European Commission

Study 'The situation of theatres in the EU Member States'

Final Report

Creative Europe

Study 'The situation of theatres in the EU Member States'

Final Report

Study report prepared by PPMI and KEA European Affairs

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Abstract

The 2020 Annual Work Programme for the implementation of the Creative Europe Programme foresee an action on 'Sectorial support to the theatre sector' in the form of a general study, the results of which are presented in this report.[1] The findings of this study are expected to contribute to providing better support to the theatre sector at EU level. The study aims to provide a comprehensive mapping of the socio-economic profile and impact of the theatre sector in the EU, by collecting both quantitative and qualitative data. It showcases the sector's diverse nature and the differences between stakeholders in terms of their business models, financing/ownership structures, and programming systems. In addition to collecting socio-economic data, the study also addresses the initial impact of the COVID-19 pandemic and provides a detailed analysis of the support schemes made available to the theatre sector in Creative Europe countries. The study also covers aspects such as the education of theatre professionals, as well as gender balance, sustainability and accessibility within the sector.

The study report is prepared based on data collected through desk research, interviews, survey and inputs received from stakeholders during the validation seminar.

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[1] European Commission (2019), *2020 annual work programme for the implementation of the Creative Europe Programme*.

Introduction

Introduction

The Final Report is submitted for the implementation of the specific contract No EAC-2020-0751 for the study 'The situation of theatres in the EU Member States', implementing the Multiple Framework Service Contract No EAC-01-2019 to carry out studies supporting European cooperation in education, youth, sport and culture.

The study was carried out by PPMI Group in cooperation with KEA European Affairs.

About the study

In 2019, the European Commission commissioned an expert report on the theatre sector, prepared by the European Expert Network on Culture and Audiovisual (EENCA).[2] The study aimed to improve the Commission's understanding of the main challenges faced by the theatre sector in Europe, and to identify relevant themes and stakeholders for an EU-level dialogue. Following further discussions with theatre stakeholders, the 2020 Annual Work Programme for the implementation of the Creative Europe Programme foresaw an action on 'Sectorial support to the theatre sector'.[3] This sectoral support resulted in a general study on the theatre sector, the results of which are presented in this report.

The study, together with the European Theatre Forum, which took place in November 2020, form the 'European Theatre Initiative'. The 'European Theatre Forum 2020: European Performing Arts in Focus' brought together 12 European theatre and performing arts networks representing different players and art forms within the sector, for a several-day event and discussions. The Forum resulted in a 'The Dresden Declaration', highlighting the key challenges faced by the sector and calling for the development of pan-European actions needed to support the European theatre and performing arts sector.[4] The study presented here was also launched during the event.

This study report is prepared on the basis of extensive desk research, interviews, case studies, survey findings and a validation discussion with EU-level stakeholders. The description of the methodology below explains the scope of each method and the limitations of the study. It also details the extent to which stakeholders were consulted at different stages in the research – interviews, survey, validation workshop. Although data gaps exist and there are limitations to the mapping of this diverse and dynamic sector, the study presents an overview that highlights its key strengths, challenges and developments. We expect the data collected during this study to benefit future research into this sector, which will be especially in capturing the long-term impacts of the COVID-19 pandemic, and how the sector has transformed itself following the crisis.

Aims, objectives and scope of the study

The purpose of this study is to provide a comprehensive mapping of the social and economic profile and impact of the theatre sector, including the various support schemes that exist in EU Member States. This study should contribute to the collection of both quantitative and qualitative data on the theatre sector, filling in important knowledge gaps, as well as expanding on the existing data on the theatre ecosystem, its strengths and key challenges. The data collected should contribute to informing policy making aimed at designing responses at European level to support the sector, as well as to alleviate the impact of the COVID-19 pandemic.

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[2] European Expert Network on Culture and Audiovisual (EENCA) (2019), *Main challenges in the European theatre sector: Input for exploratory meetings and future EU actions.*
[3] European Commission (2019), *2020 annual work programme for the implementation of the Creative Europe Programme.*
[4] *The Dresden Declaration.* Available at: https://www.europeantheatreforum.eu/page/the-dresden-declaration-of-the-european-theatre-forum (accessed: 27 May 2021).

As highlighted in the Technical Specifications, the study has four general objectives (see below).

Box 1. Objectives of the study

1. To make relevant data available, which will bridge the gap of knowledge about the theatre sector:
    a. Data on the socio-economic situation and an overall picture of the sector;
    b. Data about the reactions of theatres following the COVID-19 crisis;
    c. Data on the educational aspect of theatre professionals.
2. To highlight best practices created and displayed during the COVID-19 crisis;
3. To facilitate action at the European level as well as cooperation between organisations and artistic companies;
4. To provide input for policy recommendations and follow-up at the European level.

In terms of its geographical scope, the study covers all EU Member States. During the desk-research phase, additional data were also collected regarding the support measures put in place in response to the COVID-19 pandemic by national, regional and local authorities in non-EU Creative Europe countries (Norway, Iceland, Albania, Bosnia and Herzegovina, Montenegro, the Republic of North Macedonia, the Republic of Serbia, Kosovo, Armenia, Georgia, Ukraine, and Tunisia). The thematic focus of this study is the theatre ecosystem (excluding other performing arts activities such as opera, ballet, dance or circus).

The Final Report is organised into several parts. Following the introduction, we set out our study methodology. The second part of the Report then goes on to describe the profile and role of the theatre sector within the EU. The third part of the Report addresses the socio-economic profile and impact of the theatre sector. The impact on the sector of the COVID-19 pandemic and policy/organisational responses are explored in the fourth part of the Report. Parts 5 and 6 of the Report present our findings in the fields of educating theatre professionals, sustainability, gender balance and inclusion. The final part of the Report then sets out preliminary conclusions and recommendations, focusing on the future funding and policy actions of the European Commission. A number of annexes are submitted together with the main body of the report.

1 Methodology

1. Methodology

This section describes the methodology of the study. It provides a concise explanation of how the main research methods were applied to arrive at the study results and conclusions. A mixed methods approach was adopted in this study, combining both qualitative and quantitative data collection and analysis tools – desk research, interviews, case studies, survey, mapping, and a validation seminar with stakeholders of the theatre sector.

Desk research

The study team conducted extensive desk research mapping references related to the socio-economic situation of the theatre sector in Europe, including on the main topics of the analysis (i.e., labour, business models, finance/funding, education, environment, gender and inclusion). Our desk research focused on collecting data related to the changes brought by the COVID-19 pandemic on the aforementioned topics, including research outputs and grey literature (press and blog articles, sector data). The team compiled an extensive set of references on the situation of the European theatre sector before the COVID-19 pandemic and in relation to it.

Desk research was also conducted at a national level as part of the case study programme. The study team reviewed statistics, national country reports, networks and association reports, websites of national funding bodies and theatre organisations. To complete our desk research on specific topics, we contacted various networks and experts for interviews and/or for suggestions of additional literature.

Interview programme

The study team conducted 75 interviews with various stakeholders to enrich and validate preliminary findings. The interview programme was divided into two parts: EU-level interviews and national-level interviews for country case studies. We sought to interview a diverse range of stakeholders in the sector to piece together as comprehensive view of the situation as possible.

The table below provides a breakdown of interviews conducted per different stakeholder category. A full list of stakeholders interviewed is provided in Annex 1.

Table 1. Breakdown of the interviews conducted

Stakeholder group	Number of interviews conducted
EU-level interviews	
EU policy institutions	3
Networks, associations, trade unions and other	12
National-level interviews	
Theatre venues and companies, festivals (both public and private)	32
Educational institutions	8
National policy-making institutions	6
Networks, associations and other (experts, independent artists)	14
Total	75

The interview questionnaires were based on the aspects set out in the Technical Specifications of this contract, including the socio-economic situation, available support

schemes, the impact of the COVID-19 pandemic, educational systems, gender and sustainability issues, digitalisation, business models etc.

Case studies

We prepared a total of 10 country case studies. Since a detailed analysis of all EU Member States was not possible within the scope of this study, the purpose of the case studies was to conduct an in-depth analysis at the national level in a selected sample of countries. The countries were selected based on their geographical distribution, national characteristics of the theatre systems, the impact of the COVID-19 pandemic in each country, and existing statistics on the cultural sector. The countries selected were the following: Spain, Italy, Poland, Romania, Lithuania, Sweden, Ireland, Belgium, Germany, and France.

A variety of sources were reviewed during the preparation of the case studies, including national statistics, existing studies and reports. In total, 60 national-level interviews with different stakeholders were conducted, providing qualitative data on the situation of the theatre sector in the selected countries.

The case studies were used by the study team internally. The study team summarised the findings from research in different countries in a systemic order in the case study reports. The information synthesised in the case study reports informed the preparation of the Final Report.

Survey programme

The purpose of the survey was to collect quantitative data covering different aspects of the theatre sector. Survey questions focused on such aspects as funding models of theatre companies, employment conditions of theatre professionals, collaboration within the sector and the impact of the COVID-19 pandemic.

The questionnaire was divided into four branches, aiming at different stakeholder groups:

- *Theatre companies* (theatre venues, production companies, groups or ensembles, festivals, etc.);
- *Theatre professionals* (artists, directors, technical staff, university lecturers, theatre education pedagogues, etc.);
- *Education providing institutions* (drama schools and academies, universities, informal learning institutions, etc.);
- *Institutions representing the sector* (associations, networks, policy institutions etc.) and other professional groups.

The survey targeted theatre stakeholders in all EU Member States, but responses from non-EU countries participating in the Creative Europe programme were also welcomed. The survey was available in the three main working languages of the EU: English, German and French.

The survey was launched on 16 March 2021 and was closed on 14 May 2021. It was in total open for eight weeks (it was closed for one week due to a technical error). The survey collected 153 usable responses from 20 EU Member States and 6 non-EU countries. The distribution of responses per different stakeholder groups was: theatre companies – 42, theatre professionals – 70, educational institutions – 8, and sectoral institutions and other interested groups – 33.

The study team, in cooperation with the client, undertook broad efforts to disseminate the survey. At the EU level, the Creative Europe Desks were engaged in disseminating the survey. A link to the survey was also published on KEA's social media channels and shared in a newsletter, as well as sent to different European and national associations or networks

with requests to distribute it further to their members. For a detailed overview of the measures taken to disseminate the survey, see the table below.

Table 2. Description of the dissemination effort

Measure	Description
European Commission network	Engagement of Creative Europe Desks in disseminating the survey
Social media/network	The link to the survey was shared via KEA's social media channels (5253 views on Twitter, 966 on Facebook, 1077 on LinkedIn) and newsletter (opened by 896 recipients)
Direct contact with organisations	EU-level organisations contacted:
	European Theatre Convention, Mitos21, E:UTSA, Culture Action Europe, European Festivals Association, IETM, Pearle*, Northern Dimension Partnership on Culture, Fabulamundi, BeSpectACTive, Europe Beyond Access (British Council), EAIPA
	National-level organisations contacted:
	Lithuanian Theatre Union, Assitej Lithuania, The Austrian Association of Independent Theater, Stage Association Vienna, Association of independent theatres Czech Republic, Ständige Konferenz Schauspielausbildung (SKS), The German Association of Independent Performing Arts (BFDK), Irish Equity, THEATER FEDERATIOUN (Luxembourg), FAETEDA (Spain), Teatercentrum and Teaterförbundet (Sweden), Danish Actors' Association, Estonian Theatre Association, the Latvian Theatre Union, The Slovenian Association of Dramatic Artists (SADA), the Malta Entertainment Industry and Arts Association, the Latvian Theatre Union (LTU), the Association of Finnish Theatres, Assitej Croatia, Croatian Association Of Drama Artists, Union of Bulgarian Actors
	Individuals contacted: interview participants and other contacts

Comprehensive mapping

The purpose of the comprehensive mapping exercise was to summarise the data collected during this study according to each country. During the mapping, the research team relied mainly on the data gathered through desk research and interviews. The results of the survey were used for the EU-level mapping, as the number of responses collected did not allow to perform a meaningful analysis per each EU Member State. Nonetheless, it provided a useful glimpse into the status of the sector at the EU level that can be further complemented by similar studies in the future. A list of indicators that underlined the analytical framework for this study was used to summarise key data in the EU-level fiche.

As a result of this mapping, 27 country-level fiches and one EU-level fiche were developed (submitted separately with the Final Report). It also resulted in an in-depth analysis of the emergency support measures adopted by the EU Member States and non-EU Creative Europe countries in response to the COVID-19 pandemic (see Annex 2).

Validation seminar

An online validation seminar was held via the Microsoft Teams platform on 29 June 2021. The purpose of this validation seminar was to present the main findings of the study to the European Commission officials and a wider audience of theatre experts and stakeholders.

In preparation for the validation seminar, the study team prepared a discussion paper outlining the key objectives of the event and summarising the preliminary findings,

conclusions and recommendations of the study. Before dissemination, all material was coordinated and agreed upon with the Commission.

The seminar, in total, gathered 16 participants (besides the core study team). The list of organisations represented by the participants is provided below. Notably, not all participants attended the seminar for its entire duration due to conflicting schedules.

Table 3. List of participants to the validation seminar

Organisation represented	Number of participants
European Commission	4
EACEA	3
European Theatre Convention	2
ASSITEJ (International Association of Theatre for Children and Young People)	1
Bocconi University	1
EAIPA (The European Association of Independent Performing Arts)	1
FIA (International Federation of Actors)	1
Mitos21	1
Pearle* - Live Performance Europe	1
UNI MEI (International Arts and Entertainment Alliance)	1
Total number of participants	16

The discussion paper was also shared with several stakeholders who were unable to attend the event asking for their feedback on the subject. During the seminar, participants were presented with the key study findings, conclusions and recommendations. An open discussion between participants followed the study team's presentation of the key findings. The issues raised during the open discussion were further delved into during the break-out group sessions. The participants were split into two smaller groups enabling an equal engagement of all participants. Group 1 had a larger focus on support to venues, companies and EU collaboration, as well as sustainability aspects. Group 2 primarily focused on the situation of theatre professionals, education of professionals, diversity and inclusion.

Limitations to the study

Several limitations were faced when implementing the study. Importantly, the comparability of data was hindered by differences in how national or sectoral institutions collect data. Statistical definitions of the sector are not harmonised at EU or national levels. Very often, data about theatres are not singled out, and most statistics report on the performing arts sub-sector, which also includes opera, dance, circus, mime and cross-disciplinary performance formats. In addition, the data gathered during this study cover different timeframes, as national statistics on 2020 were not yet released in all countries at the time of compiling this report.

An important aspect of this study was capturing a pre-COVID-19 and post-COVID-19 situation. The COVID-19 pandemic is still ongoing, and restrictions to the operation of theatres in many countries were still in place during the data collection phase. Therefore, the study describes mostly the short-term impact and immediate changes that were brought about by the pandemic. Certain aspects required in the Technical Specifications like providing a number of theatres that have closed definitely due to the crisis is also not viable given the aforementioned issues with statistical data on the theatre sector. To

properly measure the full impact of the COVID-19 pandemic, future research measuring similar aspects would be needed after the pandemic is fully confined. In addition, data sources and literature on the COVID-19 pandemic were still emerging while preparing this study. This means that some findings may lose their relevance as new data and studies emerge in the future.

2 Profile and role of the theatre sector in the EU

2. Profile and role of the theatre sector in the EU

Theatre is one of the most ancient and liveliest European art forms, and it evolved over the centuries to include nowadays an important variety of creative forms. Defining theatre has inspired the debate since Ancient times, and discussing its boundaries is still a dividing topic among experts and practitioners.[5] Theatre, or dramatic art, uses both literary and histrionic elements in a performance to appeal to the human senses of sight and hearing, connecting the actor with the spectator and audience[6]. Theatre is included in the wider sector of performing arts together with dance, opera, live music, magic, illusion, mime, spoken word, storytelling, puppetry, circus arts and street arts.[7] The intersections within the disciplines create difficulties in drawing a clear-cut line within the performing arts field. Performing arts are considered to be a presentation of live art (a form of art in which artists use their voices, bodies, or inanimate objects to convey artistic expression) to a live audience[8] while touring or in a fixed venue.

Theatres, as spaces and venues, correspond to performing arts events facilities enabling the creation, production, distribution and exhibition of theatrical performances with their related operational services.[9] Since theatres are frequently seen as the venues where such live forms of art are hosted, opera and ballet are often included in statistics on theatre, despite representing slightly different sectors and not included in the scope of this study. In addition, numerous theatres in Europe act as live performance and live-music venues or even screening spaces. Therefore, a broad interpretation considers theatres as the locations where the majority of performing arts can take place, where interactions between performers and observers are hosted in a shared physical arena.[10]

Theatre value chain

A variety of professions (playwriters, actors and performers, costume designers, props masters) and stakeholders (artistic education institutions, public and private theatre venues, local and national institutions providing subsidies, individual donors, festivals and audiences) compose the flourishing ecosystem of theatre. Activities within the theatre sector include not only the creative component of theatrical creation and production (e.g. playwriting, acting), but also technical support, distribution/marketing activities, and the operation of theatre facilities (e.g. theatre management). A schematic representation of the core activities and the main stakeholders involved within the theatre value chain is presented in Figure 1.

Theatre venues and companies in Europe are very diverse and the production and dissemination system is fragmented. In terms of financing structures, the study entails private and public theatre venues, as well as the independent practitioners. Public theatre venues rely mostly on the public subsidies from national-, regional- or local- governments, while private theatre venues and companies depend mostly on revenue from ticket sales

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[5] Chris Wilkinson (2010), Noises off: What's the difference between performance art and theatre? The Guardian. Available at: https://www.theguardian.com/stage/theatreblog/2010/jul/20/noises-off-performance-art-theatre.

[6] See: https://www.britannica.com/art/theatre-art

[7] IETM - International Network for Contemporary Performing Arts (2019), Power of the performing arts in Europe. Available at:
https://www.ietm.org/sites/default/files/attachements/news/power_of_performing_art_in_europe_final.docx_1_0.pdf.

[8] ESSnet-CULTURE (2012) European Statistical System Network on Culture
https://ec.europa.eu/assets/eac/culture/library/reports/ess-net-report_en.pdf#page=31

[9] ESSnet-Culture (2012), European Statistical System Network on Culture - Final Report. Available at:
https://ec.europa.eu/assets/eac/culture/library/reports/ess-net-report_en.pdf#page=31, p.66.

[10] David Osipovich, "What is a Theatrical Performance?", The Journal of Aesthetics and Art Criticism Vol. 64, No. 4 (Autumn), pp. 461-470m 2006.

and other activities (e.g., renting facilities). The independent scene encompasses professional freelance practitioners working in theatre.

Theatre sector in different countries also have varied programming traditions, some of which have a clear geographic distribution. A publicly funded repertory system of theatres is common in Central, Northern and South-Eastern Europe. Such theatres have a steady ensemble of actors and has a repertory of self-produced performances to stage.[11] In Western Europe, an additional publicly funded producing theatre system exists. Theatres can assemble new casts for each production. This structure provides for more collaboration opportunities and producing with artists and companies. The co-production model and consecutive programming is prevalent the most among private theatre venues, companies and independent scene. Such companies assemble a cast and other staff for productions according to the needs of each production. Touring is especially important in co-producing. More issues faced by actors from different programming systems are described in Sub-section 3.1. on collaboration in the sector.

Also, the management and governance structures differ among institutions creating additional obstacles in collaboration with other partners in or outside the sector. In the Anglo-Saxon tradition it is common to have a governing board in public theatres.[12] In other cases the governing of the venue may lie mainly with the management. The director can either take both roles of the artistic and general management or these can be divided among two persons. Significant differences also exist in the organisation of work (departments, rehearsals, planning schedules etc.).

The differences described above determine a multi-faceted ecosystem of theatre. Comparing theatre systems in different EU Member States and the operation of individual theatre venues and companies is not a straightforward task. The below value chain depicts the key stages in the path from creating an idea for performance to delivering it to the audience – content creation, production, dissemination, and exhibition. Notably, the way in how each of these stages is implemented highly depends on a number of 'variables' – the programming model of the institution (e.g., either venues and companies take a play from their repertoire or stage a new performance), business model (e.g., whether it is a theatre with a venue or a company that tours around the country or abroad), or whether the company/theatre is co-producing. The business models condition differences in the dependence and employment structures within the various chain steps and towards the administration. For instance, co-production companies conclude agreements with other independent companies, while in-house companies employ all of the key actors or employ them as freelancers. In co-producing, the performance can be exploited, disseminated and financially awarded based on agreements with other companies. This is contrary to the in-house model, where the use of artistic result is in sole hands of one producer. Given these differences between how theatre venues and companies function within different systems and business models, the activities and the relationship between the actors involved changes depending on the specific company/venue or production analysed.

[11] European Expert Network on Culture and Audiovisual (EENCA) (2019), *Main challenges in the European theatre sector: Input for exploratory meetings and future EU actions,* p. 9-11.
[12] Ibid., p. 10.

Figure 1. Theatre value chain (venues and companies)
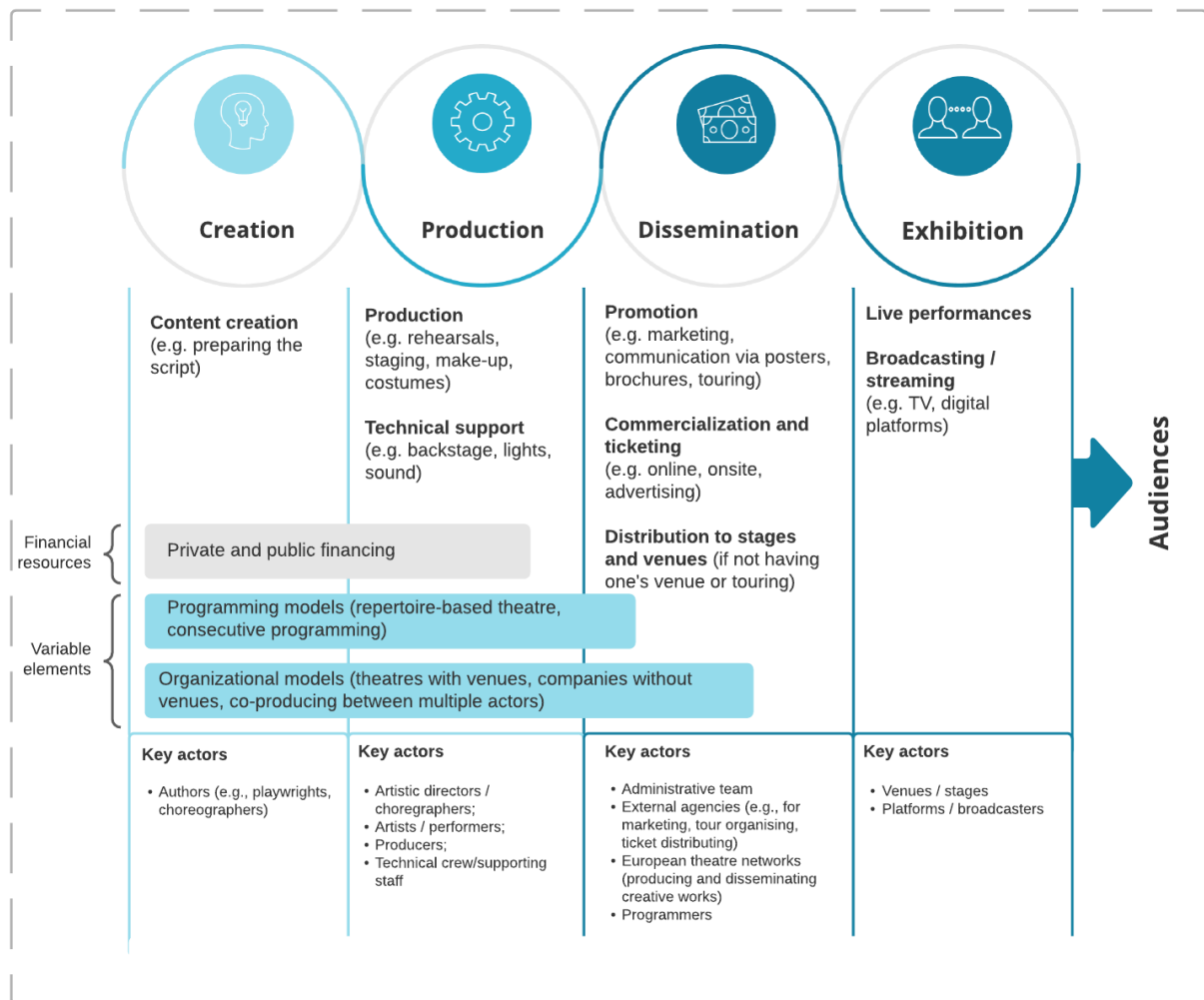
Source: created on the basis of the value chain model of performing arts sector developed by IDEA Consult, imec-SMIT-VUB and KEA (2017) *Mapping Creative Value Chains.* Report prepared for the European Commission, DG EAC.

The value chain above reflects on the functioning of theatre creating organisations. Many other important stakeholders exist that are part of the theatre ecosystem and contribute to upholding it. These include education activities (e.g. drama schools, theatre research institutes, professionalisation and training schools); preservation/archiving (e.g. theatre books, plays, programmes, video recordings and photographs); advocacy and representation (at European, national or local level); copyright administration and management (e.g. collective management organisations); and funding/legal advice (e.g. public authorities, private companies, creative hubs). Also, the interaction with the audiences is central to theatre and live performances in general. Audience members and their reactions are an essential part of the theatrical experience[13] while performers and spectators share a space and emotions in a common live moment.

Stakeholders that took part in the validation seminar noted that the theatre sector has a particular position compared to other cultural and creative sectors (e.g., film, media) and poses specific challenges in terms of mixing disciplines and sectors, which has an impact

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[13] Theatron (2012), Engaging New Audiences. Available at:
https://issuu.com/theatronnetwork/docs/theatronprojectdescription.

on designing policies and support programmes. Many companies/operators in the theatre value chain are also active in other sectors as well.

Socio-cultural role of the theatre sector in the EU

Theatre, like other forms of art, represents and questions the society and its current challenges. This is why it also brings about important social impacts. As noted by Samuel Beckett: 'I regard the theatre as the greatest of all art forms, the most immediate way in which a human being can share with another what it is to be a human being.' Theatre performances tell the stories of human experiences and can bring people together to work through changes or painful moments as recalled by Lynette Linton, artistic director of the Bush theatre in London in the aftermath of the assassination of George Floyd and the Black Lives Matter movement across the globe.[14]

The Dresden Declaration of the 2020 European Theatre Forum identifies the unique value of theatre and performing arts as the following:[15]

- Fostering democracy;

- Enhancing social cohesion;

- Stimulating critical thinking;

- Nourishing empathy and imagination;

- Promoting intercultural dialogue.

Yet, participation in theatrical activities is uneven across the EU. The Special Eurobarometer 399 on Cultural Access and Participation (2013) reveal important geographical, demographic and socio-economic differences among Europeans determining their participation. According to the survey, 28% of respondents had been to the theatre once or more in the last year, and 18% had been to see a ballet, dance performance or opera. These data indicate that theatrical activities are leading cultural activities attended in a specific venue, however, relatively less popular than other relatively inexpensive cultural activities that can be done at home, such as reading or watching/listening to a cultural programme on the TV or radio (72%).

The Eurobarometer survey also underlined uneven geographical distribution in the EU in relation to theatre participation. For instance, respondents in the Netherlands and Sweden were most likely to have been to the theatre, with 53% of respondents going at least once in the last 12 months. Respondents in Portugal were least likely to have visited the theatre: 87% said they had not done so at all in the previous 12 months.

In relation to age, older respondents went to the theatre least often, with 25% of those aged 55 and over having done so at least once in the last year compared to 32% of 15-24 year-olds. Education also correlates with theatre attendance: 42% of those who studied beyond the age of 19 and 40% of those still studying had visited the theatre at least once in the last year, compared with 13% of those who left school aged 15 or younger and 23% of those who left school aged 16-19.

Across the EU27, respondents generally said that lack of interest or lack of time are the main obstacles to participating in a particular activity. Lack of interest is the main reason for not going to the theatre (36%) or attending a ballet, dance performance or opera (50%). Cost is also an important factor with 'too expensive' being mentioned as a reason for not going, or going less often, to the theatre (20%).

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[14] Arifa Akbar (2020, June 9), There is a growing unease': will Covid-19 damage theatre's progress in diversity. The Guardian. Available at: https://www.theguardian.com/stage/2020/jun/09/covid-19-theatre-diversity.
[15] European Theatre Forum, the Dresden Declaration. Available at:
https://www.europeantheatreforum.eu/page/the-dresden-declaration-of-the-european-theatre-forum

Improving access to theatrical activities for different communities can bring great benefits to the well-being of society. Studies have found that regular attendance to theatres promotes meaningful social interaction, psychological stimulation, and positive emotions.[16] In addition, attending theatrical activities contribute to creating a shared sense of community.

