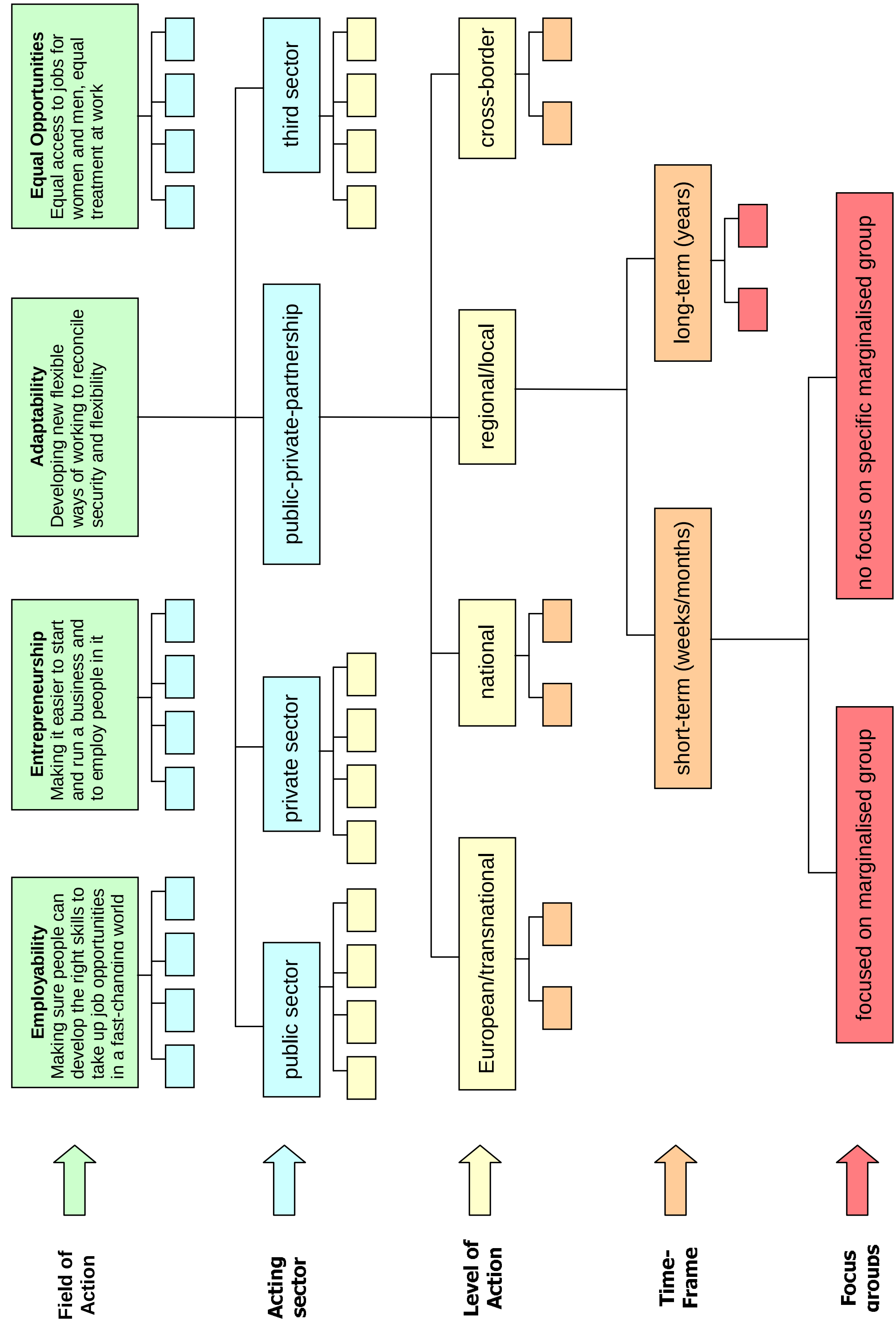


Table 10: Significance of the main EES pillars for digital culture

I. Employability	**II. Entrepreneurship**
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.)	*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	**IV. Equal Opportunities**
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	*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

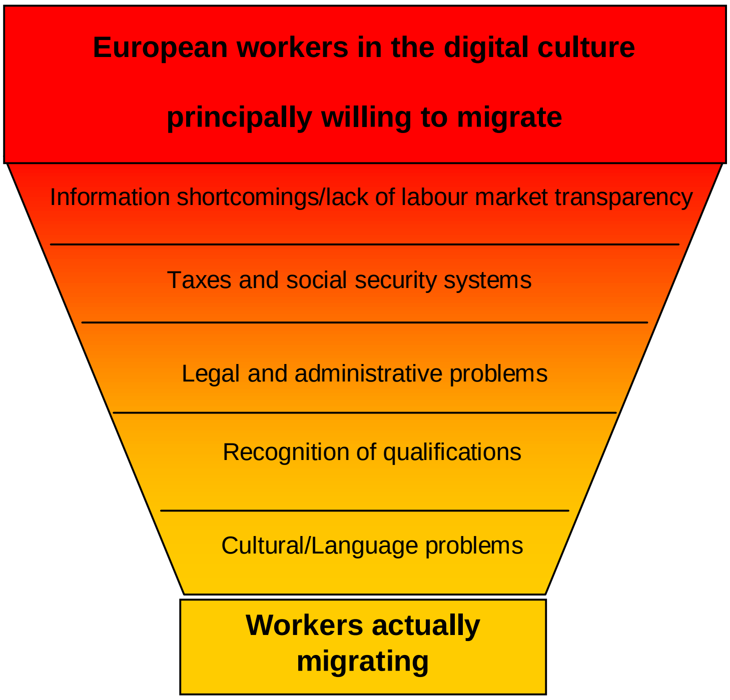
In a single market, the number of migrating and cross-border commuting workers within the digital culture should be at least three times higher than the current level, taking into consideration the high internationalism of the digital culture and the importance of this sector for future economic growth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

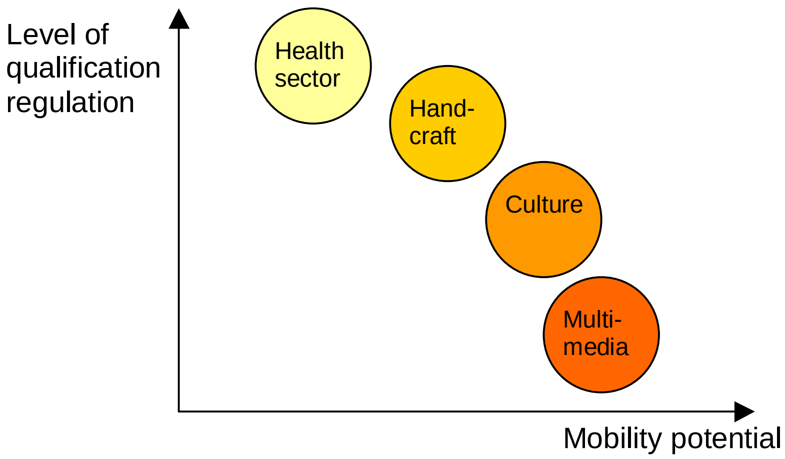


  Figure 22 illustrates the correlation between the level of qualification regulation and potential mobility. Deregulation of qualification recognition and European harmonisation of qualifications can contribute significantly to a higher potential of mobility, but only in those sectors that are still highly 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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