Theatre is a genuine part of Europe's cultural and linguistic diversity and its venues are important public spaces for an open European society. Engaging in cultural and intercultural activities is reported to lead to a greater tolerance and openness, to community engagement and civic activities and even to be more politically active through voting or signing petitions.[17] The theatre offer is an indicator of the cultural vibrancy of European cities whatever their size as per the Cultural and Creative Cities Monitor[18] set up by the European Commission Joint Research Centre.

Theatre plays a role providing a space for communities and shared experiences but also as an artistic reflection of human lives in a scenic mimicry.[19] Performing arts have the ability to trigger the human reaction of identifying and empathising with the situation and characters on stage. Through creating connection, understanding and even compassion between individuals and groups they contribute to healthy society and democracy.[20] For instance, the Deutsches Theater Berlin created a festival for Eastern European theatre named 'RADAR OST', using theatre as a medium to testify the past and current situation in Eastern European countries. Through theatre, historical upheavals and contemporary social and political evolutions in the post-communist countries can be reflected.[21]

There is a growing evidence of the impact of the arts in improving mental and physical health. The creativity involved in arts participation is thought to develop creative thinking, problem solving and the reconstruction of beliefs contributing to building social and community capital. There are many ways in which theatre contributes to social bonding and inclusion and addresses mental health issues. For instance, theatre projects were developed in Bosnia and Herzegovina to support reconciliation following armed conflict. Theatre productions on bipolar disorders were found to reduce stigma among health-care providers and participation in improvisation theatre workshops reduced social anxiety among participants.[22]

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[16] Vandenbroucke, R. J., Meeks, S., *How Theatre Encourages Well-being –*
and Can Engage a Wider Audience.
[17] Council of Europe (2016), Cultural participation and inclusive societies. Available at:
https://rm.coe.int/cultural-participation- and-inclusive-societies-a-thematic-report-based/1680711283.
[18] See: https://ec.europa.eu/jrc/en/publication/eur-scientific-and-technical-research-reports/cultural-and-creative-cities-monitor-2019-edition
[19] Theatron (2012), Engaging New Audiences. Available at:
https://issuu.com/theatronnetwork/docs/theatronprojectdescription.
[20] IETM – International Network for Contemporary Performing Arts (2019), Power of the performing arts in Europe. Available at:
https://www.ietm.org/sites/default/files/attachements/news/power_of_performing_art_in_europe_final.docx_1_0.pdf.
[21] Birgit Lengers, "RADAR OST: Deutsches Theater Berlin Looks Eastward", in ETC Journal 2019/2020
[22] World Health Organisation (2019), What is the evidence on the role of the arts in improving Health and well-being? A scoping review, Health Evidence Network Synthesis Report. Available at:
https://apps.who.int/iris/bitstream/handle/10665/329834/9789289054553-eng.pdf.

3 Socio-economic profile and impact of the theatre sector

3. Socio-economic profile and impact of the theatre sector

The situation of theatre institutions

Box 2. Economic data about theatres in the EU

Collecting economic data related to the situation of theatres in Europe faces two major challenges. First, statistical definitions of the sector have not been harmonised at either EU or national level. Second, there are issues with the way data is collected. Very often, data about theatres are not singled out, and most statistics report on the performing arts sub-sector, which also includes opera, dance, circus, mime and cross-disciplinary performance formats. Many theatres are public organisations owned by public institutions at national, regional or local level and are labelled as such and not as pertaining to the NACE 90 category.[23]

Moreover, in some countries, the theatre sector includes lyrical theatre and opera houses, in some others, it is possible to differentiate theatre structures according to the genres they produce e.g. puppet theatres. For these reasons, it is difficult to provide definite figures relating to the number of theatre venues and their annual turnover, the number of staged performances, new productions and European collaborations per season, audience numbers with a distinction between commercial and public theatres. The study therefore used European data provided by Eurostat as well as data provided by national statistics offices, professional organisations, associations and networks at European and national levels. It is worth mentioning that not all of these organisations across the EU have a mandate to collect statistics about the sector nor have the resources to do so, hence discrepancies in terms of data collected exist from country to country.

Theatre is part of the highly labour-intensive and dynamic cultural and creative sub-sector. According to Eurostat data, the Performing Arts sub-sector has seen the strongest growth in value added and employment between 2013 and 2017. The value added by the Performing Arts sub-sector has grown at an 8.6% CAGR, the strongest among all CCS subsectors reaching EUR 44,7 billion in 2017 and representing on average a contribution of 0.6% towards each Member State's value added. Nearly 2 million people,[24] representing up to 25% of Europe's cultural and creative sector workers,[25] are employed in the live performing arts, including theatre and music. At a 9.4% CAGR, employment in Performing Arts has grown more than in any other cultural and creative subsector reaching 1.81 million workers in 2017. The share of Performing Arts employment has increased to 1.3% of the EU workforce as it has seen a growth rate of 7.1% CAGR between 2013 and 2017. In terms of number of companies, the performing arts sector is the largest amongst CCS in Europe with 814,530 companies (on average 3.2% of companies in each Member State).[26]

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[23] The NACE 90 category includes the following codes: 90.01 Performing arts, 90.02 Support activities to performing arts, 90.03 Artistic creation and 90.04 Operation of art facilities. A concrete example of statistical issues in the live and performing arts field is provided by HIVA KU-Leuven on 'Cross-border employment in the live performance sector, Exploring the social security and employment status of highly mobile workers', p.70, available at: https://hiva.kuleuven.be/en/news/newsitems/Cross-border-employment-in-the-live-performance-sector

[24] Pearle* Europe, 'On the European stage 2019–2024 priorities for the live performance sector' March 11th, 2019 Available at: https://www.pearle.eu/news/on-the-european-stage-20192024-priorities-for-the-live-performance-sector

[25] See: https://ec.europa.eu/culture/sites/culture/files/factsheet-culture-may2018-en.pdf

[26] European Investment Fund (2021), Market analysis of the cultural and creative sectors in Europe. Available at: https://www.eif.org/what_we_do/guarantees/cultural_creative_sectors_guarantee_facility/ccs-market-analysis-europe.pdf

The figures below intend to provide a snapshot of the theatre sector in Europe based on a mapping exercise conducted through desk research. The mapping provides information on the number of public and private theatres and companies (not distinguished based on type in the figures below), the number of staged performances per year or per season, the number of audiences attending theatre performances in EU Member States per year or per season, and revenue generated by these organisations. The data presented on theatres below was found in official national statistical sources. The comparability of data is therefore limited since the scope, the year of data collection, and calculation methods vary from country to country. The existing differences in data collection do not allow to provide estimations on the overall size of the sector in the EU. However, they can provide a valuable snapshot on the role and size of theatrical activities in different countries.

In terms of the number of dramatic theatre venues, companies and other type of entities operating in EU Member States, it was often difficult to single out data on the dramatic theatres. The data found in most cases included both public and private venues, and in some cases companies, ensembles and other entities operating in theatre and other performing arts sub-sectors. The number of theatre venues and companies (not only drama theatres) found is presented in the figure below.

Figure 2. Number of theatre venues and companies in the EU (according to available official statistical data)

The following graphs rely on multiple sources which are not comparable as such (different calculation methods, scope of the sector and time period measured). The purpose of the chart is to give a glimpse into the potential size of the sector, not to provide definite figures.
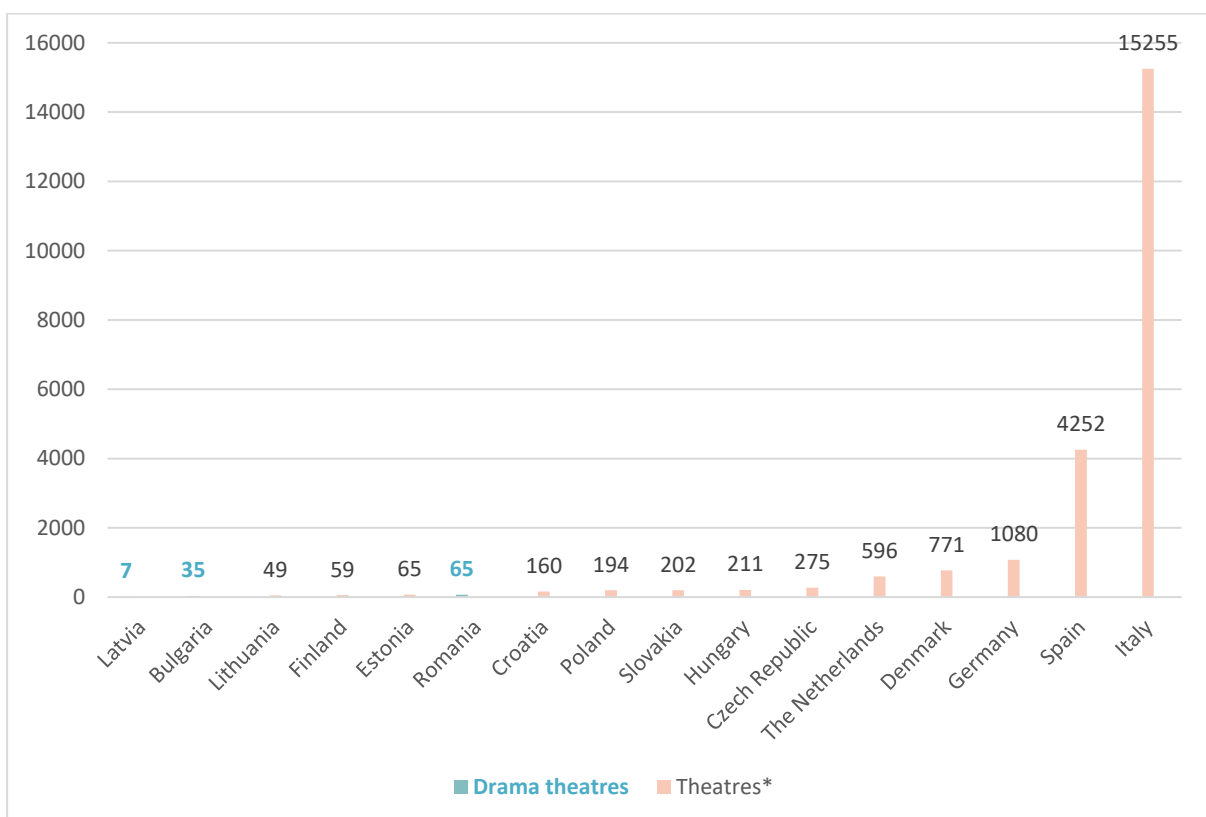
Source: multiple sources; national statistic offices.
*Theatres: including other performing arts venues and companies besides drama theatres, like venues showing musicals, ballet, opera etc.

The theatre venues and companies that were measured by national statistics shown a great number of performances. In a given year or season, theatres in EU countries staged from 3,021 performances (Bulgaria in 2020) to 65,995 (Germany, 2018/2019 season). The official data differs in terms of reporting periods, with some countries collecting data per season, whereas others per calendar year.

Figure 3. Number of performances per season or year in the EU Member States

Number of performances

Country	Number of performances
Italy (2019)	132201
Germany (2018/2019)	65995
Spain (2019)	47372
Portugal (2019)	37049
Czech Republic (2019)	31283
Poland (2020)	24400
Hungary (2020)	18000
Finland (2019; drama theatres)	16774
Romania (2019)	12648
Denmark (2019/2020)	11692
Netherlands (2019)	11278
Austria (2017/2018)	7523
Estonia (2019)	7047
Greece (2018/2019; municipal theatres)	7018
Slovenia (2019)	6551
Croatia (2019/2020)	5934
Slovakia (2019; drama theatres)	5039
Lithuania (2020)	3300
Latvia (2019)	3263
Bulgaria (2020; drama theatres only)	3021

■ Number of performances

Source: multiple sources; national statistic offices.

Attendances at theatre performances ranged from 371,000 audience members in Bulgaria in 2020, to more than 18.5 million in Germany, during the 2018/2019 season (see the figure below).

Figure 4. Attendance to theatres in the EU Member States per season or year

Attendance numbers

Country	Attendance numbers
Germany (2018/2019)	18590500
Spain (2019)	11500000
Czech Republic (2019)	6831000
Portugal (2019)	6037000
Poland (2020)	4500000
Hungary (2020)	4367000
Austria (2017/2018)	3727500
Finland (2019)	2933000
Romania (2019)	2816000
Greece (2018/2019)	2529000
Denmark (2019/2020)	1906200
Netherlands (2019)	1721000
Estonia (2019)	1273300
Italy (2019)	1180638
Slovenia (2019)	996700
Slovakia (drama theatres, 2019)	955500
Latvia (2019)	920000
Croatia (2019/2020)	845000
Lithuania (2020)	561000
Bulgaria (2020)	371000

Note: Multiple sources; national statistical offices

Data on the revenue generated by theatre venues, companies and other type of establishments was found for 10 countries. The data is not easily comparable as in some statistics the revenue measured includes all total revenue (incl. revenue from all type of activities) while other statistics report only on the revenue from ticket sales. The lowest revenue numbers were found in Lithuania and Bulgaria. However, the data for these countries covered 2020, the year when the COVID-19 pandemic started. In 2020, Bulgarian theatres that were covered by the official statistics generated EUR 4,746,700 in ticket sales. The most revenue was generated in Portugal, Austria, and Germany.

Figure 5. Revenue of theatre institutions in EU Member States per season or year

Revenue

Country	Revenue
Germany (revenue), 2018/2019	586757000
Italy (revenue), 2019	499935319
Austria (revenue), 2017/2018	174586000
Portugal (ticket sales revenue), 2019	125314000
Denmark (self-generated revenue), 2019/2020	92726800
Finland (ticket sales revenue), 2019	66887800
Czech Republic (revenue), 2019	53115600
Estonia (revenue, state and town theatres), 2019	52485900
Estonia (revenue, other theatres), 2019	7211700
Lithuania (ticket sales revenue), 2020	5787000
Bulgaria (ticket sales revenue), 2020	4746700

Note: Multiple sources; national statistical offices

Collaboration among theatres in Europe

Creating and producing across borders can be a challenge for theatres for various reasons. First of all, the production system in which the theatres operate. The so-called 'French oriented system' is based on productions, touring and selling plays to other venues making international co-production easier to fit in a programme. In a 'German oriented system' whereby theatres operate as production houses with in-house established ensembles, international co-production is less natural since the programme is set for the season. Theatres operating within this system sometimes engage in international co-productions or invite a guest performance at a specific time in their season.[27] Second, the repertoire is another variable to consider when looking at international collaborations among theatres. The term 'repertoire' covers various acceptations: beyond the 'classics' of a county's dramaturgical heritage, it can designate all the plays from the same period (e.g. the romantic repertoire), all the plays performed by the same theatre or the same company (e.g. the repertoire de la Comédie-Française), all the plays by the same author, roles by the same actor, productions by the same director.[28] Theatres based on a repertoire practice are in less of a favourable situation to co-produce with others. Finally, the funding system, in particular the public subsidies, of the country can be a hurdle or a support for theatres to take risks of engaging resources for an international production which takes one or two years to prepare. Theatres with pluriannual budgets granted by public institutions are in a more favourable position to create at international level.

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[27] Interview with the European Theatre Convention
[28] Fabula, 2008, « Le théâtre de répertoire : lieu de mémoire, lieu de création », available at : https://www.fabula.org/actualites/le-theatre-de-repertoire-lieu-de-memoire-lieu-de-creation_23967.php

However, European theatres, whether public or independent, do engage in international cooperation at various levels, by will and / or by need (e.g. pooling resources, accessing to additional funding and to other territories, enriching their professional practice and diversifying their artistic programme for the audience) for artistic and professional benefits. There are various platforms for European cooperation in the theatre sector, starting with the Creative Europe cooperation projects where performing arts in general and theatre in particular are very well represented. [29] Two main networks receive funding from the Creative Europe Programme to encourage international networking and professional development in the theatre sector. These include the European Theatre Convention created in 1988 and the International Network for Contemporary Performing Arts (IETM) created in 1981. Informal networks and interpersonal connections are very important to initiate international operations among theatres. Public theatres interviewed for this study have demonstrated strong links with international partners on a bilateral basis, often out of theatre directors' personal connections. Formal and informal European theatre networks interviewed reported on the benefits of international collaboration for exchanging intelligence on the way to access and navigate the international theatre landscape to create outside of the national scale, for sharing knowledge and inspiration to enrich each other's programmes, for bringing together different perspectives from various regions and joining forces in advocacy activities towards policy making institutions. [30] However some stakeholders highlighted that joining European networks requires a financial and professional capacity that small theatres cannot afford. The main theatre networks, such as ETC, Prospero, Union des Théâtres de l'Europe, are thus mainly made of large, influential public theatre institutions.

Economic data collected suggests that the performing arts sector (in a pre-pandemic situation) is a very dynamic one in terms of employment and growth. Theatre venues and companies play an important role as employers in the performing arts for a wide range of occupations, artistic but also administrative and technical. The next section focuses on the socio-economic situation of theatre professionals in the EU.

Situation of theatre professionals

The CCS are characterised by small-size organisations (10 to 49 people) or micro enterprises (less than 10 people).[31] This is also confirmed by the conducted interviews, during which attention was drawn to the fact that what is commonly regarded as a large theatre institution is basically a small enterprise. Institutions employing more than 50 people are rare. Especially in Western Europe, where theatres are more venues inviting various productions rather than institutions with a permanent cast, producing for their own use, as in the countries of Central and Eastern Europe and, for example, in Germany. Small production companies employ few permanent workers, adjusting their employment to ongoing projects, where the staff can reach even hundreds of people. The lack of a permanent team allows them to freely build a cast, based on the needs of the moment. Even in institutional theatres with a full-time team, it is impossible to avoid hiring external professionals for the project e.g. a director, actor or technician specialized in a given field. The theatre sector ecosystem is therefore made up of a large number of freelancers, casual and temporary workers.

According to survey data, in theatre venues and companies relying mostly on public funds, the in-house staff that is employed at the institution constituted around 64% of the total workforce. The staff that is hired on a freelance basis on average constituted 35% of the

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[29] Interview with EACEA, 13 April 2021
[30] Interviews with Mitos21 and ETC
[31] European Parliament Policy Department for Structural and Cohesion Policies Directorate-General for Internal Policies (2021), *Cultural and creative sectors in post- COVID-19 Europe, Crisis effects and policy recommendations.* Available at:
https://www.europarl.europa.eu/RegData/etudes/STUD/2021/652242/IPOL_STU(2021)652242_EN.pdf

total workforce. At institutions that relied mostly on private funds, this ratio between employed and freelance staff was reversed.

According to the data presented in Cultural and creative sectors in post-COVID-19 Europe, 32% or almost a third of the cultural sector employees in the EU-27 in 2019 was self-employed. The average for the entire economy is 14% (Labour Force Survey data). More than twice the number of self-employed in the cultural sector clearly shows that this market is based on freelancers, cooperating with various organizations, participating in various projects. Another feature of employment at CCS is the large number of part-time employees. Only 75% of workers with employment contracts work full-time. There is also still a large number of workers who escape the statistics. Temporary and casual workers, voluntary workers and those who are forced to work in a second, non-cultural, job for survival.[32] The interviews show that artists most often choose the education sector as the one that will help them survive. In addition, the survey findings reveal that theatre professionals on average have more than one occupation (1,9 occupations).[33]

According to the stakeholders, there is a high rotation in the market. Unable to break into the mainstream, young people start their own businesses and organize their own projects. Over time, however, there is an influx of new generations that are pushing out of the market those who have not entered the mainstream, have not gained fame. Often these artists are forced to cooperate internationally and take advantage of the opportunities offered by touring, because the local market is not able to absorb such a number of initiatives. The difficulties of breaking through the market and remaining in the theatre sector leads to a certain extent to a homogeneous social profile of the actor as 'predominantly white middle class' as mentioned by various stakeholders from different countries.

An important issue that gained prevalence during the pandemic is a fair remuneration of artists for online work. Stakeholders consulted during this study noted that digital business models, which especially increased during the pandemic, are rarely financially beneficial to professionals. A few stakeholders suggested that labelling theatre operators' experiments with digital means and streaming during the pandemic as 'new business models' can be misleading. For many professionals engaged in such activities, they did not provide adequate income that could substitute work in live performances. It was noted that many questions still remain unanswered in relation to remuneration of professionals engaged in digital works, copyright and generating revenue.

The taxation of cross-border performances is another issue that causes problems for artists working internationally: inside and outside their country of residence. Article 17 of the OECD Model Convention has been taken over in most bilateral tax treaties to avoid practical difficulties, but in reality often creates practical problems such as double taxation and high administrative expenses.[34] Stakeholders also point out that touring is labour intensive, time consuming and expensive, while the outcome is unpredictable. There is no certainty what the audience will be like, how the artwork would be received and whether the audience will come back for another spectacle or not. This is against the principles of the functioning of the market in terms of balancing profits and costs.

Artistic work often requires financial support from public institutions, sponsors or donors. However, the interviews show that the artists themselves are still the people who make the greatest financial contribution to art. They are highly motivated to work, having a sense of mission. Often, in order to remain independent, artists (especially independent artists)

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[32] European Parliament, op.cit.

[33] Survey data, N=56

[34] European Expert Network on Culture and Audiovisual (2020), *The status and working conditions of artists and cultural and creative professionals*. Available at:
https://eenca.com/eenca/assets/File/EENCA%20publications/Study%20on%20the%20status%20and%20working%20conditions%20of%20artists%20and%20creative%20professionals%20-%20Final%20report.pdf

consciously choose to avoid institutional structures and public funding. Nevertheless, their work remains precarious. Interviews with stakeholders show that freelancers' wages are low, and they lack stability and social protection. They cannot apply for benefits or state support. The theatre sector in Europe is based on these workers. This feature of the labour market must be taken into account when analysing the impact of the COVID-19 on the sector. This situation is also reflected in the survey findings, where a significant part of respondents did not have access to certain social security entitlements or felt insecure about their jobs (see Figures 6 and 7 below).

Figure 6. Theatre professionals: Based on your current employment situation or your other activities/status, are you entitled to
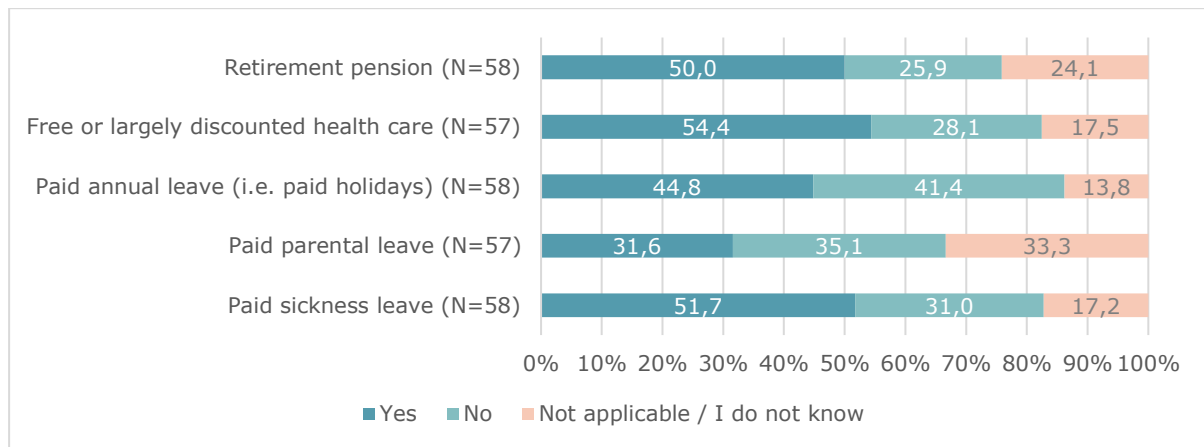
Source: Survey data

Figure 7. Theatre professionals: To what extent do you agree or disagree with the following statements regarding your working conditions
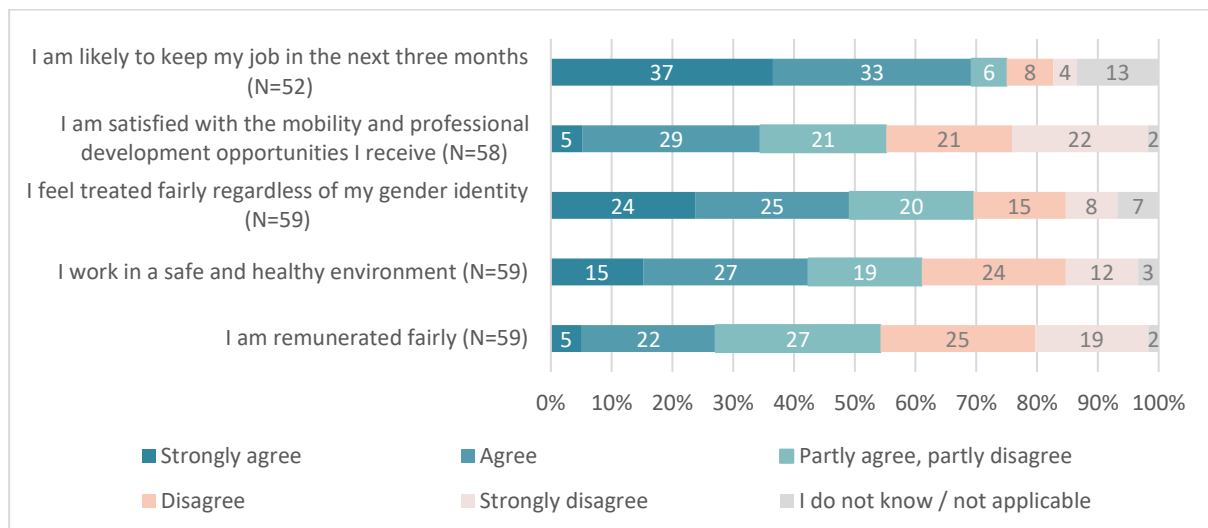
Source: Survey data

Box 3. Good practices in improving the social and economic conditions of freelance/temporary workers in the theatre sector

Performing Arts Social Fund (Sociaal Fonds Podiumkunsten) in Flanders, Belgium, opened a Career Centre, where professionals in the performing arts can benefit from a 'training credit' worth EUR

600 for professional support.[35] This scheme is particularly dedicated to temporary workers in the sector.

The topics addressed by the scheme include:

— artistic development, master classes, inspiration sessions
— well-being: dealing with stress or stage fright, ergonomic ways of working, work/life balance
— organisation: self-promotion, how to make optimum use of social media, digital business models, negotiation techniques
— software: how to start a podcast, light or sound software

As of 1 January 2021, the scheme is available for all temporary employees having worked for at least 10 days in 2019, 2020 or 2021. It is no longer necessary to have a valid contract at the time of the training. Workers who are not employed at the time of the training receive a wage for their participation.

The Theatre Alliance (Teateralliansen) was established in 1999 by the Swedish theatre employers' organisation (Svensk Scenkonst), the Swedish actors' trade union (Teaterförbundet/för scen och film), and the Employment Security Council (Trygghetsrådet TRS), the latter of which was founded by employer organisations and trade unions to help the newly unemployed.[36]

The underlying idea behind the Theatre Alliance is that the public (society) takes responsibility for the basic security and continuity of established freelance actors who work mainly at publicly supported theatres. The aim of the alliance is to increase the social security of freelance actors who are not permanently employed even after they have been in the profession for many years. Originally, another objective was to stimulate the circulation of actors in theatres across the entire country and encourage actors to work in smaller theatres as well as larger ones. Today, the Theatre Alliance employs some 160 actors, providing them with a network of peers and producers, as well as continuous training and education.

Financial schemes for the theatre sector

The legal status of theatres varies greatly across Europe and within EU Member States. The theatre ecosystem is made of the coexistence of public organisations (directly managed by the state or the local authorities), private organisations working with public funds (e.g. many Italian theatres are foundations operating with a majority of public funding), and of entirely private, commercially-oriented theatre venues that rely mainly on box office revenues. Theatres therefore rely on a variety of funding sources, from public funding to self-generated income and private funding, which are detailed in this section.

Public funding

Public intervention has traditionally played a crucial role in supporting the theatre sector that suffers from a chronic market failure called a 'cost disease'.[37] Despite recent improvements in productivity levels, the sector is still characterised by high fixed production costs (e.g. equipment, costumes) and marginal costs (associated to each individual play) that cannot be fully charged to the consumer because the ticket price would be too high. This is particularly the case for complex theatrical performances with a large cast and / or stage design. As a consequence, public support is particularly important both for price-setting and revenue sharing in the theatre sector. Furthermore, theatre (as other

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[35] https://www.podiumkunsten.be/english/118/training-credit-temporary-employees/3634
[36] See: https://teateralliansen.se/teateralliansen-in-english/
[37] William J. Baumol and William G. Bowen (1968), Performing arts: the economic dilemma. A study of problems common to theater, opera, music and dance. Cambridge: M.I.T. Press.

cultural products) can be considered as 'public good' because it does not only benefit those who see and pay for it but also society in general, thus justifying public intervention.

An overview of the main types of supporting schemes involving public intervention is presented below:

- *Subsidy and grants*: public funding is usually focused on supporting creation and production through the direct subsidisation of production or competitive grants allocated to theatre organisations (venues, companies, artists).[38] Other forms of subsidies target the audience (e.g. in the form of vouchers giving the audience or a specific part of the audience such as young people or the elderly the opportunity to go and see a performance or to buy tickets at reduced cost). Subsidies and grants are the most common forms of public support in Europe and are available for theatres at national level, usually through ministries of culture or such arm's length bodies as arts councils (for National Theatres or labelled venues according to a set of guidelines and obligations) and at local level through regions and municipalities. In many European countries, part of the theatre ecosystem is directly managed by the public institutions financing them (ministries, regions or municipalities) out of annual budgets for their infrastructure (building, staff, sometimes artistic team) and their productions. The emblematic case of public management is the National Theatres that are present in all EU Member States. These subsidies and grants are awarded according to the authority to which the theatrical structures belong. Public subsidies enable theatres to take risks with their programming, staging emerging artists or experimental work, offering them a space to meet audiences without the pressure of profitability. Public subsidies can also support companies or individual artists, in the form of grants for research or mobility projects for instance. At the same time, short-term subsidies (provided on project basis) do not provide some private and public institutions an opportunity for long-time planning of their activities.

- *Tax and fiscal incentives:* these forms of governmental intervention have become increasingly popular in EU Member States to stimulate private investment in the sector. Initially applied to the audio-visual sector, tax incentives (e.g. tax shelters or tax rebates) for content production/circulation have been extended to other CCS including performing arts. For instance, in 2016 Belgium introduced a dedicated tax shelter to performing arts production, based on the existing audio-visual tax shelter scheme. Up to 70% of the costs can be claimed as fiscal reductions.[39] Other types of tax incentives include tax reliefs on sponsorships and/or donations to encourage philanthropic patronage. For example, since 2017 Italy has extended the 65% tax credit of charitable contributions to non-profit cultural organisations (the 'Art Bonus') to the performing arts sector, including theatres.[40] Another form of fiscal support is lower indirect tax (reduced VAT) for the admission to cultural services, including theatre. Examples of EU countries that apply a reduced VAT rate (below 10%) include Belgium (6%), Germany (7%), the Netherlands (9%) and Romania (5%)[41].

- *Loans and equity / guarantee mechanisms*: banks and private investors have an important role to play in the cultural sector, in particular for building up cash flow, pre-financing subsidies or for the purchase of specific equipment or real estate.

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[38] Luis Bonet, Héctor Schargorodsky (2018), Theatre management: models and strategies for cultural venues. Kunnskapsverket Available at:
https://kunnskapsverket.org/sites/default/files/Theatre%20management%20PDF%20Protegit.pdf.
[39] See: http://www.creationartistique.cfwb.be/index.php?id=15683
[40] Ministero per i Beni e le Attività Culturali e per il Turismo, Art Bonus, https://artbonus.gov.it/.
[41] European Commission (2020), VAT rates applied in Member States of the European Union. Available at:
https://ec.europa.eu/taxation_customs/sites/taxation/files/resources/documents/taxation/vat/how_vat_works/rates/vat_rates_en. pdf.

However, it is not possible for all actors to benefit from this type of support. For this reason, mechanisms have been created to make investment in CCS more attractive to the private sector (see about the CCS Guarantee Facility in the box below).

Box 4. European support for the theatre sector

As mentioned above at European level, the Creative Europe Programme offers opportunities for theatre organisations through the Culture strand. Between 2014 and 2018, the theatre sector received substantial support in the form of grants for cooperation projects: a total of 85 theatre projects received the funding of EUR 40 million, making theatre the second largest beneficiary sector after music.[42]

Not dedicated to the performing arts but available to professionals in the sector, the i-Portunus project enables the mobility of individual artists and cultural professionals.[43] The 2019 call of the project applications from the performing arts sector amounted to 43.69% of the total received.[44] In 2020, two new actions were announced: the call 'Circulation of European Performing Arts' to support the recovery following the COVID-19 pandemic outbreak (Perform Europe project[45]), and the 'Sectorial support to the theatre sector' in the form of a study assessing the key challenges for the theatre sector in Europe.

Theatre networks are also funded through Creative Europe:

- As **cooperation projects**: for instance, the Prospero network – through the 'Prospero - extended theatre' project enabling the creation of large-scale European theatre plays and their touring among the 9 countries of the network as well as creating professional recording of these creations, their translation in 6 languages and supporting their availability for public and private broadcasters[46], or the 'Fabulamundi Playwriting Europe' project – an international network with the aim of creating a system of support and promotion to the contemporary dramaturgy, encouraging the consolidation and strengthening of the activities and artists operating in the sector and offering to the playwrights, horizons of spreading, of dialogue, of international exchange. The project has been funded for the third time in a row.[47]
- As **Creative Europe networks**: IETM and the European Theatre Convention.

Creative Europe Programme also provides a guarantee mechanism for the CCS: the **CCS Guarantee Facility** started in 2016 by the European Commission in the framework of the Creative Europe programme (2016-2020). Through this initiative, loans are provided more easily to micro-businesses and SME's (small and medium-sized enterprises) in the cultural and creative sectors from EU Member States, Iceland and Norway. Indeed, the facility guarantee on the one hand encourages potential investors to invest in CCIs and on the other hand makes them aware of the needs of the sector through appropriate training[48]. The CCS GF is intended to cover up to 70% of potential investment losses. This guarantee can be done directly through the banks or indirectly with a counter-guarantee provided by a guarantor.[49] In total, in June 2020, 3,325 companies had already invested a total of EUR 640 million through this mechanism. Of this total, over EUR 60 million of debt financing has helped support 321 SMEs in the performing arts sector in Europe.[50] More precisely, this Guarantee Facility helped to fund the following activities: production of live theatrical presentations, concerts and opera or dance productions and other stage productions,

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[42] European Commission (2019)
[43] See: https://www.i-portunus.eu/
[44] https://www.i-portunus.eu/about-the-programme/i-portunus-statistics/third-call-2019/
[45] See: https://www.performeurope.eu
[46] See: https://ec.europa.eu/programmes/creative-europe/projects/ce-project-details/#project/617010-CREA-1-2020-1-BE-CULT-COOP2 and http://www.prospero-theatre.eu/en/
[47] See: https://ec.europa.eu/programmes/creative-europe/projects/ce-project-details/#project/583844-CREA-1-2017-1-IT-CULT-COOP2 and https://www.fabulamundi.eu/en/
[48] See: https://www.eif.org/what_we_do/guarantees/cultural_creative_sectors_guarantee_facility/index.htm
[49] See: https://digital-strategy.ec.europa.eu/en/policies/finance-creative-sector -
[50] Internal EIF data

activities of casting agencies and bureaus, such as theatrical casting agencies, the operation of arts facilities, performing arts and support activities and performing arts schools providing tertiary education.

Although the most common and used, Creative Europe is not the only European funding programme benefiting the performing arts sector, the European Commission, DG Employment for instance funded various **research and coordination projects** among social partners of the sector on topics such as creative skills,[51] or fighting gender stereotypes.[52] The most recent example is the study published by HIVA KU-Leuven on 'Cross-border employment in the live performance sector, Exploring the social security and employment status of highly mobile workers' in partnership with Pearle* Europe, the University of Ghent and the University of Strasbourg.[53]

Self-generated income

Usually, public support (especially subsidies) makes up a significant part of the budgets of theatre organisations, except for the purely commercially-oriented ones. However, the performing arts sector in Europe has suffered from severe budget cuts over the past years (pre-COVID pandemic). This situation urged theatre organisations to increasingly rely on self-generated income or to find alternative revenue sources in addition to public support, including the uptake of new business models and strategic collaborations, also supported by digitisation.

- *Ticket sales*: ticket sales in public funded theatres usually amounts to about 25% of the theatre budget.[54] Commercially-oriented private theatres and independent companies however rely mostly on revenues generated from the box office and other commercial activities. Among the surveyed private theatre venues and companies, revenue from sales (tickets, admissions) constituted around 40% of their budgets before the COVID-19 pandemic. This has an impact on the artistic choices of the programming to show performances attracting the audience and to play as many shows as to cover the production costs and to generate profit which will be reinvested in new productions or structural works on the venue.

- *Catering*: drinks and food sold during the breaks or after the performances contribute to make theatre a full social experience. Catering contributes in a marginal way to public theatres' budget but can make an important source of revenues for small independent venues and private theatres. In such cases, the Covid-19 pandemic has had a dramatic impact on their finances, since they were not allowed to sell food nor drinks when they could reopen for performances.

- *Renting of spaces:* renting rooms or the entire theatre venue for external performances (theatre or other artistic forms such as music or dance, or school projects) or for corporate or political meetings is common practice among theatres in the EU, both public and private however it does not make up for the majority of the theatre budget.

- *Selling productions*: in some countries (e.g. Italy), fees obtained from selling in-house produced theatre plays (and touring them in other venues) is an important revenue sources for theatres. In order to sell their productions to others, theatres present them in national or international festivals and prepare video recordings for professional audiences. Selling a ready-made performance is also an important

[51] See: Creative Skills Europe, available at: https://www.creativeskillseurope.eu/about-us/

[52] See: FIA "Handbook of Good Practices to Combat Gender Stereotypes and Promote Equal Opportunities in Film, Television and Theatre in Europe", available at: https://fia-actors.com/policy-work/global-diversity/gender-equality-and-portrayal-details/article/handbook-of-good-practices-to-combat-gender-stereotypes-and-promote-equal-opportunities-in-film-tel/

[53] Publication available at: https://hiva.kuleuven.be/en/news/newsitems/Cross-border-employment-in-the-live-performance-sector

[54] Average estimation based on the interviewed and surveyed organisations

income source for ensemble/repertory theatres not only for production-based theatres.

- *Co-productions*: co-production (produce a performance with several partners together) can offer a means for theatres and artists to get larger and more expensive performances funded, as well as opportunities to access a larger (national or international) audience. Furthermore, co-productions favour experimentations, artistic innovation and a broader European orientation. [55] In the context of budgetary cuts, for production-based theatres, co-production also represents a way to bundle resources more efficiently. Conversely, for ensemble/repertory theatres, co-productions can induce more costs as they represent an additional activity not part of their regular programme.[56]

- *Cinema and online retransmissions*: even before the pandemic, cinema broadcastings of live performances have been increasingly adopted in the performing arts and theatre sector to reach a wider audience and to generate extra revenues. Examples include the Live at the 'Comédie-Française' in France.[57] More recently, theatre performances have been made available through dedicated streaming platforms, such as 'Digital Theatre[58]. On the European Stages, ETC's dedicated online space for performance information from Europe's theatres, information has been increasingly published on digital activities when theatres switched online in the 2020/2021 season.[59]

- *Workshops, teaching*: theatre professionals (individual actors, professional companies) sometimes provide services to other organisations in order to diversify revenue streams. This can consist of, for instance, giving corporate workshops or providing team building activities or being invited in universities to provide a course on a specific topic (e.g. European funding out of personal experience). As an illustration, in 2015 the company Effetto Larsen in Italy created a new, for-profit organisation in order to provide facilitation, communication workshops, digital strategy and team building services to enterprises.[60] It runs in parallel of other artistic and research projects of the company.

Private funding

- *Crowdfunding*: crowdfunding is increasingly being considered as a complementary source of finance for small-to-medium sized companies or independent artists[61] are often quite small (ranging between EUR 4,000 and EUR 10,000 on average), thus it often needs to be coupled with other sources [62]. For example, the French crowdfunding platform 'kisskissbankbank' allows individuals to invest in dozens of sectors, including theatre [63]. The 2020 barometer drawn up by 'Financement Participatif France' (FPF), representing players in the sector, reports a record collection of more than EUR 1 billion, i.e., an increase of 62% compared to 2019[64]. Therefore, crowdfunding in general has not suffered from the COVID-19 crisis.

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[55] IETM - International Network for Contemporary Performing Arts (2011), International Co-production Manual. Available at: https://www.ietm.org/en/system/files/publications/international_coprod_manual_1.pdf.
[56] Interview with ETC
[57] Pathe Live, Comédie-Française, https://www.pathelive.com/programme/comedie-francaise-19-20.
[58] Digital Theatre, https://www.digitaltheatre.com/.
[59] See: https://www.europeantheatre.eu/page/news/member-news
[60] See: https://reverbsrl.eu/
[61] Benjamin Bœuf, Jessica Darveau, Renaud Legoux, "Financing Creativity: Crowdfunding as a New Approach for Theatre Projects". International Journal of Arts Management, No. 16, 2014.
[62] Anne-May Meurs, The success of the performing arts on crowdfunding: A case study of a Dutch platform. Master thesis, https://arno.uva.nl/cgi/arno/show.cgi?fid=605454
[63] https://www.kisskissbankbank.com/
[64] https://www.lemonde.fr/argent/article/2021/02/19/le-financement-participatif-ne-connait-pas-la-crise_6070496_1657007.html

- *Corporate sponsorships, participatory patronage and donations:* several theatres rely on the support of businesses and individuals to fund their activities (e.g. productions, education and outreach programmes). In many cases, theatre companies offer several benefits to business sponsors, such as public recognition and visibility. For example, in Belgium, the ASBL 'Prométhéa' is the main reference for corporate sponsorship. Its aim is to develop sponsorship in the field of culture by encouraging partnerships between the cultural and economic sectors[65].

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[65] Vincent, A. & Wunderle, M. (2010). Le financement privé de la culture. Dossiers CRISP, N°74(1), 9-84

4 The impact of the COVID-19 pandemic and response measures at policy and organisation level
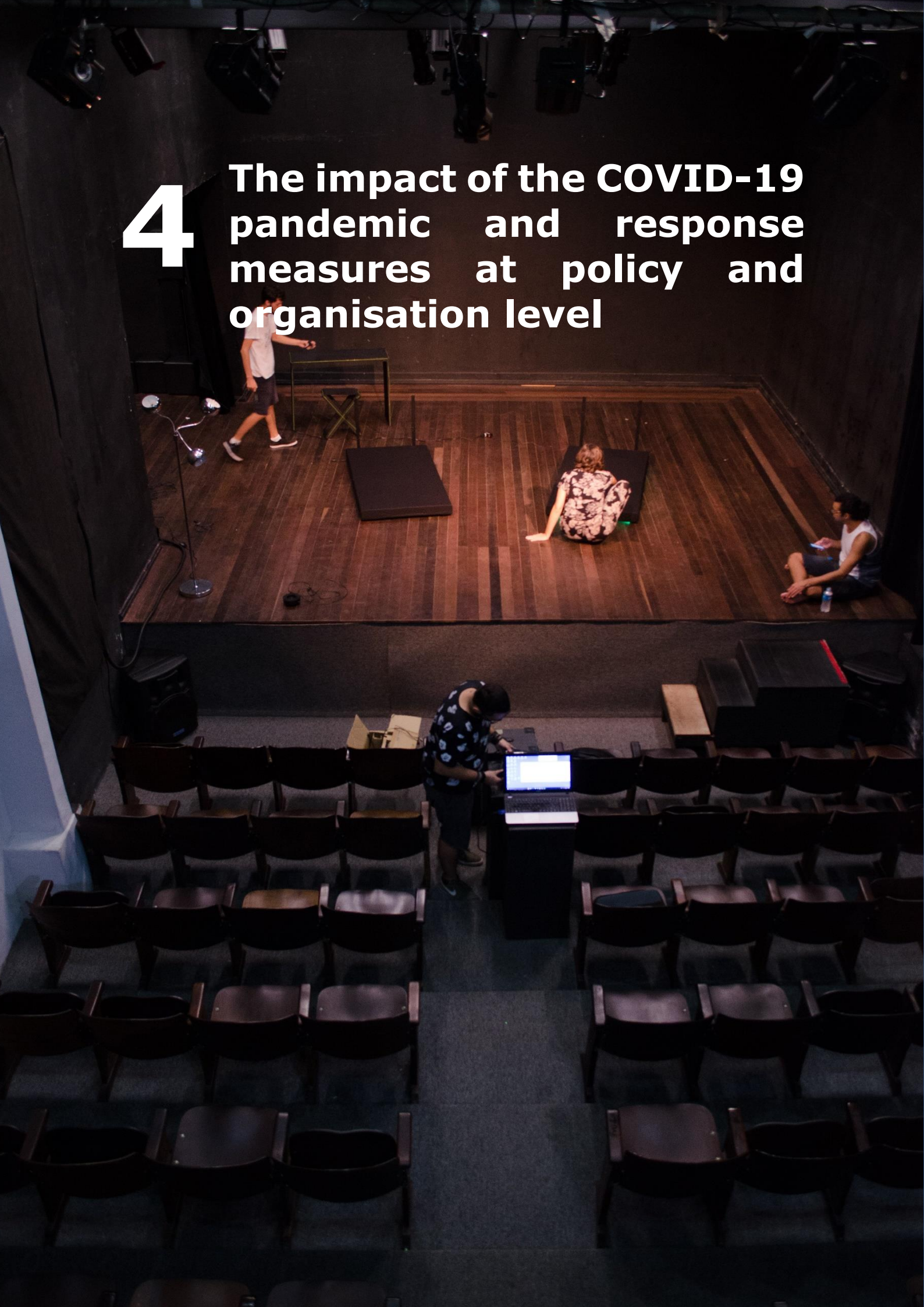
4. The impact of the COVID-19 pandemic and response measures at policy and organisation level

The COVID-19 pandemic and the crisis have demonstrated the interdependence of the highly diverse structures and players within the performing arts ecosystem. In some countries, it has exposed significant gaps across the value chain, between large and small organisations; artists and institutions; companies, venues and festivals; full-time staff and freelancers; independent, commercial and public structures. The various national responses and support mechanisms show a patchy picture across Europe while everywhere artists and arts organisations have shown an extraordinary level of inventiveness and determination to fight the impact of the crisis, putting in place solidarity and self-organisation mechanisms.

Financial and social impact of COVID-19 on theatres

It is estimated that the performing arts have suffered most from the crisis, losing 90% of turnover i.e., EUR 37 million between 2019 and 2020.[66] In some countries, the shock is harder as the performing arts sector represents a larger part of the CCS market. For instance, while the European average is at 4% of the CCS market, the performing arts account for 10% of the CCS economy in Hungary.[67] Publicly funded organisations in North and Western Europe have reported to have experienced a less severe loss of income thanks to government support.

Due to restrictions on public events and gathering, theatre venues and professionals have seen their revenues from ticket sales but also some subsidies, sponsorship, donations, visiting activities, tour sales and ancillary services shrink or disappear. The absence of box office revenue and the non-arrival of governmental support account for the most important deficits.[68] Restrictions affecting theatres' operations have often been changed and extended with short notice periods, which has made it challenging to anticipate changes in operations, change productions and thereby generate savings. The further the restrictions, and in particular the complete closures of public events, continue, the more difficult the situation for theatres.

The financial damage to the theatre ecosystem heavily depends on the business models and government support available. While it is still difficult at this stage to calculate the financial impact of the pandemic on the theatre sector at European level, national sources provide an estimate of the revenue and audience losses, for instance:

— A study by the Austrian Institute of Economic Research estimates that the pandemic caused EUR 1,5-2 billion damage in the field of culture, which is a quarter of the annual added value.[69] The loss of income poses an existential threat for many freelance artists, cultural operators and NGOs in the field of culture.

— Dansk Teater in Denmark estimates that the theatres have suffered a loss of between DKK 100,000,000 (EUR 13,446,546) and DKK 150,000,000 (EUR 20,169,819) during the spring 2020 closing period with 311 cancelled productions and 3699 cancelled performances.[70]

— According to the Finnish Theatres Association, the performing arts sectors are suffering a loss of income of up to EUR 35 million for the period November-December 2020 and January-March 2021. The full closures of the November-

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[66] EY (2021) Rebuilding Europe. Available at: https://www.rebuilding-europe.eu/

[67] ibid.

[68] European Parliament (2021), op.cit.

[69] Austrian Institute of Economic Research , "Ökonomische Bedeutung der Kulturwirtschaft und ihre Betroffenheit in der COVID-19-Krise" Available at : https://www.bmkoes.gv.at/Kunst-und-Kultur/Neuigkeiten/StudieCOVID.html

[70] Temperaturmåling – teatrenes tilstand i juni 2020 https://www.danskteater.org/wp-content/uploads/2020/08/41959_dansk-teater_temperaturmling_uge25.pdf

December 2020 public events already caused losses of around EUR 10 million for public theatres and EUR 2 million for free field organisations and groups. For state-owned theatres, a full closure from January to the end of March 2021 would cause a total of about EUR 15 million in losses. For the independent theatre field, the losses would be up to EUR 5 million.[71]

— Figures from France relating only to the spring 2020 lockdown, for example, give an idea of the alarming economic situation of the performing arts and of the future aftermath of the crisis: the revenues lost for theatres in the period amount to EUR 174 thousand.[72]

— In Germany, the Berlin-based institutionally funded theatres, orchestras and dance groups report a drop of 73% in audiences (and as less ticket sales), from 3.3 million in 2019 to 900 thousand in 2021 as a result of the pandemic.[73]

— It is estimated that in Italy, the theatrical activity lost 70.71% of admissions compared to 2019 and reported a 78.45% reduction in box office spending.[74]

— In Norway, according to a report by Menon Economics in November 2020, stage artists are the third group of culture practitioners after musicians and visual artists to have experienced the most pronounced decrease in revenues due to the Covid-19 crisis.[75]

— In Lithuania, based on the data of national statistics office, the number of performances in state theatres declined by 48% between 2019 and 2020, and the revenue for ticket sales fell by EUR 4,824,000. In non-state (private) theatres, the number of performances fell by 57.5% and the revenue lost amounted to EUR 4,616,000.[76]

— The Broadcasting, Entertainment, Communications & Theatre Union (BECTU) estimated that in the UK, at least 5,000 jobs had been lost in the cultural sector by the end of July. The commercial West End theatre in London has been particularly hit, with some 2,700 redundancies and there are fears that some theatres will never reopen. This is also the case in other major cities. More than 15,000 theatrical performances were cancelled during the first 12 weeks of lockdown, resulting in a loss of GBP 300 million (EUR 349,1 million) in box office revenue according to the Parliamentary Digital, Culture, Media & Sport Committee.[77]

What is more, if in some countries, theatres could reopen under certain social distancing conditions, only a few of them were actually able to open, given the capacity restrictions in force. For instance, in Spain such restrictions were set at between 50 to 75% of the venue capacity. Many production companies experienced cancellations during the reopening phase and some theatres, to avoid having to cancel performances, have moved these online. Based on the survey of theatre companies and venues, attracting back customers/audience and compliance with changing regulations of public authorities were

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[71] Suomen Teatterit. Available at: http://www.suomenteatterit.fi/202 1/01/esittavan-taiteen-alat-karsimassa-jopa-35-miljoonan-euron-tulonmenetykset/
[72] Ministère de la Culture (2020), ANALYSE DE L'IMPACT DE LA CRISE DU COVID-19 SUR LES SECTEURS CULTURELS Secteur du Spectacle vivant.
[73] Kunst vor Publikum - an Berliner Bühnen seit März 2020 fast unmöglich 13.04.21. Available at : https://www.berlin.de/sen/kulteu/aktuelles/pressemitteilungen/2021/pressemitteilung.1074348.php
[74] SIAE, Dati SIAE 2020: Ecco il prezzo che ha pagato lo spettacolo all'emergenza Coronavirus, 8.02.2021. Available at: https://www.siae.it/it/iniziative-e-news/dati-siae-2020-ecco-il-prezzo-che-ha-pagato-lo-spettacolo-all'emergenza
[75] Kulturradet - Arts Council Norway, Half a year with covid-19 in the cultural sector - experiences and future prospects https://www.kulturradet.no/english/vis/-/half-a-year-with-covid-19-in-the-cultural-sector
[76] Statistics Lithuania, 2021. Available at: https://osp.stat.gov.lt/statistiniu-rodikliu-analize?theme=all#/
[77] Compendium of cultural policies and trends, Country Report UK, 2020. Available at: https://www.culturalpolicies.net/covid-19/country-reports/uk/

indicated as concerning for majority of respondents (67.6% and 56.8% respectively; see the figure below).

Figure 8. Theatre venues and companies: Thinking about re-opening or continuing your activities in post-pandemic period, which of the following factors do you perceive as a threat?
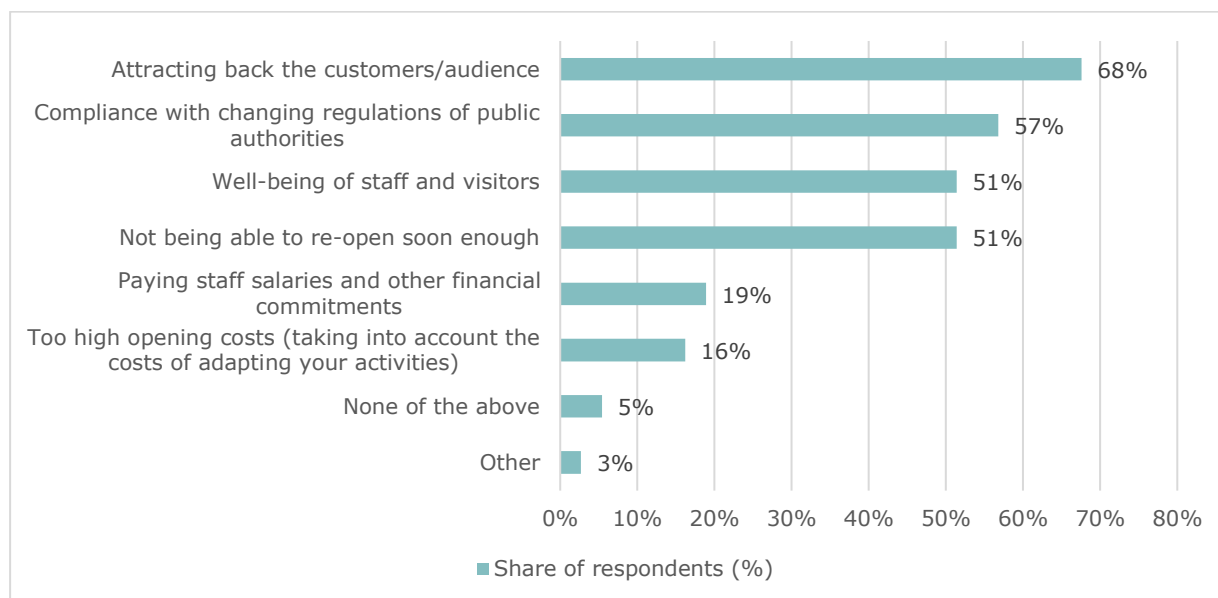
Source: Survey of theatre venues and companies, N=37

Beyond the turnover of theatre venues and companies, the whole theatre ecosystem has suffered from the crisis, especially the non-permanent staff of theatre institutions, namely artists and technicians.

Social impact

The COVID-19 pandemic is having a huge impact on the entire CCS. These are one of the most affected sectors, as due to the restrictions, many theatres, museums, concert halls, etc. had to suspend their activities and many festivals and events were cancelled. This resulted for self-employed artists, and those without employment contracts in immediately losing their income. Preliminary estimates of the European Commission, from May 2020 predicted a decrease in turnover by over 50%. However, they did not take into account next waves of the pandemic resulting with restrictions and closings. Both the EU and its Member States tried to develop aid instruments for CCS.[78] In practice, however, they did not cover all artists. Many of them, due to the type of employment, had problems with proving their artistic work, or were simply excluded from support systems. The German Association of Scenographers, for example, revealed that only 1.23% of the 227 scenographers who participated in their survey had been paid.[79] Interviewees pointed out that the closure of theatres resulted in the termination of many contracts and leaving the artists destitute, forcing them to seek alternative sources of income. It often happened that aid programs were not direct support but a competition for innovative projects that could be implemented in times of a pandemic. If support was offered, it was rather short-term, not covering the whole duration of the pandemic.

The survey data also reinforces a similar picture. Among the 62 theatre professionals that provided information on changes in their income, they on average experienced 26.85% of

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[78] European Expert Network on Culture and Audiovisual (2020), *The status and working conditions of artists and cultural and creative professionals*. Available at:
https://eenca.com/eenca/assets/File/EENCA%20publications/Study%20on%20the%20status%20and%20working%20conditions%20of%20artists%20and%20creative%20professionals%20-%20Final%20report.pdf
[79] Bund der Szenografen, Flash Corona survey, March 2020 in European Parliament (2021), op. cit.

loss in annual income in 2020 when compared to 2019. Almost half (48.28%) of 58 surveyed theatre professionals reported that jobs have been cancelled or postponed (for self-employed/commissioned work). A third (31.03%) of respondents have experienced salary cuts/loss of income, in addition to 17.24% of respondents who had payments for work already done postponed (for self-employed/commissioned work). 29.31% experienced no changes to their work conditions.

The current situation may cause an outflow of workers from the theatre sector. Interviewees have faith that the artists will return to performing arts when the pandemic is over which is based on a great sense of mission among artists and their need for artistic expression. The situation is more dangerous considering technicians. Their skills are crucial for the well-functioning of the sector, however, the current situation forces them to look for jobs in other sectors, where there are often better wages. If technicians move to other sectors, it is not known whether they will want to return to theatres. This dangerous outflow of specialists will result in the loss of many skills and knowledge in the market and the need to educate a new generation of specialists, which will take a long time.

The sudden changes imposed by new restrictive measures and their consequences on production contracts, sometimes without any compensation of losses or guarantee led to a worsening of relationships across the theatre value chain, in particular between (large) venues and artists, companies and producers.[80] A number of interviewees have highlighted the bottleneck effect the rescheduling of 2020 and 2021 performances will have on access to market for less established, younger, artists. Not only the limitations will have a negative effect on performers revenues but also on productions and releases in 2021 and 2022.[81]

In addition, the international operations of theatre professionals which are pivotal for the development of their careers and for the financial sustainability of organisations selling performances to other venues in Europe have been stopped due to travel restrictions. A large number of performing artists work as independent or freelance and are portfolio workers. Traveling bans and social distancing measures prevented them from networking and meeting potential employers and benefiting from multiple income streams they used to rely on.[82]

The situation of workers in the theatre sector in the pandemic has highlighted their labour conditions, initiating a large debate about the system that should support them in their creative activity. There is an ongoing debate in milieu about problems in the labour market and how to solve them. Good practices are emerging, such as negotiating a minimum wage for artistic work in the theatre, also for people working on other terms than an employment contract e.g. in Austria or Finland. In some countries, such as Poland, new legal acts and wide-ranging regulations are created to support this professional group. In Belgium, the situation of artists resulting from the pandemic pushed the creation of a new type of 'fair trade' contract, in order to improve the contractual relations between artists and cultural operators. As a result of such a contract, a play can either be postponed or cancelled, but in the latter case part of the fees must be paid to the artists. There are also projects such as a joint project by the four European trade union federations in the Media, Arts and Entertainment sector, namely: the International Federation of Actors (FIA); the International Federation of Musicians (FIM), UNI MEI Global Union in Media, Entertainment and Arts and the European Federation of Journalists (EFJ) entitled 'Reaching the Full Potential of Social Dialogue for Atypical Workers' which focused on the challenge of union representation of workers in the Media, Arts and Entertainment sector, who are freelance, self-employed or otherwise atypical workers. The project was funded via the European Commission's DG Employment and Social Affairs budget line for Information and Training Measures for Workers' Organisations. It helped the unions to train and put in place a

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[80] European Parliament (2021), op.cit.
[81] EY (2021) Rebuilding Europe. Available at: https://www.rebuilding-europe.eu/
[82] European Parliament (2021), op.cit.

strategy in relation to organising, with a focus on freelance, self-employed and otherwise atypical workers in the Media Arts and Entertainment sectors."[83]

All interviewees agree that the situation of workers in the theatre sector is critical and requires a response from national authorities and the European Union. Regulations tailored to the specifics of this sector, which will ensure stabilization and access to social security for all workers, are necessary.

Response of theatres to the crisis

Information sharing, solidarity and cooperation across the sector

The COVID-19 pandemic has led to unprecedented levels of solidarity across the performing arts. Some venues offered to compensate freelancers and companies for the losses of cancelled shows. For instance, 31.6% of 38 theatre venues and companies surveyed during the pandemic retained freelancers for different/alternative work or were paying in advance for the future work. In other cases, some of the budgets of big festivals had been distributed in the form of incentives to artists and performers, as it happened in the city of Krakow.[84] The 'SOS Relief' initiative, created by the Belgian platform 'State of Arts' is also a good example of the solidarity among professionals that took place during the crisis. This initiative promotes person-to-person financial solidarity. In this way, during the crisis period, the most fragile actors in the cultural sector were helped. Nau Ivanow, a cultural residence space in Spain that has a venue, decided that all income from ticket sales during the COVID-19 pandemic will be given to the performing companies and artists. Also, since the beginning of the COVID-19 pandemic they decided to offer their two rehearsal spaces for free for the interested artists/companies.[85]

A 'Crisis Cell' set up by several Belgian cultural players from both the subsidised and the non-subsidised sector[86] has helped strengthen the dialogue between the government and the live sector and proposed guidelines for a safe reopening of cultural venues which was approved by the government.

Rethinking performances, experimenting, learning, and engaging with audiences

As detailed further below in a section dedicated to new practices and business models, the theatre sector largely moved to the online stage as of March 2020.

Besides financial and social concerns, the emergency for theatres and artists has been to maintain the link with their audiences and provide substitutes to the performances with accessible content. According to the survey data, offering the community access to cultural and creative content was the most common reason behind theatre venues and companies proposing online activities during the lockdown (89% of respondents, N=33). This has been done through using video archives to broadcast previous performances, live-streaming and beyond performances providing readings, podcasts, interviews, workshops on social media and even online festivals. For example, the Abbey National Theatre created a project 'Dear Ireland: Reflections on a Pandemic' where many different actors film their notes and reflections related to the pandemic and then all those reflections are shown to the audiences remotely.

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[83] Joint Handbook, (2020) *Handbook on Trade Union Organising in the Media, Arts and Entertainment Sector*. Available at: https://www.uni-europa.org/wp-content/uploads/2020/07/EN-FIA-travailleurs-atypiques-print-EN.pdf

[84] Case presented during the webinar: http://www.oecd.org/cfe/leed/culture-and-creative-sectors.htm

[85] Interview with Nau Ivanow

[86] Antwerp Arts Consultation (AKO), Artists Coalition, Brussels Arts Consultation (RAB / BKO), Corona Taskforce Belgian Event Sector, Ghent Arts Consultation (GKO), Live Sector Consultation, Consultation on the Arts Organizations (oKo), State of the Arts, Flemish Museum Consultation as well as actors from the free and non-subsidised cultural (and event) sector.

Not all theatres had the skills nor the technical equipment or the capacity to invest in the latter to transfer their activities online. Although there have been many experiments across Europe, it can be noticed that the bigger theatre companies and often publicly funded structures had more capacity to operate such a rapid change. The ability of institutions to transform their activities to a virtual environment could also be determined by their experience with experimenting with digital technologies before the pandemic (see the box below).

Box 5. Digital technologies and theatre before the pandemic

Most interviewees admitted that, before the pandemic, digital tools in their work were limited to online ticketing systems, advertising, mailing lists/newsletters, or connecting with audiences via different social media channels. Although some interviewees reported having broadcasted performances in the past, this was not a common practice before the COVID-19 pandemic. Some other venues/companies have also been recording their shows for archiving purposes. The unexplored demand for broadcasting/retransmitting services, issues/uncertainty over copyright, as well as lack of resources to record or broadcast a high-quality performance were important issues discouraging theatre venues and companies from engaging in such activities.

Importantly, digital transformation in theatre does not necessarily mean performances streamed online (live or recorded), it also entails innovation and adoption of the digital technologies in producing the show. Before the pandemic, sectoral organisations as well as theatre venues and companies have already begun to explore the field of digital performances and conduct research on it.[87] Digital performances or digital theatre uses the technologies to innovate and create new ways of both production and performance, helping to better engage audiences and tell the story. Examples may include the use of computer graphics, 3D elements or holograms to create immersive 'digital theatre' experiences for the audience.[88] For instance, the unconventional company 'HumanMachine' has conceived a theatre production called 'Improbotics' that involves both human performers and machines.[89]

Before the pandemic, attention was already drawn to the fact that new jobs like digital dramaturges, digital producers or intermediaries between the theatre and companies working with digital should be established, helping to better integrate digital tools in the content creation. Theatre venues and companies quite often faced lack of time to experiment with digital tools, as well as limited financial resources and expertise of the digital field. The lack of digital skills and reluctance to perform for the screen could have been hurdles to the live streaming of performances or integrating the digital tools. At the same time, the pandemic situation accelerated the engagement with digital technologies both in terms of processes (online communication) but also in terms of content creation (see more the section on new business models).

Good practice examples in the digital theatre field before the pandemic include:

- 'PHONE HOME' (small-scale cooperation project, 2015-2017) :[90] Three theatre companies in three European cities (Athens, Munich, London) created an innovative theatre performance, produced simultaneously on 3 theatre stages, with the audience in each city watching a part of each story. The stories were then completed with the scenes interconnecting live and the actors on each stage communicating via the internet. The performance text was based on the true stories of people who - willingly or not - left their home to create a new one. All 10 performances on all three stages were transmitted live via internet streaming making them available to watch live online and giving the audience at home the opportunity to choose which theatre stage and which part of each story they preferred to watch at any given time. Live surtitling was used during the performances, to facilitate understanding of all spoken text by live audiences.

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[87] ETC (2018), *Drama goes digital vs Theatre invades digital*. Berlin: European Theatre Convention.

[88] Dougal Shaw (2012, May 27), Digital Drama: The technology transforming theatre. BBC News. Available at: https://www.bbc.com/news/technology-17079364.

[89] Human Machine, https://humanmachine.live/

[90] See: https://ec.europa.eu/programmes/creative-europe/projects/ce-project-details/#project/559249-CREA-1-2015-1-EL-CULT-COOP1

- 'European Theatre Lab (ETL)', a project co-funded by the Creative Europe programme, unites 7 theatres devoted to researching a digital strategy for theatre.[91] In the frame of this project, a series of seven OpenLabs, two conferences, four theatre productions and two publications were implemented from 2016 to 2018. The project aimed to examine the effects of new technologies on aesthetics, audience development as well as communication and dissemination.

The opportunity to perform on stage with the relaxation of the measures from May 2020 and during the summer was a relief for theatre organisations. After the first lockdown period, most countries allowed reopening theatres with a limited capacity. Adjusting their spaces to limited capacity and social distancing restrictions has brought challenges for theatres to plan the spectator experience and to financially manage their operations. Indeed, for private theatres not receiving public subsidies, a limited audience means that they cannot reach their profitability level. Some venues installed plastic separators to protect spectators (e.g. Hamburg's Thalia Theatre) and digital ticketing has been strongly encouraged to avoid gatherings near the ticket offices. On the professional side, rehearsals could resume with notable solidarity initiatives such as the JK Opole Theatre in Poland providing free access and use of its stage to free-lancers for 1-2 days. In other theatres, health and safety protocols adapted to the situation of the COVID-19 pandemic were developed, addressing how physical interaction between actors may be solved. For instance, in the COVID-19 crisis management protocol prepared by Schauspielhaus Graz for reopening in Autumn 2020, measures that need to be taken by each worker's group were identified (e.g. actors, hairdressers, box office etc.).[92] The acting was perceived as other cultural or sport practices that cannot be properly practised without physical interaction (e.g. sports).

The pandemic pushed theatre professionals and institutions to rethink their productions and stage habits: from sourcing local talents in the absence of large international touring companies, to finding tailored venues to ensure physical distance between audience members and performers and repurposing abandoned car parks, wastelands, fields, natural spaces to stage events. The sector might shift to more versatile venues, without fixed seats or immovable stages, with fewer hallways and technical restrictions.

In Romania, for instance, the Țăndărică Theater played puppet shows outdoors in public parks of the Bucharest neighbourhoods in the summer of 2020, a way to reach out to young audiences who are the theatre's target and to carry the cultural offer beyond the city centre. In Galway, Fíbín Theatre Company has found a way to bring audiences an epic drama while complying with the safety guidelines in Ireland's first drive-in stage theatre show. In order to compensate the loss of opportunities and revenues for theatre companies due to the cancellation of the Avignon Festival, Theatre 14 in Paris organised a full programme of performances and encounters in July 2020: the Paris OFF festival, with a strict sanitary protocol. 250 tickets were sold every day of the festival, more than the equivalent of the largest stage of the Avignon Festival. The festival was positive for participating companies, especially the smallest ones who could get press exposure from large media which they usually struggle to have access to. Moreover, organising the festival in July enabled Theatre 14 to reach a local audience who is not used to attending theatre performances.

Experimentation, adaptability and flexibility have been key components of new performances with small, local casts, simple sets and restricted audiences. However, this requires careful planning and mapping out every step for performers, audiences, and theatre staff considering questions of safety length of the performance vs. audiences'

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[91] See: https://www.europeantheatrelab.eu/
[92] Schauspielhaus Graz, *COVID-19 crisis management*. A PowerPoint presentation.

expectations, the space available, flows of people, and technical issues for acousticians and stagehands.

Support measures at national and EU levels

European level support actions

The European Commission put forward a variety of measures to mitigate the socioeconomic impact of the COVID-19 pandemic. The Union is providing a global response using three main instruments: The Corona Response Investment Initiative (CRII), the Corona Response Investment Initiative Plus (CRII+) and the Support to Mitigate the Unemployment Risks in an Emergency. In addition, new state aid rules allow Member States to support sectors and workers hit by confinement measures, including the culture sector.[93]

On 21 July 2020, the Council of the EU validated a compromise agreement on the 'Next Generation EU' Recovery Fund and the new Multiannual Financial Framework (MFF) 2021-2027. Next Generation EU is an unprecedented EUR 750 billion plan in response to the social-economic fallout of the COVID-19 pandemic.

On 17 September 2020, the European Parliament voted overwhelmingly in favour of a Motion urging Member States to include the CCS in their National Recovery Plans – a prerequisite to unlock various funding streams from NextGenerationEU. In her State of the Union address on 16 September 2020, EC president Ursula von der Leyen acknowledged the role of art and culture in NextGenerationEU. NextGenerationEU aims to respond effectively to the COVID-19 crisis by helping the sectors most in need. The Recovery Plan mobilizes several support instruments, particularly for the period 2021-2023. The European Commission affirmed in their communication 'Europe's moment: Repair and Prepare for the Next Generation' that the CCS are among the 14 sectors most affected by the ongoing pandemic. This recognition makes the CCS eligible for support through NextGenerationEU.[94]

Four support instruments in particular can be mobilised by EU Member States to support the CCS: the Recovery and Resilience Facility, REACT-EU, InvestEU and the European Agricultural Fund for Rural Development for green and digital development in rural areas. However, no extra money from this plan has been channelled specifically to Creative Europe or to other European programmes benefiting the CCS (e.g. Erasmus+).[95]

Regarding the MFF, the European Parliament's call to double funding allocated to the 2021-2027 Creative Europe programme, the only CCS specific EU funding programme, was not successful. In June 2020, the European Parliament's Committee on Education and Culture expressed its concerns that cuts in funding in the new proposal for the EU budget would lead to less artists receiving support.[96] Finally, the 2021-2027 Creative Europe will benefit from a budget of EUR 1,64 billion, equivalent to the European Commission's proposal in May 2018.

Measures focusing on the CCS include deferral or extension of deadlines of projects funded by Creative Europe, instructions to Creative Europe Desks on how to invoke the force-majeure close, redirection of already existing funding, or the establishment of a direct fund

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[93] European Commission, State aid cases: https://ec.europa.eu/info/business-economy-euro/economic-and-fiscal-policycoordination/jobs-and-economy-during-coronavirus-pandemic/state-aid-cases_en
[94] https://ec.europa.eu/info/sites/info/files/communication-europe-moment-repair-prepare-next-generation.pdf
[95] Culture Action Europe, Sounds like a deal, 22 July 2020. Accessible: https://cultureactioneurope.org/news/sounds-like-a-deal/
[96] European Parliament CULT Committee, Long term EU budget: MEPs slam cuts to culture and education. Press release, 22 June 2020. Accessible: https://www.europarl.europa.eu/news/en/press-room/20200619IPR81615/long-term-eu-budget-mepsslam-cuts-to-culture-and-education

to support cinemas affected by the pandemic.[97] The European Commission supported the creation of the Creative Unite platform[98] to facilitate knowledge exchange and share coronavirus-related information amongst the CCS. The platform counts more than 70 entries on performing arts including position papers, resources on reopening venues, digital experiences of artists and companies. In addition, the CCS Guarantee Facility has been reinforced with EUR 251 million to mitigate the impact of the crisis on CCS. The new support measure of the European Investment Fund (EIF) and the European Commission, active from August 2020 but retroactive as of 1 April 2020, will incentivise financial intermediaries to provide more flexible terms and conditions to SMEs and Small Public Enterprises in order to alleviate the financial constraints caused by the COVID-19 crisis.[99]

Regarding theatre and performing arts in particular, the EU has deployed various measures:

— A EUR 2,5 million call for the cross-border distribution of performing arts works (in theatre, dance, circus and street arts), both physical and digital, awarded to the Perform Europe project.

— A EUR 500,000 dedicated to 'sectorial support to theatre'.

— The present mapping study on the ecosystem of theatres and the impact of the COVID-19 crisis on the sector for the European Commission DG EAC.

— The European Theatre Forum in November in the frame of the German Presidency and in cooperation with the European Commission.[100] The forum offered for the first time a European representation for the entire field of theatre and performing arts. It also addressed the impact of the COVID-19 pandemic on the performing arts and perspectives for the sector.

On 17 March 2021, the European Commission announced that it will develop guidelines for reopening cultural venues and events including in the performing arts sector.[101]

The European performing arts and theatre sector (e.g. European Theatre Convention, IETM, European Festivals Association, Pearle*) and cultural networks (e.g. Culture Action Europe) have been active from the beginning of the pandemic, sharing information and intelligence on the impact of COVID-19 through surveys, online meetings and position papers, exchanging good practices and formulating recommendations on the way forward and out of the crisis. For instance, the Consortium Member Organisations of the European Theatre Forum continued to meet on a monthly basis to pursue their exchange and efforts for a sectoral support on EU level.

Support at national and local levels

In order to mitigate the negative effects of the COVID-19 on organisations and workers of the CCS, measures have been taken at various levels of administration in EU Member States and in Creative Europe countries.[102] Emergency and recovery support to the CCS depends on the countries' administrative organisation (centralised vs. federal) and tradition of cultural policy. The aim of this section is to provide a closer look at how theatres

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[97] European Commission, Coronavirus: how it affects the Creative Europe Programme: https://ec.europa.eu/programmes/creative-europe/content/corona-virus-how-it-affects-creative-europe-programme_en
[98] https://creativesunite.eu/
[99] See: https://ec.europa.eu/digital-single-market/en/news/european-commission-and-european-investment-fund-announcenew-coronavirus-measures-businesses.
[100] See: https://www.europeantheatreforum.eu/.
[101] European Commission, COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE EUROPEAN COUNCIL AND THE COUNCIL, A common path to safe and sustained re-opening. 17.03.2021. Available at: https://ec.europa.eu/info/sites/info/files/communication-safe-sustained-reopening_en.pdf
[102] i.e., Albania, Armenia, Bosnia and Herzegovina, Georgia, Iceland, Kosovo, Montenegro, North Macedonia, Norway, Republic of Serbia, Tunisia, Ukraine

in Europe have been supported throughout the crisis. As a result, this section focuses on national emergency support measures issued between March 2020 and end of March 2021, available at national level, and highlights some of the regional support in Belgium, Germany and Spain.

For the analysis of emergency support measures, the research team has built its analysis on previous research at EU level, namely recently published studies. These include the KEA mapping of emergency support measures[103], the study 'Culture and Creative sectors in post-COVID-19 Europe'[104], the COVID-19 country reports elaborated and regularly updated by the Compendium for Cultural Policies and Trends[105], as well as OECD report 'Culture shock: COVID-19 and the cultural and creative sectors'[106]. Additional desk research including the websites of the ministries of culture of EU Member States and Creative Europe countries as well as of main theatre institutions in these countries completed the mapping. For more details on the sources used, see Annex 2.

The above-mentioned studies and reports do not consider the emergency support measures that Member States either adopted or pursued because of the third wave of the pandemic which roughly started in February-March 2021. In April, cultural venues that were able to operate again in autumn and winter 2020/21 had to be completed shut down again almost everywhere in Europe except in some countries, like in Spain, Croatia or in Luxembourg, venues were still able to operate under certain conditions. A complete overview of the support measures collected and considered for the analysis is provided in Annex 2.

Analysis of collected support measures in the EU Member States

142 support measures in the 27 EU countries were collected in total. The support measures concern mainly CCS or theatre specific support measures but also includes general economic support measures from which the CCS can benefit.

Figure 9. Number of collected support measures by countries
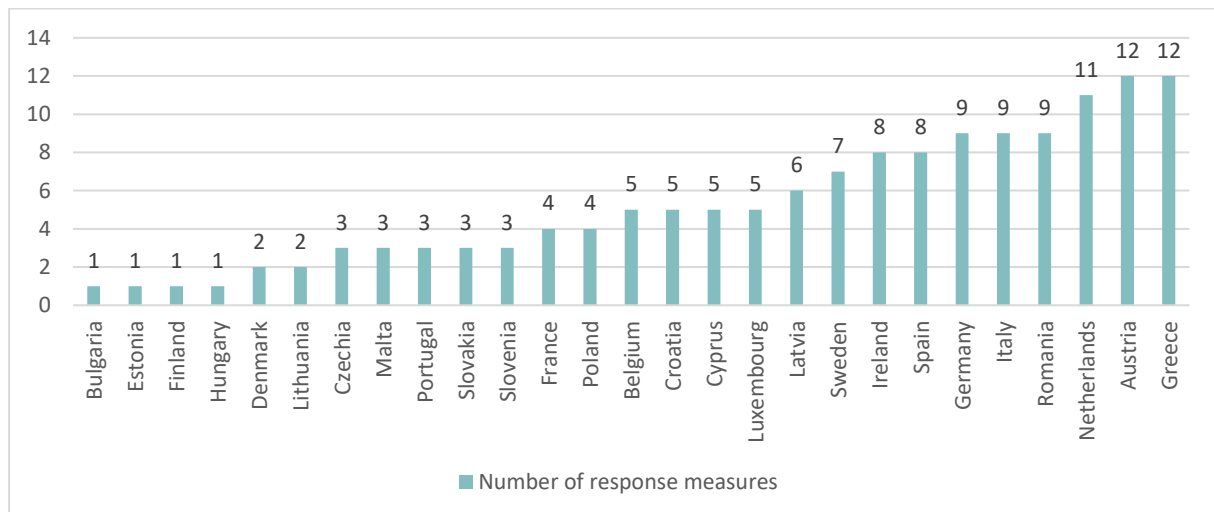
Note: multiple sources

[103] See: https://keanet.eu/research-apps/c19m/
[104] IDEA Consult, Goethe-Institut, Amann S. and Heinsius J. 2021, Research for CULT Committee – Cultural and creative sectors in post-Covid-19 Europe: crisis effects and policy recommendations, European Parliament, Policy Department for Structural and Cohesion Policies, Brussels https://www.europarl.europa.eu/RegData/etudes/STUD/2021/652242/IPOL_STU(2021)652242_EN.pdf
[105] See: https://www.culturalpolicies.net/covid-19/country-reports/
[106] See: https://www.oecd.org/coronavirus/policy-responses/culture-shock-covid-19-and-the-cultural-and-creative-sectors-08da9e0e/

It is important to underline that the number of support measures does not imply that the country provided more support than another country with counts less support measures. The main reason for this is that information on support measures is aggregated at various levels in the different sources available. Sometimes one measure represents one national plan with little detailed information for the CCS whereas some other give detailed information about the specific calls dedicated to sub-sectors. Considering the large amount of data available and the limited timeframe for the research, the level of aggregation of support measures for the CCS was not harmonised across countries. The lack of data harmonisation and the scarcity of data on the theatre sector in particular prevents the analysis of the budgets of the mapped measures and the assessment of their beneficiaries within the theatre sector (public/private theatres, festivals, companies, individual artists etc.). However, the key parameters against which the collected measures are analysed allow to show some trends about how the theatre sector has been supported in the EU.

The measures were classified according to the classification adopted in the study 'Cultural and creative sectors in post-COVID-19 Europe' which was published in February 2021 by the European Parliament.[107]

Characteristic 1: Level of support provided
93% of collected measures were issued at national level and 7% at regional level. Regional support measures were identified in Spain, Belgium and Germany, countries where the cultural competence lies in the sub-national level (the autonomous communities in Spain, the Länder in Germany and the language communities in Belgium).

Characteristic 2: Issuing body
The majority of these measures (92%) were issued by public governmental bodies and the rest by other bodies (i.e., foremost collecting societies) but also social insurance funds or banks like in Austria. In some cases, measures were issued by the national theatres themselves like in Malta, specialised performing arts funds like in the Netherlands where the Performing Arts Fund issued grants for productions or by professional organisations like in Poland which issued income generating support measures for individual and freelancers.

Figure 10. Issuing body

Regional intervention can be clearly seen in those EU Member States with competence on culture located at the regional level (e.g. Spain, Belgium, Germany). In Hamburg, the Land made available special programmes for private theatres and live clubs. The North Rhine-Westphalia government provides additional funding of around EUR 4,4 million to support non-profit cultural institutions, in particular socio-cultural centres (e.g. youth theatres with high-quality artistic offerings). The government of the Federation Wallonia Brussels deployed EUR 8,5 million to support the Cultural and Creative Sector, including EUR 3 million devoted to performing arts.[108]

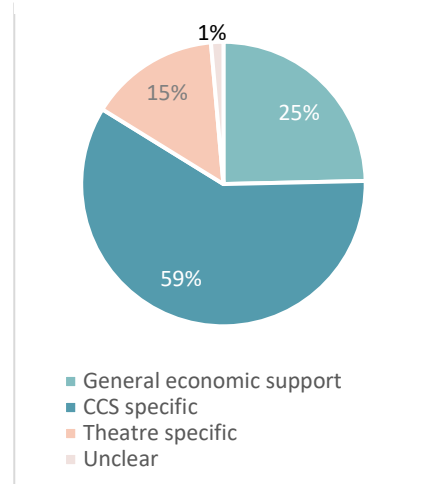Overall, the contribution of the local level is vital to the theatre sector since local venues are largely funded by local authorities across Europe. At this level, the intervention consisted mainly in the digitalisation and distribution of content (valuable examples are Madrid and Bratislava) and in economic support. The administration of Milan set up the 'Mutual Aid Fund' (EUR 13 million) to support the municipal economic fabric, cultural venues included (theatres have been especially indicated as beneficiaries). The municipality of Sintra deployed the 'Municipal Fund for Cultural Emergency' (EUR 250,000) aiming to support the cultural scene in the field of performing arts.

Characteristic 3: Scope of the support measures
25% of the measures collected are general economic support measures, 59% CCS specific, 15% Theatre specific and 1% could not be clearly classified (as a result classified as 'Other or unclear'). The reason for the overrepresentation of support measures dedicated to the CCS comes probably from the source used for this analysis which aims to gather mostly support measures dedicated to the CCS as the Compendium monitors cultural policies.

Theatre specific support measures were identified in eight countries (France, Germany, Italy, Lithuania, Luxembourg, Netherlands, Poland, Spain and Sweden.) The relatively small number of countries providing a dedicated support to the theatre sector could be explained by the diverse degree of aggregation of the support measures collected. In some countries, theatre

Figure 11. Scope of the support measures

specific support measures are included within bigger support plans and hence do not appear clearly in the mapping. The second reason is that the support to the theatre sector, and especially to the independent (non-state led) theatre sector in particular, is probably less developed in several EU countries.

Theatres in countries where no targeted support have been identified, could still benefit from CCS specific or general economic support measures such as the reimbursement for the cancellation of shows, or unemployment schemes.

Characteristic 4: Type of support
More than 90% of the support measures concern emergency support measures. Our mapping focuses on emergency and support measures until March 2021 and does not include the national recovery plans that are still in the process of being submitted to the European authorities at the time of writing of this report. The preliminary analysis of the

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[108] M.J. (2020, June 11), Fonds d'urgence pour le soutien à la Culture : accord sur la répartition des premières aides. RTBF. Available at: https://www.rtbf.be/info/belgique/detail_fonds-d-urgence-pour-le-soutien-a-la-culture-accord-sur-la-repartitiondes-premieres-aides?id=10520417.)

national recovery plans does not allow to identify a specific and consequent support to the theatre sector which is absorbed in the envelopes dedicated to culture, difficult to identify at this stage and would require further research when the official plans are issued.

Characteristic 5: Final beneficiaries
The support measures are primarily targeting institutions (companies or theatres) as final beneficiaries (49% of the support measures) and 22% are targeting individuals (artists, freelancers).

The high amount (30%) that either concern both institutions and individual professionals or could not be clearly earmarked for one specific category shows that a better harmonisation in the reporting of the support measures is needed in order to be able to better assess the coverage of public support available to the theatre sector in the EU. It also shows that the support measures are general and unlikely to take into account the specificities of the theatre sector and its needs.

76% of the identified theatre specific support measures are targeting institutions (theatre venues or companies, and 19% concern individuals and 5% target both.

Figure 12. Final beneficiaries

- ■ Both or unclear
- ■ Individual (artists, freelancers)
- ■ Institutional (theatres, enterprises)
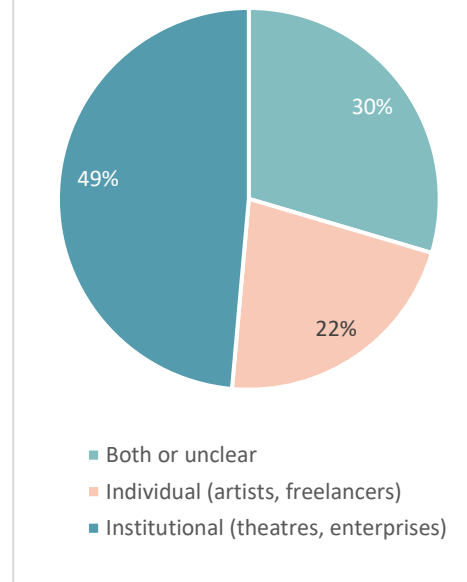
Characteristic 6: Main goal of the support measures
64% of the support measures collected are aiming at generating income for individuals or institutions. This category comprises diverse types of measures such as the maintaining or increasing of the subsidies to cultural institutions (and in some instances to theatres). This is for example the case in Romania where the Administration of the National Cultural Fund announced that it would keep the call for the second financing session of 2020 open, despite the closure of cultural organisations. Some of the public cultural institutions (National Dance Centre, National Heritage Institute, Clujean Cultural Centre, National Museum Complex ASTRA Sibiu, Studio M Theatre in Sfantu Gheorghe) announced that they did not attend this funding session in order to show their solidarity with the independent cultural operators, whose resources have been drastically diminished, and who were less eligible for support than state funded institutions.

Figure 13. Main goal of the support measures

- ■ Costs reduction, modification of the legal framework and status of the artist
- ■ Income generating support measure
- ■ Support measures for innovation for and with the CCS
- ■ Unclear
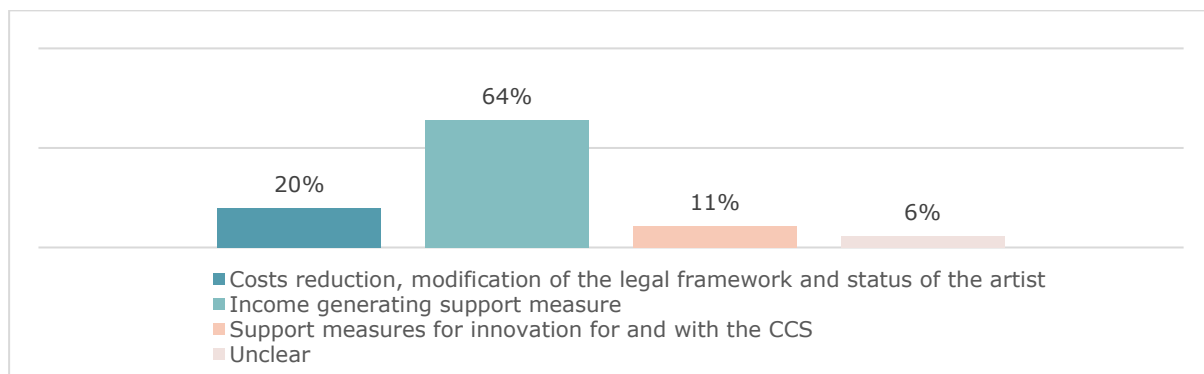
Note: Multiple sources

Income generating measures also include the reimbursement for the unsold tickets due to the limitation of the venue capacities. Another popular type of measure of this category is the reimbursement by the state for reimbursed tickets by theatres to the audience, or the creation of vouchers in order to maintain the cashflow as much as possible within the sector. Finally, this category also comprises diverse loans or loan guarantees.

*Figure 14. Main goal of **theatre specific** support measures*

- Costs reduction, modification of the legal framework and status of the artist
- Income Generating Measure
- Support measures for innovation for and with the CCS

As support for the CCS in general, theatre specific support is also mainly geared towards generating income. For instance, in Germany, a total of 8 theatre specific support measures have been planned within the 'Neustart' culture plan. They represent income generating support measures in the form of grants dedicated for special actions such as support for children's and youth theatres or promoting digital investment within venues. Some support measures are dedicated to artists, free performance groups, private theatres and on is dedicated to the 'word of variety and cabaret.'[109]

Analysis of collected support measures in Creative Europe countries

Desk research on the 12 Creative Europe associated countries allowed to identify 30 support measures (see Figure 15 below).

Figure 15. Number of support measures by countries
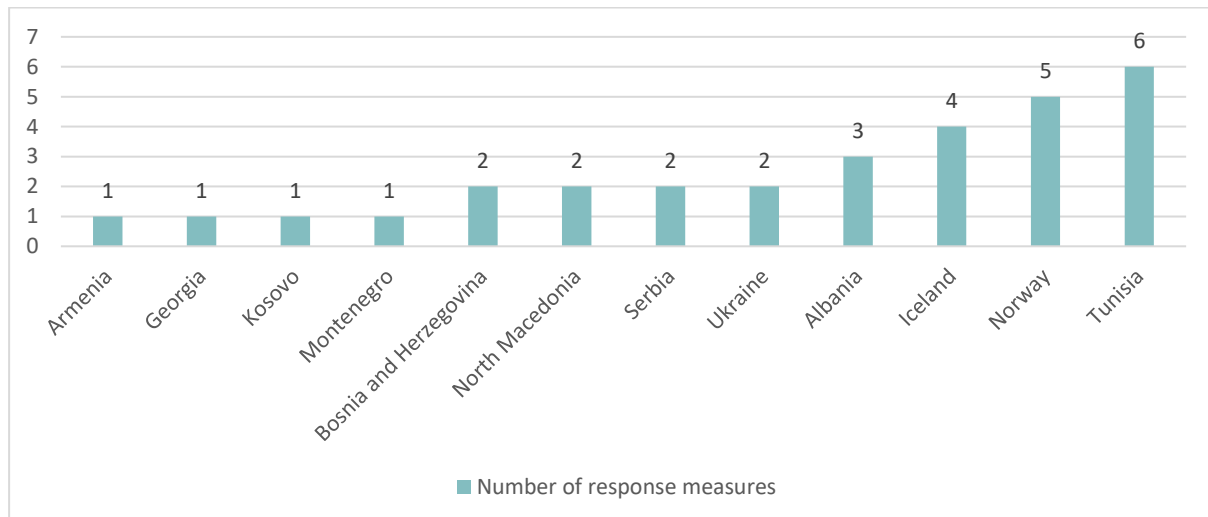
Note: multiple sources

As in the EU countries, the support measures in Creative Europe countries have largely been issued at national level (93%), 90% by public authorities and concern exclusively emergency support measures. In Georgia, solely one support measure issued by the

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[109] See: https://neustartkultur.de

private sector was identified: a CCS dedicated good practice exchange platform for the actors of the sector.

This can suggest that the theatre sector in those countries might be less structured in terms of professional organisations or that governments have less knowledge about the production system and needs of the theatre sector.

80% of the measures are CCS specific and 7% are general economic support measures. Theatre specific support measures were only identified in Iceland and Ukraine. Public authorities in Iceland put in place income generating support measured at national and local (in the city of Reykjavik) mainly in form of an increase in subsidies to theatre support programmes. The Ukrainian government also set up a grant, dedicated to supporting the operating expenses of the theatres.

Figure 16. Final beneficiaries of supported measures in Creative Europe countries

- Both or unclear
- Individual (artists, freelancers)
- Institutional (theatres, entreprises)
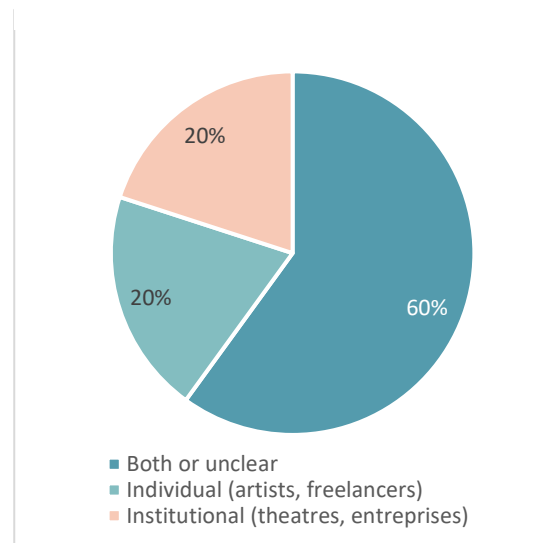
Finally, as for the support measures identified in EU countries, income generating support measures prevail as they represent 53% of the identified support measures in Creative Europe associated countries.

Figure 17. Main goal of the identified support measures in Creative Europe countries

- Support measures supporting social cohesion
- Support measures for innovation for and with the CCS
- Unclear
- Income generating support measures
- Costs reduction, modification of the legal framework and status of the artist support measures
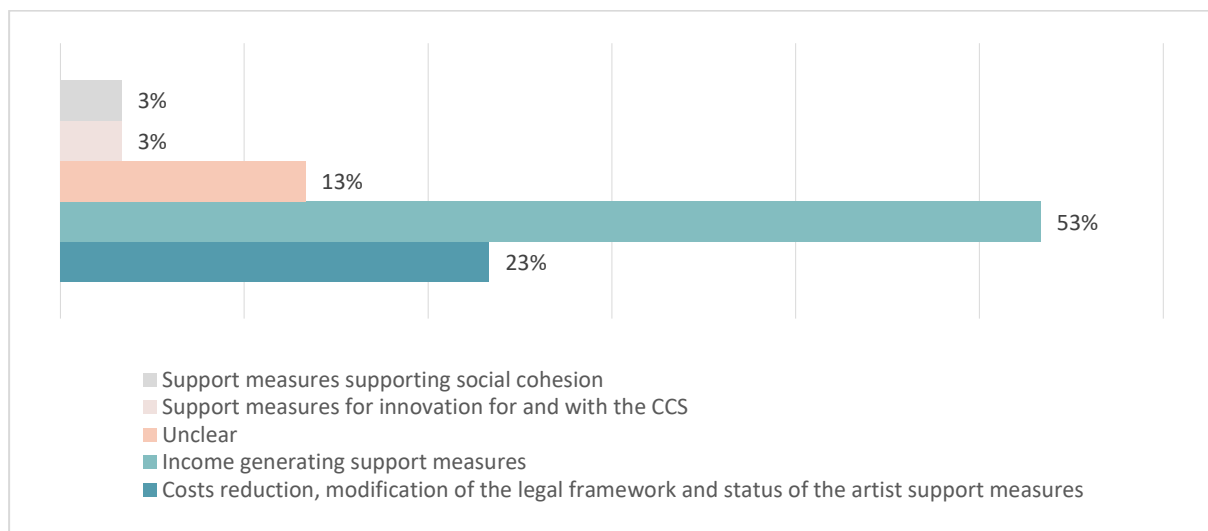
Note: multiple sources

New practices and business models that emerged

To mitigate the pandemic's effects, and primarily to maintain a relationship with the audiences, the theatre sector largely turned to the digital stage, uploading past or live performances online, transferring entire festivals to the digital world (e.g. Sibiu

International Theatre Festival in Romania,[110] POSTWEST festival organised by Volksbühne[111] and Radar Ost Digital by Deutsches Theater in Berlin[112]), proposing 3D-theatre festivals in a virtual venue, performances, workshops, interviews, behind the scene tours, very often free of charge. In Poland, the programme 'Culture on the Web' supporting the dissemination of creative activities or the presentation of their effects in electronic communication channels provided a guide to 'Polish Theatre on Demand' as from March 2020.[113]

Moving online has made new spaces for creativity and collaboration that may not close when venues reopen. On the artistic side, digital theatre rapidly emerged from the remote environment, giving birth to a form of art: the Zoom-native drama with an experimental energy of its own.[114] The performance 'End Meeting for All' by the collective Forced Entertainment was recorded in single live takes by six performers improvising at a distance—from Sheffield, London, and Berlin and broadcasted in April and May 2020. Its director noticed that the collective started using the Zoom grid as they would do for a stage 'a space we shared but in which we were nonetheless both connected and disconnected'.[115] The performance, a play-within-a-play, presents the challenges of six artists trying to create a Zoom drama, echoing the difficulties of existing in a time of pandemic.

Theatre venues have tested online solutions for broadcasting previous performances or live streaming from their venues closed to the public. For instance, it is estimated that during the first lockdown period, 73.5% of Italian theatres made shows available from their archives, 50% proposed interviews with theatre professionals and 20% broadcasted live.[116] During the first lockdown in spring 2020, the Schaubühne in Berlin gathered 37,500 spectators during its online broadcast of Thomas Ostermeier's Hamlet. Théâtre de Paris-Villette has developed a VOD catalogue, especially for its young audience to access theatre during the first months of the COVID-19 crisis in 2020. From a punctual free of charge experience based on existing video captures (100,000 viewers over three months) they moved to a paying on-demand catalogue articulated with the live offer, to be developed and expanded beyond the pandemic. Since theatres had not reopened fully yet at the time of this research, Theatre Paris-Villette had not been able to study the articulation between its online and live offers, especially whether the on-demand catalogue can bring new audiences for old plays which have finished their live cycle or whether it can encourage audiences to come to the theatre and see new works of the same artistic group they watched online.

In Spain, Teatre Lliure also shifted its activities to the digital space by creating an online digital platform with their productions. This new platform/online venue now has around 2000 subscribers and generates approx. EUR 16,000 of income. The theatre records and uploads their own productions to the platform, some of which have been already performed in the past and others that are specifically created for this platform. Opening this platform provided an opportunity to reach more audiences than before, as it reaches viewers not only from Spain but from other countries in Europe and beyond.

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[110] Arts Manager,
Sibiu International Theatre Festival goes online, 26 March 2020. Available at: https://www.internationalartsmanager.com/news/theatre/sibiu-international-theatre-festival-goes-online.html
[111] POSTWEST \\ guess where Transcultural festival 24.–26.06.20, Available at: https://www.volksbuehne.berlin/en/programm/8735/postwest-guess-where
[112] https://www.deutschestheater.de/programm/a-z/radar-ost-digital/
[113] Marcelina Obarska (2020, March 24), Polish Theatre on Demand. Culture. Available at: https://culture.pl/en/article/polish- theatre-on-demand
[114] Barbara Fuch (2020) End Meeting For All, Zoom Theatre, Launched. Accessible: https://howlround.com/end-meeting-all
[115] Forced Entertainment, 'Falling into place, a note on End Meeting for All'. Available at: https://www.forcedentertainment.com/falling-into-place-a-note-on-end-meeting-for-all/
[116] According to a study by the Bocconi University Arts and Culture Knowledge Centre, cited in: Artribune, 13 June 2020. Available at: https://www.artribune.com/professioni-e-professionisti/2020/06/analisi-degli-effetti-della-pandemia-su-musei-e- teatri-una-ricerca-della-bocconi/

However, performances, past or current, have not been the only type of online content proposed by theatres during their public closure due to the pandemic. Many theatres have explored creative ideas to keep a link with their audiences while showing they were still active and present for the community. The National Theatre in Bucharest, Romania proposed a new programme in the form of TV show ('TNB TV') providing daily updates about theatre plays and interviews with actors and directors. Another Bucharest-based theatre, Teatrul Andarica, specialised in puppet theatre proposed a similar initiative with a 30-minute show mimicking TV news. In France, the Théâtre National La Colline proposed a whole set of online initiatives entitled 'Fil d'Ariane'[117] (literally *Ariadne's thread* as a breadcrumb trail) including among others: a weekly audio experience, during which three artists tell, each in their own way, the present in which they find themselves; a word-of-mouth text interpreted and embellished by actors and spectators alike; a collective embroidery project to 'mend the bond that terror seeks to undo' whereby each registered participant receives an embroidery note by post, along with a cotton thread, needle and instructions for use. When allowed by the sanitary conditions, the embroiderers will be invited to the theatre to assemble each word and reconstruct the text, which they will thus bring back to life collectively.

Hybrid forms (online and onsite) of theatre were also born during the crisis. For instance, Emilia Romagna Theatre Foundation (ERT) proposed a new genre of participative theatre in Cesena, Italy, in order to tell the story of the city through the points of view of various generations: theatre professionals and local associations collected the personal stories of youngsters and elderly people in the city for actors and playwriters to create a collective story accessible through QR codes disseminated in popular places across the city.

On the side of technical innovation, the pandemic pushed the theatre sector as a whole to accelerate the use of digital solutions for recording and streaming performances. As an illustration, the Franco-German company Panthea, a ticket and surtitling operator for the theatre sector, shifted its operations to focus only on the latter activity since the start of the COVID-19 crisis. Before the pandemic, surtitling and solutions for the deaf and hard of hearing represented 40% of the activities of the company. The lockdown period has enabled Panthea to develop new devices and adapt them to the most popular tools in use such as social media. They have developed new digital services for shows adapted or entirely created for the virtual realm, in particular for the Lille Opera in October, the National Theater of Brittany and German festivals.[118] In a pandemic context, it is also difficult for professional audiences to access performances. A system like Panthea's makes shows accessible to international programmers (theatres, festivals) and journalists, which can be decisive for the circulation of a theatre performance across borders in a post-pandemic context.

Streaming online content lifted locked-down audiences' spirits, showcased artistic talents and sparked innovation in order to reach remote audiences in a new way. Online drama also found new audiences as reported by growing demand on the streaming platforms Marquee TV and Digital Theatre.[119]

However, transforming online experiences into monetisation for theatre professionals is not yet achieved. The pandemic has advanced the exploration of issues related to copyright, privacy, monetisation, market concentration, inclusive access, safety, digital footprint and sparked the discussion among the sector. As an illustration, some interviewees reported that despite their willingness to engage with collecting societies on royalties from online performances, they were not prepared and therefore had to adapt on

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[117] See: https://www.colline.fr/publics/le-fil-dariane
[118] Culture Matin, 'Surtitrage: Panthea s'adapte au livestream et accompagne la création à l'international', 30 November 2020. Available at: https://www.culturematin.com/publics/mediation/surtitrage-panthea-s-adapte-au-livestream-et-accompagne-la-creation-a-l-international.html
[119] Financial Times (2020, July 30), Theatres plot their next act. Available at: https://www.ft.com/content/223ceb1e-c2e8-40f0- 9344-6743ed448d52

a case-by-case basis to remunerate the artists for the broadcasting of performances that had not been recorded for public purposes.

The digital sphere has been considered as a space for experimentation and exchanges between professionals, opening new creative paths but it has also been an imposed shift for the theatre professionals and institutions unequally prepared for such rapid transition. IETM underlines that the rapid digitisation pushed by the circumstances of COVID-19 restrictions has brought 'mixed results: from innovative and pioneering work to poorly adapted digital performances which satisfied neither audiences nor artists.'[120]

Other live stages have been explored during the pandemic. Deprived of the conventional stage, some companies started working with hospitals, retirement homes, schools, universities where the live component was still possible. KVS, one of the main Belgian theatres, has also presented work in hospitals and schools for the first time. Whether this is something they would continue after the pandemic, Michael De Cock, KVS Artistic Director, said that these new activities will definitely impact the future of the theatre, bringing new dynamics, ways of thinking and learning points.[121] Performing and teaching at schools and universities is also a path explored by artists to maintain an activity and be eligible for social benefits.

The theatre sector proposed creative ways to keep performing and maintaining the link with audiences during the pandemic. However, stakeholders underline that what started as emergency solutions need reflexion and support to be sustained on the long run and articulated with the live experience. The emergence of digital performances, streaming and other activities is overarching different segments of the theatre eco-system, posing challenges to both venues, production companies and individual professionals. Some stakeholders stressed that digitalisation is a new approach to creating and disseminating, requiring further capacity building and skills within the sector.

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[120] IETM (2020) The moment for change is now, COVID-19 learning points for the performing arts sector and policy-makers. Available at: https://www.ietm.org/en/system/files/publications/ietm_covid_publication_v3.pdf
[121] Ibid.

5 Education of theatre professionals

5. Education of theatre professionals

In European history, the professions related to theatre were predominantly transmitted through a 'learning by doing' process before the establishment of educational institutions related to the theatre sector.[122] Currently, although alternatives to institutional education pathways do exist (apprenticeships, on-the-job learning, programmes offered by the industry – e.g. Bush Futures Project by the Bush Theatre in the UK[123]), interviewees from educational institutions agreed that the most common pathway to start a career in the sector remains to be formal education. This especially has been reported to be the case for creative professions.

The complexity of the sector requires different type of specialists to engage in running theatre venues, developing the productions or promoting activities. Education can be divided to preparing artistic performing and creating roles (actors, directors, playwrights, musicians, singers, etc.), theatre non-artistic professions (wig makers, scenographers, sound technicians, sculptors etc.), and management (administration, legal, accounting, human resource, marketing, production etc.). The below description focusses more on the preparation of artistic and non-artistic professions specific to theatre and performing arts, as education to enter management positions is overarching different fields and professionals from sectors like marketing, business development, education etc. can join the sector.

Type of educational institutions attended

The status of schools and institutes where theatre professionals can acquire their education differs in each country. We distinguish several types of schools and establishments where professionals can acquire their skills. These include higher-education institutions, vocational education schools, private schools and schools/programmes linked to theatres. In terms of areas that are taught, these include a diversity of roles engaged in the sector – acting, directing, puppetry, sound design, stage and costume design, film editing, scenic writing, animation, photography, scenography etc.

Notably, it is difficult to differentiate between education that prepares only theatre professionals from education that prepares performing arts professionals in general. Graduates from both type of education institutions can move to work into different performing arts sectors, as these sectors are very interconnected and may require similar skills (e.g. actors, stage technicians, costume designers).

Higher-education institutions

The higher-education institutions can be further divided into specialised drama and/or art academies, schools and conservatories, as well as arts universities or universities with a dedicated performing arts department. These are often public schools, subsidised from state funds. There is an extended network of drama schools in some countries, like in Spain, where are 18 public schools for teaching dramatic arts, or in Germany where are 14 public acting schools. In other countries, the education of dramatic arts can be rather centralised like in Lithuania where only one higher-education academy dedicated for performing arts exist (the Lithuanian Academy for Music and Theatre). The programmes at such schools can usually award both BA and MA degrees.

The data collected reveal that the admissions process is highly competitive. The nature of practice-based teaching puts limitations on the size of the programmes. In addition, some stakeholders argued that it is important to match the number of graduates to the actual

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[122] Luis Bonet, Héctor Schargorodsky (2018), Theatre management: models and strategies for cultural venues. Kunnskapsverket Available at: https://kunnskapsverket.org/sites/default/files/Theatre%20management%20PDF%20Protegit.pdf.
[123] Brauneck, M. and ITI Germany (eds.) (2017), *Independent Theatre in Contemporary Europe. Structures – Aesthetics – Cultural Policy.* Verlag, Bielefeld, p. 385-386.

demand of such professionals in the labour market. According to survey data, the average number of graduates from theatre-related programmes preparing professions in artistic/creative roles average around 30 graduates per year (6 schools answered). To illustrate, *Real Escuela Superior de Arte Dramático de Madrid* in Spain, on average every year receives 500-600 applications, out of which can accept max. of 98 students across all its study programmes. Similarly, the BA-level 'Drama' study programme at HMDK Stuttgart enrols only approximately 8 students per year out of 400-500 applications. As noted by one interviewee from Sweden, given the high competition of getting onto such programmes, applicants usually already have prior experience or preparatory training. In addition, although admission systems vary between countries, potential students may often face several rounds of examinations and audition processes.

In terms of professions prepared at these institutions, they mostly focus on creative positions like actors, directors, playwriters etc. These programmes are often provided at both bachelor and master levels. However, less possibilities have been noted to exist at the level of postgraduate practice-based research. For instance, not all countries offer possibilities to acquire a doctoral degree based on practice-based research in performing arts. By practice-based research, a possibility to acquire a doctoral degree for producing a cultural product (e.g. a performance, building a production) in the process of experimenting with new ideas is meant instead of analysing theatre practices from a theoretical perspective.

Vocational education schools

Institutions providing vocational education are also important actors of the theatre education field. These schools can also be either general schools that offer a few theatre-related courses or specialised in the artistic education. The courses offered at such institutions can have a two-fold purpose – preparing specialists that can enter into the labour market upon graduation or providing a foundation for further studies at a higher-education level. The latter can be especially important given the high competitiveness to get into some drama schools.

During the case study programme, it was noted that while vocational education institutions also provide courses for creative roles, these often can be good spaces for preparing non-artistic staff (e.g. decorators, technicians). However, despite the variety of different level institutions that can prepare support staff for the theatre sector, some countries experience a gap related to the preparation of qualified theatre stage technicians, as it was mentioned during the interview programme.

Private schools

Given the high demand for training places for theatre professionals, there are also a number of private education institutions, which usually charge tuition fees. In terms of programmes taught at these schools, they range from creative roles to more technical positions. Some of these institutions are viewed critically by professional artist associations for what they consider does not represent professionally well-founded and broad training.[124] The latter thought was also echoed by one interviewee who mentioned that these are often not as qualified in terms of number of staff, hours of teaching or quality of teaching. Yet, no interviews with private schools were carried out to verify this situation.

Other programmes and establishments

Theatre institutions themselves play an important role for the development of young artists in the field, providing them with opportunities to create and experiment after their graduation. Théâtres de la Ville in Luxembourg, for instance, has created a TalentLAB[125] to

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[124] Schulz, G. & Zimmermann, O. (2020), *Frauen und Männer im Kulturmarkt*. Available at https://www.kulturrat.de/publikationen/frauen-und-maenner-im-kulturmarkt/. p. 69.
[125] See: https://théâtres.lu/TALENTLAB.html

provide international opportunities for artists and support the ongoing professional development of the local artistic community. This is embedded in the mission of the public institution as a way to 'give back to the community' and add value for artists, the audience and the organisation.[126] Thanks to their international networks, public theatre institutions can also facilitate internships or assistant positions with international directors for their emerging artists, encourage foreign companies to include local artists in their productions by holding auditions locally. In Italy, there has been a multiplication of theatre schools, with a school attached to each National Theatre. Theatre schools attached to public theatres are well organised with incentives for employing young artists under 35. Also, Teatro alla Scala has been running its own academy (Accademia del Teatro alla Scala), further fortifying links between education and transitioning into work in the industry.

Teaching practices and curricula

During the interview programme it was noted that the basic training received by students in different academies is largely similar and can be characterised by practice-based learning and small teaching groups. It was observed by one interviewee that there is a stronger 'Stanislavsky' teaching aspect in Eastern countries and a stronger performative aspect in western countries, like in the Netherlands. In addition, as in other fields, different institutional systems and pedagogical practices exist in different EU countries.

Most interviewed educational institutions confirmed having links to the industry either by providing work placements/apprenticeships for students, inviting prominent professionals to teach, or collaborating with theatres on student shows. For instance, HMDK Stuttgart in Germany continuously cooperates with numerous theatres in the region, especially with the state theatre Stuttgart (including yearly co-productions), as well as with a film academy (Ludwigsburg) and the regional radio (SWR). Such cooperation was noted to offer its students more opportunities, including gaining practical experience in the last semester of their studies. Some schools have their own independent professional teaching and learning theatres.

In terms of new trends in the teaching curriculum, interview respondents mentioned about the growing awareness of interdisciplinary work and the need to open-up to different disciplines (e.g. making links with the audiovisual sector, science, music, different social contexts). Global topics like sustainability, reducing climate change, feminist issues are also becoming integrated into the study programmes at some schools. In addition, concerns were expressed regarding better adaptability of teaching curricula and programmes to include people with disabilities and provide opportunities for them to become actors, directors etc. A good practise example in this regard includes the Royal Conservatoire of Scotland that developed a bachelor programme in Performance in British Sign Language and English, which targets persons identifying as D/deaf or hard of hearing.[127]

In addition, a number of stakeholders mentioned that more attention should be given to entrepreneurial and transversal skills in the teaching curricula. The sector is very precarious with many self-employed professionals who need to know how to manage their finances, taxes, protect their work with copyright, as well as develop their own businesses. The teaching of practical skills could also include the emerging topics that will shape the future work of the sector, like teaching actions on how to manage venues or develop productions in more sustainable ways, or how to produce theatre via digital means.

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[126] Tom Leick-Burns, "Find Ways to Give Something Back to the Local Community": Promoting Young Creation in Luxembourg", in ETC Journal 2019/2020
[127] See: https://www.rcs.ac.uk/courses/ba-performance/.

Mobility and collaboration

The proportion of international students in theatre-related study programmes is not very large among most of the institutions interviewed. An important factor for this is the language of instruction, as in many cases most programmes are taught in one of the country's official languages. This aspect largely reflects the issues faced by the sector in relation to language barriers. International mobility schemes and other frameworks allowing cooperation were noted as most convenient ways for mobility and international activities. According to survey data, around 30% of students on average make use of international mobility opportunities.

Interviewees from higher education institutions mentioned that not many frameworks allowing students' and teachers' mobility exist. The Erasmus+ programme was reported to be the most widely used mobility programme. Stakeholders noted that this programme is easy to integrate into institutions' administrative systems and provide good opportunities for students. Based on Erasmus+ projects database, between 2014 and 2020, there have been 262 Erasmus+ projects related to theatre and carried out by tertiary level higher education institutions and 58 projects by tertiary level vocational education institutions (some of these results may duplicate).[128]

In relation to challenges to mobility and international cooperation, no courses in English were offered in the several academies interviewed, meaning that they cannot receive incoming students. However, other type of short-time mobility (courses, summer schools etc.) can still be popular in such institutions. Besides language constrains, challenges include lack of human resources that could work on international collaboration and mobility, as well as problems with students missing parts of their curricula and not getting the training needed. For the latter, it was noted that such programmes like Erasmus+ traineeships that can be taken during the summer or after graduating can be more convenient for the students.

The Norteas network uniting Nordic and Baltic Performing Arts institutions in higher education was mentioned among other examples of mobility schemes. Norteas provides student mobility grants for student exchanges between Norteas member institutions. The exchanges can last between one week to several months.[129] The network also provides mobility grants for teacher exchanges between teachers employed at Norteas member organisations. The minimum duration for exchanges should be 8 contact hours, covering teaching, tutoring, or development of teaching materials etc.[130] The network now has 17 members in Denmark, Estonia, Finland, Iceland, Latvia, Lithuania, Norway and Sweden.

Educational institutions also participate in projects funded though Creative Europe. However, it was noted during the interview programme that the Creative Europe applications and projects can discourage some organisations from participating as certain administrative burden is associated to them. Some cooperation projects among educational institutions can be funded through Horizon 2020.

Networks also play an important role not only in mobility opportunities but also in exchanging ideas and experiences. One of the most prominent network of theatre academies in Europe is E:UTSA (Europe: Union of Theatre Schools and Academies). E:UTSA has 18 members in Europe (with 2 academies in Russia, and 2 associate partners – European Theatre Prize and a newly founded African network for performing art students). Among other activities, E:UTSA is committed to supporting collaboration between its members, including student-lead projects, student festivals, international workshops,

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[128] Based on a search by type of institutions, programme and keyword „theatre" on Erasmus+ projects database: https://ec.europa.eu/programmes/erasmus-plus/projects_en#search/project/keyword=theatre&programmes[0]=31046216&organisationTypes[0]=31045391

[129] See: http://www.norteasnetwork.org/student-mobility

[130] See: http://www.norteasnetwork.org/teacher-mobility

student exchanges, and teacher exchanges.[131] Another network of theatre schools – *Ecole des Ecole* – focuses on teachers and students in performing arts, and unites 17 schools.[132] There is also a Platform European Theatre Academies (PLETA) that was funded through the Creative Europe Programme.[133]

Overall, the Europeanisation of the teaching curricula was mentioned to be a challenge, determined by language barriers, as well as a lack of frameworks and structures for collaboration. Some stakeholders mentioned that possibilities to have joint programmes or develop joint productions with students from different countries would bring positive benefits in this regard. Europeanisation of the teaching curricula could also be enhanced by increasing diversity of plays and content of the study programmes, allowing for more translated works from European countries to be featured.

Challenges faced by educational institutions

Ensuring a smooth transition of graduates into the labour market was among the main challenges highlighted by the stakeholders. Some argue that there are far too many graduates than jobs available in the sector, which further contributes to the competitiveness of the sector. The situation may also be worsened by the COVID-19 pandemic. 'Bottlenecks' in programming and the number of productions already prepared but not yet premiered may result in fewer work opportunities for emerging professionals. Also, as noted by different interviewees, graduates need to compete for jobs with professionals with different levels of experiences. This may be especially more difficult for women since there are usually more roles written for men than women. In addition, upon entering the sector, the young graduates face precarious work conditions that complicate the possibility of establishing themselves as artists. In Belgium's Wallonia-Brussels Federation, a federal subsidy 'CAS' pays part of the income of young graduates in the Belgian theatre sector when they are hired. It is a kind of employment bonus, and as a result, there are far fewer young people who train on the job and manage to get into Belgian public theatres without this aid.

Some schools also reported facing a lack of resources. Schools face issues with finding appropriate teaching spaces, rehearsal spaces, buildings, and equipment. Financial resources were also an issue for some schools lacking funds for attracting and paying staff or developing extra activities like internationalisation. The funding structures of higher education schools that do research is often applied to theatre academies and schools. A misalignment between funding structures and the specifics of performing arts teaching and research exist, as research in performing arts differ in terms of the process and outputs produced from research in other fields. A lack of practice-based research programmes at the university level was mentioned to be an issue in some countries.

Broadening participation and inclusion is another important area of work for theatre schools. Stakeholders seek to attract more people with minority or disadvantaged backgrounds, applicants with disabilities to reflect better the society the educational institution is based at. Yet, the situation in this regard still needs to improve. Among other challenges, issues faced with securing qualified teachers, responding to the needs of a new/younger generation or the lack of frameworks for international cooperation/exchange on artistic work emerging within study programmes were mentioned.

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[131] See: https://eutsa.eu/about/
[132] See: http://www.ecoledesecoles.eu/about/.
[133] Platform European Theatre Academies (PLETA), http://pleta.eu/.

Adapting and responding to the COVID-19 pandemic

Like in other fields, many higher education institutions in culture and the arts had to close for a certain period of time due to mandatory national government requirements.[134] Many institutions lost opportunities to train and perform in person, which is key to many theatre education programmes that are based on practical training. Some exceptions of mixed-learning where it is alternated every week between in-person and online learning, as well as possibilities to access the necessary equipment when needed were mentioned. However, the teaching practices and regimes (online or in person) are changing in relation to the changing restrictions and epidemiological situation in each country.

A varied picture was observed in terms of student recruitment. While in the interviewed institution from Sweden, the applicant number for the bachelor programmes decreased during the pandemic, applications to master and all other free-standing advanced level courses have increased. Meanwhile, in GSA in Ireland, the student enrolment has dropped as they stopped running part of their short-term courses.

Theatre teachers had to adapt to new tools and formats of teaching online in a short timeframe. While schools managed to quickly turn to online teaching upon beginning of the pandemic, the teaching quality has been affected, as in-person training with colleagues and audience is essential to the theatre craft. There have been instances where final year students could not finish their programmes or their final shows were not produced (which usually are good opportunities to showcase their talent). Also, some schools considered providing students an opportunity to extend their studies or cover certain topics/subjects during a summer school. Concerns were also expressed regarding recent graduates and difficulties of moving into the labour market during the pandemic when most productions are stopped. The pandemic also put pressure on opportunities for networking (e.g. internships, student relationships).

The quick transition to online learning required teachers and lecturers to reinvent their teaching practises. Some teachers have adapted the content of courses to focus on storytelling or sharing testimonies, they invited guest lecturers or performers to join the call or called on their students to explore the artistic potentials beyond the studio in their own houses. It was also noted during the interview programme, that one school experimented with organising activities in public parks, gardens, forests (depending on restrictions existing at the time), or recording the live meetings and using them later.

Beyond technical issues of lack of equipment (both at schools and for students), sound, broadband and learning how to use video conferencing apps and support tools, there are real limitations to teaching theatre, demonstrating and properly guiding students.[135] ELIA, the European network representing higher arts education, has compiled challenges of Digital Teaching and Learning:[136]

- Providing students with fair, high-quality, digital assessment while on location exams and showcases are impossible to host for most institutions;
- Teaching courses that require studio time and/or workshops, virtually especially for performing arts;
- Guaranteeing accessibility of digital/online education;
- Ensuring health and wellbeing of students and staff including students' psychological and financial wellbeing and extra workload for teachers;
- Rethinking internationalisation while mobility is temporarily blocked;

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[134] Results of an ELIA members survey in March-April 2020. Available: https://www.elia-artschools.org/news/elia-members-response-to-covid-19

[135] See: https://howlround.com/teaching-performing-arts-during-pandemic.

[136] See: https://www.elia-artschools.org/news/elia-members-response-to-covid-19.

- Being ahead of the long-term consequences of the pandemic.

In this context of the difficulties faced by theatre schools, E:UTSA proposed an educational and cultural exchange among theatre schools. A platform was created with the aim to bring together teachers from different E:UTSA schools willing to share and stream their classes together with E:UTSA students.[137]

Although it might still be too early to determine a long-term impact of the COVID-19 pandemic on educational practices, some potential changes were already observed. Mainly, the pandemic might have an impact on the future travelling practices among institutions as the shift to digital learning and working proved that conferences, symposiums, lectures etc. can be held effectively online. It was noted that they will be much more selective when they travel and when they ask for people to travel to them. For instance, at the Department of Performing Arts at UNIARTS, the new masters programme will be done 80% online. Some respondents also found that the virtual environment allow them inviting prominent professionals from abroad to teach online. This was often mentioned as a good practice that can be kept in the future. Some schools noted that the remote learning also enhanced students' autonomy and abilities to work independently, which should also be promoted in the future. At the same time, most of theatre professions require a practise-based face-to-face teaching, which cannot be eliminated. Yet, the digital technologies will be much more used for the purposes of teaching than prior to the pandemic. The recorded lectures and other teaching materials will be available to use in the future as online databases of teaching materials have been created during the pandemic.

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[137] E:UTSA website https://eutsa.eu/event/eutsa-20-e-learning-exchange/.

6 Other aspects related to the professional theatre and good practise examples

6. Other aspects related to the professional theatre and good practise examples

Sustainability of the theatre sector

Theatre venues and theatrical productions can have a sizeable environmental footprint. According to 2015 data from Julie's Bicycle's carbon calculator tools, performing arts venues in the UK (incl. theatres and concert halls) per year on average used 645 litres of water, 101 kWh of electricity and 139 kWh of gas/m^2.[138] A 2008 study investigating the carbon footprint of the theatre industry in London reveals that the total amount of emissions from theatres in the city is approximately 50,000 tonnes a year (excluding pre-production and audience travel).[139] This amount - 50,000 tonnes of CO_2 emissions – can equal to 124,069,479 miles driven by an average passenger vehicle or 826,761 tree seedlings grown for 10 years.[140] In addition, the travel of audiences to theatre venues was evaluated at generating approximately 35,000 tonnes of CO_2 per year.

Although the carbon footprint of theatre venues and productions may differ across countries and be influenced by local energy efficiency practices (e.g. the use of renewable energy in the country, accessibility to the venue by public transport), the 2008 study on theatres in London shed light on the different sources of CO_2 emissions of theatre venues. The largest share of emissions (35%) was created by activities related to a theatre's front of house (incl. air-conditioning and cooling of the facilities).[141] Then, 28% of emissions were created in maintaining the rehearsal spaces (heating/cooling), 9% - maintaining the theatre offices, 9% - stage electricals (lighting, sound, automation), 6% - by the overnight theatre. Pre-production management and production materials constituted 5% each of the total carbon footprint, and exterior lighting of theatres – 2%.

In addition, the emissions generated through the mobility of audiences (travelling to the venue, festival etc.) should not be overlooked, as often these contribute a lot to the overall sector's carbon footprint. According to the Staatsschauspiel Dresden's carbon footprint calculation, in 2019, mobility caused 40% of all emissions of a theatre's activity, including the local audiences travelling to the venue (22.2%).[142] Mobility of the production team had also a sizeable impact constituting 6.7% of the total emissions created.

In addition to the areas above, an important issue is the travelling/touring practices within the sector. According to the report published by IETM, before the pandemic, travelling for short trips to meetings and conferences was widespread within the sector.[143] Many theatre companies also rely on international touring and mobility. Flights, hotels, the purchase of one-off items, and the energy used during these trips can amount to a large environmental impact. Interviewees stressed that the sector still needs to re-think international collaboration to reduce the environmental impact of travelling and touring. Travelling for showing one production in one place, especially large ones, require lots of resources. At the same time, it was expected that the pandemic would influence the sector's perspective on travelling. The pandemic showed that a large proportion of meetings could take place online, which could reduce unnecessary travel in the future.

At the same time, moving to digital activities and storage of digital data were also noted to have an impact on the environment, which should also not be forgotten. According to

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[138] See: https://juliesbicycle.com/resource-benchmarks/.

[139] Mayor of London (2008), *Green Theatre. Taking action on climate change.* London: Greater London Authority. Available at: https://juliesbicycle.com/wp-content/uploads/2019/10/Green_Theatre_Guide_2008.pdf, p. 5.

[140] According to United States' Environmental Protection Agency's 'Greenhouse Gas Equivalencies Calculator'. See: https://www.epa.gov/energy/greenhouse-gas-equivalencies-calculator.

[141] Ibid.

[142] *Auswertung THG Bilanz Staatsschauspiel Dresden*. A PowerPoint presentation.

[143] Janssens, J., Hesters, D., Fraioli, M. (2021), *Rewiring the Network (for the Twenties). Resetting the agenda for IETM.* Brussels: IETM, p. 14.

one article, every gigabyte of data that is consumed or produced by participating in a video conference, listening to a podcast or watching a livestream event can total to at least 855 g of carbon dioxide emissions.[144]

Actions taken by different actors

The concern with the environmental footprint of the theatre and performing arts has been growing significantly. Actions are taken on different levels including policymakers, sectoral organisations, individual theatre companies and artists to tackle this issue.

In 2020, a report was prepared for the European Parliament's CULT Committee on effective measures to 'green' Erasmus+, Creative Europe and European Solidarity Corps, highlighting ways how these programmes could be 'greener'.[145] At the national policy level, there have been examples of incentivising more sustainable practises and travel habits. For instance, state enterprises in Sweden (like national theatre Dramaten) are obliged to produce a sustainability report that is based on multiple, dynamic principles rooted in sustainable business management. Pro Helvetia, a fund for supporting and disseminating Swiss arts and culture, stopped supporting short tours outside Europe.[146] The Dutch Performing Arts Fund gives additional support for those touring by train.[147] However, in engaging in such practices, great attention needs to be given to maintaining inclusiveness and access to creative activities to all segments of society.

At the sectoral level, theatre and performing arts networks and associations draw their members' attention to environmental issues, as well as provide capacity building. For instance, Mitos21, a network of European theatres, in 2013 organised one of the first international conferences on culture and sustainability.[148] In 2016, the network also designed a course on sustainable cultural management, which was offered to its members and later to other colleagues across the cultural and theatre sector. The ETC has also offered training workshops for its members on sustainability, carried out in cooperation with NABU (Nature and Biodiversity Conservation Union) and Julie's bicycle.[149] In addition, the ETC has established the Green Theatre Committee, which developed a Sustainability Action Code for its member theatres announced in June 2021. The code is the ambitious two-fold vision to create sustainable progress in Europe's theatres and to reach a climate positive network and membership by 2030: The theatres are committed to measure, understand, reduce and offset their ecological footprint through information, mobilization and legislation on European level. Adaptation and a change-process of their environments and actions comprises three areas towards- sustainable processes in theatre organisations, sustainable theatre buildings, sustainable artistic productions.[150] IETM envisions that by 2040 the sector will base its activities on the four building blocks: an increased ecological awareness among artists and policymakers, an increase of ecological artistic production practices, green mobility and decrease of unmeaningful travel, as well as the emergence of new forms for international collaboration beyond travelling.[151] The urgency of the

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[144] Mathew, V. (2021), "Streaming in the Just Transition A Producer's Guide to Measuring, Budgeting, and Lowering the Carbon Emissions of Livestreams and Video Conferences", in *Howlround Theatre Commons*. Available at: https://howlround.com/streaming-just-transition.

[145] See: https://www.europarl.europa.eu/RegData/etudes/IDAN/2020/629218/IPOL_IDA(2020)629218_EN.pdf and https://www.europarl.europa.eu/doceo/document/A-9-2020-0141_EN.html.

[146] Janssens, J., Hesters, D., Fraioli, M. (2021), *Rewiring the Network (for the Twenties). Resetting the agenda for IETM.* Brussels: IETM, p. 14.

[147] Janssens, J., Hesters, D., Fraioli, M. (2021), *Rewiring the Network (for the Twenties). Resetting the agenda for IETM.* Brussels: IETM, p. 14.

[148] Interview data.

[149] See: https://www.europeantheatre.eu/news/sustainable-cultural-management-green-communication-workshops and https://www.europeantheatre.eu/news/wild-spaces-action-areas-for-sustainable-theatres.

[150] See: https://www.europeantheatre.eu/news/apply-to-join-the-etc-green-theatre-committee.

[151] Janssens, J., Hesters, D., Fraioli, M. (2021), *Rewiring the Network (for the Twenties). Resetting the agenda for IETM.* Brussels: IETM, p. 19.

subject was reflected at the European Theatre Forum, as it focused on sustainability as one of three programme themes.[152]

Organisations also make resources available focusing on concrete actions that can increase the sustainability of theatre venues and companies. Julie's bicycle's guide to sustainable productions details actions that can be taken in different departments of production like lighting, sound and AV, set design, scenic art and construction, cast, communications and marketing etc.[153] Suggested actions include reducing and avoiding using finite and/or un-recyclable resources, setting a carbon budget for the production, exploring possibilities of using renewable energy, or taking the train instead of flights when travelling or touring. Another UK-based initiative is the Theatre Green Book setting standards to introduce sustainability for the whole of theatre to change for a greener practice.[154]

The environmental sustainability ideas are also integrated into the practices of theatre venues and production companies. According to the survey data, 62.9% of theatre venues and companies that responded to the survey have adopted measures to reduce the environmental impact of their organisation to a large or moderate extent. Similarly, 42.9% responded integrating environmental issues to the content of artistic productions to a large or moderate extent.

Figure 18. Theatre venues and companies: To what extent has your institution implemented any practices related to the environmental issues in recent years?
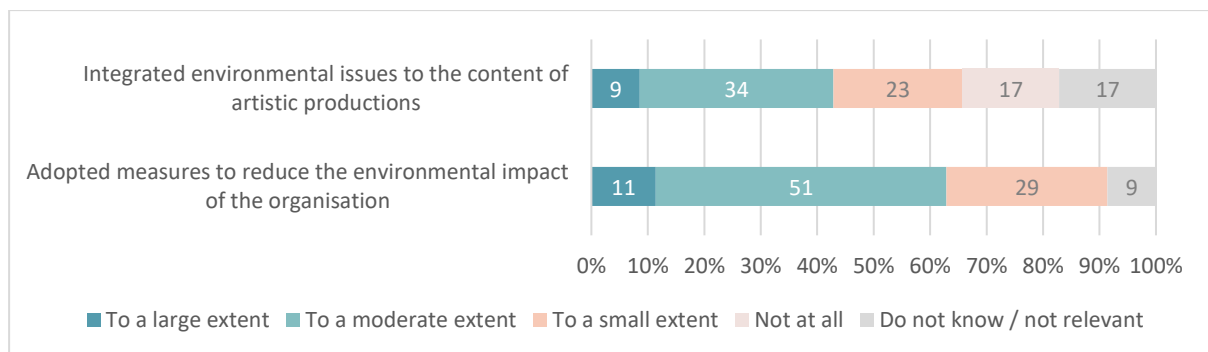
Note: N=35

According to the interview data, most common practises adopted by theatre venues and companies to increase their environmental sustainability include reducing consumption of plastic within the venue or during production, using re-cycled materials, reusing stage equipment, changing their printing habits (e.g. stopping to print flyers, posters), transitioning to LED lighting, having policies regarding travel (e.g. taking the train as often as possible) or sustainability plans. Less commonly reported practises, which as well are more resource-intensive, included having dedicated teams or workforces to deal with sustainability, hiring eco-consultant, conducting an external sustainability assessment, decreasing water usage, improving building's insulation or planning to instal solar panels. Special attention should be given to heritage houses that are often the location of theatres in Europe. The shift towards a more sustainable operation has to be adapted to the specifics of preservation and potentially be more costly.

Some production companies have also been experimenting with new modes of working (see Théâtre Vidy-Lausanne among good practise examples). For some theatres, the pandemic has been a productive period for reflecting on the sustainability issues. Several interviewees from theatre venues/companies mentioned using the pandemic period for

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[152] www.europeantheatreforum.eu
[153] Julie's bicycle (2013), *Sustainable production guide. How to limit environmental impacts at every stage in the production process.*
[154] https://theatregreenbook.com/

refurbishing the venue and creating a task force for rethinking sustainability. To illustrate, the Malmo City Theatre in Sweden is planning to close the venue in Spring 2021 for refurbishing the theatre building. For this, they are collaborating with *Architects Declare* initiative, which is a network of architectural practices committed to addressing the climate emergency. The National Kaunas Drama Theatre in Lithuania replaced some less efficient technologies (for example, stage lighting) during the quarantine, which helped to avoid stopping their performances.

Theatres have also been integrating the topics of environmental issues into their artistic programmes, with an aim to inspire individual and societal change.[155] For instance, a theatre director in Belgium, Anne-Cécile Vandalem, set one of her recent works 'ARCTIQUE' in a near future where ice melt would enable trade and luxury cruise ship routes through the Arctic Ocean, questioning the political and commercial instrumentalisation of climate change in the area.[156] In 2017, Katrine Faber has created performance 'Tales from the Trash' (in Danish *Affaldsfortællinger*). During the performance, in which an old woman appears from the plastic trash, the global themes of crises, climate change, and dissonances between the living creatures on Earth are explored.[157] Awareness raising of climate change and environmental issues also take place in the form of educational activities, summer camps or workshops.

The topics of climate change and environmental sustainability are slowly being integrated into educational curricula. Several interviewed theatre schools mentioned engaging with these topics. For instance, the Department of Performing Arts at UNIARTS in Sweden are integrating into their teaching programmes the topics of sustainability, Agenda 2030, reducing climate change and achieving a more equal distribution of resources in the world. However, given the lack of expertise within the sector on how to translate sustainability ideas into action, a greater attention may need to be given on practical management of theatres and productions in sustainable ways.

Challenges faced

Although the sector demonstrates high consciousness about the environmental issues, stakeholders face a number of challenges in tackling them. Based on the survey data, 40% of respondents were integrating environmental issues to the content of artistic productions 'to a small extent' or 'not at all'. Likewise, 29% of respondents were adopting measures to reduce their carbon footprint only to a small extent. The main reason behind this was reported to be costs/lack of financial resources (76.5%). As shown by interview data, transitioning to LED lighting or refurbishing the venues to comply with higher sustainability standards require substantial financial resources. Oftentimes, public funding is needed to be able to fund the changes. Among other reasons (17.6%), respondent mentioned the lack of environmentally friendly energy suppliers or artists' demands for new materials.

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[155] KEA and PPMI (2019), Culture and creative sectors in the European Union – Key future developments, challenges and opportunities, Study for the European Parliament.

[156] See: https://www.theatrenational.be/fr/activities/32-arctique#presentation

[157] See: http://teaterviva.dk/index.php/da/forestillinger/tales-from-the-trash-affaldsfortaellinger.html.

Figure 19. Theatre venues and companies: What would you say are the key issues in increasing your organisation's environmental sustainability?
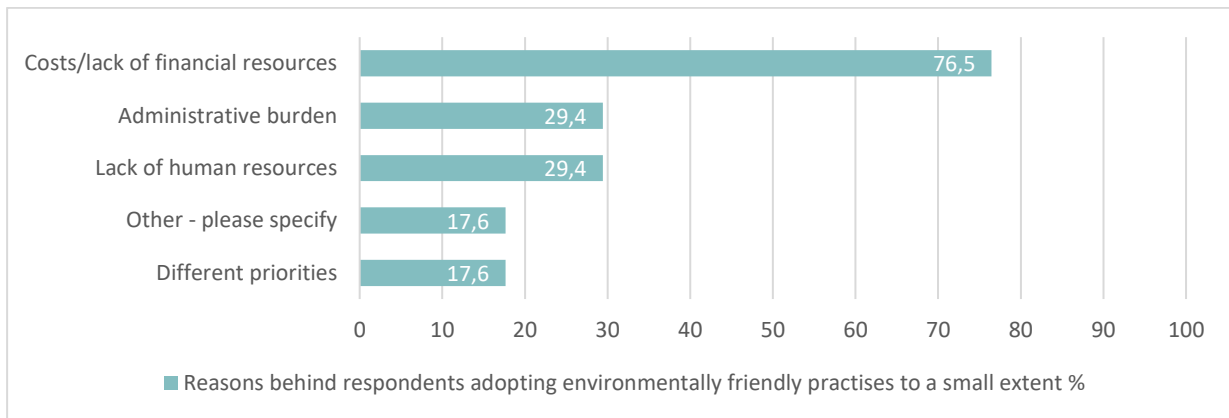
Note: N= 17

In addition, other challenges like lack of expertise, touring or measuring the difference made were indicated during the data collection process:

- Expertise/human resources challenges: Given the relative novelty of this topic, the sector still lacks expertise in how to work in more sustainable ways and implement concrete changes. As argued by a stakeholder, sustainability officers are positions that do not exist yet in theatres. Theatres rely on external expertise to assess their practises, but few external experts know the needs of the theatre system.

- Touring practises: As noted already above stakeholders argued that the balance between touring and sustainability still needs to be found, especially between being economy orientated and aware of the carbon footprint generated. This may also pose challenges for diffusion companies, which may face a greater pressure by theatre institutions that do not want to sign deals for performing artists having only one date scheduled on their territory. As explained by one interviewee, the diffusion company has to find other dates in the same country while not having the commitment of the first one.

- Measuring the carbon footprint of activities: Some stakeholders that participated in the validation seminar noted that there are not enough tools available for venues/companies and professionals to calculate the environmental impact of their activities. Developing tools for measuring environmental impact of the sector, supporting research into effective changes, as well as supporting dissemination of good practises were mentioned as vital for improving sustainability of the sector..

- Dependence on the practises of other organisations: While production companies are proposing to use LED lighting in their artistic performances, not all receiving venues can be equipped with the latter technology.

Good practices

The below table presents a list of good practice examples in the environmental sustainability area. The list is non exhaustive and presents main practises that were encountered over the course of research for this study.

Table 4. Good practice examples

General practises
Policy-level: • Financial support for refurbishing the building, changing existing equipment

- Incentives through financing / funding to develop productions in a more sustainable way

Sectoral level:
- Capacity building through workshops and trainings
- Awareness raising among the members

Organisational level:
- Reducing the use of paper and printing leaflets, posters etc.
- Reducing water consumption within the building (e.g. refurbishing the toilets)
- Reducing the use of plastic cups and other one-off plastic items
- Recycling
- Installing solar panels
- Improving insulation of buildings
- Educating community about environmental issues (e.g. through programming, summer camps)
- Sustainability plans
- Hiring external consultants / having dedicated teams
- Conducting sustainability assessments
- Reducing carbon footprint created by the mobility of audiences (e.g. special discounts for persons arriving to a performance with bike or public transport)
- Transitioning to LED lighting
- Innovating with new, more sustainable business models

Educational level:
- Integrating environmental issues in the teaching curricula of theatre professionals

Specific examples	
Switzerland	Théâtre Vidy-Lausanne has been working on a production that redefines international touring of theatre productions. The production 'No Travel' (provisional title) is being developed completely online. Instead of taking the whole production that includes cast, stage materials etc. on tour, the team will share with partners in different countries the script of the production and detailed instructions how to recreate it.[158]
Ireland	The Green Arts Initiative aims to provide Irish arts organisations with the resources and support to help build a green Irish arts community. It supports its members with practical advice on reducing their carbon footprint and overall environmental impacts, provides members with opportunities to enhance their sustainability competencies through training and networking and collect information about what organisations are currently doing to improve their sustainability.[159]
Switzerland / the Netherlands	Incentives to move to more environmentally friendly practises through funding allocated via public authorities. For instance, Pro Helvetia, a fund supporting and disseminating Swiss arts and culture, stopped supporting short tours outside of Europe.[160] The Dutch Performing Arts Fund gives additional support for those touring by train.[161]
Italy	The city of Milan was giving cheaper tickets for people coming to the theatre with the city bikes, hence contributing to compensating carbon footprint created by the mobility of audiences.
Multiple countries	Norteas member schools/theatre academies participated in a two-year pedagogical project 'The Sustainable Theatre Artist'.[162] The project encompassed monthly online lecture series hosted by the participating schools, a series of express courses on sustainability, and an intensive one-week course for up to

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[158] See: https://www.europeantheatre.eu/publication/our-experiments-a-radical-international-collaboration?fbclid=IwAR06tGIqQRrkkC8g0m-VZMrVVOL2V9QbA2m2LAAEloZQ2gCL1lNLh3DOZAc.

[159] Theatre Forum (2021). *Green Arts Initiative in Ireland.*

[160] Janssens, J., Hesters, D., Fraioli, M. (2021), *Rewiring the Network (for the Twenties). Resetting the agenda for IETM.* Brussels: IETM, p. 14.

[161] Janssens, J., Hesters, D., Fraioli, M. (2021), *Rewiring the Network (for the Twenties). Resetting the agenda for IETM.* Brussels: IETM, p. 14.

[162] See: https://lmta.lt/en/kvietimas-dalyvauti-tarptautiniame-projekte-teatro-menininko-tvarumas/.

	100 students in Vilnius, hosted by the Lithuania's National Academy for Theatre and Music in 2018.

Besides good practice examples that are implemented in different countries, we selected a handful of practical tools and guides aimed at theatre and CCS professionals that seek to help them improve the environmental sustainability of their activities. The list is intended to serve as a starting point for exploration, providing concrete examples of how the notion of sustainability can be translated into action.

Table 5. Examples of practical tools and guides for increasing sustainability of theatre activities

Type of tool	*Examples of tools and guides*
Tools for measuring carbon footprint of activities	• Julie's Bicycle's carbon footprint calculator. Available at: https://juliesbicycle.com/reporting/ Julie's bicycle has created a free set of unique carbon calculators developed specifically for the creative industries. These calculators are used by over 5 000 organisations across different countries. The calculators help organisations to understand the environmental impacts of their cultural buildings, offices, outdoor events, tours and productions. The calculators have been translated and are now tested in Germany with selected institutions. For more information, see: https://aktionsnetzwerk-nachhaltigkeit.de/projekte/pilotprojekt-co2-rechner-in-deutschland/ • Staatsschauspiel Dresden, a theatre in Germany, developed its own carbon footprint calculation methodology as part of the pilot project during which 19 German cultural institutions sought to create such tools to measure the impact of their activities. For more information, see: https://www.kulturstiftung-des-bundes.de/de/projekte/nachhaltigkeit_und_zukunft/detail/klimabilanzen_in_kulturinstitutionen.html and https://www.kulturstiftung-des-bundes.de/fileadmin/user_upload/Klimabilanzen/210526_KSB_Klimabilanzen_Publikation.pdf
Tools for reducing carbon footprint of travelling and mobility	• Julie's Bicycle (2015), *Practical guide: Audience travel*. Available at: https://juliesbicycle.com/wp-content/uploads/2019/10/Audience_travel_guide_2015.pdf. The purpose of the tool is to support CCS venues and companies in encouraging audiences to make greener travel choices and subsequently reduce the carbon footprint associated to it. The target audience is anyone working in a cultural venue or with temporary event production. The guide provides information on why and how to carry out audience travel surveys, suggests ideas for planning more sustainable audience travel to events and for incentivising more sustainable travel. • Julie's Bicycle (2011), *Green mobility: A guide to environmentally sustainable mobility for performing arts*. Available at: https://juliesbicycle.com/wp-content/uploads/2019/11/ENG_Green_Mobility_Guide_2011.pdf The guide offers practical information on what first steps can be taken in terms of environmental sustainability and mobility. The guide is relevant for touring organisations and venues, as well as membership organisations and funding organisations working in the cultural and creative sectors. • Green Touring Network, *Green Touring Guide*. Available at: https://www.greentouring.net/downloads/GreenTouringGuide_EN.pdf. The guide aims to inform practitioners about ways in which their touring activities can be greened. It targets musicians, agents, tour managers, promoters, venues, and booking agencies. The guide covers a range of topics, from catering, mobility, venues, and hospitality, to merchandising and communication. It also lists a range of sustainable German providers in the hospitality, catering, and merchandising industry on their website which could prove useful for German tour operators.
Tools for reducing carbon	• Julie's Bicycle (2014), *Practical Guide: Productions and Exhibitions*. Available at: https://juliesbicycle.com/wp-content/uploads/2019/10/Productions_and_exhibitions_guide_2015.pdf

Type of tool	Examples of tools and guides
footprint of productions	The practical guide seeks to provide professionals with ideas on how sustainable actions can be integrated in different stages of productions. It covers the key delivery stages of production and maps out sustainable actions that can be taken from conception to take down, covering design, construction, furniture, props, lighting, and sound. The guide is for anyone involved in the production or design of an event or exhibition.
Tools for reducing carbon footprint of festivals and events	• Green Events Nederland (2018), *Toolkit waste-free festivals: From waste to resources.* Available at: https://greenevents.nl/wp-content/uploads/2016/12/Green_Deal_toolkit_EN_160119-4.pdf The toolkit seeks to provide knowledge to cultural practitioners (festival or event organisers) on creating circular festivals. It explains certain technicalities around recyclable or recycled materials, showcase a material flow analysis, which along with life-cycle assessments is one of the most widely used methods to assess the sustainability of certain products or systems. • Powerful Thinking (2017), *The powerful thinking guide: Smart energy for festivals and events*. Available at: https://juliesbicycle.com/wp-content/uploads/2019/11/PowerfulThinkingGuideMarch2017v1_UK.pdf The guide aims to increase understanding on sustainable electricity usage at events, even outside of a festival setting. It targets culture and creative professionals. The guide presents information on the pros and cons of different types of energy sources, and features factsheets on smart grids, biofuels, and hybrid generators.
Tools for reducing carbon footprint of other activities / comprehensive guides	• American Theatre (2021), *Green Theatre: A Reference Guide*. Available at: ttps://artsmetric.com/green-theatre-a-reference-guide/. The guide provides theatre professionals with tools to implement environmentally sustainable practises in their institutions (e.g. creating policies). It features information on sustainable theatre materials, as well as an example of an environmental policy specifically designed for theatres. • Theatre Green Book. Available at: https://theatregreenbook.com/book-one-sustainable-productions/. The Theatre Green Book encompass three parts. Each part gives theatre clear, practical and detailed guidance towards 1) sustainable shows, 2) sustainable buildings, and 3) sustainable operations. • Broadway Green Alliance (2021), *Reduce, reuse, reopen: backstage toolkit. Sustainable solutions for reopening theatre.* Available at: https://static1.squarespace.com/static/5af08f2ae2ccd1af68cb78bf/t/60be5d80 919c5240e0326d28/1623088513107/Reduce%2C+Reuse%2C+Reopen_+Back stage+Toolkit+_+Broadway+Green+Alliance.pdf The toolkit aims to provide theatre professionals guidance on how to ensure sustainability while reopening theatres during the pandemic and adhering to health and safety rules. For instance, it suggests purchasing reusable masks from local vendors rather than single-use safety equipment.

Gender balance

Gender inequalities within the sector can manifest in terms of gender stereotyping, lack of representation within the decision- making and leadership positions, access to resources and equal pay issues, access to the labour market, as well as sexual harassment.[163] Studies note that gender stereotypes are still vivid in the theatre sector due to a 'deep-rooted

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[163] European Expert Network on Culture and Audiovisual (EENCA), *Gender gaps in the Cultural and Creative Sectors.*

acceptance and continued reinforcement of the gender imbalance'.[164] The data collected within this study shows that gender balance remains an important topic for the theatre stakeholders consulted during this study.

Current situation

Although more women (60%) than men (40%) are enrolled in art studies, there are overall more men in the CCS workforce (53%).[165] In addition, more men than women working in the CCS have greater professional stability as they are employed full-time (14 percentage points more). The study published by the ETC on gender equality in the theatre sector, which investigated aspects of gender among its member theatres in 22 European countries, reveals that women were more present in 'stereotypically female occupations'. At the same time, more men were found at the top of the institutions' hierarchical positions.[166] ETC's sample comprised 4000+ employees, out of which 57.9% were female, and 38.6% were male.[167] More men were found in such positions like technical/sound/lighting occupations, while more women were found in administrative positions.[168] A less statistically significant imbalance was also noted in directing positions, with more male than female directors found. However, a certain balance was found in artistic roles (actors, singers, musicians etc.).[169] In terms of representation within theatre programmes, women combine 39% of the people mentioned in theatre programmes.[170]

In terms of different countries, similar patterns emerge when looking at national-level statistics. For instance:

— In France, despite women representing the majority of the students in education preparing for performing arts (52%), female presence drastically decreases along with the career development: 31% of practising artists, 11% of programmed artists, 4 to 12% of rewarded artists (awards etc.) being women since 1980.[171]

— In Ireland, a 2017 study demonstrates that women are underrepresented in every professional role except in costume design. For other roles, 28% of script authors, 9% of sound designers, and 37% of directors employed are women. The study also shows that the higher the funding received by a theatre organisation, the lower the female representation in key roles is.[172]

— In Sweden, a 2018 report published by the Swedish Arts Grants Committee reveals that out of 4 178 artists working in theatre, there are generally more women than men in such positions like actors (women – 54.2%), stage designers (67.9%) and musical artists (59.9%), but slightly more men in theatre director positions (56.3% men).

— In Romania, statistics show that only 3% of professionals in the performing arts sector are women.[173]

[164] Daniel Sage, Catherine Rees (2016), To do or not to do (gender)' and changing the sex-typing of British theatre. Gender, work and organization, Vol. 23, Issue 5. ì
[165] European Parliament (2021), *At a glance. Women in arts and culture – Artists, not muses.* European Union, p. 2.
[166] European Theatre Convention (2021), *Gender Equality & Diversity in European Theatres. A study.* Berlin: European Theatre Convention, p. 4.
[167] Ibid., p.13.
[168] Ibid., p.25.
[169] Ibid., p. 15.
[170] Ibid., p. 33.
[171] HCE (2018), Inégalités entre les femmes et les hommes dans les arts et la culture. Available at: https://haut-conseil-egalite.gouv.fr/IMG/pdf/hce_rapport_inegalites_dans_les_arts_et_la_culture_20180216_vlight.pdf.
[172] Brenda Donohue, Ciara O'Dowd, Tanya Dean, Ciara Murphy, Kathleen Cawley, Kate Harris (2017). Gender counts: an analysis of gender in Irish Theatre 2006-2015.
[173] Culturadata (2020). Available at: https://culturadatainteractiv.ro/sectoarele-culturale-si-creative-din-romania/numarul-de-pfa-ii-if-din-sectoarele-culturale-si-creative/

— In Lithuania, the interview data show that there is slightly more work for male actors since many plays have more male than female roles. Also, in 2019 there were more male (83) than female (42) directors in Lithuania in the dramatic theatre sector.[174]

The above-mentioned trends were also echoed by the stakeholders consulted for this study. According to the data collected during the survey programme, the women-men distribution of the total workforce at organisations that responded to the survey (N=30) features more men than women (see Figure 20). The greatest imbalance was visible among managing directors of theatre venues/companies (69.1% were male), artistic directors of productions (64.8% were male) and plays written by female/male for performances as part of institutions' annual programmes (61.8% were written by male).

Figure 20. Theatre venues and companies: Please indicate what share male and female workers approximately take per different position in your institution. This question includes the total workforce (including freelance and employed team members).
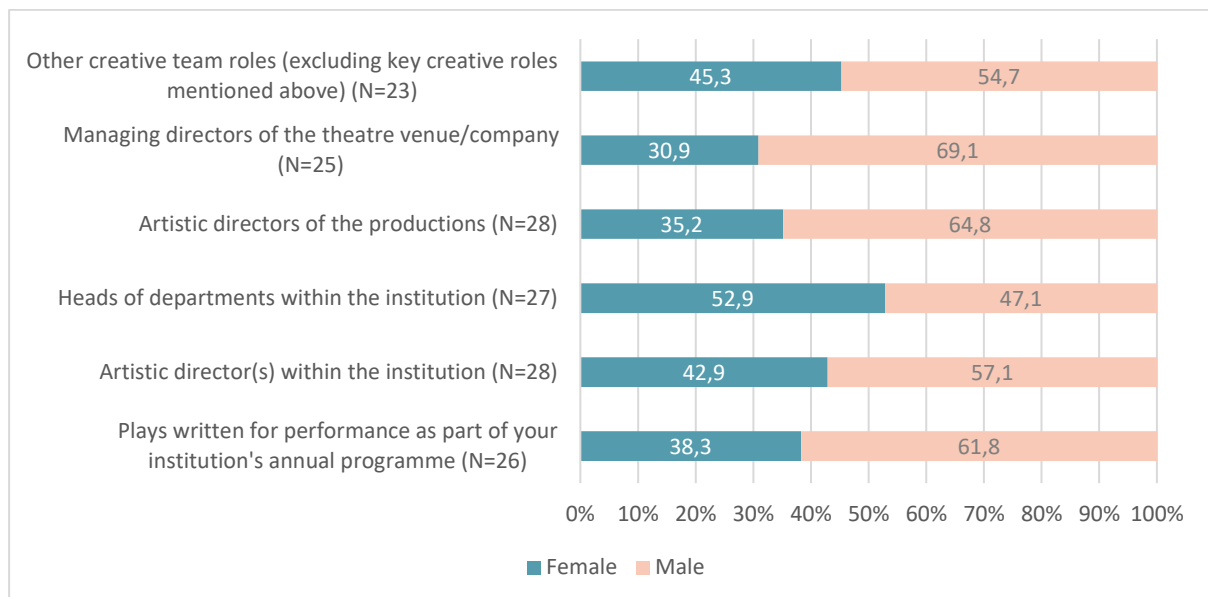
Note: N=30. N is different per each response option since it was not compulsory to answer to each category in case the organisation did not employ persons in all position.

Among theatre professionals who responded to the survey, more male than female felt treated fairly regardless of their gender identity (see Figure 21). In total, 40% of female respondents and 62.5% of male respondents strongly agreed or agreed with this statement.

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[174] See: https://smka.lt/activity/2019-3/.

Figure 21. Theatre professionals: To what extent do you agree with the statement 'I feel treated equally regardless of my gender'?
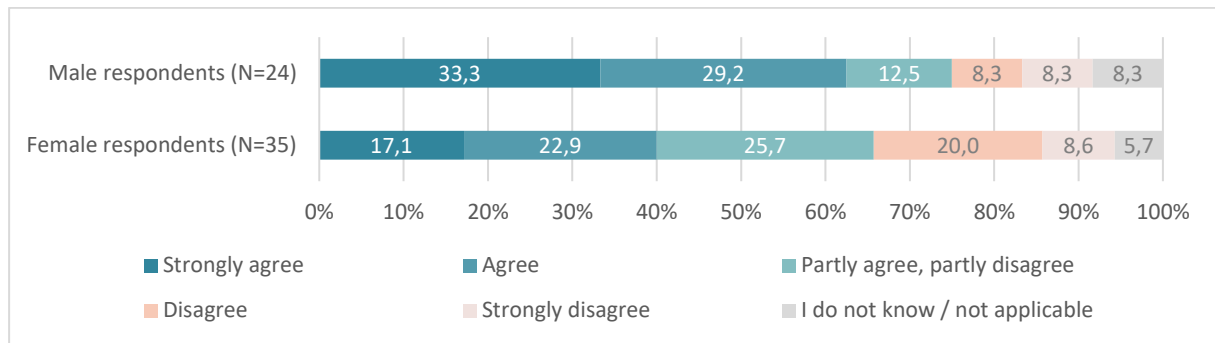
Responding to the situation in place

A number of initiatives and measures were applied by different actors of the sector to combat gender inequalities, some of which are selected and described as good practice examples in the table below.

At the EU-level, the topic of gender balance has become increasingly more integrated into the policy documents related to culture in the recent years. In 2018, the European Commission adopted the New European Agenda for Culture. The new agenda, among other aspects, focuses on social inclusion and increasing women's participation in the labour market. For instance, it proposes that the successor programme to Creative Europe would have selection criteria that reward projects guaranteeing gender equality in their organisation.[175] The Work Plan for Culture 2019-2022, also adopted in 2018, outlines five priorities for European cooperation in cultural policy making, one of which is gender equality.[176] In 2021, the Open Method of Coordination (OMC) working group of Member States' experts developed a report with recommendations 'Towards gender equality in the cultural and creative sectors'. [177] The report provides a comprehensive list of recommendations on increasing gender balance based on existing good practise examples. The Creative Europe Programme for 2021-2027 also integrates the aspects of gender into the programme and seeks to contribute to achieving a greater gender balance in the CCS.[178]

The sectoral organisations in theatre and performing arts sectors have also made pledges for increasing the gender balance. For instance, in 2018, following a European Theatre Convention's (ETC) conference, the *Diversity in Action* code of conduct for European theatres was created. The ETC members have committed to adhere to the principles of the code that include increasing diversity among theatre staff, reflecting gender and diversity

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[175] European Commission, Commission Staff Working Document, A New European Agenda for Culture - Background Information, Accompanying the document, Communication from the European Commission to the European Parliament, the European Council, the Council, the European Economic and Social Committee and the Committee of the Regions, {COM(2018) 267 final}, Brussels, 22.5.2018, SWD(2018) 167 final, p. 6.
[176] Council of the European Union, Draft Council conclusions on the Work Plan for Culture 2019-2022, Brussels, 15 November 2018 (OR. en),
13948/18, CULT 137. Available at: https://data.consilium.europa.eu/doc/document/ST-13948-2018-INIT/en/pdf#http://data.consilium.europa.eu/doc/document/ST-13948-2018-INIT/en/pdf.
[177] Menzel, A. (2021), "Towards gender equality in the cultural and creative sectors". Luxembourg: Publications Office of the European Union. Available at: https://op.europa.eu/en/publication-detail/-/publication/103b765e-c79c-11eb-a925-01aa75ed71a1/language-en.
[178] European Expert Network on Culture and Audiovisual (EENCA), *Gender gaps in the Cultural and Creative Sectors,* p. 14.

across artistic creation, investing in training, and ensuring equal pay across gender.[179] The *Dresden Declaration*, which was announced following the European Theatre Forum in November 2020, recognises diversity, inclusion, and access to be among the sector's key challenges.[180] PEARLE in cooperation with FIA have launched a project 'Gender Equality on and off the Stage', which aims to deliver a detailed overview of the situation in relation to gender equality in the live performance sector in the EU.

At the level of individual organisations, number of actions can be taken to increase gender balance and equality within the team. According to the recent ETC's study, having a policy for gender equality and diversity had a positive relation to a lower level of perceived discrimination within the team. Out of 22 theatres that participated in ETC's study, 63.6% had an organisational policy focusing on gender equality.[181] It was also noted by this study that the diversity of the directing team was reflected in the diversity of the cast.

The survey and interview findings reveal that diverse situation in this regard. A significant part of interviewees reported undertaking measures aimed at increasing gender balance and inclusion, including special codes of conduct or charters for ensuring gender balance or were in the process of developing ones. Additional actions include having policies against discrimination and harassment, monitoring gender distribution per different positions, as well as creating task forces and working groups to deal with such issues within their organisation. However, there were several theatres that explicitly mentioned not having such policies related to gender and equality, as they do not perceive these issues relevant to their organisation. According to the survey data, only 4 out of 36 theatre venues and companies that replied to the survey had a special programme or a charter for ensuring gender balance and equality.

Stakeholders engaged within the study generally agreed that gender imbalances exist within the sector. It has also been noted that positive improvements have been made over the years in this regard. A large share of theatre venues and companies interviewed reported awareness about the gender issues within the team and rather balanced teams, especially within the staff that is permanently employed. However, situation regarding gender balance was reported to be more difficult in relation to artistic roles, as there is higher competition for female roles. In addition, 27.30% of theatre venues and companies that responded to the survey (N=33) and 27.65% of theatre professionals deemed the lack of gender balance and equality within the sector as 'very important' or 'somewhat important' challenge faced by them in the recent years.

The interview findings also show that although gender balance remains an important topic on the agenda of policy institutions and theatre venues/companies, their concern with diversity also extends beyond reaching a gender balance. Better representation of groups with minority backgrounds or persons with disabilities is also an important area of work, with an aim for the sector to be better representative of the society it produces for.

Good practise examples

The table below presents a list of good practice examples in the area of increasing gender equality. The list is non exhaustive and presents main practises that were encountered over the course of research for this study.

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[179] European Theatre Convention (2019), *'Diversity in Action' - ETC Code of Conduct for European Theatres*. Available at: https://www.europeantheatre.eu/page/advocacy/europe/diversity-in-action-etc-code-of-conduct-for-european-theatres (accessed: 15 March, 2021).

[180] *The Dresden Declaration*. Available at: https://www.europeantheatreforum.eu/page/the-dresden-declaration-of-the-european-theatre-forum (accessed: 15 March, 2021).

[181] European Theatre Convention (2021), *Gender Equality & Diversity in European Theatres. A study.* Berlin: European Theatre Convention, p. 25.

Table 6. Good practice examples

General practises
Policy-level: • Obligatory policies in place to strive for gender equality within teams • Incentives through financing / funding to ensure gender balance within teams Sectoral level: • Data collection on the gender balance in the sector • Advocacy and awareness rising work for increasing gender balance (e.g. conferences) Organisational level: • Putting in place Equal Opportunity Plans / Gender Equality Plans both for the organisation and for creative teams and theatre productions, to reflect the societal diversity in the people who work in the theatre, the artistic programme on stage, the public in the audience • Having policies / codes of conduct for anti-harassment and discrimination Educational level: • Integrating gender equality and diversity issues in the teaching curricula of theatre professionals • Encouraging gender balance among students admitted to programmes

Specific examples	
Sweden	Swedish Union for Theatre, Artists and Media — Teaterförbundet – introduced gender equality checklists. The purpose of these checklists is to serve as a tool for identifying possibilities and difficulties in organisations in relation to gender equality. The checklists include such questions like: 'Has the team considered issues like ethnicity, gender, power and sexuality?' or 'Has the production company discussed whether the story contributes to preserving or challenging prevailing norms and notions concerning for example age, ethnicity, disabilities, sexuality?'.[182]
Finland	The Finnish Actors' Association, the Finnish Theaters, the Theater Center and the Association of Theater and Media Workers organised training on equality, non-discrimination and prevention of harassment in the performing arts sector.[183] The training was aimed at professional organisations in the performing arts. The training gathered a total of 312 people from 89 different performing arts organisations.
Spain	To foster gender equality and inclusion, the Ministry of Culture created the Observatory for Gender Equality in Culture and has been running the Jornadas de Inclusión Social y Educación en las Artes Escénicas (Social and Inclusion in the Scenic Arts Education Days) for 12 years.
Germany	The German Stage Association (DBV) made it mandatory to have a man and a woman as co-heads of different groups within their organisation. Also, the DBV together with the radio has implemented the project Themis, which is a contact point for those experiencing sexual harassment or violence in the sector and provides those affected with support.
Ireland	'Waking the feminists' (2015) initiative helped to collect a lot of useful statistics that helped to improve the situation in relation to gender balance in the sector.
N/A	The European Theatre Convention prepared a monitoring / assessment guide that theatres can use to monitor the situation regarding gender equality in their institutions.[184] The assessment grid was developed as part of ETC Gender Equality and Diversity Study.

Inclusion and accessibility

Inclusion in the cultural realm means that all individuals, independently of their physical aspect, language, religion, education, buying power or the fact that they live or not with disabilities should be able to freely and naturally participate in all cultural activities. In practice, however, physical obstacles, an ill-adapted offer or social misgivings make access

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[182] EIGE (2016), *Gender in culture*. Luxembourg: Publications Office of the European Union, p. 14.
[183] See: http://www.teatterikeskus.fi/ajankohtaista/tiedotteet/93-teatterit-yhdenvertaisuus-jatko
[184] European Theatre Convention. See: https://www.europeantheatre.eu/page/advocacy/diversity-gender-equality-theatre.

to culture and participation more difficult, especially for people living with disabilities.[185] An inclusive cultural offer is not conceived especially for people with disabilities but equally with them so that they can have access to cultural content like everybody else.

For the theatre sector this implies taking into account all steps of the audience experience: from booking to coming to the venue and being welcomed, to moving around and attending the performance. For instance, it includes making buildings or venues physically accessible (e.g. for visually impaired people or for people using a wheelchair), providing communication assets readable for all (e.g. printing flyers with a larger font for the elderly), enabling audio description or subtitles of the theatre pieces, training staff to welcome all kinds of audiences, to understand and to respond to specific needs. The personalisation of the services offered by theatre venues for the dissemination of live performances to a wider audience can be partly tackled through digital technologies, for instance surtitling glasses for the deaf and hard of hearing. Those are used in France by the Théâtre Édouard VII and the Festival d'Avignon and other theatres in Europe are also equipped with tablets or other types of screens.

The *Dresden Declaration* stemming from the 2020 European Theatre Forum recognises 'enhancing social cohesion' and 'promoting intercultural dialogue' as the unique value of theatre and performing arts. Among other important issues, the declaration shows 'diversity, inclusion and access' as one of key challenges, especially during the COVID-19 pandemic. Signatories postulate creation of a sectoral working group at the EU level, which will design an EU instrument for inclusion, diversity and access in the sector, including focus on rural areas, minority involvement and education. [186]

Efforts increasing inclusion and accessibility

Theatre venues and companies that responded to the survey targeted different societal groups with their programmes and actions, aiming to enhance their engagement and participation (Figure 22). Most of their activities were targeted at ensuring engagement of persons despite their age groups (71.4% implemented such activities).

Figure 22. Theatre venues and companies: Do you provide any programmes or activities targeted at increasing engagement of certain societal groups? If yes, which groups and what kind of programmes do you offer?
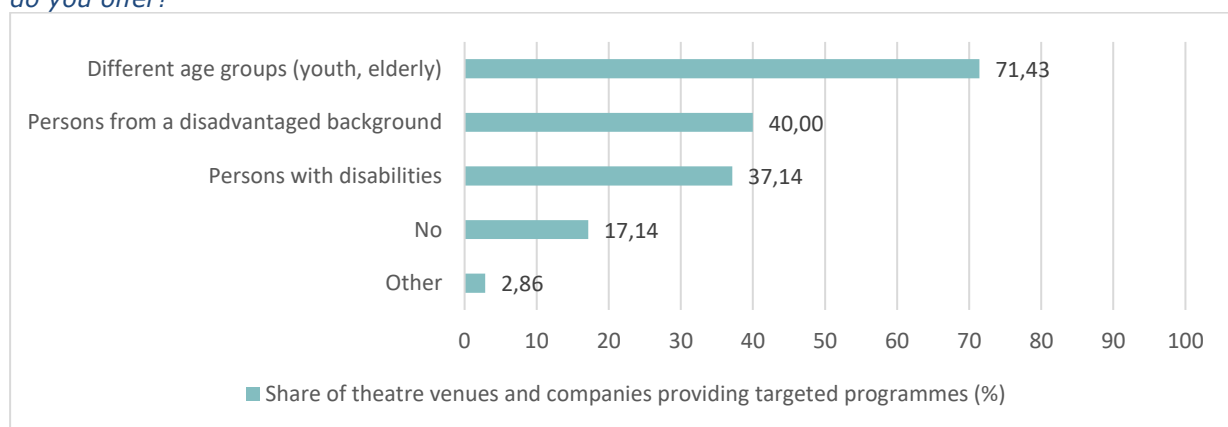
Note: N=35

[185] Service Culture inclusive de Pro Infirmis, Sensability and Pour-cent culturel Migros (2019), Pour une sortie culturelle accessible, Guide de l'inclusion dans les arts de la scène (théâtre, danse et musique) pour les publics vivant avec et sans handicap. Available at: http://www.insieme-ge.ch/wp-content/uploads/2020/01/guide-inclusion-arts-scene-culture-inclusive.pdf
[186] *The Dresden Declaration*. Available at: https://www.europeantheatreforum.eu/page/the-dresden-declaration-of-the-european-theatre-forum

Stakeholders engaged in the study adapted a variety of practises, aiming to increase participation of the community they are based at. Among the most common practises were providing discount tickets or programming more diverse plays that could be more appealing to different age groups. The price of theatre tickets might be an important barrier to many groups. Less commonly reported activities included creating 'audience development departments', implementing socio-cultural projects (like weekly forums of exchange for the community or reintegration of young people who are out of the educational and labour systems through the practice of performing arts resulting in the creation of a performance), or adapting performances to the needs of certain groups (subtitles or audio descriptions for persons with hearing difficulties).

Stakeholders also pointed out that it is important not only to make theatres more accessible to the audiences, but also to deeply open the sector to minority groups, by involving specific actors or other professionals and by supporting the development of companies run by representatives of such communities. A well-functioning theatre provides inclusion and accessibility from non-barrier architecture through communication to programme planning and equality in recruitment. Some theatres tackle this issue by developing special programmes or programming that is lead by artists with minority backgrounds (see good practise examples).

One of the programmes supporting inclusivity in Europe is Arts and Disability, British Council's programme focussing on improving access to theatres for people with disabilities not only as audience but also as artists. Europe has a long tradition of companies, festivals and events associating people with disabilities. However too often these artists face a barrier to get into mainstream institutions, organisations and companies. The aim of the programme is to ensure that artists with disabilities will be able to simultaneously receive the necessary support and become known in the mainstream institutions.[187]

Another important group to engage within the sector is people with disabilities. According to Eurostat data from *Disability statistics- prevalence and demographics* 12.8% of the population of 27 European Union countries aged 15-64 are with disabilities. This means over 42 million people in this age group. This percentage rises to 19 if we take into account people who acquire disability in old age (data from 2012).[188]

The British Council is leading Europe Beyond Access[189], a 4-year large scale collaboration project supported by the Creative Europe programme of the European Union, focusing on disability in the performing arts. The project established the European Arts & Disability Cluster in 2019. The cluster includes organizations from 18 countries, representing people working in the field of disability in art or in mainstream projects with the participation of artists with disabilities. They developed 6 recommendations for cultural initiatives and EU funding instruments, which call for seeking more actively applications which support the greater cultural engagement of professionals with disabilities, introducing include specific budget lines to meet costs that reduce barriers to participation of persons with disabilities in theatrical activities, as well as develop a dedicated funding mechanism to support the

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[187] Turnbull, J. (2017), *Why the British Council's Arts and Disability programme is such a priority in Europe.* Available at: https://www.disabilityartsinternational.org/resources/why-the-british-councils-arts-and-disability-programme-is-such-a-priority-in-europe/

[188] Eurostat, (2015) *Disability statistics- prevalence and demographics, Statistics Explained.* Available at: https://ec.europa.eu/eurostat/statistics-explained/pdfscache/34409.pdf

[189] Europe Beyond Access on the Arts and Disability programme website. Available at: https://www.disabilityartsinternational.org/europe-beyond-access/

cultural engagement of audiences with access needs through dedicated audience development actions.[190]

The respondents agreed that issues related to inclusion, diversity and accessibility are important for the development of the sector. Better representation of people with disabilities and minority groups is important for productions to reflect the social structure and reach the communities for which they are creating. Actors and actresses on stage can act as role models to the audience members, especially youth, prompting to explore different career options or relate better to the artistic content presented.

Good practises

The below table presents a list of good practice examples in the area of inclusion and accessibility. The list is non exhaustive and presents main practises that were encountered over the course of research for this study.

Table 7. Good practice examples

General practises

Policy-level:
   • Incentives through funding / financing priorities to support more projects that aim to increase engagement of groups that are less engaged and represented
 	
Sectoral level:
   • Data collection on diversity and inclusion within the sector
   • Awareness rising of the issues related to diversity, accessibility and inclusion
 	
Organisational level:
   • Discount tickets
   • Adapting programming to represent the diverse audience
   • Increasing diversity in recruitment of artistic and non-artistic staff
   • Establishing audience development department
   • Starting community activities
   • Touring theatres – bringing theatre to more remote locations, schools
 	
Educational level:
   • Providing opportunities for all persons regardless of their physical conditions or background to train to work in the theatre sector
   • Increasing diversity among the students and teaching staff to better reflect the society

Specific examples	
Poland	Teatrosfera without barriers (2018) project of Foundation of Culture without Barriers. The assumption was to increase the theatre offer for people with disabilities outside the capital city of Warsaw. Facilities for performances in Katowice, Lublin and the agglomeration of Gdansk, Gdynia, Sopot have been prepared. In total, 9 performances were made available.
Finland	Inclusion day in the theatre sector. Theatre Info Finland INFO, Culture for All service, Ursa Minor, DuvTeatern, Globe Art Point and the Association of Finnish Theatres celebrated the Inclusion Day on 27th March 2020. A campaign drew attention not only to accessibility of theatres to everyone but also to equal opportunities for artists and other theatre professionals.
Denmark	ACT, New Nordic Voices: theatre company whose vision is introducing diversity on stage. Their vision: 'ACT's vision is to have multiple cultures share a stage. Conversely, it's artistic policy is to connect thespians globally and act as an inter-

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[190] Panagiotara, B., Evans, B., Pawlak, F. (2019), *Disabled artists in mainstream: a new cultural agenda for Europe.* Available at: https://www.disabilityartsinternational.org/wp-content/uploads/2020/03/Report_A-new-cultural-agenda-for-Europe-FINAL-050320.pdf

	cultural creative integrator in the interest of embracing cultural uniqueness and diversity within the Danish arts sector broadly and more specifically in theatre.'[191]
Different countries	Equality Action Plans/ Equal Opportunity Plans. E.g. the Arts Council England Equality Action Plan (UK): https://www.artscouncil.org.uk/advice-and-guidance-library/equality-action-plan-guidance#section-1
Multiple countries	Sign & Sound Theatre Europe is a project supported by the Creative Europe Programme of the EU and implemented by a group of 9 partners from 6 countries (Belgium, Finland, Croatia, Bulgaria, Portugal and the UK). The group's main aim is to promote deaf theatre all over Europe, and particularly in the inclusive bilingual theatre format: deaf and hearing actors equally on the stage; deaf and hearing audiences equally in the theatre. Sign & Sound Theatre also aims to offer all actors and theatre groups in Europe a platform to present themselves, meet and learn from each other.[192] Sign & Sound Theatre Europe is part of the European Arts & Disability Cluster.
Multiple countries	'Crossing the Line' (a small-scale cooperation project funded through Creative Europe, 2014-2017)[193] has for the first time brought together three of Europe's leading professional theatre companies which make work with learning disabled artists. Via three residencies, they have enabled artists to meet, work and learn together to increase their skills. They created theatre productions and shared their creative working processes. The partnership enabled the companies to explore their respective modalities for audience engagement as well as each other's business models, with a view to enhancing the sustainability of artists and their work.
United Kingdom	The Royal Conservatoire of Scotland developed a bachelor programme in Performance in British Sign Language and English, which targets persons identifying as D/deaf or hard of hearing.[194]
Germany	Staatsschauspiel Dresden developed a community project – Montagscafe. They originally offered counselling, language courses, platform for work, exchange and communication at height of the 'refugee crisis'. It later developed into a weekly forum of exchange for all citizens, deals in artistic, discursive and aesthetic formats with the issues of the time and the city, admission free. The Montagscafe received ~7000 visitors per year and was considered a model project in Germany – similar projects have been created as a response at other venues.
Sweden	The Malmo City theatre in Sweden is working on a comprehensive strategy to increase engagement of minority groups. They have made an action plan for the next four years. They are closing down in May 2021 for rebuilding the house to make it more welcoming by having a new restaurant/café, and a community space that will be open to the public. They are also working on the repertoire and plan to launch a programme which is called 'Otherness', entailing three performances over the next three years.

[191] ACT New Nordic Voices, *Vision*. Available at: https://thespians.dk/#about

[192] Sign & Sound Theatre Europe website. Available at: https://signandsoundtheatre.eu

[193] See: https://ec.europa.eu/programmes/creative-europe/projects/ce-project-details/#project/552199-CREA-1-2014-1-SE-CULT-COOP1

[194] See: https://www.rcs.ac.uk/courses/ba-performance/.

Conclusions and recommendations

Conclusions and recommendations

The following conclusions and recommendations are directed at the European Commission to guide its funding and policy actions. For instance, we outline how the sector could be better supported through the current and new schemes within the framework of the existing funding programmes (especially Creative Europe), and suggest how this specific sub-sector could be better managed within the existing policy framework at EU level. The conclusions and recommendations cover the key areas of research included in the scope of this study: the socio-economic situation of the theatre sector, alleviating the impact of the COVID-19 pandemic on the sector, educational aspects, increasing diversity and inclusion within the sector, as well as improving the accessibility and environmental sustainability of the sector.

General conclusions and recommendations

Alongside other sub-sectors of CCS, theatre is a significant contributor to social cohesion and the well-being of the population. Theatre performances provide a collective experience and can bring people together. Theatre can reflect contemporary society, mirror current developments, and allow its participants to engage with urgent topics and issues in a critical way. Hence, theatre is political and essential for dialogue in healthy democracies – a condition that is increasingly under attack from rising nationalistic tendencies in European countries.

In addition, theatre reflects Europe's cultural and linguistic diversity, and its venues are important public spaces for fostering an open European society. Theatre as it exists today was born in Europe, and remains closely interlinked with European countries' identities and shared cultural values. As such, theatre can play a positive role in engaging with European cultural diversity, especially from the perspective of international cultural relations.

The sector is organised into sectoral organisations (e.g. associations, networks) representing different segments at both EU and national levels (public theatre venues, private venues and companies, independent artists, technicians, playwrights, etc.). However, the European Theatre Forum, held in November 2020, was the first platform of its kind to encourage dialogue between stakeholders and help to professionalise the sector.

Recommendations 1-2:

1. Acknowledging the specific challenges experienced by the theatre sector (language barriers, the large impact of the COVID-19 pandemic, systemic differences hampering international collaboration, etc.), **pursue a more sectoral approach to theatre** within the framework of the New European Agenda for Culture and the Work Plan for Culture and further advance the implementation of the European Theatre Initiative. The implementation of this approach could involve a dialogue between different theatre stakeholders (see below), various types of events (including workshops or seminars), theatre-specific studies, calls for proposals/tenders or pilot projects, peer-learning, and other activities.

2. **Maintain a structured and regular dialogue** between Member States, European institutions, theatre organisations and operators, as well as civil society, through the European Theatre Forum, by applying different working methods (including discussions and exchanges of practice regarding the impact of the COVID-19 pandemic on the theatre sector). As a new platform for sectoral dialogue, the Forum could be further expanded to include all theatre operators, regardless of their business model and the programming system within which they operate. Theatre academies and schools should also be represented, as should

independent producers, which are less structured at European level than theatre venues.

A major issue faced in mapping the sector and measuring both its size and impact was the lack of available and comparable data. Statistical definitions of the sector are not harmonised at EU or national level. Very often, data about theatres are not singled out, and most statistics report on the performing arts sub-sector, which also includes opera, dance, circus, mime and cross-disciplinary performance formats. Differences in the way in which data are collected allow us to provide only a snapshot of the sector's size, and not the full picture.

Since data focusing on theatres was not available in all of the databases of national statistical offices that are available online, several key knowledge gaps were identified. These include the availability of data for some EU Member States, a lack of possibilities to single out data specifically on drama theatres, inconsistencies between reporting periods (season or calendar year), and the types of activities measured.

Recommendation 3:

3. Consider organising at EU level **a platform/pool of data and/or a series of longitudinal research studies** (including a possible panel survey) to continue gathering and analysing data from various national and sub-national sources (national statistics, theatre organisations and professionals) in order to track the situation of the theatre sector in Europe and its development over time (in terms of the number of theatres, performances, audiences, turnover, etc.), taking into account the impact of the COVID-19 pandemic.

   Below, the study team suggests the key (minimum) data needs that could be addressed on a regular basis, in cooperation with national statistical offices or other organisations collecting statistics. Some of this data may already be collected as part of more general performing arts statistics. Hence, opportunities to single out specific data on drama theatres from the existing data on performing arts should be further investigated, in cooperation with relevant institutions.

Minimum key data needs	Reporting periods	Filtering options
▪ Number of institutions in the country (at least those owned or -funded by the state); ▪ Number of performances; ▪ Audience numbers attending performances; ▪ Revenue generated; ▪ Persons employed in theatres	▪ Season or calendar year (decide on uniform approach)	▪ By type of institution: venue, production company, ensemble or festival etc. ▪ By type of management/governance: public or private entity ▪ By type of art: drama theatres, puppet theatres, musical theatres etc.

Socio-economic situation of the sector

The study confirms that the theatre sector in Europe is very diverse, and that its system of production and dissemination is fragmented. The legal status of theatres varies widely across Europe and within the EU Member States. The theatre ecosystem consists of public organisations (directly managed by the state or local authorities); private organisations working with public funds; and entirely private, commercially oriented theatre venues that rely mainly on box office revenues. Theatres, therefore, rely on a variety of funding sources, ranging from public funding to self-generated income and private financing.

According to our mapping (which does not provide definite figures, and may include other performing arts venues alongside drama), the number of theatre venues and companies in EU Member States range from seven (in Latvia) to 4,252 (in Spain). However, the data collected from official statistical sources is not fully comprehensive, as the types of venues/companies counted differ. In a given year or season, theatres in EU countries staged from 3,021 performances (Bulgaria in 2020) to 65,995 (Germany, 2018/2019 season). Attendances at theatre performances ranged from 371,000 audience members in Bulgaria in 2020, to more than 18.5 million in Germany, during the 2018/2019 season.

Data regarding the revenue generated by theatre venues, companies and other types of establishments was found for nine countries. These data are not easily comparable, as some statistics measure total revenue (including revenue from all types of activities), while other statistics report only revenue from ticket sales. For instance, the lowest revenue figures came from Lithuania and Bulgaria. However, the data for these countries covered 2020, the year in which the COVID-19 pandemic began. The largest revenue generated by theatres was in Germany (EUR 586,757,000 during the 2018/2019 season), Austria (EUR 174,586,000, 2017/2018 season) and Portugal (EUR 125,314,000 in 2019).

Theatre is part of the highly labour-intensive and dynamic cultural and creative sub-sector that provides employment for a wide range of artistic, administrative and technical occupations. Employment under a permanent contract is most common in publicly funded institutions, whereas the majority of workers in the private sector work on a freelance basis, particularly those personnel who are in creative positions. A significant portion of practitioners working on freelance contracts face severely precarious work conditions. The data collected during this study show that freelancers' wages are low, and that a significant share of them are not entitled to social security benefits such as retirement pension, free healthcare, paid annual leave or paid sickness leave under their regular freelance contracts. For instance, 54.4% of professionals who responded to the survey reported not being entitled to free or significantly discounted health care; 51.7% said they were not entitled to paid sick leave, and 40% said they could not claim a retirement pension. The COVID-19 pandemic raised a magnifying glass to imbalances in the legal and financial situations of the various categories of worker within the theatre ecosystem, raising public awareness. This has resulted in acts of solidarity and the first legislative changes in some EU Member States.

Creating and putting on theatre productions across borders can be a challenge, for various reasons. These include the system under which the theatres operate (differences between the production-based system and repertoire/ensemble-based system), as well as differences in repertoire and funding system. In particular, public subsidies within a particular country can be either a hurdle or a support for theatres taking the risk of engaging resources for an international production that takes one or two years to prepare. In addition, theatre practice is rooted in languages – a fact that hampers the smooth exchange of performances and touring opportunities. Touring is labour-intensive, time-consuming and expensive, while its outcomes are unpredictable.

The taxation of cross-border performances is another issue that causes problems for artists working internationally, both inside and outside their country of residence. Article 17 of the OECD Model Tax Convention has been adopted by most bilateral tax treaties to avoid practical difficulties, but practical problems often emerge in reality in terms of double taxation and high administrative expenses. This issue is of increasing relevance, as taxation, social security and copyright issues in global virtual environments are yet to be clarified, given the fact that the cultural product is transformed from an ephemeral theatre performance into a reproducible video medium when disseminated online.

Recommendations 4-5:

4. Continue **addressing the status and working conditions of artists and cultural and creative (including theatre) professionals** within an Open Method of Coordination (OMC) group. Within the framework of the European Pillar of Social Rights and other Commission initiatives, work together with DG EMPL and other DGs and services of the European Commission to address the constraints faced by theatre professionals (e.g. by improving the social status of cultural and creative professionals, simplifying tax systems and regulations for working across borders, or exchanging good practices on the remuneration of artists for online work or promoting better remuneration conditions via the funding mechanisms).

5. Continue supporting **physical and virtual exchanges of cultural and creative theatre professionals, ideas and concepts** in Europe, to promote the development of personal, professional and intercultural skills, as well as the creation and production of European works of theatre.

Changes brought about by the COVID-19 pandemic

The theatre sector has been severely hit by the pandemic, with long periods of closure, interrupted seasons, and scattered rehearsal times that have negatively affected the processes of creation and production. Based on the data collected, in some countries the number of performances staged fell by half or more between 2019 and 2020 (e.g. a fall of 53.7% in Lithuania). Box office revenues declined by 62% in Lithuania, and as much as 78.45% in Italy, between 2019 and 2020. In Berlin-based institutionally funded theatres, orchestras and dance groups, a 73% drop in audience numbers was reported.

The pandemic has especially affected private venues and independent professionals, whose main source of income (revenues from ticket sales and other activities) was drastically reduced. Although some support has been provided, it has often been ill-adapted to the specific needs of private bodies and individuals within the sector. Meanwhile, large public theatres have suffered less from the crisis, as most of their subsidies remained uncut and institutions were able to retain their staff.

The crisis has exacerbated the weak links in social protection for individual artists, freelancers and co-producing companies in the sector. Recovery will be highly dependent on the ability of artists and productions to move both around their countries and internationally to engage with audiences. This could be hampered by pre-existing issues with social security rights and taxation, and by limitations imposed on international travel in certain countries. The sector is concerned about future international opportunities for collaboration (creation, exchanges, tours) in the post-COVID-19 context, with public funding focusing instead on the national scale. This could jeopardise freedom of expression in certain countries (illiberal democracies), whose authorities instrumentalise theatre for nationalist purposes.

Some theatre productions that have been created during the pandemic will not be shown for another one or two seasons. This 'production jam' will be detrimental to Europe's next generation of young artists and to new productions, which will lose immediate opportunities to be seen by professionals and by audiences, limiting their career development.

The COVID-19 pandemic has further accelerated the digital shift in the sector. Many theatre practitioners and venues have been forced to move their activities online to maintain their presence and continue their social mission to provide cultural content to society. Yet, the development of and research into digital theatre has been uneven between countries. The study reveals the necessity to strengthen digital skills in the sector, and to work with multidisciplinary and digital teams. In addition, disseminating theatre performances online is not yet a business model for earning income, which means artists work for free – further increasing their precarity. The stakeholders who participated in the validation seminar

stressed the importance of this topic, and the need to discuss successful models for the remuneration of artists for digital work.

Maintaining or regaining the link with the audiences, especially those members of society who have been most isolated during the COVID-19 pandemic, and who are far (physically, economically or socially) from the cultural offer, will be a priority for the recovery. Theatre can help individuals and society recover from the crisis by helping to regain trust in the societal public space and connecting with people in a shared space, as well as by providing time to engage in a dialogue after having been socially distanced for so long. Bringing theatre to young audiences will be especially important, as it reaches and empowers youth in an immediate way, and directs the spotlight on to the critical and diverse voices of the future generation. Involving young people in creative decision-making processes through a strategic participatory approach can help to build citizen engagement.

Notably, public authorities at EU, national and local levels have responded to the pandemic by providing a variety of support measures aimed at businesses and workers in general, and the CCS or theatre specifically. During our research, 142 support measures (released by March 2021) were identified in 27 EU Member States, from which the CCS (including the theatre sub-sector) could have benefited. Of these measures, 15% were theatre specific (in France, Germany, Italy, Lithuania, Luxembourg, Netherlands, Poland, Spain and Sweden). Upon the re-opening of the sector, support was also provided in other forms (e.g. by covering loss of ticket sales in the event of restrictions that required theatres to operate with a limited capacity.

Recommendations 6-9:

6. Consider creating a pilot scheme to **support young theatre artists**, providing them with an opportunity to show their work while theatre seasons are booked at least until the 2022-2023 season. For instance, consider creating a 'Third Space' for theatre venues, connecting with theatre schools and academies, to programme this work and support young artists to enter the professional theatre scene after graduating. Consider initiating a European Theatre Showcase (e.g. as a thematic and artistic focus added alongside the upcoming European Theatre Forum), offering a long-term perspective and providing the next generation of young theatre artists from Europe a unique and much-needed industry networking space, alongside with a European Theatre Prize. Such a forum could build on the existing good-practice examples of the Canadian CINARS or the Asian PAMS, which facilitate policy dialogue, industry networking and artistic collaboration.

7. **Continue supporting the theatre sector in taking advantage of the digital shift and exploring new business models** by funding capacity-building projects for digital European theatres. These projects could involve such activities as establishing digital venues, high-quality digital performances created for the screen, training for digital theatre professionals, investment in high-end technical material, translation and captioning techniques to make performances available to wider international audiences. These projects could involve collaborations between different types of theatre and educational organisations representing various EU countries.

8. Increase coordinated actions at EU level to inform various stakeholders about the **national/sub-national interventions** provided in response to the COVID-19 pandemic. For instance, offer a platform for exchange both at governmental working level, as well as with sectoral representatives, to accelerate knowledge exchange, professionalise the sector's capacities for advocacy, and create a structural leverage effect for Europe's theatre eco-system to overcome the crisis.

Such a place could be the European Theatre Forum, which could develop such regular exchanges as a method for dialogue.

9. **Integrating the topics of the impact of the COVID-19 pandemic and the evolving needs of the theatre sector into future discussions and studies:** given that the COVID-19 pandemic is still ongoing, and the sector faces a high level of uncertainty regarding its return to pre-pandemic levels, it is important to continue observing the impact of COVID-19 on this sector through future discussions (including those that could be organised through a European Theatre Forum), studies and other working methods.

Educational aspects

Although alternatives exist to institutional education pathways (apprenticeships, on-the-job learning, programmes offered by the industry), the most common pathway for starting a career in the theatre sector remains to be formal education. This has been reported to be the case in particular for the creative professions. The systems for arts education in each country are very diverse, with some countries possessing an extended network of theatre and art academies (e.g. in Spain, there are 18 public schools for teaching dramatic arts; in Germany, 14 public acting schools), while other countries have just one or only a few such public schools. Notably, it is difficult to make a clear distinction between education that prepares only theatre professionals from education that prepares performing arts professionals in general. Hence, the conclusions and recommendations for possible actions may also cover performing arts schools more generally.

Like the theatre sector as a whole, educational institutions are also limited by language barriers. Students attending these schools are prepared mainly for work in the national theatre or performing arts sector. Few courses are taught solely in English, and stakeholders report that mobility opportunities (e.g. Erasmus+) are also limited to those who speak the language of instruction of the destination institution. The internationalisation of school curricula remains a challenge.

Ensuring the smooth transition of graduates into the labour market was among the main challenges highlighted by educational stakeholders. Graduates and young professionals face high levels of competition to enter the theatrical labour market. This situation is likely to be worsened by the COVID-19 pandemic, which has limited opportunities for graduates and young professionals to network and showcase their abilities. In addition, the COVID-19 pandemic required educational institutions to shift to teaching online, which in some instances has compromised the quality of teaching. Most theatre disciplines require practice-based, face-to-face teaching.

The situation regarding the broadening of participation and inclusion has also been noted as requiring improvement. Stakeholders seek to attract more people from minority or disadvantaged backgrounds, as well as applicants with disabilities, to better reflect the societies within which such educational institutions are based. The increasing diversity within education curricula should also entail introducing more diverse type of plays and content into study programmes, allowing for more translated works from European countries to be featured.

Recommendations 10-11:

10. Further promote **the internationalisation of theatre education** within the European Education Area and existing EU programmes by supporting the emergence of collaboration within various study programmes (e.g. creating joint performances) through cooperation projects to access the European theatre market and expose students to different systems and practices during their studies. This

could also be achieved by establishing networks of schools or by better promoting the opportunities already available through existing European Commission programmes (e.g. Erasmus+ and Creative Europe).

11. Consider offering more opportunities for students and young professionals to showcase their talent/work, to gain additional skills and to access the European theatre market through **apprenticeships, placements and other types of on-the-job learning** (see the 'Third Space' Programme above). Examples of successful projects in other performing arts sectors such as circus (FEDEC's CIRCLE project[195]) could be taken as model actions.

Diversity and inclusiveness

The data collected show that the sector remains imbalanced in terms of gender distribution, especially within leadership positions (managerial and artistic) and in programming plays, where men dominate. For example, only 37% of theatre directors employed in Ireland in 2017 were women. In Sweden, the figure in 2018 was 43.7%, while in Lithuania (2019), it was 33.6%. Women also more often face sexual harassment, discrimination, and more precarious work conditions than men.

Stakeholders acknowledge that improvements have been made over the years in this regard, and as a result the balance has improved. An important push forward came from the #Metoo movement, which brought these issues to the attention of the wider public. Theatres have taken various kinds of actions, such as putting in place special charters or policies aimed at addressing the gender balance within their teams. ETC's recent study noted a positive correlation between having official measures in place and the perceived gender equality within teams. Despite these positive efforts, however, work needs to be continued to further improve gender balance and equality within the sector.

Further efforts also need to be made in relation to increasing diversity within theatre teams and creating opportunities for persons from all backgrounds and situations (e.g. persons with disabilities) to perform equally on stage and to engage in other activities relating to theatre operations.

Making theatre accessible to different groups/audiences within society has been important to many stakeholders. Some of the most common measures taken include offering discount tickets or tailoring programmes to different groups (youth, elderly, persons from minority backgrounds etc.). Participatory theatre or other projects that engage the community with professional artistic works and strengthen the role of theatre within the community, should be further exploited by theatre venues and companies.

Among theatre stakeholders, there is a widely shared view that the COVID-19 crisis has worked as a catalyst for tackling imbalances within the sector, and that the way out of the pandemic should not mean a return to the previous situation in relation to the status of artists, touring, audience engagement and diversity, among other issues. There is momentum for driving change through legislation and practices regulating the theatre sector, both formally and informally.

Recommendations 12-13:

12. Since gender equality was selected as a priority in the Council's Work Plan for Culture 2019-2022, **continue to address gender disparities within the CCS** (with a focus on the theatre sub-sector) through the mapping and exchange of

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[195] See: http://www.fedec.eu/en/articles/23-circle-project

information in the specific OMC group, potentially leading to a set of concrete measures. Recommendations already proposed by the OMC in its report 'Towards gender equality in the cultural and creative sectors'[196] could be taken as a starting point.

13. **Promote and support the exchange of good practices and/or capacity-building activities in gender mainstreaming, equality and diversity management** to increase gender equality and diversity, and to combat discrimination in the theatre sector (e.g. through the European Theatre Forum), adapted to the various levels of progress across different Creative Europe countries.

Environmental sustainability

Concerns over issues such as climate change and a more environmentally sustainable way of working are very prevalent within the sector. Stakeholders seek to renovate buildings, reduce waste, experiment with new production and collaboration models, as well as integrating environmental topics into their artistic outputs. According to the survey data, 62.9% of theatre venues and companies that responded to the survey have adopted measures to reduce the environmental impact of their organisation to a large or a moderate extent.

Stakeholders face significant challenges in reducing their environmental footprint. Substantial investment is needed to transform buildings into being more energy-efficient, and these expenses can be rarely covered by the venues themselves. Expertise in how to transform sustainability ideas into practice, the management of buildings, as well as complex and sector-specific organisational processes and behaviour in theatre venues and artistic productions is still lacking and developing. Few tools are available to theatre professionals and organisations to calculate carbon footprint, which would help them to not only measure their current situation but also any progress made. In addition, collaboration, mobility and touring, which are integral parts of theatrical work, have a sizeable impact on the environment. Stakeholders highlighted that the principles used for touring and travelling need to be redefined in the light of environmental concerns, calling for more in-depth discussion and support for the prototyping/testing of new solutions. Informing, measuring, reducing and offsetting the sector's impact on the climate requires a large-scale European effort in coordination with Member States to accelerate the process of change at all levels, supported by adequate resources and cross-sectoral knowledge transfer.

Recommendations 14-15:

14. Coordinate with Member States, at European level, the transformation process of the cultural sector (including theatre organisations) **to develop and adapt a sustainability strategy**, covering the areas of the transformation of buildings, management and organisation, as well as artistic productions. Work together with national authorities (those ministries responsible for budgetary, economic, environmental and cultural policies) to provide the financial means necessary for the implementation of this strategy within the framework of the Recovery and Resilience Facility and other funding programmes.

15. The implementation of this strategy could involve **capacity-building measures**, developing a comparable calculation of carbon footprint and offset concepts adapted for the theatre sector, enabling it to achieve climate-neutral status. Capacity-building projects aimed at practitioners could focus on how to

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[196]   See: https://op.europa.eu/en/publication-detail/-/publication/6e0e514d-c738-11eb-a925-01aa75ed71a1/language-en

translate sustainability ideas into action and create a strategic approach towards increasing the sustainability of their activities. These measures could also involve research and discussion among the key stakeholders within the theatre sector regarding the future of mobility and the potential for increasing the sector's sustainability.

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List of annexes

Annexes submitted separately to the European Commission.

Annex 1. List of interviews conducted

Annex 2. List of COVID-19 support measures

Annex 3. 10 case studies

Annex 4. EU-level and country-level factsheets

Annex 5. Survey results